



Request for Proposals

Customer Engagement Portal,  
Online Bill Processing, and  
Physical Bill Processing  
Services

Issue Date: August 22, 2017  
Due Date: September 29, 2017  
4:00 p.m. (PDT)

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# 1. RFP Overview

## 1.1 Purpose of RFP

Valley of the Moon Water District (District) is seeking to deploy a consumer engagement portal that contains both customer side and District side advanced features and analytical capabilities. In addition to a consumer engagement portal the solution must also be able to handle online/e-bill payments and the District also desires to have an optional proposal line item for traditional physical bill processing and mailing services.

The solution will go beyond a basic portal and allow for District side data analytics, automated customer communications and integration in District billing/financial software.

Proposers are encouraged to describe any additional offerings based on their experience in working with similar size agencies. To this end, proposals should clearly describe optional offerings and the pricing associated with the optional offerings.

The District is prepared to make required resources available to make possible a January 1, 2018 “go live” schedule. If Proposers are not able to meet this timeline, they are encouraged to propose an alternative timeline for the District to consider.

## 1.2 RFP Timeline

To meet the District’s desired implementation date, the District is committed to the RFP process and schedule outlined below.

**Table 1 – RFP Schedule of Events**

RFP EVENT	DATE/TIME
District Issues RFP	August 22, 2017
Deadline for Proposer Questions	September 15, 2017
Responses to Proposer Questions Provided	September 18, 2017
Deadline for Proposal Submission (4:00pm cutoff)	September 22, 2017
Evaluates Proposals and Interview(s) if Needed	September 25-28, 2017
Award of Contract	October 3, 2017
Project Start Date	October 16, 2017
Go Live	January 1, 2018

The District reserves the right, at its sole discretion, to adjust this schedule as it deems necessary. Notification of any adjustment to the RFP Schedule of Events will be provided to all Proposers and posted on the District’s website.

## 1.3 RFP Contact

All communications concerning this RFP must be submitted by email to the RFP Contact identified below. The RFP Contact will be the sole point of contact for this RFP.

Daniel Muelrath, General Manager Email – [draelrath@vomwd.com](mailto:draelrath@vomwd.com)

***Proposer contact with anyone else in the District is expressly forbidden and may result in disqualification of the Proposer’s bid.***

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## 1.4 RFP Amendment and Cancellation

The District reserves the unilateral right to amend this RFP in writing at any time. The District also reserves the right to cancel or reissue the RFP at its sole discretion. If an amendment is issued, it will be provided to all Proposers and posted on the District's website. Proposers will respond to the final written RFP and any exhibits, attachments, and amendments.

## 1.5 Questions Pertaining to the RFP

Specific questions concerning the RFP should be submitted via e-mail to the RFP Contact (See Section 1.3) before the date identified in Section 1.2 (RFP Timeline). Proposer questions should clearly identify the relevant section of the RFP and page number(s) related to the questions being asked. The District will post responses to all questions on the District's website at: <http://www.vomwd.com/business.php> in the form of an addendum.

## 1.6 Proposal Submittal

Proposals will be submitted no later than the "Deadline for Proposal Submission" as identified in Section 1.2 (RFP Timeline). Proposers assume the risk of the method of delivery chosen. The District assumes no responsibility for delays caused by any delivery service. A Proposer's failure to submit a proposal as required before the deadline may cause the proposal to be disqualified.

Proposers must submit in a sealed package one (1) original signed Master, two (2) copies, and one (1) electronic copy on a thumb drive in .pdf file format.

The package should be clearly labeled as follows:

**"Proposal for Consumer Engagement Portal"**

The proposal package should be mailed, couriered, or hand delivered to the following address:

### **Courier, FedEx, UPS, etc.**

Valley of the Moon Water District  
ATTN: Daniel Muelrath, General Manager  
Proposal for Consumer Engagement Portal  
19039 Bay Street  
Sonoma, CA 95476

### **USPS:**

Valley of the Moon Water District  
ATTN: Daniel Muelrath, General Manager  
Proposal for Consumer Engagement Portal  
PO Box 280  
El Verano, CA 95433

All proposals must be received by the District by 4:00 p.m. on the Deadline for Proposal Submission date as indicated in Section 1.2. Proposals received after this time and date will not be considered. Postmarks or emailed submissions will not be accepted as proof of receipt.

## 1.8 Public Records Law

Pursuant to California Government Code Section 6250, public records may be inspected and examined by anyone desiring to do so, at a reasonable time, under reasonable conditions, and under supervision by the custodian of the public record. All submitted proposals are considered public records subject to disclosure. Financial records, including cost proposals, will not be considered confidential and are also subject to public disclosure.

