

## Agenda Report

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**FROM:** James D. Herberg, General Manager  
Originator: Lorenzo Tyner, Assistant General Manager

**SUBJECT:**

### **COMPLETE FIELD INSTRUMENT CALIBRATION SOLUTION**

### **GENERAL MANAGER'S RECOMMENDATION**

**RECOMMENDATION:** Recommend to the Board of Directors to:

- A. Award a Professional Services Agreement to Beamex, Inc. to provide Instrumentation Data Management Services, Specification No. CS-2020-1102, for a total amount not to exceed \$257,714;
- B. Award a sole source purchase order for the purchase of instrumentation hardware in an amount not to exceed \$259,124; and
- C. Approve a contingency in the amount of \$77,525 (15%) for both procurements.

### **BACKGROUND**

The Orange County Sanitation District (Sanitation District) uses electronic field instruments to measure flow, level, temperature, pressure, and other analytical data (pH, turbidity, conductivity, nitrate, etc.) throughout different process areas. These instruments must be regularly inspected, calibrated, and maintained to ensure accurate monitoring of our operations. Staff is recommending implementation of a complete solution for the collection and reporting of instrumentation data for calibration, maintenance, and inspection activities performed on treatment plant equipment, in accordance with regulatory and reliability requirements. The Software and Professional Services contract was competitively bid and Beamex, Inc. was the only responsive and responsible bidder to respond.

### **RELEVANT STANDARDS**

- Ensure the public's money is wisely spent
- Maintain a culture of improving efficiency to reduce the cost to provide the current service level or standard
- Protect Orange County Sanitation District assets
- Maintain a proactive asset management program

## PROBLEM

The current instrument calibration process is manual with significant areas of inefficiencies. Sanitation District process and field tools do not efficiently utilize the technicians “wrench-time.” Each field tool serves a single purpose of measurement. These measured readings are hand transcribed on paper and later manually uploaded to the Computer Maintenance Management System. Data extrapolation for preventive maintenance optimization and root cause analysis absorb multiple resources to effect improvement towards asset management. In addition, beneficial occupancy for projects are time consuming by not having an efficient process to compile project instrumentation data.

## PROPOSED SOLUTION

Purchase software and hardware to automate the calibration process workflow from data collection to analysis and establish a standard methodology for calibration across both Plants.

## TIMING CONCERNS

N/A

## RAMIFICATIONS OF NOT TAKING ACTION

A decision not to purchase the Beamex instrument calibration solution and related professional services would result in the continued use of manual unverified calibration strategies.

## PRIOR COMMITTEE/BOARD ACTIONS

N/A

## ADDITIONAL INFORMATION

On January 14, 2020, the Sanitation District issued a Request for Proposals (RFP) for a field instrument calibration solution. The following evaluation criterion were described in the Request for Proposals and used to determine the most qualified firm.

CRITERION	WEIGHT
1. Qualifications & Experience of Firm	40%
2. Proposed Staffing & Project Organization	20%
3. Work Plan	20%
4. Cost	20%

The RFP closed on March 5, 2020. The Sanitation District received a response from one company. The RFP evaluation team of five (5) Sanitation District staff consisted of a Maintenance Superintendent, a Senior Information Technology Analyst, an Information Technology Analyst, and two Maintenance Supervisors. This RFP used the individual scoring method. The evaluation team

first reviewed and scored the proposals based upon the criteria listed above. The proposal was accompanied by a sealed cost proposal.

<b>Rank</b>	<b>Proposer</b>	<b>Criterion 1</b>	<b>Criterion 2</b>	<b>Criterion 3</b>	<b>Presentation</b>	<b>Cost</b>	<b>Total Weighted Score</b>
1	Beamex, Inc.	87.5%	82.5%	77.5%	N/A	100%	87%

Based on these results, staff recommends awarding the Agreement to Beamex, Inc. upon effective date of Notice to Proceed.

The RFP scope of work required that the selected firm provide professional services to implement and support the Instrumentation Data Management System. To utilize the system seamlessly, equipment that is proprietary to Beamex, Inc is required. The proprietary equipment includes an Advanced Field Calibrator/Communicator, a Pressure Module, a HART Communicator, Multichannel Datalogger, and a Temperature Block Communicator. Staff also recommends awarding of sole source purchase order to Beamex, Inc. for purchase of necessary equipment.

## **CEQA**

N/A

## **FINANCIAL CONSIDERATIONS**

This request complies with authority levels of the Sanitation District's Purchasing Ordinance. This item has been budgeted. (FY2018-19 & 2019-20 Budget, Section 8, Page 80, EAM Software & Process Implementation (SP-100)).

## **ATTACHMENT**

*The following attachment(s) may be viewed on-line at the OCSD website ([www.ocsd.com](http://www.ocsd.com)) with the complete agenda package:*

- Professional Services Agreement