

LEGAL NOTICE

The Town of Sardis (the "Town") invites interested firms to submit a sealed Request for Proposal (RFP) with Statement of Qualifications (SOQ) for the following:

SERVICES FOR WATER METER SYSTEM REPLACEMENT

Interested parties may submit Qualifications for an Advanced Metering Infrastructure (AMI) Full-Service Implementation and Maintenance Program to improve the process of collecting monthly water utility meter data to enhance the level of service offered to customers.

The AMI Full-Service Program will be implemented system-wide in a short time frame to maximize the System's benefits. Interested parties are to submit qualifications for turnkey deployment of approximately 1,100 metered accounts, followed by an ongoing field maintenance program with field labor that includes network, AMI endpoints, and software maintenance, as well as full-service data hosting and delivery to the Town.

The requirements for Qualifications, including instructions, requirements, and formatting for the SOQ may be secured at the Sardis City Hall, 114 w. Lee Street, Sardis, MS 38666, 662-487-2371 or by web, cityofsardisms.com.

Firms interested in being considered for selection should respond by submitting one original and three copies of the SOQ in a sealed envelope marked "**SEALED QUALIFICATIONS ENCLOSED - AMI Maintenance Program**" to City Clerk, Sardis City Hall, 114 w. Lee Street, Sardis, MS 38666. Responses received after the specified due date and time will not be considered.

TO BE ADVERTISED: September 15, 2021 and September 22, 2021– The Panolian

SOO Scope of Work for Town of Sardis Water Meter Replacement Project

I. Overview of Project

- a. Interested parties to submit Qualifications for an Advanced Metering Infrastructure (AMI) Full-Service Implementation and Maintenance Program to improve the process of collecting monthly water utility meter data and subsequent billing to enhance the level of service offered to its customers
- b. The AMI Full-Service Program will be implemented system-wide in a short time frame, to maximize the System's benefits. Interested parties are to submit qualifications for turnkey deployment of approximately 1,100 metered accounts, followed by an ongoing field maintenance program that includes network, AMI endpoints, and software maintenance, as well as full-service data, hosting, and delivery to the Town.
- c. The Submitter shall be the single point of responsibility on all components of the Full-Service Program (included but not limited to services, equipment, hardware, software, and warranties).
- d. The Full-Service Program shall run for a term of 15 years.
 - i. Provide and perform the initial replacement of all existing water meters.
 - ii. Provide and install radio transponder endpoints with two-way licensed communications at the 450-470 MHz frequency or cellular technology.
 - iii. Install a fixed-based data collection system that simultaneously collects water meter readings and information from AMI modules and transmits to a hosted server.
 - iv. Install all hardware and software that will receive meter readings, prepare reports, and interface with the Utility's billing system.
 - v. Provide equipment, training, and implementation to migrate from the current System to the fixed base Full-Service Program.
 - vi. Secure hosting of meter readings that the Utility can access at any time.
 - vii. A Maintenance Program that provides field replacement of failed components, including all labor required for repair or replacement.
- e. **Submitters are encouraged to carefully review all the materials contained herein and prepare their Qualifications accordingly.** The detailed requirements set forth below will be used to score the Qualifications. Failure of the Submitter to provide the information requested for a specific requirement may render their Qualifications non-responsive and may result in rejection.
- f. Submitters shall carefully study and compare the information and documents presented in this Request for Qualifications to ensure there are no conflicts, shall examine the site and local conditions, if applicable, and shall at once report to the Contact Person any errors, inconsistencies, or ambiguities discovered
- g. The Utility shall not be liable for any costs incurred by a Submitter in preparing or producing its Qualifications or for any Services provided before execution of an Agreement.
- h. All terms and conditions outlined in this Request for Qualifications and any associated Addenda shall become a part of the Agreement entered between the Utility and the Successful Submitter.
- i. Questions: Submitters shall submit all questions about the meaning or intent of the Request for Qualifications to the Contact Person in **written format only**. It will be at the

Utility's discretion whether questions received after the date for "deadlines for questions" as noted in the Event Timeline will or will not be answered. Interpretations or clarifications considered necessary in response to such questions will be issued by a written Addendum. **Only questions answered by a formal written Addendum will be binding. Oral and other interpretations or clarifications will be without legal effect.**

- i. Questions submitted shall not constitute formal protest of the specifications or this Request for Qualifications
- ii. All inquiries about this Request for Qualifications are to be directed to James Butler at JButler@panola.com
- j. Submitters should review and become familiar with the Event Timeline. The dates and times of each activity within the Timeline may be subject to change. It is the responsibility of the Submitter to check for any changes. All changes to the Timeline will be made through an addendum to this Request for Qualifications.