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## 2. Project Objectives

The objective of this RFP is to identify, select, and implement a proven public sector water utility customer engagement portal based on a state-of-the-art platform, using the latest in technologies and best practices. The portal must deploy a rich customer engagement experience, which will include conservation tracking and alerts, improve digital engagement, and reduce operational costs by providing a digital platform for its customers. The solution must integrate with the District's backend utility billing and website.

The New System should meet the following high-level objectives:

- Responsive design to customer engagement
- Comprehensive local support during Pacific Standard Time
- Consumption data displayed yearly, monthly, daily and hourly for AMI meters (bi-monthly for traditional reads)
- Comparison data displays customers' current and multiple prior years usage (or designated prior year usage)
- Customer can see billing history as far back as data is provided for
- Customer can see and pay bill on portal or mobile device without requiring a separate login
- Robust analytics tracking customer payment history, usage patterns, customers enrolled in water conservation programs, active and inactive users, etc.
- Analytics which can review meters and customer data to identify water theft and leakage incidents, as well as non-revenue water calculations
- Ability to search and track usage, trending statistics, high/low monthly averages, annual averages at the individual account level
- Ability to view temperature and rainfall data on top of usage data
- Ability to identify, manage, and track reported violations, follow-up actions, and fines
- Ability to easily export data to Excel or PDF with a click of a button
- Conservation module on portal and mobile devices which can provide conservation programs, rebate programs, and education and water saving tips
- Outage or construction project notifications can be created and sent to affected customers in real time (via email, text and phone call)
- Provide user friendly and intuitive user interface;
- Promote a paperless environment.

In selecting a vendor, the District is looking for a vendor that can provide the following:

- A solution that supports continual innovation to implement best business practices
- Long-term vendor commitment to product improvements to keep up with best practices
- Enhanced features and functionality to support operational efficiencies
- Provide continuous maintenance and compatibility with future versions of IOS, Android, and Windows
- Cost effective annual ongoing maintenance and support costs
- Cost effective new hardware/data storage requirements
- Cost effective data maintenance and updating requirements

The District is interested in implementing full and optimal functionality of all the features of the new technology. The District desires to capitalize on how other agencies have implemented the Customer Portal application so as to optimize the deployment from the start.

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To help the District select the right innovative technology partner, the District desires each Proposer to identify California-based municipal clients that are fully utilizing their system and demonstrate how these clients have implemented their software to its fullest capability to make their business processing and customer service highly effective and efficient.

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### 3. New System Requirements

#### 3.1 Consumer Engagement Portal

At a minimum, the proposed New System should address and satisfy the following requirements:

- Customer facing requirements:
    - Mobile and web based customer engagement platform for all Water related District services compatible with iOS, Android, Windows Phone OS
    - Mobile and web based payment, billing, account management, graphical usage comparisons, service request, rebates, and conservation program enrollment
    - Ability to display and compare customers' usage between current and previous years
    - Mobile and web based hourly, daily, monthly and bi-monthly usage graphs (system automatically displays usage options based on customer's meter type) including ability to overlay weather data for hourly and daily usage graphs
    - Mobile and web real-time customer notifications (including text, email, native mobile OS and IVR notification types) for outage, leak, and other communications
    - Multi-language support allowing customer to choose language type on the fly and see the interface automatically across mobile and web platforms
    - Mobile and web bill presentment including bill history, payment history, and account balances; with the ability to pay through an integrated billing module
    - Mobile and web based monthly and annual bill amount budgeting with threshold alerts
    - New System must be personalized to the District per District's requirements
  - Utility facing requirements:
    - Ability to create an unlimited number of customer segment types
    - Ability to search and track usage, trending statistics, high/low monthly averages, annual averages at the individual account level with the ability to rate and rank customers based on efficiency calculations which are easily exported to excel or pdf with a single prompt
    - Ability to create conservation programs and target programs to customers based on segment type and other demographic data
    - Full conservation program automation from customer messaging, rebate application, enrollment, approval, field inspections, and program tracking
    - Ability to track performance of conservation programs
    - Water allocation calculations and usage tracking by customer segment
    - Calculation and reporting of account level usage metrics by segment type
    - Analytics and reporting for calculating and tracking customer and property level water use efficiency metrics
    - Integration of local CIMIS weather station data which can be overlaid on usage information
    - Flow analysis and leak detection capability based on metering data across water distribution system
    - Analytics which are able to scan meters and customer data to identify water theft and leakage incidents and non-revenue water calculations
    - Ability to integrate with work management system (WebSoft Mobile MMS) to trigger field activity based on various customer and analytics triggers and requests
    - Ability to integrate into District's financial and billing software (MOM software)
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- Ability to create and send outage notifications to affected customers in real time
- On-going maintenance and updating of the platform to insure compatibility with future versions of IOS, Android, Windows phone, and Windows PC

### **3.2 Online Bill Processing**

Provide a comprehensive online bill processing and payment solution that is integrated into the consumer engagement portal and does not require an additional login or website redirect.

