



CITY OF TALENT, OREGON
Public Works Operations

Solicitation #

**REQUEST FOR COMPETITIVE
SEALED PROPOSALS
FOR**

ADVANCED METERING INFRASTRUCTURE TRANSITION

Issue Date: Wednesday, February 21, 2024

Due Date: Wednesday, April 3, 2024, 2:00 PM (Pacific Time)

Interim Public Works Director**Jeffrey Ballard, PE**
Public Superintendent **Rob Slayton**

For more information regarding this Request for Proposals, email
JBallard@RH2.com

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RFP SUMMARY

RFP TITLE	ADVANCED METERING INFRASTRUCTURE TRANSITION												
DEADLINE FOR SUBMISSIONS	2:00 PM, APRIL 3, 2024												
SCOPE	<p>The City of Talent is seeking proposals for the development and implementation of an Advanced Metering Infrastructure (AMI) System.</p> <p>The successful proposer must demonstrate the ability to deliver a system that adheres to the specifications outlined in this document, support the System on an on-going basis, and provide references of similar systems that have been successfully installed and are currently in a production environment. The proposals will be evaluated according to the selection criteria established in the RFP. Installation Contractor will be selected under separate solicitation.</p>												
SUBMIT PROPOSAL TO:	<p>City of Talent Attn: Rob Slayton City Hall 110 E. Main Street Talent, OR 97540</p>												
LABELING	<p>All proposals must be packaged, sealed and clearly labeled.</p> <p>Proposer's Name and Address TITLE: ADVANCED METERING INFRASTRUCTURE TRANSITION DUE: 2:00 PM, APRIL 3, 2024</p>												
FORMAT OF SUBMITTALS	<ol style="list-style-type: none"> 1. Submit Technical and Cost Hard Copy Proposals in separate, distinct parts. 2. Electronic proposal in a PDF format supplied on a USB thumb drive, identical in content and sequence to hardcopy proposals. 3. All proposals must be packaged, sealed and clearly labeled as either "COST" OR "TECHNICAL" PROPOSAL: <table border="1" style="margin-left: 40px; width: 60%;"> <tr> <td><u>Cost Proposal:</u></td> <td>One</td> <td>(1)</td> <td>Signed original</td> </tr> <tr> <td><u>Technical Proposal:</u></td> <td>One Four</td> <td>(1) (4)</td> <td>Signed original + complete copies</td> </tr> <tr> <td><u>Electronic Copy:</u></td> <td>One One</td> <td>(1) (1)</td> <td>Copy Technical + copy Cost Proposal</td> </tr> </table> 	<u>Cost Proposal:</u>	One	(1)	Signed original	<u>Technical Proposal:</u>	One Four	(1) (4)	Signed original + complete copies	<u>Electronic Copy:</u>	One One	(1) (1)	Copy Technical + copy Cost Proposal
<u>Cost Proposal:</u>	One	(1)	Signed original										
<u>Technical Proposal:</u>	One Four	(1) (4)	Signed original + complete copies										
<u>Electronic Copy:</u>	One One	(1) (1)	Copy Technical + copy Cost Proposal										
QUESTIONS AND REVISIONS TO RFP:	<ol style="list-style-type: none"> 1. No questions, oral or written, will be permitted after <u>5:00</u> PM, PST, March 29, 2024. This will enable the City to respond to last-minute questions and make them available to all potential Proposers before the proposal submittal deadline. Only written answers will be binding. 												

	<p>2. If it is necessary to provide additional clarification or revision to the RFP, the City will post addenda to its website – see Section 2.4. It is the Proposer’s responsibility to regularly monitor the websites for any such postings.</p>
<p>DIRECT ALL INQUIRES TO:</p>	<p>Jeffrey Ballard, PE City Engineer RH2 Engineering, Inc. Phone: 541.301.1555</p> <p>Email: jballard@rh2.com</p>
<p>BID DOCUMENTS AVAILABLE AT:</p>	<p>Solicitation documents can be downloaded from the City of Talent website at https://www.Cityoftalent.org/index.asp.</p>

SECTION 1: GENERAL BACKGROUND INFORMATION

1.1 PURPOSE

This request for Proposals (RFP) is intended to solicit proposals from proposers capable of satisfying City of Talent's needs for a new water metering system. The Utility is requesting a proposal that includes an Advanced Metering Infrastructure (AMI) system. The Utility will review each system and determine which meter reading system is the most advantageous to install. This solicitation is to enable the City to select the desired technology and establish a price for the selected infrastructure moving forward. The City will solicit for installation after the technology has been selected. This document provides information to help proposers prepare their responses and facilitates the subsequent evaluation and comparison thereof. In that regard, the RFP:

- Provides information essential to making meaningful recommendations and realistic commitments.
- Specifies the desired format and content of written responses.
- Outlines the evaluation and proposer selection procedures.
- Establishes a performance standard for the selected proposer.
- Installation will occur under separate solicitation.

1.2 ORGANIZATION BACKGROUND

The City of Talent (City) serves approximately 6,282 people through about 2,191 metered service connections. Talent purchases water wholesale from Medford Water.

1.3 ADVANCED METERING INFRASTRUCTURE SYSTEM OBJECTIVES

Talent wishes to acquire and implement an AMI system to satisfy its needs. Primary objectives related to the use of these system include:

- Improve customer service.
- Replace meters that are 15-25 years and older.
- Reduce current labor effort required during meter reading and utility billing.

1.4 PRODUCTS AND SERVICES REQUESTED

This section describes the general nature of the services and products solicited, including not only meters, interface units and software, but also the support services related to the meter installation and maintenance.