EVENT	DATE	TIME
Issue Request for Qualifications	September 15, 2021	NA
Qualifications Due Date and Time	October 7, 2021	2:00 pm
Oral Presentations (if applicable) (subject to change)	TBD	
Approval of Selection and Award (subject to change)	TBD	

- k. SEALED Qualifications are to be submitted on or October 7, 2021 at 2:00 PM to: City Clerk, Sardis City Hall, 114 w. Lee Street, Sardis, MS 38666.
- l. Four (4) copies of the qualifications shall be submitted, sealed, and mailed or delivered to be received no later than the above Qualification Due Date and Time.
- m. The outside of the package must be marked with the following information:**
 - i. The words "SEALED QUALIFICATIONS ENCLOSED - AMI Maintenance Program"
 - ii. Name of the entity submitting the Qualifications
 - iii. If the mailing package is not marked and is opened in error, the Qualifications may be rejected.
- n. The Utility assumes no responsibility for a Qualification received after the due date and time or at any location other than that specified herein, whether due to mail delays, courier mistakes, mishandling, inclement weather, or any other reason. **Qualifications received after the due date and time shall be returned unopened. There will be no exceptions to this policy.**

II. Submittal Format

To aid in the scoring of the Qualifications, provide the following information in the format as noted. This information will be used as the foundation for scoring the Qualifications. Qualifications must be submitted in 8½" x 11" size, typed, three (3) holes punched, and fastened with a paper clip or binder clip. Lengthy narratives are discouraged; presentations

should be brief and concise and not include extraneous or unnecessarily elaborate promotional material. **The qualifications should not exceed 30 pages in length, excluding appendices.**

Submitters should use the following outline in organizing the contents of their qualifications:

- a. Title Page
- b. Introduction - introduce the firm and briefly state the understanding of the services to be provided and why they should be awarded the contract.
- c. Submitter History:
 - i. Include a company contact name, address, e-mail, and phone number of the project manager.
 - ii. The Submitter shall have a proven project manager to ensure successful Full-Service Program installation. Project managers shall be experienced in managing the design, installation, and optimization of systems. Project management experience shall include system integration and training support.
 - iii. The asset management experience and capabilities shall be detailed; preference will be given to long-term asset management experience. The Proposer shall also be the provider of the Asset management and Field maintenance services. No third party or subcontractor shall be allowed. The Proposer shall be responsible for daily monitoring of the System, daily notifications, and a proactive preventative and corrective maintenance program. Provide a listing of references of similar project scope and complexity with customer contact information so that the Utility can verify experience.
 - iv. Provide details outlining the ability to service the long-term asset management program from within the state of Mississippi, including local offices and service centers and the local offices and service centers of technology partners.
 - v. The Submitter shall be a licensed contractor and provide documentation with their submittal
 - vi. Shall provide documentation of ISO9001 certification for Asset Maintenance Programs
- d. Financial Stability:
 - i. Provide a summary detailing years in business, the number of customers, financial strength, corporate structure, and reporting. Demonstrate the ability to self-finance the initial meter infrastructure for up to five (5) years by providing three (3) references with contact information. No third-party financing references shall be allowed.
 - ii. The Submitter must also be able to delay the first payment of the Project for one (1) year or until final completion of the initial installation and testing of the AMI network is complete.
 - iii. The Submitter is to complete a financial analysis that will detail the expected financial benefits that the Utility can expect to realize. The Submitter shall project the analysis for 15 years. All assumptions used in the financial analysis must be clearly explained.

- e. Full-Service Program Capabilities:
 - i. Include a summary of the Submitter's capabilities following the required maintenance program services.
 - ii. Include product descriptions for the proposed AMI system components and software capabilities.
 - iii. Include product descriptions for the proposed meter components and capabilities.
 - iv. Proposals for AMR/Drive-by, Hybrid AMI/AMR, Mesh, or Systems with Repeaters shall NOT be allowed.
- f. References
 - i. Include a list of at least three references for similar asset management projects

III. Maintenance Program

The Submitter shall provide a maintenance program that, at the option of the Utility, is renewable on an annual basis. The maintenance program will provide for the operation and long-term field maintenance of the AMI Full-Service Program. The operational component of the Maintenance Program will include:

