

SOLE SOURCE PURCHASE REPORT

To: Candida Kelcourse, Purchasing Officer

From: Jon Ebia, Electrical Engineer

Date: 2/25/2025

1. Name and address and contact information of supplier:

Schneider Electric Systems USA, Inc.

Attn: Order Management

10900 Equity Dr.

Houston, TX 77041

processautomation.us@se.com

POC: Mike Lauchlin,

email: mike.lauchlan@se.com

cell: (403) 615-7380

2. Goods and/or services to be purchased:

The services and goods to be purchased include:

- Purchase of AVEVA Enterprise SCADA (AES) software
- Purchase of associated computer hardware (servers and workstations)
- Site-specific implementation of the AES software for the ABCWUA SWRP Plant SCADA system
- System testing, training, and documentation.
- Additional Work – Migration of the FactoryTalk system into the Aveva Enterprise SCADA (AES) system. (Change Order -FactoryTalk Assistance) \$25,513.00 (not including NMGRT).
- Throughout the implementation period for the HMI Upgrade Project, Schneider Electric (SE) has maintained a running list of minor modifications to the contract work. This running list, which may include additional cost items or credits to the Water Authority, is termed the “Plus/Minus List”. These items are specifically approved by the project management team prior to adding them to the list. This change order incorporates all of the items in the Plus/Minus list through February 17, 2025. This change order also includes additional software development required to accommodate an additional feature request by the SWRP operations team for the SWRP HMI implementation.

3. Estimated total dollar amount of expenditures pursuant to this request: \$4,142,650.00

4. Term for which goods and/or services will be purchased pursuant to this request (mark only the option which applies):

- a. Estimated completion of 12/31/2027
- b. This is a one-time sole source purchase, to be completed within the next fiscal year.

5. Identify the specific circumstances that require a sole source purchase of the goods and/or services requested:

- a. Brief description of the purpose of the goods or services to be purchased:

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The existing Distributed Control System (DCS) at the Southside Water Reclamation Plant (SWRP) needs replacement. This purchase will replace the Human Machine Interface (HMI) software portion of the DCS, to standardize SCADA across the Water Authority, enabling better monitoring and control of SWRP and the associated Wastewater Collections / Stormwater remote sites.

b. Reasons for need of goods and/or services from the specific supplier. Any one reason, by itself, does not necessarily justify a sole source purchase (mark all that apply):

- i. A diligent inquiry failed to identify any source for the same or similar goods and/or services that will substantially accomplish the same or similar functions to those provided by the source identified above. If so, identify which of the following steps were taken to establish a good-faith review of available alternative sources and provide written justification verifying the actions below were taken (mark all that apply):
1. Contacted various suppliers of similar goods to discuss alternative options;
 2. Performed product research for potential alternative sources;
 3. Consulted with subject matter experts to identify potential alternative sources;
 4. Other (specifically describe any actions taken, attach additional sheets if necessary):

A structured evaluation and selection process to choose the HMI software to be the enterprise-wide standard for the Water Authority's SCADA system was completed. The evaluation included the use of a formal Request for Information (RFI), developed by the Water Authority's SCADA Consultant, EMA, Inc. The Water Authority received 12 responses to the RFI from individual software vendors, 11 of which were deemed responsive. The 11 responses were reviewed by an independent selection committee and a short list of vendors were developed.

The two highest ranked products were invited to participate in a structure demonstration process, which was also reviewed by the selection team. The AES software system scored the highest in both the RFI response and subsequent software demonstration.

(Inability to locate other sources via internet search will not suffice as acceptable due diligence.)

- ii. The goods and/or services offered are unique or proprietary in form, fit, and function. If so, describe the unique or proprietary qualities of the goods and/or services; if available, provide documentation of their unique or proprietary nature, e.g. evidence of patent/copyright/secret processes/limited rights in data (attach additional sheets if necessary):
- iii. Use of goods and/or services from sources other than an Original Equipment Manufacturer will require substantial modification to equipment or systems currently in use, resulting in substantial duplication in cost to the Water Authority that is not expected to be recovered through competition and/or unacceptable delays in fulfilling the Water Authority's requirements. If so, describe the modifications, potential costs, and/or delays associated with making substitute goods and/or services compatible with current equipment or systems (attach additional sheets if necessary):

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- iv. The procurement requires a specific supplier of goods or services. If so, identify one or more of the following reasons and provide written justification verifying that the statement below is true:
1. Limited availability of goods or services;
 2. Proven quality, accuracy, and/or dependability;
 3. Compatibility considerations;
 4. Safety considerations;
 5. Warranty issues or guarantee of parts performance;
 6. During the system design process, several alternatives were evaluated and the current proprietary process was selected;
 7. Other (specifically describe any other reasons, attach additional sheets if necessary):

See Item 5.b.i above describing the selection process.

The selection of the enterprise-wide HMI software was done in advance of the design work to implement the system at SWRP. This was necessary to optimize the overall design and ensures alignment with the Water Authority's previously completed SCADA Master Plan.

The AES software shares several fundamental components of the Water Treatment Plant SCADA system and will maintain compatibility with that system as the two systems are integrated in the future.

- v. The goods and/or services cannot be purchased by the Water Authority from any other supplier, e.g. the supplier has a protected territory established by the original producer of the goods or services. If so, attach written documentation from the original producer verifying the availability of sources for goods and/or services.

The AES software system is provided through certified system integrators who are trained and skilled in the setup, deployment and configuration of the software system. At this time, Schneider Electric Systems USA is the sole certified system integrator for the AES system.

6. Describe the reasons the purchase is in the public's interest (attach additional sheets if necessary):

The SCADA master plan identified a need to standardize on a single enterprise-wide SCADA system. The structured software selection was conducted to select the AES software system. The selected software is of the same product family as the SCADA software in use for the Surface Water Treatment Plant and Groundwater / Water Distribution system. Implementing the AES system will move the Water Authority further down the path to the objective of a single, integrated, enterprise-wide SCADA system.

This standardization will provide benefits to the Water Authority and the public in areas such as:

- *Improved monitoring of water and wastewater system operational performance*
- *Reduced software licensing and maintenance fees, by consolidating support services agreements across Water and Reclamation*
- *Reduced training costs for SCADA support teams. Implementing a common, Enterprise-wide SCADA system will allow support specialists to service both systems without the need for training on two platforms.*
- *Improved SCADA system maintenance, since support teams can seamlessly provide support to both Water and Reclamation.*

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- *Improved operational decision-making and data management*
- *Ability to enhance physical system maintenance by implementing a common approach to gathering maintenance related information and conveying this information to the Water Authority's Enterprise Asset Management system.*

7. Attach negotiated cost or fee schedule, as applicable, along with evidence confirming that the price is most advantageous to the Water Authority.


Requirement:

At least fifteen days before a sole source contract is awarded, the Central Purchasing Office shall post this notice of intent to award any sole source contracts for goods, services, or construction, on its website.

Any qualified potential contractor may protest an intent to award a sole source procurement to the Central Purchasing Office. The protest shall be submitted in writing within fifteen calendar days of the notice of intent to award a contract being posted by the Central Purchasing Office.

The signature below certifies that this justification is accurate and complete to the best knowledge and belief of the individuals signing:

Requestor's Signature:



Jon Ebia, Electrical Engineer 2/27/25
Date

Signature Acknowledgement from the Division Manager:



Cody Stinson, Chief Information Officer 2/26/25
Date

Review and Verification by Purchasing Officer:



Candida Kelcourse, Purchasing Officer 2/26/25
Date