In accordance with its overall objectives, City of Talent seeks proposals for products and services from qualified firms in six areas:

- Water meters and registers;
- AMI modules (i.e., Meter Interface Units - MIUs);
- System infrastructure and software to effectively utilize the proposed system and interface with existing systems and billing software;
- System implementation;
- Training; and,
- A minimum five (5) year maintenance contract.

1.5 USE OF SUBCONTRACTORS

Proposers are allowed to use subcontractors in their proposals. The proposer (prime proposer) shall be fully responsible to the City for the acts and omissions of all subcontractors and of persons indirectly employed by them. Subcontractors will be subject to the terms and conditions of the contract and RFP, just as the prime proposer will be. Any and all subcontractors must be identified in the proposal. These subcontractors may be evaluated under the same criteria as the prime proposer, with the exception of cost.

1.6 EXISTING SYSTEM

- Number of Meters – There is approximately 2,191 meters in service ranging in size from 3/8-inch to 6-inch.
- Meter Types – The meters in service are Sensus meters.
- Reading Frequency – All residential and commercial/industrial meters are scheduled to be read every month.
- Billing Frequency – All customers are billed monthly.
- Meter Reading Method – Meters are read by utility service personnel via handheld radio technology. The meter reader completes a route, the information collected from the handheld device is uploaded to Sensus software. When all routes have been read, and uploaded to Auto Read, the reads transfer to the utility billing system.
- Special Reads – The meter readers perform additional reads and special reads when missing or inaccurate data appears within the billing software.

1.7 METER INFORMATION

Existing meters read in gallons. Listed below are the total number of meters in the system by manufacture, and the amount of meters that need to be changed out (meter – register – radio) and the amount of meters that to be retro-fitted (radio only)

Meter Size	Change Out	Radio Only	Total
3/8-inch by 3/4-inch	2,008		2,008
1-inch	100		100
1 1/2-inch	28		28
2-inch	0	50	50
3-inch	3		3
6-inch	2		2
Total	2,191		2,191

1.8 TALENT/UTILITY INFORMATION AND BILLING SYSTEM

The City of Talent bills its existing customers using Pro 10 Software by Tyler Technologies. The system selected must be compatible with the existing City billing software.

SECTION 2: GENERAL ADMINISTRATIVE RFP INFORMATION

2.1. POINT OF CONTACT

City of Talent is the sole point of contact regarding the RFP from the date of release of the RFP until selection of the successful proposer.

Jeff Ballard, Interim Director of Public Works
City of Talent
110 East Main Street
PO Box 445
Talent OR 97540
Phone: 541.301.1555
Email: jballard@RH2.com

2.2. ANTICIPATED PROJECT SCHEDULE

Year	Quarter	Events
2024	1 st	Issue RFP for AMI Vendors
	2 nd	Analyze Bids, Interviews, Site Visits, Vendor Award Contract Negotiations
	3 rd	Initial Implementation Testing and advertise contracting for Full Scale Meter Replacement.
2025	1 st – 2 nd	Implementation of AMI System

2.3. INQUIRIES AND CLARIFICATION OF SPECIFICATIONS

Proposers shall request explanations, clarifications, or interpretations regarding any part of the RFP in writing by the deadline for written questions specified in the RFP. If a Proposer discovers any significant ambiguity, error, conflict, discrepancy, omission, or other deficiency in this RFP, the Proposer should immediately notify Talent in writing of such error and request modification or clarification of the RFP document.

The City assumes no responsibility for verbal representations made by its officials or employees unless such representations are confirmed in writing and incorporated into the RFP. Vendors must inform themselves fully of the conditions relating to the proposal. Failure to do so will not relieve a successful bidder of their obligation to furnish all services required to carry out the provisions of this contract. The Contractor, in carrying out the work, must employ such methods or means as will not cause any interruption of, or interference with, the work of any other contractor.

In the event that it becomes necessary to provide additional clarification or revision to the RFP, addenda will be posted on the City's website (**Section 2.4**). Proposers are responsible for checking the bid distributions sites regularly for such postings. Oral explanations or instructions are not binding upon the City.

Direct all questions to the City, in writing via; mail, fax or email, on or before:

5:00 PM, MARCH 29, 2024

2.4. ADDENDA/OFFICIAL COMMUNICATION

During the solicitation process for this RFP, all official communication between the City and Proposers will be made via notices on the City's website. (<https://www.Cityoftalent.org/index.asp>) The City will post such notices, which may include, but not be limited to, addenda for any modifications to administrative or performance requirements, answers to inquiries received, clarifications to requirements, and the announcement of the apparent winning Proposer. It shall be the responsibility of the Proposers to regularly monitor the website for any such postings. Failure to retrieve such addenda and include their appropriate provisions in the response, may result in your proposal being disqualified.

2.5. INCURRING COSTS

Proposers shall be responsible for any costs associated with preparing, submitting, or presenting proposals, inspection of City locations or making facilities available for a site inspection or in satisfying any demonstration, award or other requirements as part of the RFP process.

2.6. ACCEPTANCE/REJECTION OF PROPOSALS

The City reserves the right to accept or reject any or all proposals submitted, in whole or in part, and to waive any informalities or technicalities, which at City's discretion is determined to be in the best interests of the City. Furthermore, the City makes no representations that a contract will be awarded to any Proposer responding to this request. The City expressly reserves the right to reject any and all proposals responding to this invitation without indicating any reasons for such rejection(s).

The City reserves the right to postpone due dates and openings for its own convenience and to withdraw this solicitation at any time without prior notice.

2.7. PROPOSER'S RESPONSIBILITY

Proposers shall examine this RFP and contract documents and shall exercise their own judgment as to the nature and scope of the work required. No plea of ignorance of conditions or difficulties that exist or may hereafter arise in the execution of the work under this contract as a result of failure to make necessary examinations and investigations, shall be accepted as an excuse for any failure or omission on the part of the proposer to fulfill the requirements of the contract.

