

IRVINE RANCH WATER DISTRICT
INSTRUMENTATION SYSTEMS
AND CONTROL PANEL SUPPLIER
PREQUALIFICATION APPLICATION



APPLICANT: _____

MAIL:

IRVINE RANCH WATER DISTRICT
15600 SAND CANYON AVENUE
IRVINE, CALIFORNIA 92618
ATTN: ENGINEERING

INTERNET:

www.irwd.com
engineeringinfo@irwd.com

JANUARY 2024

**INSTRUMENTATION SYSTEMS AND CONTROL PANEL SUPPLIER
PREQUALIFICATION APPLICATION**

Provide complete and accurate information as requested herein. Additional sheets may be used as necessary for the information requested on this page only.

Contact Information

Firm Name: _____ Check One: Corporation
(If licensed, as it appears on license) Partnership
 Sole Prop
 LLC

Contact Person: _____

Title of Contact Person: _____

Contact Email: _____

Business Address: _____

Business Phone: _____ Business Fax: _____

Company Information

If licensed, Supplier's License Number(s) (License No. / Class / Type / Categories):

Supplier's Calif. Dept. of Industrial Relations (DIR) Number: _____

Home Office Location (City, State): _____

Name of Surety Company and Single Project Maximum Bonding Capacity:

Number of years your firm has been in business in California: _____

State your firm's gross revenues for each of the last three years (Year/Gross Revenue):

State your firm's Experience Modification Rate for each of the last three years:

APPLICATION INFORMATION

Background

Irvine Ranch Water District (IRWD) maintains a list of prequalified Instrumentation Systems and Control Panel Suppliers for construction contracts. In this document, an Instrumentation Systems and Control Panel Supplier is defined as the corporation, partnership, sole proprietorship, or LLC who will enter into an Agreement with the Prime Contractor or electrical subcontractor for construction. The Instrumentation Systems and Control Panel Supplier shall provide materials and services to the Prime Contractor or electrical subcontractor and will not have a direct contract with IRWD.

Application Submittal

The application package included herein consists of three sections including Instrumentation Systems and Control Panel Supplier Prequalification Application, Application Requirements, and Reference Projects. Each section of the application must be completed in its entirety by a qualified representative of the applying firm who is capable of providing the requested information. The application shall be type written and completed in the format provided. Attachments intended to be used as a replacement for the provided format will not be accepted. Supplemental information that directly supports the statements of experience stated on the application is encouraged; however, it shall not be considered a substitute for completing the Application and Reference Project Template forms in their entirety.

Each firm shall be responsible for the completeness and accuracy of the information provided. Incomplete or material misstatements on the application package may be grounds for rejection of the firm's approval for prequalification. Any such misstatement, if discovered after prequalification may be grounds for revocation of the firm's prequalification status. Submittal of an application package shall indicate the firm's acceptance of the terms and conditions of this prequalification document.

While completed application packages may be submitted at any time, IRWD will review application packages annually. **Application packages submitted on or before July 1 will be reviewed by October 1 of that year. Application packages received after July 1 will be held and reviewed by October 1 of the following year.** IRWD will notify each applying firm of its prequalification status in writing.

If the applying firm changes its name or business organization subsequent to its initial application, an additional prequalification application package with updated information must be submitted for review. Prequalification under a previous name or business organization will not relieve the firm of this requirement.

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Evaluation Methodology

A firm will be approved for prequalification on the basis of a comprehensive evaluation of all factors judged to be in the best interest of IRWD. These factors will include, but not be limited, to the following:

- Those specifically identified in this document;
- Those provided by the firm in the Instrumentation Systems and Control Panel Supplier Prequalification Application section;
- Those provided by the firm in the Application Requirements section;
- Those provided by the firm in the Reference Projects section; and
- Those provided by the reference project contact person(s).

IRWD may conduct such investigations as it deems necessary to assist in the evaluation of any application package and to establish the responsibility, qualifications, and financial capability of the applying firm. IRWD may conduct personal interviews with the firm's key personnel and may contact previous clients. Prequalification of the firm will generally be based on the application contents, prior experience of the firm as an Instrumentation Systems and Control Panel Supplier, specific project experience related to supplying instrumentation and control panels, and favorable responses from applicant's references. At a minimum, the firm must meet the minimum qualifications defined herein.