- a. All costs for operating, maintaining, and updating the backhaul communications system from the data collectors to the hosted software.
 - i. The Submitter will repair or replace any failed component of the data collectors, including but not limited to the battery, power supply, solar panel, communications board, and firmware upgrades. Should the communications protocol from the cellular company require updating, it will be at no additional installation costs to the Utility. All labor shall be included.
 - ii. Ongoing hosting costs. This will include managing the data, server replacement, and back-office operations, such as backups, software upgrades, and installation of software patches.
 - iii. Software upgrades: The Submitter will provide updates to the AMI software upon release by the Manufacturer. The Submitter will validate the proper installation of the upgrade and the integration into the Utility's billing systems.
 - 1. The Submitter will provide on-site training, within 15 days of the upgrade, to Utility staff on the operation of the software, highlighting any changes or enhancements in the new version of the software.
 - 2. The Submitter will provide unlimited online and telephone support to address any questions or issues using the software.
 - iv. The field repair or replacement of any failed component of the AMI system for performance reasons, including water meters, transmitters, data collection units, and software. The maintenance will include replacement hardware and labor to remove, repair, and reinstall the failed component(s). The costs will be a lump sum amount that will safeguard the Utility in the event of a higher than the expected failure rate of any of the metering system components.
 - v. Back-office IT operations, including backups, disaster recovery, and server replacement
- b. System Performance: The Submitter will provide the following level of service to meet

or exceed the following criteria:

- i. The Full-Service Program will deliver at least one billing read from 98.5% of meters over a three (3) day period. Billing reads are defined as readings available to be used for calculation of utility bill
- ii. The Submitter will be required to take any action to remedy any issue(s) that hamper the AMI Full-Service Program from meeting the above criteria. Proposer must have the financial strength to support this requirement for at least 15 years.
- c. Subcontractors: The Submitter will provide a list of subcontractors that will be used to execute the Project. Each subcontractor will be identified by name and provide the following information: years in business and an outline of similar experience and capabilities.
- d. Wages: All contractors and subcontractors shall pay the appropriate wage rate (when applicable) to all craftsmen, tradespeople, laborers, and mechanics that work on the Project.

IV. Fixed Network Advanced Metering Infrastructure (AMI) System Specifications

- a. The enclosed specifications intend to provide the Town with a Fixed Network Advanced Metering Infrastructure (AMI) System that will work with all major water meters, with an expected reading accuracy of 98.5% or more for all meters in the System.
- b. The Town will not consider technology that has not been field-tested. The proposal shall be for new equipment. No used, rebuilt, or refurbished equipment will be considered.
- c. When the Project is completed, the Town will own and operate a functional and upgradeable Fixed Network AMI System capable of utilizing several types of meters and meter manufacturers.
- d. The System shall be two-way and utilize leading technology and an open architecture to ensure compatibility with all identified meter types. The System shall operate in the 450- 470MHz range or cellular technology.
- e. The System shall be capable of reading water meters under the same network.
- f. If not cellular, the Fixed Network shall consist of a series of data collector units (DCU) located strategically throughout the Town service area. The Fixed Network AMI System vendor shall determine the locations as part of the bid. The network shall be designed with redundancy where a high level of MTU's can communicate with at least 2 DCUs. The degree of redundancy shall be stated in the bid. The DCU units will be powered using either AC/battery or solar/battery to retrieve meter readings and relay them to a hosted server. The DCU units and the corresponding MTU units must operate on a licensed frequency that is the exclusive property of the Town. The DCU's shall be capable of simultaneously obtaining reads from water, gas, and electric meters as standard.
- g. Repeaters shall not be permitted in the System.
- h. All Fixed Network or cellular AMI retrieved meter readings will be in a format compatible with the Vendor supplied software for the Fixed Network or cellular system. The software will prepare and format the meter reading data to print selected management reports and transfer the meter reading data to the billing software for

customer invoicing. All aspects of the interface between the AMI and the billing software shall be the responsibility of the AMI vendor. The Fixed Network or cellular AMI System shall provide, at minimum, the following:

- i. Provide for automatic, routine operation of the AMI System, including diagnostic procedures on all hardware and logging of all known alerts, alarms, and exceptions.
- ii. Provide the ability to view specific account information.
- iii. Process the readings and add them to the AMI database.
- iv. The AMI System software shall be capable of providing individual account reports, flagging significant usage, system status, detailed history for specific accounts, battery strength, and tamper alarms.
- v. Shall be compatible with a distribution leak detection system, pressure monitoring sensors, and sanitary sewer overflow sensors.
- vi. Shall be compatible with a remote disconnect device for water meters.
- vii. Enable provision of enhanced products and services to customers, such as internet-based information access.