2.8. PROPOSER QUALIFICATIONS

The City may make such investigations as it deems necessary to determine the ability of the proposer to perform the work, and the proposer shall furnish to the City all such information and data for this purpose, as the City may request. The City reserves the right to reject any proposal if the evidence submitted by, or investigated of, such proposer fails to satisfy the City. The proposer understands the full scope of work and is properly qualified to carry out the obligations of the contract and to complete the work contemplated herein.

2.9. PROPOSAL CONTENT

The evaluation and selection of a Contractor and the contract will be based on the information submitted in the vendor's proposal plus references and any required on-site visits or oral presentations. Failure to respond to each of the requirements in the RFP may be the basis for rejecting a response.

SECTION 3: PROPOSAL EVALUATION AND SELECTION

3.1. Awarding Authority / Evaluation Committee

This RFP is issued by the City of Talent. An evaluation committee will have responsibility to review and evaluate all proposals submitted in response to the RFP. The City reserves the right to include outside consultants to assist in the evaluation process; however, such consultants would be precluded from submitting a proposal in response to this RFP.

3.2. Preliminary Evaluation

Received proposals will be reviewed for completeness and compliance with RFP guidelines. All incomplete RFPs submitted may be determined nonresponsive and removed from the evaluation process. To be considered complete, RFPs shall include all required submittals listed in the checklist (**RFP Form A**) and shall be signed and dated. All content of a proposal submitted is subject to verification. Misleading or inaccurate responses shall result in disqualification. In the event that all proposers do not meet one or more of the requirements, the City reserves the right to continue the evaluation of the proposals that most closely meet the requirements of this RFP.

3.3. Proposal Evaluations, Interviews and/or Site Visits

The City RFP Selection Committee will make the final selection and recommendation following the evaluation of the proposals which may include site visits and interviews, if deemed necessary, with some or all of the Proposers. However, the City may make preliminary selection(s) on the basis of the original proposals only, without negotiation, interviews and/or site visits with any proposers.

If interviews and or site visits are conducted, the Selection Committee may choose to assign additional points for these processes or re-evaluate, re-rate and/or re-rank the finalists' proposals based upon the written documents submitted and any clarifications offered in the interviews.

3.4. Interviews

Each qualified proposer shall be prepared to explain their proposal at an interview. This should include demonstrating proposed products as much as reasonably possible to help verify compliance with the specifications contained herein.

The focus of the demonstration is to determine how well the proposed system will meet user needs. System deficiencies will be documented and discussed with proposer personnel to identify potential solutions. All expenses related to demonstrations and solutions of deficiencies are the responsibility of responding proposers.

3.5. Clarification of Proposals.

The City reserves the right to contact a vendor after the submission of offer proposals for the purpose of clarifying a proposal to ensure mutual understanding. This contact may include written questions, interviews, site visits, a review of past performance if the vendor has provided goods or services to the City or any other political subdivision wherever located, or requests for corrective pages in the vendor's bid proposal.

An individual authorized to legally bind the vendor shall sign responses to any request for clarification. Failure to comply with requests for additional information may result in rejection of the bid proposal as non-compliant.

3.6. Reference Checks

The Evaluation Committee may at any time investigate a proposer's ability to perform the work. The Evaluation Committee may in addition to references supplied, request additional information about a company and its experience with previous contracts. Proposers may choose not to submit information in reply to the Evaluation Committee's requests; however, if failure to submit such information results in questions about the proposer's ability to perform, the evaluation committee may at its discretion discontinue further consideration of a particular proposal.

3.7. Consideration of Proposals

In making their selection under this RFP, the City and the RFP Selection Committee will consider the submittals, Contractor interviews, general qualifications, prior history of performance as well as the selection criteria set forth in this RFP.

3.8. Disposition of Offers

All proposals become the property of the City. At the conclusion of the award/contract process, the contents of all offers will be in the public domain and be open to inspection by interested parties subject to exceptions provided for in Oregon State Statutes or other applicable law.

3.9. Negotiation

The City reserves the right to negotiate final fees and scope of services with the selected Contractor, potentially including the final composition of the Contractor team.

3.10. Process

At any phase, the City reserves the right to terminate, suspend or modify this selection process; reject any or all submittals; and waive any informalities, irregularities, or omissions in submittals, all as deemed in the best interests of the City.

3.11. Right to Reject Proposals and Negotiate Contract Terms

The City reserves the right to reject any and all proposals and to negotiate the terms of the contract, including the award amount, with the selected proposer(s) prior to entering into a contract. If contract negotiations cannot be concluded successfully with the highest scoring proposer(s), the City may negotiate a contract with the next highest scoring proposer.

3.12. Basis for Evaluation and Award:

The City will have sole discretion as to the methodology used in making the award. The award will be made to the responsible and responsive Proposer who offers the best combination of criteria to include, but not limited to: cost, system functionality, completeness and quality of proposal, qualifications, references local preference and quality of solution in compliance with the specifications and requirements of this solicitation.

SECTION 4: PROJECT SCOPE AND REQUIREMENTS

1.9 General Information

This section identifies the Contractor's Scope of Services. The proposal shall provide narrative descriptions for the Contractor's approach in addressing the tasks listed within this RFP. The Contractor may propose other options above and beyond the list of tasks if deemed beneficial to the City Advanced Metering Infrastructure program.

The selected Contractor shall perform and administer all work under this RFP and shall coordinate with City staff to provide a comprehensive AMR / AMI solution.