IRWD reserves the right to:

- Reject any or all application packages, including without limitation, the right to reject any or all nonconforming, nonresponsive, or conditional application packages;
- Reject the application package of any firm if IRWD believes that it would not be in the best interest of IRWD to award prequalification to that firm;
- Waive informalities, minor irregularities, and omissions in the information contained in the application packages submitted;
- Require the firm to submit additional information during the review process; and/or
- Consider additional information about a firm other than that submitted in the application.

This request does not commit IRWD to prequalify any firms or to pay costs incurred in the preparation of application packages. Application packages and accompanying materials will become the property of IRWD.

APPLICATION REQUIREMENTS

If the answer is “No” to any of Questions 1 through 6, do not proceed with completing the remainder of the application package as your firm does not meet the minimum requirements for prequalification.

1. If your firm UL508A, UL698A classified and CSIA compliant?

Yes No

2. Is your firm appropriately insured? At a minimum, IRWD requires the following insurance coverage:

The firm shall provide worker's compensation insurance coverage for no less than the statutory limits and employer's liability insurance coverage, for all persons whom contractor employs or may employ in carrying out the work. This insurance shall be in accordance with the requirements of the most current and applicable state worker's compensation insurance laws.

The firm shall provide commercial general liability insurance coverage equivalent to Insurance Services Office Form CG 00 01.

The firm shall provide business automobile liability insurance coverage equivalent to Insurance Services Office Form CA 00 01. Business automobile liability insurance coverage shall be provided for all owned, non-owned, and hired vehicles.

Insurers shall have financial and size ratings of at least an "A", VIII in accordance with the most current Best's Key Rating Guide, Property Casualty.

Limits will vary by project, but for the purposes of establishing a minimum coverage level, the following coverage levels shall be provided at a minimum:

	<u>Per Occurrence</u>	<u>Aggregate</u>
General Liability	\$1 million	\$2 million
Bodily Injury/Property Damage/Personal Injury	\$1 million	\$2 million
Products/Completed Operations	\$1 million	\$2 million
Auto Liability	N/A	\$2 million

Yes No

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3. Does your firm have at least five consecutive years of experience with procurement, calibration, and testing instruments as an Instrumentation Systems Supplier for water and/or wastewater projects in the State of California?

For the purposes of this question, water and/or wastewater projects are defined as projects involving potable water, recycled water, sewer collections, and/or water and wastewater treatment for a local, County, State agency, or special district.

Yes No

4. Does your firm have at least five consecutive years of experience as a Control Panel Supplier for water and/or wastewater projects in the State of California?

For the purposes of this question, water and/or wastewater projects are defined as projects involving potable water, recycled water, sewer collections, and/or water and wastewater treatment for a local, County, State agency, or special district.

Yes No

5. Has your firm completed, as the Instrumentation Systems Supplier, at least five water and/or wastewater projects in the State of California within the last five years?

For the purposes of this question, water and/or wastewater projects are defined as projects involving potable water, recycled water, sewer collections, and/or water and wastewater treatment for a local, County, State agency, or special district.

Yes No

6. Has your firm completed, as the Control Panel Supplier, at least five water and/or wastewater projects in the State of California within the last five years?

For the purposes of this question, water and/or wastewater projects are defined as projects involving potable water, recycled water, sewer collections, and/or water and wastewater treatment for a local, County, State agency, or special district.

Yes No

If the answers to Questions 1 through 6 are “Yes”, please proceed to Questions 7 through 18.

If the answer is “Yes” to any of Questions 7 through 18, do not proceed with completing the remainder of the application package as your firm does not meet the minimum requirements for prequalification.

