



REQUEST FOR STATEMENT OF QUALIFICATIONS
(PROPOSAL)

TO PROVIDE

ON-CALL SCADA SYSTEM INTEGRATOR SERVICES

Proposals Due

Wednesday, February 8, 2023, at 2:00 p.m.

Issued By:

**Oak Lodge Water Services
14496 SE River Rd, Oak Grove, OR 97267**

Issue Date

Wednesday, January 11, 2023

VIA EMAIL

**Regarding: Oak Lodge Water Services
Request for Statement of Qualifications (Proposal) for
On-Call SCADA System Integrator Services**

Oak Lodge Water Services (OLWS) is requesting System Integrator qualifications to provide On-Call SCADA System Integrator Services for OLWS's ongoing capital improvement projects, construction projects, and maintenance projects. The services required will include Design Review Services, Coordination with the Contractor during construction phase, PLC, OIT and HMI Programming, Operational Technology Network Maintenance, Participation in Performance Testing, Startup and Commissioning Services, and On Call Support related services to OLWS's Technical Services and Operations Divisions.

The intended result of this Request for Statement of Qualifications (RFQ) is to select up to three On-Call SCADA System Integrator(s) who will be contracted for a four-year period. OLWS will have the option to extend this contract for an additional two-year period. During the contracted period, OLWS can issue task orders to the selected On-Call SCADA System Integrator to augment the services provided by OLWS's current design engineers, general contractors, or other entities. OLWS will also have the authority to issue task orders for as-needed services and standalone projects. The selected On-Call SCADA System Integrator(s) will be contracted directly with OLWS to provide direct coordination and oversight for programming deliverables.

Qualifications (Proposal) will be accepted until 2:00 PM on Wednesday, February 8, 2023, by electronic submission only. Proposals and questions shall be submitted to Brad Albert at brada@olwsd.org. A searchable PDF file of the technical qualification proposal is required. The rate schedule shall be separated from technical qualification proposal and attached as a separate searchable PDF file.

1. PROJECT LOCATION, DESCRIPTION, AND BACKGROUND INFORMATION

As part of OLWS's commitment to providing its customers with reliable, high-quality drinking water, wastewater, and watershed protection services, a list of capital improvement projects, repair and replacement projects, and general engineering and operations support services have been identified for implementation over the next several years that require SCADA System Integrator support services. The support services associated with each project will be assigned to the On-Call SCADA System Integrator(s) using Task Orders.

The anticipated implementation guidelines for each Task Order are as follows:

- OLWS will provide request-for-proposals or an outline of a scope-of-work for the Task Order to On-Call SCADA System Integrator.
- On-Call SCADA System Integrator will submit concise and simple proposals for each Task Order to identify fee and hours estimate, technical approach, detailed scope of work, team members, project schedule, and deliverables in accordance with the request-for-proposals.
- Fee estimates will include hourly labor rates for each proposed team member (in accordance with approved contract rates), subtotals and totals for hours, labor, material, other direct costs (ODCs), and sub-consultants by task/subtasks.
- On-Call SCADA System Integrator's fee rate schedule shall be in effect upon execution of contract and limited to a maximum increase identified by the CPI-W (the Consumer Price Index for the West Region) per year after the first year.
- Scopes of Work for various potential Task Orders will be based on the needs of OLWS and will vary in size and scope. The sum of all Task Orders shall not exceed the total contract award amount. Total contract award amount will be determined based on approved amount by OLWS Board of Directors and may include provisions for future additional funding.
- Task Orders will be approved as appropriate for specific project conditions and requirements.
- OLWS reserves the right to solicit proposals for any potential Capital related project or engineering/operations services outside of the On-Call SCADA System Integrator Services Contract as deemed appropriate by OLWS.

OLWS reserves the right to develop scopes of services and establish requirements as it deems appropriate for all Task Orders to meet the needs and objectives of OLWS for all water, recycled water, wastewater, watershed protection, and general needs.