This RFP considers a complete turn-key solution that includes the following components:

- Water meters
- AMI modules (i.e., Meter interface units - MIUs)
- Computer hardware and software required to effectively utilize the proposed system
- Advanced Metering Communications and Infrastructure (AMI) - Communications media/equipment/software to communicate to/from the meters
- User Training
- Acceptance Testing
- Ongoing Maintenance, Customer Service, and Support
- Program Management and Project Schedule
- Oversight of the installation and Implementation of all system components
- Meter Data Management System - Software or other items required to interface the proposed systems with existing related systems

1.10 Responsibilities of City of Talent

The City and its designated representatives shall have the authority to relay instructions, approve the execution of the proposed work tasks, receive information, determine the percent of earned values based on work accomplishments, and express City's policies and decisions. The Service Provider shall be aware that the City reserves the right to eliminate any portion of work that it deems unnecessary prior to and during the course of the project.

The City shall make available to the Contractor information in the City's possession, that it believes is pertinent to the Project.

The City shall make all reasonable efforts to provide access to, and provision for the Provider, or the Provider's subcontractors, sub-consultants, and sub-vendors, to enter upon public and private lands as required to perform the work under this Agreement.

The City shall examine all studies, reports, sketches, estimates, specifications, drawings, proposals and other documents presented by the Provider and shall render in writing decisions pertaining thereto within a reasonable time so as not to delay the work of the Provider.

The City shall designate in writing a person to act as the City's Project manager with respect to the work to be performed under this Agreement.

The City shall give prompt notice to the Contractor whenever City observes or otherwise becomes aware of any defect in the Project.

The City makes no representation or warranty of any nature whatsoever as to the accuracy of information or documentation provided by the City to the Provider, that were generated or provided by third parties.

1.11 Summary of Responsibilities of the Selected Contractor

The Contractor shall provide all the hardware and software that together comprise the proposed AMI system. This includes meter interface units, wire and wire connectors, data collection units, repeaters, AMI control computers, and related software and interfaces. The Contractor shall also determine the installation locations for the data collection units.

The Contractor shall manage, monitor, coordinate, and ensure that all contract work activities are completed. The selected Contractor shall provide the City with a clear, understandable, and easily accessible method for determining the progress of work.

The Contractor shall work with the City to determine the methods and means of installing the meters and meter reading equipment with the **installation contractor selected through separate solicitation**.

The selected Contractor shall be ultimately responsible for coordinating all aspects of work among its project team, City staff, and any City representatives involved in this project.

1.12 Key Assumptions

Proposers should consider the following information in formulating their responses:

4.12.1 General

- The City is open to any system configurations for an AMR / AMI system. For a proposer to be considered, at least one complete system must be proposed. If in doubt as to which type of system to propose, a proposer should propose alternative configuration systems. The City highly encourages proposers to submit bids for an AMR and an AMI system.
- The City encourages multiple system configurations. If a proposer wishes to submit multiple configurations, please indicate your “primary solution” and your “alternate solution” on separate pages. Indicate each alternate solution as Alternate 1, Alternate 2, etc.
- The City is considering options for either replacing a limited amount of meters identified in **Section 1, Item 1.7** of the RFP or a complete change-out of all meters.
- The Contractor will act as a “Prime” with overall responsibility for the proposal that addresses all of the requirements of the complete solution. The Prime Contractor will either meet all requirements themselves, or establish partner/subcontractor relationships with other firms, as needed. The Prime Contractor shall be fully responsible to the City for the acts and omissions of all subcontractors and of persons indirectly employed by them. Subcontractors will be subject to the terms and conditions of the contract and RFP, just as the prime proposer will be. Any and all subcontractors must be identified in the bid. These subcontractors may be evaluated under the same criteria as the prime proposer, with the exception of cost.
- Subcontractor relationships shall be reflected in the contractual documents; in the financial and business risks; and that the obligation would extend until the City has taken final acceptance.
- The City shall rely upon the representations made during the RFP process, including those in the Proposal, while selecting a firm. The successful Proposer(s) shall be required to warrant their representations are accurate and shall accept full responsibility for its responses to the RFP.
- The City reserves the right to reject any proposals it determines not responsive to the RFP. Furthermore, the City reserves the right to reconsider any proposal submitted during any phase of the procurement process; meet with select firms at any time to gather additional information; add

or delete functionality from the scope of work up until the final contract signing, acknowledging these changes may result in increased or decreased effort/pricing.

- Any and all third-party software solutions proposed as part of the Proposer’s solution are subject to the same requirements of this RFP, unless otherwise stated.
- The City intends to formalize all participating parties’ rights, duties and obligations in written agreements, including the sample “Contract for Purchase of Services” in Attachment A.

1.13 Pricing

- The City requests the pricing associated with this RFP be a firm proposal price that must remain open and in effect for not less than 180 days after the due date and time of the proposal.
- Proposers shall submit their written cost proposal in a detachable sealed section of the response as described and submitted as **Appendix A – Cost Proposal**.
- Certain vendors may be asked to update their costs submissions with a best and final offer.
- The City requires that licenses for software be paid-up, perpetual, non-exclusive, and enterprise, unless specified otherwise for a period of 20 years.
- The City requires that maintenance and support costs be paid for a period of five (5) years unless specified otherwise.
- Proposers shall submit in their detailed cost proposal, license and software fees, maintenance, support cost, and all other costs for the period listed above.

1.14 Project Organization & Implementation Considerations

4.12.1. Implementation Team

The City expects to form a team to support the implementation by working with the selected vendor(s) during the implementation planning activities. The Proposer shall include an approach for involving and engaging all the City’s partnering agencies within their proposal and clearly state expectations for the City’s team within the Narrative Response section of this RFP.