7. Has your contractor’s license been revoked at any time in the last five years?

Yes No Not applicable as my firm is not licensed

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8. Has a surety firm completed a contract on your behalf, or paid for completion, because your firm was default terminated by the project owner, Prime Contractor, and/or electrical subcontractor within the last five years?
 Yes No
9. At the time of submitting this application package, is your firm ineligible to bid on, or be awarded a public works contract, or perform as a subcontractor on a public works contract, pursuant to either Labor Code section 1777.1 or Labor Code section 1777.7?
 Yes No
10. At any time during the last five years, has your firm, or any of its owners or officers been convicted of a crime involving the awarding of a contract of a government construction project, or the bidding or performance of a government contract?
 Yes No
11. Was your firm in bankruptcy at any time during the last five years?
 Yes No
12. In the last five years, has your firm, or any firm with which any of your company's owners, officers or partners was associated, been debarred, disqualified, removed or otherwise prevented from bidding on, or completing, any government agency or public works project for any reason?
 Yes No
13. At any time during the past five years, has any surety company made any payments on your firm's behalf as a result of a default, to satisfy any claims made against a performance or payment bond issued on your firm's behalf, in connection with a construction project, either public or private?
 Yes No
14. In the last five years has any insurance carrier, for any form of insurance, refused to renew the insurance policy for your firm?
 Yes No
15. Has your firm or any of its owners, officers or partners ever been found liable in a civil suit or found guilty in a criminal action for making any false claim or material misrepresentation to any public agency or entity?
 Yes No

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16. Has your firm or any of its owners, officers or partners ever been convicted of a crime involving any federal, state, or local law related to construction?

Yes No

17. During the last five years, has your firm ever been denied bond coverage by a surety company, or has there ever been a period of time when your firm had no surety bond in place during a public construction project when one was required?

Yes No

18. Has Cal-OSHA cited and assessed penalties against your firm for any “serious,” “willful” or “repeat” violations of its safety or health regulations in the past five years?

Yes No

If the answers to Questions 7 through 18 are “No”, please proceed with completing the remainder of the application package.

Instrumentation Systems

The firm shall demonstrate experience with procurement, installation, calibration, and testing of instruments for water and wastewater projects. This experience shall include, but not be limited to, preparation of shop drawings, bill of materials, instrument calibration (shop and field calibration), cabinet to field point-to-point IO checks (i.e. loop checks), development of written operational testing procedures and documentation, and preparation of as-built drawings. The firm shall provide an example loop check document and operational testing procedures document with its application. The example shall, at a minimum, consist of a loop check IO list with DI contact status and action (NO/NC – fail/normal), analog verification at 0%, 25%, 50%, 75% and 100%, and operational testing that includes step by step equipment startup procedures, equipment safety failure confirmation procedures, and alarm confirmation procedures.

Control Panels

The firm shall demonstrate experience with design, procurement, fabrication, and testing of control panels and control systems for water and wastewater projects. This experience shall include, but not be limited to, PLC control panels, preparation of shop drawings with panel layouts and elevations, bill of materials, loop drawings, cabinet power schematics, factory demonstration and witness testing and reporting, point-to-point IO checks, Modicon PLC and IO cards, power supplies, relays, Hirschmann Ethernet switches, radios, uninterruptible power supplies (UPS), starters, contactors, Maples operational interface terminals (OITs), cooling systems, and preparation of as-built drawings. The firm shall provide an example control panel submittal with its application package that shall, at a minimum, consist of panel layout drawings, panel elevation drawings, bill of materials, wire identifications, loop drawings, and power diagrams.

Minimum Qualifications

The firm shall have a minimum of five years experience providing instrumentation systems and control panels in the water/wastewater industry. Within the last five years, the firm shall have completed construction of at least five separate projects as the Instrumentation Systems Supplier and at least five separate projects as the Control Panel Supplier. At least three of the five projects as the Instrumentation Systems Supplier shall have been a minimum of \$35,000 in total project value, and at least three of the five projects as the Control Panel Supplier shall have been a minimum of \$75,000 in total project value. The total project value shall include work related only to instrumentation systems and control panels including design, procurement, fabrication, installation, calibration, and testing.

At least five reference projects demonstrating compliance with the above criteria for each specialty area shall be provided to be considered for prequalification. If the firm served as the Instrumentation Systems Supplier and the Control Panel Supplier on the same project, that single project may be used as a reference project for each specialty area.

REFERENCE PROJECTS

In order to demonstrate compliance with Questions 5 and 6 in the Application Requirements section, at least five water and/or wastewater project references, for projects completed in the State of California within the last five years, shall be provided for each specialty area. The firm shall also submit information for reference projects as identified previously in the Minimum Qualifications section for both instrumentation systems and control panels. The reference projects submitted to demonstrate compliance with the Minimum Qualifications section for each specialty area may also be used to demonstrate compliance with Questions 5 and 6 in the Application Requirements section.