2. Minimum Qualifications

The System Integrator's proposal shall include a list of certifications or shall demonstrate sufficient project experience to satisfy the following requirements. Proposers that do not fulfill all the requirements listed below may not be considered.

- Projects completed within the last three (3) years.
- All proposed staff shall be located within 100 miles of Oak Grove, OR.
- Experience with water, wastewater treatment, and wastewater collection processes.
- System Integrator shall have minimum two (2) staff experienced with the maintenance, installation, and programming of AVEVA's System Platform.
- System Integrator shall have two (2) staff experienced with the maintenance, installation, and programming of Rockwell Automation MicroLogix, CompactLogix, and ControlLogix PLC platforms.
- System Integrator shall have two (2) staff experienced with the maintenance, installation, and programming of various Rockwell Automation PanelView platforms, and Automation Direct HMI's.
- System Integrator shall have two (2) staff experienced with the maintenance, troubleshooting, and replacement of UL508a, and UL698a control panel components.

Additionally, these staff shall possess suitable licenses to perform this work.

- System Integrator shall demonstrate commitment to OLWS requests by completing Table 2-1. High Criticality is defined as failure of a process requiring immediate attention likely requiring onsite support. Medium criticality events be responded to onsite after some initial remote support. Low criticality is a planned activity or minor issue requiring attention.

Table 2-1. Integrator Response Time					
Service	Criticality	Number of Staff Available to Support	Office Location of Staff	Hours of Operation	Maximum Response Time
Hardware Support	High				
	Medium				
	Low				
PLC Programming Support	High				
	Medium				
	Low				
SCADA Support	High				
	Medium				
	Low				
Network Support	High				
	Medium				
	Low				

3. Description of Requested Services

This On-Call SCADA System Integrators Services contract covers a range of projects and services which consists of, but is not limited to:

- Review and provide feedback on project design deliverables from consultants, suppliers, and contractors, such as P&IDs, control panel layouts, panel bill of materials, network and SCADA architecture diagrams, control strategies, start-up plans, vendor requirements, and specifications for technical engineering and feasibility studies.
- Provide OLWS with computer aided design (CAD) record drawings for any control panel modifications performed as part of any task order issued by OLWS. CAD drawings shall be delivered in standard AutoCAD .dwg format.
- At task order closeout, provide OLWS with the following record documentation:
 - Documented PLC programming files in their native format. Programming files shall not be locked, and all contents of the program become the property of OLWS.
 - Wonderware System Platform Galaxy backups (.cab files)
 - The operations and maintenance manual for any replaced components.
 - A summary report describing the completed changes to the SCADA system.
- Participation in workshops, onsite meetings, conference calls, and direct coordination

with the design engineer, contractor, or supplier.

- Review and/or develop panel support equipment such as power supplies, relays, terminal strips, timers, grounding bars, etc.
- Review requirements, develop and/or review testing plans, and conduct or witness Factory Acceptance Test at the control panel fabrication or testing facilities.
- Attend construction coordination meetings.
- Review and/or develop the contractor's construction start-up and commissioning plan.
- Develop and modify existing PLC process control logic based on Rockwell Automation's Studio 5000, and RSLogix500. The System Integrator shall have their own Rockwell Automation programming licenses and shall not rely on OLWS's licenses.
- Provide SCADA programming modifications to the existing AVEVA System Platform Galaxies based on new OLWS requests and/or project requirements.
- Provide OIT programming modifications to the existing PanelView Plus 1500, PanelView 1000, PanelView 5510, and Automation Direct based on new OLWS requests and/or project requirements. The System Integrator shall have their own Rockwell Automation and Automation Direct programming licenses and shall not rely on OLWS's licenses.
- Provide modifications to the WIN-911 configurations based on new OLWS requests and/or project requirements.
- Facilitate HMI and OIT screen review workshops for OLWS's review.
- Participate in start-up and commissioning activities including control panel inspection, witness testing of field devices, witness testing of equipment controls, checkout of control panel I/O, and integration of vendor systems.
- Lead testing of all PLC control (manual and automatic), extended process control testing, and validation of all HMI functionality.
- Develop training plans, related classroom materials, and conduct classroom sessions for the operator instruction for HMI features.
- Assist with developing performance test plan including identifying points to be monitored and recorded.
- Review performance testing data.
- Provide onsite and remote support for trouble calls, troubleshooting, and improvements for PLC and HMI programming.
- Perform network maintenance, upkeep, and configuration changes to OLWS's SCADA and DMZ network layers. OLWS has a separate contract for maintaining the wide area Business Network.
- Perform SCADA computer maintenance and upkeep. This service shall include advising OLWS on critical SCADA and operating system patches, and installation of these patches when approved by OLWS. These services shall occur twice each calendar year.