4.12.2. Implementation Approach & Workplan

The City is looking for vendors to propose an implementation plan and any phasing recommendations that are appropriate for the size and complexity envisioned for the project. Proposals shall include detail on any phasing recommendations and how the Proposer has been successful with this approach in the past.

4.12.3. Training Approach

The City is looking for Proposer’s to put forward a comprehensive training approach that will meet the needs of the City and its Partnering Agency system users. Procedure documentation, internal control documentation, and training manuals are expected deliverables. These materials are envisioned to support the end-user training for the new system prior to go-live and support ongoing training of new users.

4.12.4. Go-Live Support

The City expects the selected Proposer will support the go-live activities and provide a limited amount of support post go-live. Proposal shall detail the Proposer's recommendations on post go-live support based upon their experience with cities of similar size and complexity as Talent and its Partnering Agencies.

SECTION 5: INSTRUCTIONS FOR SUBMITTING PROPOSALS

5.1. General

It is the responsibility of each Proposer, before submitting a Proposal, to (a) examine the RFP thoroughly, (b) if applicable, visit the Utility's service territory to become familiar with local conditions that may affect cost, progress, performance or furnishing of the Work, (c) consider Federal, state and local laws and regulations that may affect cost, progress, performance, or furnishing of the Work, (d) study and carefully correlate Proposer's observations with the RFP, and (e) notify the City of all conflicts, errors or discrepancies in the RFP. Failure to do so will be at Proposer's own risk. A Contractor shall not be relieved of a requirement of this RFP on the plea of error.

5.2. Submittal Requirements

- Submit Technical and Cost Proposals in separate, distinct parts.
- Hardcopy proposals typed and securely bound.
- Electronic proposal in a PDF format on a USB thumb drive, identical in content and sequence to hard copy.
- Proposals must be packaged, sealed, and clearly labeled as either: "COST" OR "TECHNICAL" PROPOSAL

Cost Proposal:	One	(1)	Signed Original +
Technical Proposal:	One	(1)	Signed Original +
	Four	(4)	Complete Copies+
Electronic:	One	(1)	Copy Technical +
	One	(1)	Copy Cost Proposal

5.3. Discrepancies

If any discrepancies between the paper copy and the electronic copy are discovered, the copy that the City relied upon will prevail.

SECTION 6: REQUIRED INFORMATION AND CONTENT OF PROPOSALS

In the context of this section “you” and “your” is the same as “Proposer” and “Proposer’s”, respectively. “System” means the proposed AMI System. The evaluation and selection of a Contractor (defined as the Proposer awarded the RFP and who signs a contract with City), along with the contract issued, will be based, at least in part, on the information submitted in the proposal. Additionally, other inquiries may be made, including but not limited to references, interviews, demonstrations, and presentations.

Table of Contents

The Table of Contents outlines in sequential order the major sections of your proposal.

Chapter 1. Required Forms

Include the following required form (blank form is included in the RFP):

1. Receipt Forms and Submittal Checklist - **RFP Form A**. Acknowledge and initial parts of RFP received and submitted.

Chapter 2. Executive Summary 10 Points

The Proposer shall include a brief summary introducing your firm. Limit the Executive Summary to two (2) pages or less.

1. Briefly describe your business organization, experience and qualifications in relation to providing services required in this RFP.
2. Summarize your proposal in a brief and concise manner.
3. Provide a high-level overview of your product and the distinguishing characteristics of your proposal.
4. Describe how closely the proposed system matches the City’s needs.
5. Indicate the total number of organizations using the current version of the proposed system.
6. Reaffirm your experience in implementing AMI systems for the public sector.

Chapter 3 – Qualifications, Experience, and References - Narrative Response 25 Points

1. Prime Contractor’s Qualifications

- A. Describe briefly your firm’s background and history. State organization’s size: local, regional, national and international, in relation to providing services requested in this RFP. State the location of the office from which this engagement will be serviced, and the range of activities performed at that office.
- B. Provide a statement of the length of time you have been in business supplying the services referenced herein and experience in serving governmental entities.
- C. Demonstrate the firm’s capability and evidence of your experience providing services equal to or greater in scope than those requested in this RFP.

2. Prime Contractor's Project Team

- A. Describe proposed organizational structure for those individuals that will be involved in the execution of the selected solution.
- B. Provide the name(s) and resumes of the related Project Manager(s) or key employee(s), and outline their experience in this type of work (Limit each resume to 2 pages.)

3. Subcontractor's Qualifications

- A. Provide a general overview of all of the partners/companies that are participating in the RFP response, including proof of financial stability, number of years in operation, number of employees, etc.
- B. Provide a listing of the products or services proposed by each of the companies per solution area.

4. References

A. AMI System References

The proposer shall provide additional information for five (5) references for AMI systems, if available, from utilities of size and circumstances most comparable to the City. To the greatest extent possible, cite projects using the AMI equipment and meters specified in this proposal, and where the implementation has been substantially completed within the last five (5) years.

Include the following contract information: project beginning and ending dates, major subcontractors and suppliers, total number of units contracted, and percentage of total units that have been installed to date.

B. Tyler Technologies References

Proposer shall provide the names, titles, addresses, e-mail addresses, and telephone numbers of three (3) references, if available, from utilities of size and circumstances most comparable to the City where it has installed AMI Equipment and where the system integration was with Tyler Technologies.

5. Disclosure of Contract Failures, Litigations.

Disclose any alleged significant prior or ongoing contract failures, contract breaches, any civil or criminal litigation or investigation pending within the last three (3) years and all subcontractors involved in the project. List any contracts in which your firm and any subcontractor have been found guilty or liable, or which may affect the performance of the services to be rendered herein.