For each submitted reference project, it is the firm's sole responsibility to provide adequate information that allows IRWD to determine compliance with the Minimum Qualifications criteria. Each submitted reference project shall clearly describe the manner in which the reference project fulfills the minimum requirements.

Reference Project Template

Information for reference projects shall be submitted using the attached Reference Project Template (template) only. A template shall be completed for each reference project. Additional sheets may be used as needed to provide all of the requested information. Supplemental project information may be provided in addition to the template, but any such information, shall not be submitted as a replacement for the template.

Reference Project Contact Information

Each firm shall be responsible for providing current and verifiable contact names and phone numbers for each reference project. IRWD will make two separate attempts to contact the identified references for each submitted reference project. If IRWD is unable to reach the provided contacts, or if the provided contacts fail to respond to IRWD's attempts for contact, then that reference project will be disregarded and removed from the application package. IRWD highly recommends that you notify each provided contact that they are being identified as a reference in this prequalification process.

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Reference Project Template – Project #1 (Required)

Type of Project: (Check all that apply)

- Instrumentation Systems
- PLC Control Panels

Project Name: _____

Project Location: _____

Project Owner: _____

Owner Contact (name and current phone number):

Prime Contractor Contact (name, company name, and current phone number):

Detailed Description of Project:

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Detailed Description of Project (Continued):

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List the equipment that was provided and the associated functionality (e.g. instrumentation, PLC control panel, other):

List the testing, calibration and start-up aspects of the project that were provided:

List the total value of instrumentation and/or control panels, including change orders. List separate values for each specialty area, if applicable:

Date of Completion: _____

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Reference Project Template – Project #2 (Required)

Type of Project: (Check all that apply)

- Instrumentation Systems
- PLC Control Panels

Project Name: _____

Project Location: _____

Project Owner: _____

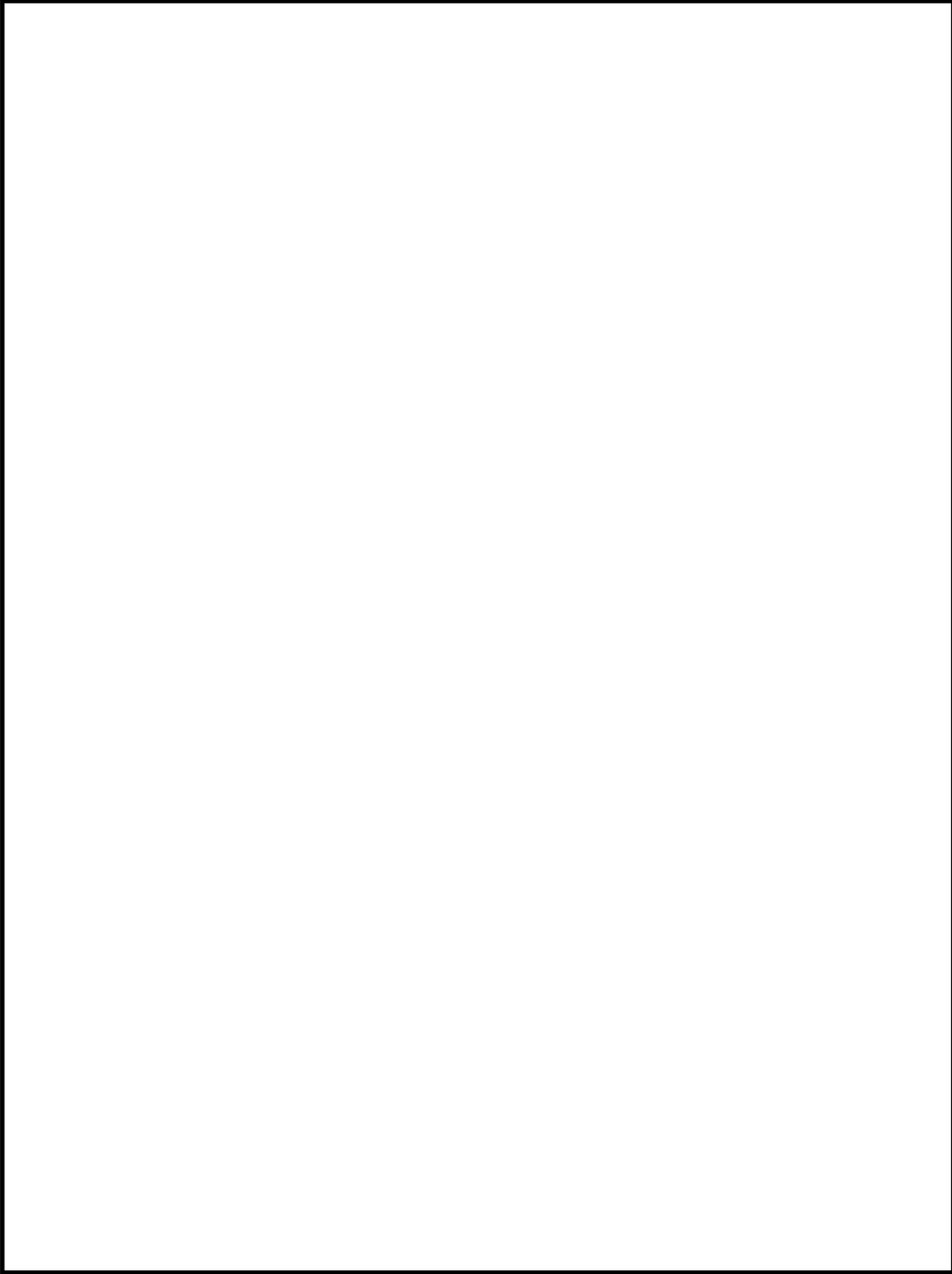
Owner Contact (name and current phone number):