V. AMI System Description

a. Provide a detailed description of the proposed Fixed Network or cellular AMI System. Include a complete system architecture diagram. Include a description of your System in response to each of the following sections.

b. AMI Hardware

i. Meter Transmission Unit (MTU)

1. **Housing:** The MTUs will be housed in a molded plastic housing, hermetically sealed and resistant to rain, moisture, and temperature changes from -30 to +70 degrees C. The enclosure must house the complete unit, including electronics, battery compartment, antenna, and wire connections.
2. **Battery Life:** The MTUs shall have a permanently installed non-field-replaceable battery with twenty (20) year life cycle expectancy.
3. **Maintenance:** The MTUs shall be maintenance-free. After initial installation, MTU will continue to operate at optimal levels for the product's entire life.
4. **Read Interval:** The MTUs shall contain a radio that transmits a brief message containing the MTU identification number and port number, the meter reading, and tamper flags at programmed intervals. The two-way water MTUs shall provide top-of-the-hour, time-synchronized hourly reads (and, for short durations, fifteen ((15) minute reads) to meet high interval reading requirements. The reading interval shall be reconfigured over the air from the host

server.

5. **Diagnostic Information:** MTUs shall provide diagnostic information, such as battery voltage and tamper flags with every transmitted reading.
6. **Meter Compatibility/Ports:** MTUs shall be compatible with multiple makes and models of meters and shall be offered as single or dual-port units. Proposer shall submit a list of current compatible makes and models of meters.
7. **Performance:** MTU's shall be compatible with system performance options including but not limited to remote disconnect devices, acoustic leak detection, over the air programming, transmission of advanced alerts and alarms, pressure monitoring, sanitary sewer overflow, and provide a roadmap for Smart City/Smart Utility/IOT connectivity.
8. **Installation:** MTUs shall be easily installed and provide appropriate provisions to avoid installer mistakes in installation, connection to meters, and programming. The MTUs shall be configured with a Field Programmer that will take the operator through a series of simple steps. Each step shall include error checking and verification, where appropriate. The Field Programmer shall communicate with the MTUs to confirm proper configuration and wiring. The Field Programmer shall also have the ability to initiate communication between an MTU and a DCU to ensure successful communication. The Field Programmer shall receive a confirmation message approximately one minute after initiation.
9. **FCC Regulation (if not cellular):** All equipment must comply with current Federal Communications Commission (FCC) requirements, including proper labeling of any system components and compliance with Part 90 of the FCC regulations. The Vendor must have supporting documentation available upon request to verify compliance. The Vendor's proposed System must operate on a dedicated, licensed frequency to prevent erroneous reading errors.

The Vendor must obtain said license on behalf of the Town, including any and all fees.
10. **Labeling:** The MTUs shall be labeled with the Manufacturer's name, ID number, date of manufacture, and required FCC labeling.
11. **Warranty:** The MTUs shall be guaranteed for the entire life of the Project (15 years).

- c. Field Programmer / Handheld
 - i. The Field Programmer / Handheld unit shall be designed to operate in a harsh reading environment, be resistant to dust and moisture, and withstand temperatures from -20 degrees F to +140 degrees F. The Programmer shall contain its software for programming and be provided with easy instructions for operation. Main and backup batteries must be readily available from local suppliers. Units shall be equipped with any needed communications software, adapters, chargers, or accessories. All software shall be licensed to the Town.

- d. Data Collector Units (DCUs)(not applicable if cellular)
 - i. The Fixed Network shall consist of a series of Data Collector Units (DCUs) located strategically throughout the Town distribution system. DCUs must operate in extreme temperature ranges of -40° to 85° C.

 - ii. **Power Supply:** The DCUs units shall be powered using either AC/battery or solar/battery to retrieve meter readings and relay them to a centralized location at Town offices.

 - iii. **Memory Capacity:** Each DCU shall have the capacity to store approximately 30 days' worth of meter readings.

 - iv. **Diagnostic Information:** The DCUs shall measure and record battery strength, Radio Frequency (RF) signal strength, and time and date stamp for each inbound transmission. These records will be included with each transmission.

 - v. **Transmission Security:** Data transmission between MTUs and the DCUs shall be proprietary and not easily deciphered by outside sources.

 - vi. **DCU Planned Network:** The DCU locations shall be determined by the Fixed Network AMI vendor as part of the bid based on a propagation study performed by the Fixed Network AMI vendor. The propagation study shall be based on a network where a minimum of 80% of MTU's for meter service addresses shall communicate with at least three (3) DCUs without the need for any repeaters. The network shall show DCU locations, not on any Town Assets, placed on poles not to exceed a height of 30 feet.