4. SCHEDULE

- RFQ Issued January 11, 2023
- Virtual Mandatory Pre-Proposal Meeting January 24, 2023, 2:00 PM
- Deadline for Questions January 25, 2023
- Final Addendum February 1, 2023, 2:00 PM
- **Proposal Due February 8, 2023, 2:00 PM**
- Review of Proposals February 2023
- Anticipated Award March 2023

5. PROPOSAL CONTENTS

The contents of the Proposal should contain a minimum of the information summarized below but should be limited to a maximum of ten (10) total pages, not including appendices for resumes and sample letter-type fee proposal.

Submittal Deliverable	Submittal Item	Page Limit
Submit as one searchable PDF file with "Proposal" in the file name	Executive Summary Letter	1 page
	Introduction	1 page
	Project Approach	1 page
	Project Team	1 page
	Project Management	1 page
	Project Experiences and References	2 pages
	Client References	2 pages
	Resumes	unlimited
	Conflict of Interest	1 page

TOTAL: 10 pages + resumes

Review, but do not submit	Insurance	0 pages
	Contract	0 pages

TOTAL: 0 pages

Submit as one searchable PDF file with "Fee Schedule" in the file name	Service Fee Schedule	2 pages
	Sample Fee Proposal	1 page

TOTAL: 3 pages

A. Executive Summary Letter: This letter shall be a brief formal letter from the Respondent that provides information regarding the firm and its ability to perform the requirements of this solicitation. This letter must include the following information:

- Complete legal company name (as it should appear in a contract)
- Company Address
- Contact person, telephone number, and e-mail address

- Identify all materials and enclosures being forwarded in response to this solicitation
 - Respondent shall state herein their willingness and ability to provide the required insurance coverage
 - The letter must be signed by an individual authorized to bind the proposing entity as set forth by the Oregon Administrative Rules (OARs).
- B. Introduction: Brief overview of firm or team proposing.
- C. Project Approach: Description of firm's general approach to completing projects/services under this contract, identifying key issues, and recommendations to accomplish the potential tasks.
- D. Project Team: Provide a specific organizational chart identifying key project personnel by name, title, role, work office location, and availability to support OLWS over the 3-year contract. Include key/critical and relevant information as deemed necessary for this solicitation. Include completed Integrator Response Time table from Section 2.
- E. Project Management: Describe your firm's project management approach, tools, communication, and QA/QC procedures as they apply to this solicitation.
- F. Project Experience and References: Provide experience and qualifications overview of the firm and personnel included on the project team. Emphasis should be placed on specific requirements outlined as part of this solicitation. Please restrict project experience listings and descriptions to the team members that are a part of this proposal team.
- G. Client References: Provide three specific client reference contacts for your firm on directly relevant projects and services. Directly relevant references shall be limited to water treatment/distribution and wastewater treatment/collection references.
- H. Resumes: Provide concise resumes of each key project team member with all relevant information including credentials, years of experience, specific roles, and expertise.
- I. Conflict of Interest: Documentation that personal or organizational conflicts of interest prohibited by law do not exist. A simple letter stating, that to the best of the firm's knowledge, no conflicts of interest exist. Where potential conflicts of interest do exist, the firm is responsible for describing the nature of the potential conflict of interest.
- J. Insurance: Submittal from either the firm's insurance carrier or equivalent regarding the firm's professional liability coverage. OLWS requires coverage as shown in the sample copy of OLWS's personal services agreement attached as the Appendix A to this Request for Statement of Qualifications. Any additional premium required by the insurance carrier for such coverage shall be included in your proposed fee. OLWS will not pay a separate insurance surcharge for the required coverage.
- K. Contract: A sample copy of OLWS's personal services agreement is attached as an Appendix A to this Request for Statement of Qualifications. Only respond to this request for proposals if you can execute this contract. OLWS will not make changes to the contract.
- L. Services Fee Schedule: Provide a listing of hourly labor rates by work classification