Chapter 4. Project Management Approach – Narrative Responses 20 Points

This section includes specific questions about the AMI solution, implementation approach, maintenance and support. Proposers must respond to all narrative sections that apply to their solution. It should provide sufficient detail and clarity for the selection committee comprised of functional utility employees to comprehend the methods and general approach and formulate a thorough evaluation.

1. Project Management Approach

Limit response to three (3) pages.

- A. Project Execution.** Describe proposed technical approach for executing the project scope, including your understanding of the project, the strategy used for controlling its quality, correcting mistakes, specific deliverables to achieve the project objectives, and the scope of services, innovative ideas, and any other relevant information concerning your firm’s qualifications for the project.
- B. Project Staffing.** Include a discussion of staffing allocation, and your contract administration methods to ensure prompt service, customer satisfaction, prompt complaint resolution, employee performance, cost controls, adhering to contract schedules, timely initiation and completion of work.
- C. Project Interaction.** Describe the proposed approach to project management to show the relationships between Proposer staff and City staff. Provide roles and responsibilities of key personnel including Installation Manager, Contract Manager, City Project Manager, Proposer field inspectors, and City field inspectors. State what information or data will be needed, used or obtained from the City. Describe the escalation process to address issues unresolved within a reasonable timeframe.
- D. Contract Management Meetings.** Contract Manager shall meet with City periodically and not less than monthly to update them on progress against the installation schedule. Describe the proposed meeting plan including reporting requirements, expected participants, frequencies, and expected topics of meetings.
- E. Installation Management Meetings.** Describe the proposed meeting plan including reporting requirements, expected participants, frequencies, and expected topics of meetings to ensure timely, cost-effective, and high-quality installations and customer satisfaction assurance with the installations.
- F.** Provide any additional information that may not have been specifically requested but deemed essential to your proposal.

2. Proposed Project Deployment Timeline

Propose a projected timeline depicting the timing of all AMI-related work streams starting from the date of contract execution.

Chapter 5. Technical, Functional, Performance Overview of System Components 50 Points

This section includes technical, functional, and performance requirements of the proposed AMI system. The information in this Section is to be used to help complete the Functional Requirements. Proposers must respond to all narrative sections that apply to their solution. Answers should provide sufficient detail and clarity for the selection committee comprised of functional utility employees to comprehend the methods and general approach and formulate a thorough evaluation.

1. Overall System Characteristics.

The City recognizes that AMI system features, characteristics, and performance result from the interaction of components, and are to be addressed in this section. Individual component requirements and characteristics are to be addressed in response to the appropriate sections following this one. Proposer is advised to read the entire RFP first and minimize repetition to the greatest extent possible.

- A. Data Transmission Accuracy and Security.** The system shall include provisions to ensure data transmission accuracy (for example, error checking), security (for example, encryption), and immunity from outside (electromagnetic) interference as well as fading and other forms of signal degeneration

or attenuation (such as multi-path fading) to prevent accidental loss or interception of customer or meter reading data. Describe how this is accomplished.

- B. Water meter technology.** Identify the meter technology that is being proposed. (Moving parts, no moving parts)
- C. Network Type.** Identify network communication type being proposed. (RF, Cellular, Satellite, etc.)
- D. Equipment Cost.** Include the total equipment cost including anticipated cost for the City for licensing, etc.
- E. Life Cycle Cost.** Provide life cycle cost for all components to operate the system over 20-year period including all parts and software. Anticipated battery life, read rate, etc.
- F. Identify Expected Life.** Identify anticipated equipment life and battery life. Describe the process if the expected life is not reached for warranty replacement in full or in part.
- G. Remote Upgrade.** Does your proposed solution allow remote upgrade and firmware upgrades.
- H. Ability to Read on Demand.** Identify the read interval planned and what impact it has on the battery life or equipment life. Does your solution offer Read on Demand.
- I. Customer Support.** Identify how the interaction operates between customer support and City Staff. Who will be the primary contact point, how long do you provide support. Include the cost of customer support. What is the overall system support model that you offer.
- J. Data Analytics and Storage Software.** Include details of how analytics are handled with your hardware or software.
- K. Installation Details.** How does the integration happen with the proposed meters and infrastructure, is there capability to integrate with existing Sensus meters, if so, how does it occur.

2. Network Data Collection.

- A. Number of Units.** Proposer is solely responsible for determining the mix of data collectors, repeaters, and MIU placement strategies needed to meet or exceed the reading success rates guaranteed in the proposal.
- B. Mounting.** Proposer must include estimates of the costs of mounting and any continuing site rental costs in its proposal.

3. Radio Licenses.

- A. Obtaining Licenses.** The proposer shall be responsible for obtaining all necessary licenses on behalf of the City if necessary. Licenses shall be assigned to City of Talent. Licenses must be obtained and assigned radio frequencies verified as suitable for use with the AMI system(s) before any AMI equipment is delivered to the City. If license frequencies are reallocated and no longer available to the City after installations have begun and this could have been reasonably anticipated by the Proposer, the City reserves the right to cancel the contract and orders for all or part of the system, and receive a full refund from the Proposer of all amounts paid, in addition to other damages incurred.

4. Head-End Computer.

The AMI system may be managed and controlled by one or more components, including one or more control and communications computers, file servers, etc. Describe all in response to this section.

- A. Hardware and Network Configuration.** Vendor will provide all of the computer hardware and software needed for a complete and working system.

5. System Software.

A. Software may be required to:

- I. Operate the control computer that interacts with other AMI system components to obtain meter readings.
- II. Manage the database of meter readings and other information.
- III. Interface to City's Customer Information and Billing system and other information systems.

B. Interface to Billing System. The AMI system should automatically provide data, corresponding to all the accounts in a billing cycle, meter reading route, or other grouping presented to it, nonproprietary format (e.g., fixed-field ASCII).