Prime Contractor Contact (name, company name, and current phone number):

Detailed Description of Project:

Irvine Ranch Water District
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Detailed Description of Project (Continued):

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List the equipment that was provided and the associated functionality (e.g. instrumentation, PLC control panel, other):

List the testing, calibration and start-up aspects of the project that were provided:

List the total value of instrumentation and/or control panels, including change orders. List separate values for each specialty area, if applicable:

Date of Completion: _____

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Reference Project Template – Project #3 (Required)

Type of Project: (Check all that apply)

- Instrumentation Systems
- PLC Control Panels

Project Name: _____

Project Location: _____

Project Owner: _____

Owner Contact (name and current phone number):

Prime Contractor Contact (name, company name, and current phone number):

Detailed Description of Project:

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Detailed Description of Project (Continued):

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List the equipment that was provided and the associated functionality (e.g. instrumentation, PLC control panel, other):

List the testing, calibration and start-up aspects of the project that were provided:

List the total value of instrumentation and/or control panels, including change orders. List separate values for each specialty area, if applicable:

Date of Completion: _____

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Reference Project Template – Project #4 (Required)

Type of Project: (Check all that apply)

- Instrumentation Systems
- PLC Control Panels

Project Name: _____

Project Location: _____

Project Owner: _____

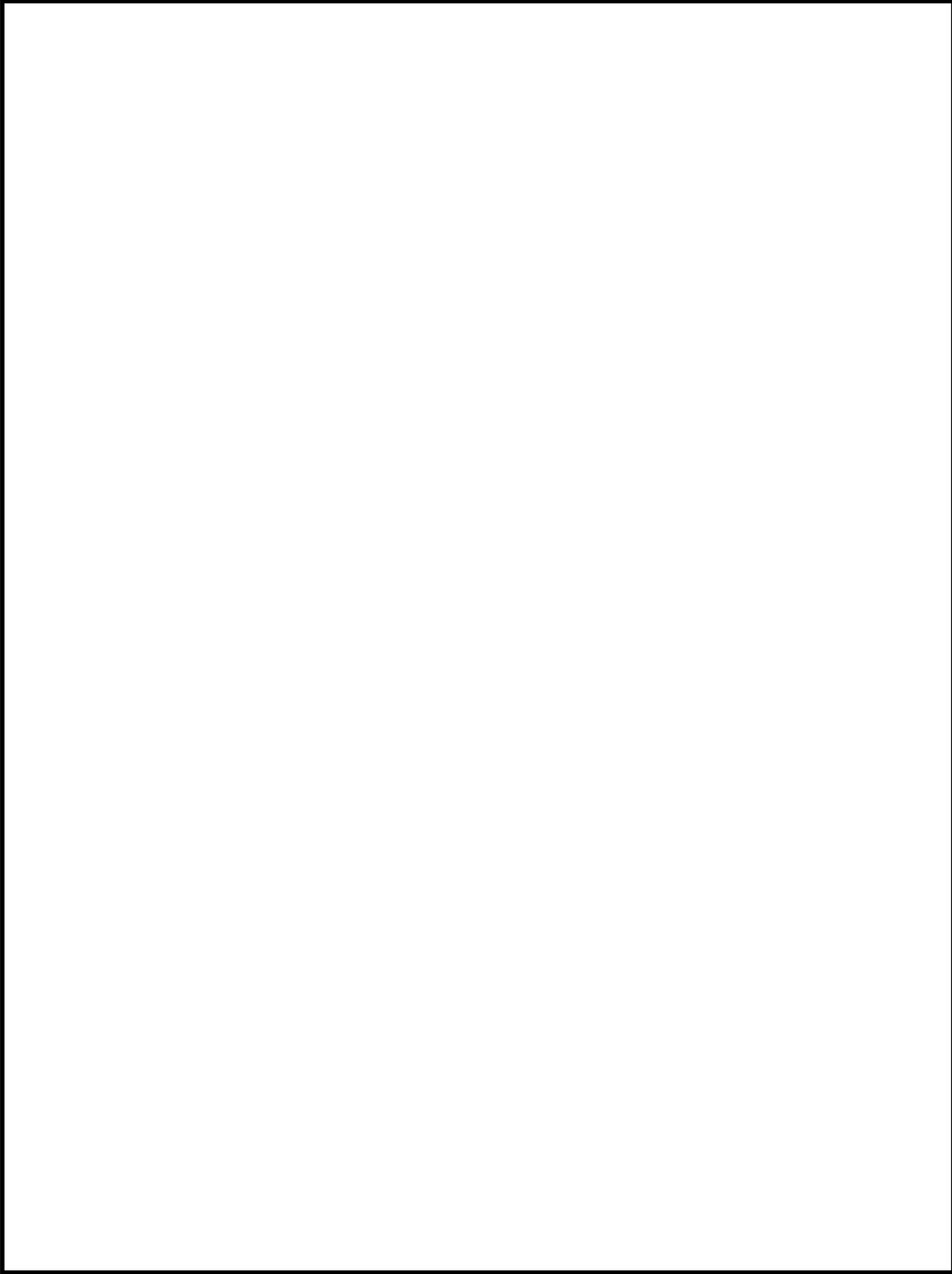
Owner Contact (name and current phone number):

Prime Contractor Contact (name, company name, and current phone number):

Detailed Description of Project:

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Detailed Description of Project (Continued):

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List the equipment that was provided and the associated functionality (e.g. instrumentation, PLC control panel, other):

List the testing, calibration and start-up aspects of the project that were provided:

List the total value of instrumentation and/or control panels, including change orders. List separate values for each specialty area, if applicable:

Date of Completion: _____

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Reference Project Template – Project #5 (Required)

Type of Project: (Check all that apply)

- Instrumentation Systems
- PLC Control Panels

Project Name: _____

Project Location: _____

Project Owner: _____

Owner Contact (name and current phone number):

Prime Contractor Contact (name, company name, and current phone number):

Detailed Description of Project:

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Detailed Description of Project (Continued):

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List the equipment that was provided and the associated functionality (e.g. instrumentation, PLC control panel, other):

List the testing, calibration and start-up aspects of the project that were provided:

List the total value of instrumentation and/or control panels, including change orders. List separate values for each specialty area, if applicable:

Date of Completion: _____

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Reference Project Template – Project #____ (Include As Needed)

Type of Project: (Check all that apply)