and personnel. Include all expected fees for Other Direct Costs (ODCs), per diem, equipment costs, or other specific fees.

- M. A Sample Fee Proposal: Provide a sample scope of work for the following activities.
- a. OLWS is having issues with error logs in the System Platform Historian. Provide a scope of work to troubleshoot and correct the errors.
 - b. OLWS desires to change the control philosophy for two of its existing water distribution sites. Develop a proposal that captures the planning effort required to develop the changes required for each site Include the number of anticipated workshops, meetings, revisions to control strategies, etc. Do not include the effort to make the programming changes.
 - c. OLWS is experiencing a critical issue with a wastewater collection pump station's backup level controls causing the pumps to short cycle.

6. EVALUATION PROCESS AND SELECTION CRITERIA

The evaluation process will include up to five selection panel members from OLWS that will evaluate each firm's statement of qualifications, per the criteria outlined below. The highest scoring firms (up to three) will be selected to enter negotiations with OLWS and enter a Master Services Agreement (MSA). OLWS does not intend to conduct interviews, after review of written proposals, with the top scoring firms. Where there is a tie in point scoring, OLWS may elect to conduct interviews with the top scoring firms.

OLWS staff will review all statements of proposals received by the stated deadline. Firms will be evaluated based on the following criteria:

- A. Experience and performance under similar contracts or scope of work, including a summary of the Project team's qualifications
- B. Completeness of proposal
- C. Project management approach including cost controls, scheduling, and resource management
- D. QA/QC approach, procedures, and practices
- E. References

- F. Sample letter type fee proposal
- G. Appropriateness of respondent's rate schedule
- H. Integrator response time per Table 6-1

Table 6-1. Proposal Scorecard		
Evaluation Criterion	Maximum Points	Comments
Experience and performance under similar contracts or scope of work and team qualifications	30	
Project Management approach including cost control, scheduling, and resource management	20	
QA/QC practices	15	
References	10	
Sample letter type fee proposal	5	
Integrator response time	15	
Appropriateness of respondents' rate schedule	5	
Maximum Total Points:	100	

The On-Call SCADA System Integrator must satisfy OLWS of its ability to perform the services required. The On-Call SCADA System Integrator must demonstrate and document a history of timely and satisfactory performance of similar projects in a manner that addresses the stated evaluation criteria. The On-Call SCADA System Integrator shall be responsible for the accuracy of the information supplied concerning references. In addition, OLWS may consider evidence of untimely and unsatisfactory performance on prior similar projects or litigation by the successful firm on previous projects to disqualify any On-Call SCADA System Integrator. OLWS reserves the right to reject any and all proposals.

7. SERVICES OR ITEMS TO BE PROVIDED BY OLWS

- A. OLWS staff will be available to answer On-Call SCADA System Integrator's questions during all phases of the project and coordinate between agencies' staff.
- B. OLWS will make all available design and record drawings, reports, and related materials available to the On-Call SCADA System Integrator.
- C. OLWS will perform all instrumentation calibration.
- D. OLWS will perform all business network maintenance and support.

8. GENERAL

OLWS will contact recent clients submitted as references by the firms. Selection of the On-Call SCADA System Integrator will be based on the proposal contents, prior experience of the firm, and specific experience and capabilities of the designated firm and other key personnel. The firm must be fully capable in all areas outlined under the scope of work above. Based upon this information, OLWS staff will make a recommendation of a firm(s) to OLWS Board of Directors for award of contract. The selected firm must be able to begin work immediately upon award of contract and must be able to maintain the required level of effort to meet the proposed schedule.