 - vii. **Mounting:** DCUs shall be capable of being mounted on roofs, utility poles, towers, etc., to collect readings from all meters in the coverage area. No special tower construction will be allowed. Submitter shall provide a wind load certification for any AMI hardware installed on assets that will affect the structural integrity due to the additional loading.

 - viii. **DCU Network Redundancy:** Redundancy shall be incorporated into the DCU placement process to accelerate the reading process and ensure all meters provide a reading. Each DCU, installed at a maximum height of 30 feet, except Town assets, shall be able to read at least one (1) square mile of coverage and support not less than one thousand (1,000) MTU units. Each meter shall communicate directly with a minimum of two data collectors. No mesh, or repeaters shall be allowed.

 - ix. **Installation:** DCUs shall be automatically recognized and installed onto the System network. DCU behaviors, including connection time, alarm message

handling, alternative connection numbers, etc., shall be configurable over the network.

- x. **Scalability:** DCU units may be added to the Fixed Network AMI System at any time without the need for system reconfiguration.
 - xi. **Electrical Isolation:** All DCU electronics shall be electrically isolated and protected against static discharge and indirect lightning strikes.
 - xii. **Maintenance:** After being installed, DCUs shall require little to no maintenance for the unit's life.
 - xiii. **WAN Technology:** DCUs shall be easily configured to utilize various WAN technologies to communicate to the head end computer. DCUs shall have optional backhaul communication methods such as cellular, Wi-Fi, Ethernet, IP, and fiber optic and shall be easily upgraded from one WAN technology to another.
 - xiv. **Warranty:** The DCUs shall be guaranteed for the entire life of the Project (15 years).
- e. Server Specifications
- i. Managed Hosting Solutions are required. Locally hosted data will not be considered.
 - ii. The Host Server shall act as the central collection point for the data within the System. All data hosting and delivery will be cloud-based, and it is the responsibility of the Submitter to set up the software, hardware, and hosting systems per the Town requirements. The server collects data from all of the Collectors and stores the gathered data in a secure database. Once data is stored and analyzed on the server, the data shall be available for display via a web-based graphical interface.
 - iii. The Submitter shall offer a Perpetual License for the Host Software. The Host Software solution shall utilize a secure web-based application user interface and be continuously accessible to the Utility. The Submitter shall explain the host software security.
 - iv. The Submitter shall provide a managed hosting service. The Submitter shall own and manage the server hardware and software, including monitoring to ensure the server continues to work effectively, provides backup services, installation of security patches, and various levels of technical support. The Submitter hosted solution shall utilize a secure web-based application.
- f. AMI Software
- i. Software must be provided to perform the following functions:
 - 1. The software must be web browser-based and shall have defined applications with standard interfaces to allow for existing and planned software applications.
 - 2. Manage the database of meter readings and other related

information about the meters and the AMI system

3. Interface with Town's Customer Information System (CIS) and other information systems. If the applications identified above are distinct and separate, the Supplier shall respond to this subsection for each application.
- ii. The software must be capable of handling the multiple utility reads simultaneously. The successful Vendor shall install access to the hosted server at the Town facilities and ensure all necessary departments can access the System. At a minimum, the AMI software will provide the following pieces of data:
 1. Customer account number.
 2. Customer address.
 3. Meter serial number.
 4. Date of system integration.
 5. System meter read history.
 6. MTU I.D. number.
 7. Customer consumption data.
 - iii. In addition to the required data noted above, the AMI vendor must support an interface with the Town billing system, as held within the meter reading software itself. The Town will provide an input/output file format to the successful Vendor. License to use said software will be issued to the Town upon delivery of the AMI server.
 - iv. Any Supplier-supplied database used to store and manage meter readings should be nonproprietary, ODBC-compliant, SQL-compliant, or provided by a standard commercial database supplier.
 - v. The fixed network software solution must offer:
 1. Rate information
 2. Customer information
 3. Service point information
 4. Meter data
 5. Tamper data
 6. Event data
 - vi. The solution must be able to store and archive multiple types of data for each endpoint, including but not restricted to:

1. Rate information
2. Customer information
3. Service point information
4. Meter data
5. Tamper data
6. Event data
7. Store/archive a minimum of 24 months of data. All data must be easily retrievable.
8. Accessible by a rich client or Web-browser-based interface for system administration and diagnostic troubleshooting.
9. Be designed as a robust and scalable data repository to leverage best practices of data warehousing. The database should support scalability and have a highly flexible data structure to allow new data elements to be created without changes in table structures.

g. Consumer Engagement

- i. The solution must include a customer engagement web portal that provides for:

1. Customer login/authentication
2. Web-based customer dashboard with:
 - i. AMI data presentment
 - ii. Bill-to-date
 - iii. Bill analysis
3. Analysis module for customers to see how their homes compare to similar homes
4. Customer alerts
5. Proactive water conservation reports

h. Interface to Billing System

- i. The AMI system supplier shall provide the appropriate software to transfer relevant data to the billing automatically and Customer Information System (CIS) in a standard, nonproprietary format (e.g., fixed field ASCII) compatible with Town existing formats. Each record provided to the CIS shall contain at a minimum: account number, MTU ID number, route number, meter ID number, meter readings, date and time for each meter reading, and tamper indications. All aspects of the interface to the billing and CIS are the responsibility of the bidder.

i. Electronic Work Order Management System

- i. The WOMS shall have the ability to track and provide information on all AMI system assets, including MTU's and meters, from commissioning to decommissioning.
- ii. The Town shall have the ability to integrate into the WOMS to obtain preventative and corrective information for the management and maintenance of the AMI system.
- iii. The WOMS shall be capable of inventory management of all AMI system assets stored in the Town for future use.

j. Water Capabilities

- i. **Read Interval:** The solution shall be capable of collecting data in intervals of 15 or 30 minutes and hourly reads.
- ii. **Leak Detection:** The System shall monitor water consumption through the meter and indicate an abnormal increase in water consumption, suggesting a leak within the customer's premises. The software must also provide meter reading management reports, usage analysis reports (leak detection, tamper detection, and backflow conditions), and system management diagnostics.
- iii. **No Flow Detection:** The System (either through reports or alarms from the MTU) shall indicate when there is an extended period of no flow or a minimum flow through the meter.
- iv. **High Flow Detection:** The System shall report accounts with abnormally high consumption during any billing period, suggesting a continuous flow condition.
- v. **Constant Consumption:** The System shall provide a continuous consumption report to identify locations which a potential leak had occurred by monitoring for constant usage or constant flow with consecutive reads
- vi. **Time Synchronization:** The System shall provide time synchronized meter reads that allow the Town to obtain a snapshot of water consumption. Describe how the System maintains time synchronization across the network. All MTUs on the network must maintain time synchronization within 30 seconds of each other.

k. AMI Compatible Acoustic Leak Detection System

- i. The System shall utilize acoustic data loggers that connect magnetically to water distribution mains to be upgraded later.

l. AMI Back-up

- i. The System shall have backup capabilities and procedures to ensure that System and consumption data is not corrupted or lost.

m. AMI System Diagnostics

- i. System diagnostics shall be collected at all levels and transferred to the host server, where several types of diagnostic reports shall be produced. Such reports shall indicate problems ranging from battery voltage to failure to recognize proper communication with the meter.

n. AMI System Maintenance

- i. In addition to warranty periods, vendors are required to supply information on required or optional maintenance programs beyond the warranty period for both hardware and software. Features of those programs shall also be included with any additional charges, such as hourly rates for on-site and remote support. The location of and procedures for obtaining such support shall be stated.

o. AMI Training

- i. The Town requires training of all appropriate staff sufficient to enable them to operate and maintain the System effectively. To be effective, the Town requires that training curriculum be provided in advance, that training is accompanied by course workbooks and materials, and that experienced instructors offer training.
- ii. During the 15 years, a yearly refresher for all new employees will be trained as well

VI. Meter specifications

a. The residential and light commercial meters will comply with the following specifications:

- i. All meters shall meet or exceed the latest version of the American Water Works Association (AWWA) Standard C700, C710, or C715 for cold water meters
- ii. All materials used in constructing the main cases shall have sufficient dimensional stability to retain operating clearances at working temperatures up to 105 degrees Fahrenheit.
- iii. The meter serial number shall be stamped on the main case of the meter.
- iv. The meter main case shall be cast from NSF/ANSI 61 certified material.
- v. The serial number should be displayed in a permanent location on the meter or register. Meter markings shall indicate size, model, the direction of flow, and NSF 61 certification
- vi. The meter electronic register enclosure shall be constructed of a durable engineered composite designed to last the meter's life. The meter shall provide a fully potted wire connection for use with AMR/AMI devices.
- vii. The standard, advanced, and enhanced communication protocol for the water meter absolute encoder register shall be fully compatible and available for use with the selected AMI system and software.
- viii. The AWWA C715 solid-state meters shall feature a bronze or stainless-steel meter body and fully-potted electronics and battery, and an IP68 rating for submersion in flooded meter pits.