- Instrumentation Systems
- PLC Control Panels

Project Name: _____

Project Location: _____

Project Owner: _____

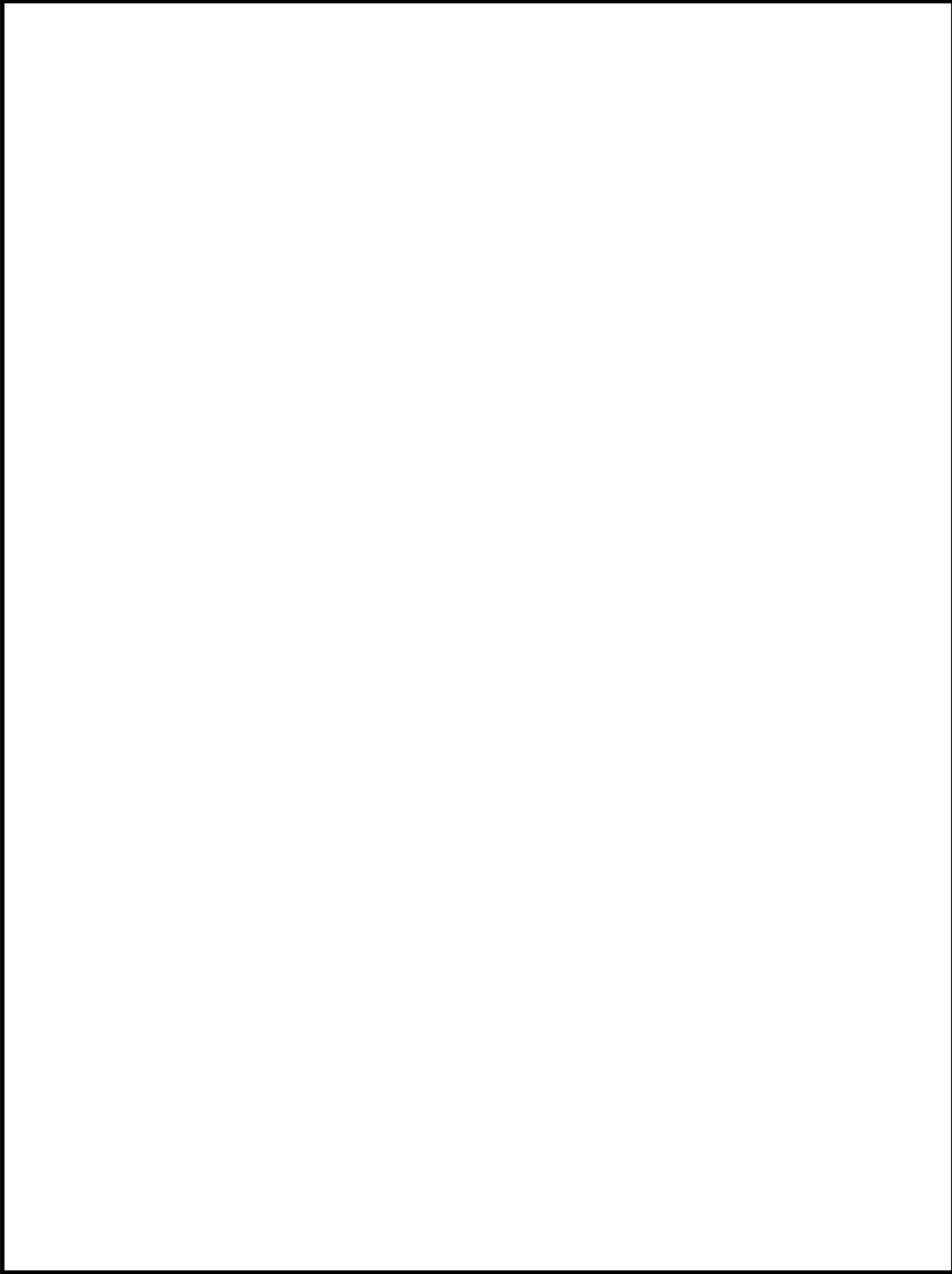
Owner Contact (name and current phone number):

Prime Contractor Contact (name, company name, and current phone number):

Detailed Description of Project:

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Detailed Description of Project (Continued):

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List the equipment that was provided and the associated functionality (e.g. instrumentation, PLC control panel, other):

List the testing, calibration and start-up aspects of the project that were provided:

List the total value of instrumentation and/or control panels, including change orders. List separate values for each specialty area, if applicable:

Date of Completion: _____