C. Database. The City requires a meter reading database as part of the AMI system. Any Proposer-supplied database used to store and manage meter readings must be non-proprietary, ODBC-compliant, and SQL-compliant. The City shall be entitled to make copies of the software, including any third-party software, and any user manuals for backup and archival purposes.

D. Third-Party Software. The City desires that the Proposer shall own all software, except for commercial generic third-party packages used to support the Proposer's system (e.g., relational database management system, report generator). Proposer must secure for the City sublicenses or direct licenses for all third-party software necessary for the systems to function as proposed. Indicate the warranty, licensing, and support provisions for any such packages. Such specialized third-party software should be under the control of the Proposer and be subject to the provisions of the license and warranty.

6. Documentation.

A. System Manuals. Proposer shall provide manuals and customized written procedures sufficient for complete operation and maintenance – including installation, configuration, diagnostics, and repair – of the system, its software, and its components.

B. Third-Party Software Manuals. Manuals for any third-party software components incorporated into the system shall be available online or on CD/DVD in a printable format.

7. Training.

A. Prerequisite to Installation. The proposer must provide training to City staff prior to the commencement of installations. There will be no installations permitted until after the City's staff is properly trained.

B. Location. All training shall be done at the City's offices and facilities.

8. Support.

A. General. Service is a paramount consideration in the use of the proposed products. A statement by the proposer must be included in your proposal that will ensure the City maintenance services will be provided at a minimum for the next five years either by the proposer or their agent. If an agent is used, an assurance must be provided by the proposer that they will provide the service, or that the service will be provided by another agent in case of default.

B. Initial Support Period. Proposer should provide onsite support during the installation period at no additional cost to the City beyond the annual component and software maintenance fees.

- C. **Telephone Support.** The proposer shall provide trained persons to answer technical questions and guide City employees through the use or diagnosis of the system through a toll-free number.

9. Installation.

- A. **General.** The City plans to have AMI system installed by the end of the second quarter of 2025.

- B. **Installation Schedule.** The City and the Proposer shall establish an overall schedule for installation of the entire project. The proposer will provide the City an updated schedule at the beginning of each month for the status of their equipment. The Contractor installing the equipment in the field selected under separate solicitation will supply a schedule for installation.

- C. **City Project Manager.** The City will designate an employee or agent who will manage the project on behalf of the City. The function of this Project Manager is to coordinate with the Contractors and promote compliance by the Proposer with the specifications. The designation of a Project Manager shall not relieve the Proposer of its full responsibility to comply with the terms of the Contract and/or all plans and specifications.

- D. **Proposer Staff.**

- I. **Contract Manager.** Proposer shall designate a Contract Manager, who shall have the authority to handle and resolve any disputes or contract issues with the City. Disputes that cannot be handled at this level must be handled in accordance with the dispute section of the Contract.
- II. **Installation Manager.** Will be selected under separate solicitation as part of the installation RFP.
- III. **Installers.** Will be selected under separate solicitation as part of the installation RFP.
- IV. **Licensed Plumbers.** Will be selected under separate solicitation as part of the installation RFP.

- E. **Items to be Supplied by Proposer**

- I. **General.** Proposer shall furnish all supplies, materials, and specialty tools necessary for the successful and timely completion of all meter and AMI installations under this contract as specified herein.

- F. **Account Data and Installation Scheduling.**

- II. **Account Data File.** Prior to the start of the installations, City will provide the Proposer with an electronic file containing the information necessary to create work orders for meter and AMI installation.

- G. **Installation Procedures.**

- III. **Operations.** Describe your proposed installation sequence and process. Describe hand held units used, installation program, daily work plans, appointment scheduling, installation procedures, work order system, reports generated etc.
- IV. **Pilot Testing.** Prior to the commencement of full-scale installation, but after the Proposer has installed the AMI system control computer and a sufficient quantity of data collection units, the Proposer shall install the meter reading equipment and, meters (if applicable), on one of the City's routes. During this Pilot test and a period not longer than ten (10) business days following it, the City and the Proposer shall evaluate the procedures for public notification, scheduling installations, meter and MIU installation, data transfer to City's billing system, meter reading over the system, installation data management and project control, and problem resolution, to ensure they are working and effective. No work will be started on other routes until the AMI system equipment is determined to be working to performance requirements on the test routes, the

project control procedures and systems are determined to be performing accurately, and the installation procedures have been approved by the City.

Chapter 6. Required Diagrams (20 Points)

At a minimum, the following attachments should be included in the response to this RFP as a supplement to the approach and methodology. If additional items are deemed necessary by the Proposer, they should be properly labeled and included. It is the intent of this RFP to depict all required diagrams under this section. However, where diagrams have been included in appropriate sections in the RFP, Proposers shall indicate as such in this section.

- High-level diagram and description for each component of the proposed solution
- Diagram for the AMI Head End System
- Diagram for the AMI Communication Infrastructure
- AMI Communication coverage maps
- Sample Acceptance Test Plans for each component of the proposed solution
- Implementation Plan for each component of the solution being responded to
- Installation Plan for AMI System and Meters

Appendix A Example – Cost Proposal Outline

Appendix A is a generic outline for what must be included in your submittal.

General Instructions on Submitting Cost Proposals:

- 1. Format.** For Submitting Cost Proposals:
 - The cost proposal must be sealed separately from the rest of the written proposal.
- 2. Fixed Price Period.** All prices, costs, and conditions outlined in the proposal shall remain fixed and valid for acceptance for a minimum of 180 days starting on the due date for proposals. Additionally, all prices, costs, and conditions outlined in the proposal and accepted as part of the contract shall remain fixed and valid for the entire length of the contract and any/all renewals.
- 3. Documentation and Assumptions.** If you believe a system/functional requirement provided by the City is unclear, use the questions and answer process to gain clarification. Furthermore, document any assumptions for arriving at cost estimates. You are responsible for verifying the correctness of calculations in your cost proposal.