### **3.3 Physical Bill Processing**

Beyond the consumer engagement portal the District desires a response to the optional item of physical bill processing and mailing. Details of the District's billings are:

- 7,000 customer accounts billed bi-monthly
  - Approximately 3,500 bills per month
  - District bills daily Monday – Thursday
  - Billing files will be provide is .csv format
- Method of billing (approximately)
  - 90% receive hardcopy bills
  - 10% receive ebills



## 4. Proposal Submission Requirements

### 4.1 General Instructions

Proposals should be prepared simply and economically and provide a straightforward, concise description of the Proposer's company, qualifications, proposed solution, and capabilities to satisfy the requirements of this RFP. Emphasis should be on completeness and clarity of content.

Proposals must be organized consistent with the outline provided in this section of the RFP. Proposers must follow all formats and address all portions of the RFP set forth herein providing all information requested. Proposers may retype or duplicate any portion of this RFP for use in responding to the RFP, provided that the proposal clearly addresses all of the District's information requirements.

### 4.2 Proposal Format

Proposals must be structured, presented, and labeled in the following manner:

- Cover Letter
- Table of Contents
- Section 1 - Executive Summary
- Section 2 – Company Background
- Section 3 – Company Qualifications
- Section 4 – Proposed solution
- Section 5 – References
- Section 6 – Other Requirements
- Section 7 – Pricing

Failure to follow the specified format, to label the responses correctly, or to address all of the subsections may, at the District's sole discretion, result in the rejection of the Proposal.

Proposals should be prepared on standard 8 1/2" x 11" paper and printed on two (2) sides. All proposal pages should be numbered.

#### 4.2.1 Cover Letter

The proposal must include a brief cover letter (not to exceed two (2) pages) that provides the following:

- Proposer's legal name and corporate structure
- Proposer's primary contact to include name, address, phone, and email
- Identification of any subcontractors and scope of work to be performed by subcontractors
- Identification of any pending litigation against the Proposer
- Disclosure of any bankruptcy or insolvency proceedings in last ten (10) years
- Statement of the Proposer's credentials to deliver the services sought under the RFP
- Statement indicating the proposal remains valid for at least 180 days
- Statement that the Proposer or any individual who will perform work for the Proposer is free of any conflict of interest (*e.g.*, employment by the District);
- Statement of acknowledgement that the District's legal documents have been reviewed and accepted with or without qualification. If qualifications are involved, those items requiring

adjustment or modification must be identified and listed along with suggested modifications to the contract. If no modifications are noted, the District will assume that the Proposer is capable of performing all normal tasks and services without reservation or qualification to the contract;

- Signature of a company officer empowered to bind the Proposer to the provisions of this RFP and any contract awarded pursuant to it.

#### **4.2.2 Table of Contents**

All pages are to be numbered and figures, tables, charts, etc. must be assigned index numbers and identified in the Table of Contents.

#### **4.2.3 Section 1 - Executive Summary**

This section of the proposal should provide a brief and concise synopsis of the proposal and a description of the Proposer's credentials to deliver the services sought under the RFP.

#### **4.2.4 Section 2 – Company Background**

This section of the proposal should briefly identify the following:

- A brief description of the Proposer's background and organizational history;
- A statement of how long the Proposer has been performing the services required by this RFP;
- Identify the location of headquarters, technical support, and field offices;
- Identify the location of office which would service the District;
- Identify the number of employees by the following functions: corporate (sales, marketing, finance, overhead, etc.), implementation support, ongoing maintenance support, and research and development;

#### **4.2.5 Section 3 – Company Qualifications**

In this section of proposal, the Proposer should identify company qualifications and experience in implementing solutions similar to what the District is seeking. Identify your existing client base including the number of existing clients using the version/release of the platform being proposed. Clearly identify the name and number of California public agency installations.

#### **4.2.6 Section 4 – Proposed Solution**

Provide a detailed proposal of the Proposers solutions for that meet all the District objectives outlined in Section 3 or this RFP.