- ix. All meters shall be 100% factory tested for accuracy and have the factory test results provided with each meter.
 - x. Meters shall be pressure tested to ensure against leakage.
 - xi. Meters shall be guaranteed accuracy for the 15 years of the agreement
 - xii. All electrical components and batteries will be guaranteed for 15-year period of the agreement
- b. The commercial meters will comply with the following specifications:
- i. Shall meet or exceed all requirements of ANSI/AWWA Standard C701, C702, C703, and C715 for cold water meters. Each meter assembly shall be performance tested to ensure compliance.
 - ii. The meter main case shall be stainless-steel, bronze, epoxy coated ductile iron, or epoxy coated fabricated steel composition.
 - iii. The meter package shall meet or exceed all NSF/ANSI Standard 61, Annex F, and G requirements.
 - iv. All meters shall be 100% factory tested for accuracy and have the factory test results provided with each meter.
 - v. Meters shall be pressure tested to ensure against leakage.
 - vi. Meters shall be guaranteed accuracy for the 15 years of the agreement
 - vii. All electrical components and batteries will be guaranteed for 15-year period of the agreement

VII. Modification / Withdrawal of Qualifications

- a. Submitters have the right to modify or withdraw their Qualifications without cause or liability whatsoever at any time before the stipulated submittal date and time. Such requests must be made to Utility in writing. Modified or withdrawn Qualifications may be resubmitted per the instructions in this Request for Qualifications before the stipulated submittal date and time.
- b. *No Qualifications shall be modified or withdrawn by the Submitter after the Submittal Date.*

VIII. Clarifications

- a. Before contract award, the Utility reserves the right to seek clarification from the Submitter with whom Utility is contemplating award to properly score their Qualifications. Failure to provide requested information may result in not making such

an award to the Submitter.

IX. Negotiations and Contract Award

- a. The Town reserves the right to finalize the negotiations at any point and reserves the right to award a contract based on what is deemed to be in the best interest of the Town. The Town shall issue a Notice of Intent to Award, if any, to the Successful Submitter. However, no contract shall be formed between Successful Submitter and the Town until the Town signs the contractual Agreement.

X. Minimum Insurance Requirements

- a. Qualifications are to submit a copy of their certificate(s) of insurance evidencing policies and limits of insurance that they currently have in force. If this document is not submitted, the Qualifications may be rejected.
- b. *If upon Notice of Intent to Award, the Successful Submitter does not currently have the policies and limits specified below, they shall have ten (10) calendar days to provide the Utility with certificate(s) of insurance evidencing that they have procured such and policies and limits.*
- c. Submitter shall procure and maintain for the duration of the contract insurance against claims for injuries to persons or damages to property which may arise from or in connection with the performance of the work hereunder by the Contractor, his agents, representatives, employees, or sub-contractors. The coverage's, limits, or endorsements required herein protect the primary interests of the Utility, and these coverage's, limitations, or endorsements shall in no way be required to be relied upon when assessing the extent or determining appropriate types and limits of coverage to protect the Submitter against any loss exposures, whether as a result of the Project or otherwise. The requirements contained herein and the Utility's review or acknowledgment are not intended to and shall not in any manner limit or qualify the liabilities and obligations assumed by the Submitter under this contract.

XI. Commercial General Liability

- a. The insurance carrier must possess an AM Best rating of A- or Better. Coverage must be afforded under a per occurrence form policy for limits not less than \$2,000,000 each occurrence, \$2,000,000 products / completed operations each occurrence, \$2,000,000 personal and advertising injury liability, \$2,000,000 each occurrence and \$10,000 medical expense. Additionally, all firms shall provide a detailed certificate that indicates they carry Pollution Liability Insurance in the amount of no less than \$2,000,000 of coverage.

XII.

- a. ***Submitter's insurance coverage shall be primary insurance*** for Utility, its officials, employees, and volunteers. Any insurance or self-insurance maintained by Utility, its officials, employees, or volunteers shall be excess of Submitter's insurance and shall be non-contributory.

XIII. Automobile Liability

- a. Coverage must be afforded, including coverage for all Owned vehicles, Hired and Non-Owned vehicles for Bodily Injury, and Property Damage of not less than \$2,000,000 combined single limit each accident. If Submitter does not own vehicles, Submitter shall maintain coverage for Hired & Non-Owned Auto Liability, which may be satisfied by endorsement to the Commercial General Liability policy or separate Business Auto Liability policy.
 - b. ***Submitter's insurance coverage shall be primary insurance*** for Utility, its officials, employees, and volunteers. Any insurance or self-insurance maintained by Utility, its officials, employees, or volunteers shall be excess of Submitter's insurance and shall be non-contributory.
- XIV. Safety & Health Program
- a. Submitter shall describe their Safety & Health Program. It shall address the company's safety standards and policy, confirming they are trained for safety in the workplace and the Field per all OSHA and applicable standards. The proposing company SHALL submit a full copy of their Safety & Health Program. If the Program is too large/lengthy to include as a document with the response, please provide/submit it on an external USB flash drive.
 - b. Submitter shall adhere to standards of Personal Protective Equipment (PPE) designated by the Town.
- XV. See attached sheet for specification compliance, pricing schedule, and scoring criteria

Town Specification Compliance and Exceptions

This proposal is not a bid.