This request does not commit OLWS to retain any On-Call SCADA System Integrator(s), to pay costs incurred in the preparation of proposals, or to proceed with the project. OLWS reserves the right to reject any or all proposals, to negotiate with any qualified applicant, and to appoint more than one firm but a maximum of three firms to provide services outline in this Request for Qualifications.

Proposals (including accompanying materials) will become the property of OLWS.

OLWS reserves the right to request additional information from prospective On-Call SCADA System Integrators prior to final selection and to consider information about a firm other than that submitted in the proposal or interview.

If you have any questions regarding the Request for Statement of Qualifications (Proposal), please submit written questions to Brad Albert at brada@olwsd.org by January 25, 2023. All questions will be responded to via addenda accessible at this link:

Sincerely,

OAK LODGE WATER SERVICES

Brad Albert
Project Manager

Appendix A

Sample Personal Services Agreement

See attachment for Appendix A in the Supporting Documents section of the OLWS website.

Appendix B

Existing System Description

Wastewater Treatment Plant (WWTP) The WWTP operates 24/7 to treat wastewater to be returned it to the Willamette River. The facility cleans an average of 4 million gallons of wastewater per day and has a design capacity of 18 million gallons. The treatment processes include primary and secondary treatment.

The WWTP utilizes various versions of the Rockwell Automation CompactLogix and redundant ControlLogix PLC platforms. The CompactLogix PLCs are used primarily for skid-based control, while the redundant ControlLogix PLCs perform the bulk of the automatic process control functions. The plant PLCs are connected to each other via a fiber and copper ring. The PLCs provide data to an AVEVA System Platform 2014 SCADA system. OLWS is currently in the process of updating the version to 2020. This work will be completed prior to the award of the On-Call System Integration contract. Table B-1 summarizes the major equipment in operation at the WWTP.

Table B-1. Major Equipment Notes		
Treatment Process	Major Equipment List	Notes
Influent Pump Station	<ul style="list-style-type: none"> 5 Influent Pumps 2 Force Mains 	
Headworks (Primary Treatment)	<ul style="list-style-type: none"> 2 Automatic Bar Screens 1 Manual Bar Screen 2 Grit Removal Basins 2 Screenings Compactors 	
Secondary Treatment	<ul style="list-style-type: none"> 4 Secondary Clarifiers 7 RAS Pumps 3 WAS Pumps 4 Aeration Basins 3 MLR Pumps 2 SML Pumps 1 Scum Pump 3 Aeration Blowers 2 IF Pumps 	
Disinfection	Trojan UV System <ul style="list-style-type: none"> 2 Channels 2 Banks per Channel 7 Modules per Bank 8 Lamps per Module 	
Solids Treatment	<ul style="list-style-type: none"> 1 Belt Filter Press 2 Polymer Solution Skids 1 Gravity Belt Thickener 2TWAS Pumps 2 Digester Sludge Pumps 2 Digesters 2 Digester Mixing Pumps 3 Digester Blowers 	

Table B-1. Major Equipment Notes		
Treatment Process	Major Equipment List	Notes
Misc.	<ul style="list-style-type: none"> • 2 Odor Control Systems • 3 In-Plant 3W Pumps • 2 Plant Drain Pumps 	
SCADA	<ul style="list-style-type: none"> • AVEVA System Platform 2014 • Small Galaxy Repository License • Development License • 6,000 Historian Tag License • Win-911 Alarm Notification Software 	<p>One SCADA system covers the WWTP and the wastewater collection system lift stations.</p> <p>AVEVA System Platform and associated computers are being upgraded to 2020.</p>

Wastewater Collection System Lift Stations

The five lift stations distributed across the service area operate 24/7 to collect wastewater and send it to the WWTP. The PLCs provide the automatic controls based on level sensors. The lift stations utilize various versions of the Rockwell Automation CompactLogix and MicroLogix PLC platforms. The CompactLogix PLCs are used at critical pump stations (2, 3, and 5). The MicroLogix PLCs are used at less critical sites (4 and 6). Data from the PLCs are sent via a cellular network to the WWTP SCADA system. A Mission RTU system at each site also receives critical alarms and sends these via the Mission RTU network to Collections Staff. Table B-2 summarizes the major equipment in operation at the collection system pump stations.