4. Example of Cost Table

Example Maintenance Cost Table

Time Period Category	Pre Go-Live	Post Go-Live					Total Five (5) Year Cost
		Year 1	Year 2	Year 3	Year 4	Year 5	
Software/Product Licenses	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Support and Maintenance	-	-	-	-	-	-	\$ -
Upgrade Costs	-	-	-	-	-	-	\$ -
System Maintenance	-	-	-	-	-	-	\$ -
Other Costs	-	-	-	-	-	-	\$ -
Totals	\$	\$	\$	\$	\$	\$	\$ -

5. Appendix A. Supply Appendix A; Cost Summary sheets.

- **Lump Sum Cost.** Provide a lump sum cost for supplying an AMI system without installation and a subtotal for each component of the project.
- **Detailed Costs.**
 - Meters
 - Hardware
 - Software
 - Communications Backhaul
 - Initial and Ongoing cost to maintain and operate the System
 - Extended MIU pricing for 5 years
 - Include all expected costs assumed for component failure rates for meter register failures, meter interface unit failures, data collection unit failures, repeater failures, etc.
 - Interface

6. Explanation of Categories

Each of the following is a component of the Cost Proposal. Proposers shall provide a numerical cost and narrative explanation for each in the proposal **Appendix A: Cost Proposal**. Provide as much detail as possible in your narrative responses.

- **Software/Product Licenses.** List separately the software/product and any similar licenses required and associated costs, whether ongoing or one time. If any of the licenses are on a per user basis list the cost for adding additional users above an estimated five users.
- **Project Management.** List the costs for time and resources used organizing, overseeing and communicating about the project.
- **AMI Implementation/Interface Development.** List the cost for interfacing to existing or outside systems identified by the City to communicate with all the different components of the AMI system.

- **Data Conversion.** The cost to move and convert historical data from the existing system into your solution.
- **Hardware Costs.** List the costs of additional and future hardware the City will need to purchase in order to implement your solution.
- **Training.** Provide the total cost for training and detail the number of hours and rate for standard and additional training. List differences, if any, in the hours or rates for training different types of end-users (i.e., those that may only use one module of the system versus those “power” users that would learn each and every part of the system).
- **Support and Maintenance.** Present the cost of ongoing support and maintenance for your system.
 - If you offer different levels of support, price the level of support that you recommend the City purchase. Furthermore, provide detailed costs for all levels of support and maintenance you offer. Support and maintenance costs should start in Year 1, which is the first 365 days after the system is live and accepted by the City. If you propose support and maintenance costs during the implementation phase, explain why support and maintenance is necessary on a system that is not yet operating. The City will only pay support and maintenance on the portions of the system that are satisfactorily functioning, accepted and put into use by the City.
 - Proposers shall support all the software and licenses they are proposing. The City’s price proposal requires Proposers to quote Support and Maintenance for a minimum of five (5) years. Proposers are encouraged to quote Support and Maintenance costs beyond year five, for as many years as they are willing to contract for.
- **Upgrade Costs.** If not included in Support and Maintenance provide the costs for future upgrades. If upgrades of your software are bundled with the support and maintenance indicate so in the Support and Maintenance section. The term “upgrade” is used generically here for any future improvement made to the system, major or minor. In your response be sure to define, in detail, your usage of the terms; upgrade, update, version, enhancement, patch, fix, etc., when describing costs and offerings. If you have different levels of support and maintenance – some that do not include upgrades and others that do, provide the costs for what you recommend the City purchase, but provide details for all options as an additional narrative.
- **Other Costs.** Detail any and all other costs associated with your system. You must provide line-item detail and descriptions. Be specific in matching cost with specific activity.

7. Cost Considerations

- **Cost Negotiations.** The City reserves the right to make an award without further discussion of the cost proposal submitted. Therefore, the cost proposal should be submitted on the most favorable terms the Proposer can offer. However, this does not limit the City from negotiating with the selected Proposer.
- **Evaluation.** Costs will be evaluated on both initial and ongoing costs.
- **Final Contract Cost.** A finalization of all components of the AMI system is expected as a part of final contract negotiation or through a Best and Final Offer (BFO) process.

RFP FORM A

RECEIPT FORMS and SUBMITTAL CHECKLIST

The undersigned hereby acknowledges the receipt and/or submittal of the following forms:

Request for Proposal (Initial all <u>applicable</u> forms)	Initial to Acknowledge Receipt of RFP Documents	<u>Required Submittals Checklist</u> Initial all submitted documents
Section 1: General Background Information		
Section 2: General Administrative RFP Information		
Section 3: Proposal Evaluation and Selection		
Section 4: Project Scope and Requirements		
Section 5: Instructions for Submitting Proposals		
Section 6: Required Information and Content of Proposals		
Addendum No. ___ Dated: _____		
Addendum No. ___ Dated: _____		
Addendum No. ___ Dated: _____		
PROPOSAL SUBMITTALS		
	Table of Contents	
Chapter 1	RFP FORM A: Receipt Forms and Submittal Checklist	
Chapter 2	Executive Summary	
Chapter 3	Qualifications, Experience and References	
Chapter 4	Project Management Approach	
Chapter 5	Technical, Functional and Performance Overview of System Components	
Chapter 6	Required Diagrams	
Appendix A	Cost Proposal Outline - Sealed Separate Envelope	

Company Name (Print or Type)

Proposer's Name and Title (Print or Type)

Date

Signature