The price of the AMI system implementation shall include meter site surveys, water meters, pit-lids, endpoints, collectors including hardware and installation on Town assets, programmers, AMI software implementation including customer interface to billing, customer portal, installation of all components, engineering, project management, and training. The pricing structure should allow the Town to spread the cost of the implementation over a period of time. Each Proposer should propose a spread period in accordance with their capability to finance the Project.

In addition, the maintenance price shall include the ongoing annual cost of host software. Daily monitoring, software upgrades, yearly training, hardware support, license of the AMI software, data hosting and delivery to the Town, network maintenance, and Field support, including labor for endpoint field maintenance and water meter maintenance. Field support, including labor, warranty material return, backhaul data fees, and warranty on all equipment for 15 years. The maintenance price shall also include any other item not listed but detailed under the Maintenance Program, including labor.

It is incumbent upon the Proposer to determine the total cost of the metering program and determine the method of financing that will allow for a five (5) year spread pricing option to the Town directly with the Proposer. No third party or municipal lease financing options will be considered. Only proposals that offer the financial terms suitable to the Town will be accepted.

Pricing Proposal

Description - Year	Price in Numbers	Price in Words
Annual Lump Sum Payment – Year 1	\$	
Annual Lump Sum Payment – Year 2	\$	
Annual Lump Sum Payment – Year 3	\$	
Annual Lump Sum Payment – Year 4	\$	
Annual Lump Sum Payment – Year 5	\$	
Annual Maintenance Fee – Year 1-15	\$	
Annual inflation factor for Maintenance Phase		

Proposer Firm: _____

Project Bid Date: _____ City, State, Zip: _____

Selection Criteria	Value	Score
Pricing Proposal (Maximum 5 points)		
Pricing Proposal (that meets or exceeds specifications)	0 – 5	
Primary Firm Qualifications (Maximum 15 points)		
Submitter is a Licensed Contractor in the State	0 – 3	
The firm's overall understanding of Meter AMI Asset Management Program	0 – 4	
Experience of the primary firm in the municipal water industry	0 – 4	
Proven track record with performing services for the Town	0 – 4	
Key Technology Qualifications (Maximum 30 points)		
All proposed meters meet AWWA standards and are NSF/ANSI 61 certified	0 – 5	
The AMI solution shall be meter agnostic & capable of reading water, gas & electric meters	0 – 5	
The AMI solution shall have a minimum of 80% coverage with three levels of redundancy using fixed-based collectors at a height not to exceed 30ft (except Town assets). No hybrid AMI/AMR, repeaters, cellular or mesh-based systems are allowed	0 – 10	
The AMI radio transponder endpoints shall be two-way licensed communication in the 450-470 MHz frequency or Cellular Technology that is the exclusive property of the Town	0 – 10	
Project Team Qualifications (Maximum 10 points)		
Ability of project designer to achieve Town's vision & meet overall project requirements	0 – 3	
Experience of the project manager to manage scope, budget, schedule & quality	0 – 3	
Experience of the Technology Partners in product delivery, including references	0 – 2	
Experience of the Meter and AMI deployment team in project delivery	0 – 2	
Maintenance Program Qualifications (Maximum 30 points)		
Provide documentation of ISO 9001 certification for asset management	0 – 5	
Capability to meet all requirements of the asset management program with field maintenance and support	0 – 10	
Experience of the firm and technology partners with water meter asset management projects, including reference contacts	0 – 10	
Experience with asset management projects in the state	0 – 5	
Financial Stability (Maximum 10 points)		
Overall financial strength of the primary firm	0 – 2	
Proven capability of the primary firm to provide project spread payment for the initial meter infrastructure up to 10 years	0 – 2	
Able to delay the first payment of the Project for one (1) year or until final completion of the initial installation and testing of the AMI network is complete	0 – 2	
Financial analysis of expected project benefits to be realized over 15 years period	0 – 2	
Provide Certificate(s) of Insurance demonstrating all specified requirements and S&H program	0 – 2	
	TOTAL	

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