Table B-2. Major Equipment Notes		
Treatment Process	Major Equipment List	Notes
Lift Station 2	<ul style="list-style-type: none"> • 3 Pumps with VFD Controllers • Level Controlled • Cellular Connection to WWTP • Rockwell Automation CompactLogix 5370 • Rockwell Automation Panelview 1000 • Mission RTU with Cellular connection 	<p>Manhole A-5557 provides a signal through the Mission system to slow down the VFDs and control overflow. The Mission RTU system is programmed and managed by Mission RTU however the System Integrator may be asked to help troubleshoot the inputs and outputs to the Mission system.</p>
Lift Station 3	<ul style="list-style-type: none"> • 2 Pumps with VFD Controllers • Level Controlled • Cellular Connection to WWTP • Rockwell Automation CompactLogix 5370 • Rockwell Automation Panelview 1000 • Mission RTU with Cellular connection 	

Table B-2. Major Equipment Notes		
Treatment Process	Major Equipment List	
Lift Station 4	<ul style="list-style-type: none"> • 2 Pumps • Level Controlled • Cellular Connection to WWTP • Rockwell Automation MicroLogix 1400 • Mission RTU with Cellular connection 	
Lift Station 5	<ul style="list-style-type: none"> • 2 Pumps with Soft Start Controllers • Level Controlled • Cellular Connection to WWTP • Rockwell Automation CompactLogix 5380 • Rockwell Automation Panelview • Mission RTU with Cellular connection 	
Lift Station 6	<ul style="list-style-type: none"> • 2 FVNR Pumps • Level Controlled • Cellular Connection to WWTP • Rockwell Automation MicroLogix 1100 • Mission RTU with Cellular connection 	
Manhole A-5557	<ul style="list-style-type: none"> • Mission RTU with Cellular connection 	Monitors manhole level and provides feedback to Pump Station 2

Water Distribution System

The water distribution system receives treated and delivered potable water at the Valley View reservoir from the North Clackamas County Water Commission (NCCWC) Water Treatment Plant. This water source can be supplemented by the Clackamas River Water (CRW) Treatment Plant via an unmonitored Pump Station. Valley View reservoir gravity feeds its local community. It is also supplied with a booster pump station to send water to the View Acres reservoir. View Acres has both a pumped pressure loop and a gravity feed to the local communities. These two reservoir sites send telemetry data via a cellular network to a master terminal located at the OLWS Administration building. Table B-3 summarizes the major equipment in operation throughout the distribution system.

Table B-3 Major Equipment Notes		
Treatment Process	Major Equipment List	
North Clackamas County Water Commission	<ul style="list-style-type: none"> • Valley View provides flow readings via cellular network 	This site is not part of the On-Call System Integrator scope of work.

Table B-3 Major Equipment Notes		
Treatment Process	Major Equipment List	
(NCCWC) Water Treatment Plant		
Valley View	<ul style="list-style-type: none"> • (2) 5 million Gallon Reservoirs • 3 Booster Pumps • Rockwell Automation CompactLogix 5380 • Rockwell Automation PanelView 5510 	
View Acres	<ul style="list-style-type: none"> • (2) 2.8 million Gallon Reservoirs • 2 Booster Pumps • Rockwell Automation CompactLogix 5380 • Rockwell Automation PanelView 5510 • Banner I/O Radios 	
SCADA	<ul style="list-style-type: none"> • AVEVA System Platform 2020 • 1,000 I/O Tag License • Development License • 1,000 Historian Tag License • Win-911 Alarm Notification Software 	