#### **4.2.7 Section 5 - References**

The Proposer must provide at least five (5) references with at least three (3) of the references for systems that have been implemented in the last five (5) years. The District prefers references from California municipal agencies of similar size and complexity to the District.

For each reference, Proposer must provide the following information:

- Agency name and contact information (i.e. name, title, address, phone, and email);
- Brief project description, including identifying the software version and modules implemented;
- Implementation date;

- Implementation timeline and cost.

In addition to the above reference list, the District desires each Proposer to identify which of their clients are fully utilizing the system and demonstrate how those clients have implemented their software to its fullest capability and creatively structured processes around the system to make their business processing and customer service highly effective and efficient.

#### **4.2.8 Section 6 – Other Requirements**

In this section of the proposal, the Proposers should address the following items in a concise manner:

- Describe the proposed platform for your solution; software as a service (SaaS), or on-premise
  - Proposed cloud-based solutions should address the following items:
    - Service level: Describe incident levels and assigned response resolution times
    - Performance: Describe guaranteed performance levels respective to uptime, network transport, and latency
    - Storage: Describe any storage limitations that are required. Limits on capacity, and duration of archived data
    - Backup and Archive: Describe the business continuity process and procedures with your solution
    - District Data: In the event of termination of services; please detail the process and procedure for the delivery of District data.
    - District Content and Data: Please describe any use and/or aggregation of District data for the purposes of the vendor
    - Security: Describe the hosting facilities and security practices employed
- Describe any interface (API), and or integration capabilities with your solution.
- Provide hardware, software, and database requirements for the New System. Describe everything that will be needed for the New System to function optimally
- Describe ongoing maintenance, release/upgrade, and support services. At a minimum, Proposers should address the following items:
  - Identify if there are user groups and/or user conferences
  - Describe the frequency that application patches and releases have been made available, and describe hardware and software requirements for any required on-site installations

#### **4.2.9 Section 7 - Pricing**

The District seeks to understand all costs associated with the implementation and ongoing maintenance of the proposed system during implementation and during five (5) years of maintenance. The District would like to know the cost by module wherever possible.

In this section, the Proposer must summarize all costs associated with software licensing and maintenance costs, implementation services (including data conversion), 3<sup>rd</sup> party products needed for new system, professional services, and cost of travel. The District will evaluate proposals based on the “Total Cost to Implement (TCI)” and the “Total Cost to Operate (TCO)”. TCI will include all costs required for a successful implementation. The TCO will be calculated based on TCI plus five (5) years of annual maintenance fees.

The Proposer's Cost Proposal must identify all costs required to complete a successful implementation to include at least the following:

1. One-Time Costs
  - Implementation Services
  - Software installation and configuration
  - Consulting
  - Training
  - Project management
  - Software licensing
  - Data conversion
  - 3<sup>rd</sup> party products required for New System (i.e. software, hardware)
  - Consultant travel
  - Other one-time costs
2. Annual Service Fees
  - Show all services and activities included in the annual service fees, and show activities and services that would result in an increased fee to the District
  - Show the expected annual service fee for each of the next five (5) years

## **5. Proposal Evaluation**

Proposals submitted will be evaluated on the following criteria:

- Quality, clarity, and responsiveness of proposal
- Ability to meet the needs of the District
- Well thought out timeline and roadmap for a "go live" date no later than January 1, 2018
- Proven technical ability to design, install, and support the proposed system
- Demonstrated ability to work in a cooperative and collaborative manner with clients
- Anticipated value and price
- Successes with similar size clients in terms of users, population, and District services
- Ease in maintaining the system and frequency of fixes
- Ease and cost of upgrading versions
- References
- Commitment to continually evolving the system to remain current with evolving best practices

The District reserves the right, at its sole discretion, to request clarifications of proposals or to conduct discussions for the purpose of clarification with any or all Proposers. The purpose of any such discussions shall be to ensure full understanding of the proposal. If clarifications are made as a result of such discussion, the Proposer shall put such clarifications in writing.

## **6. General Requirements**

### **6.1 Miscellaneous**

### **6.1.1 Ownership of Materials**

Upon delivery, all proposals will become the property of the District.

### **6.1.2 Right to Reject/Modify**

The District may, at its sole discretion, reject any or all proposals or waive any irregularities without disqualifying the proposal. The issuance of this Request for Proposal does not bind the District to award a service agreement for services described herein.

### **6.1.3 Public Disclosure of All Proposals**

All proposals received in response to this RFP shall become the property of the District. All proposals shall become a matter of public record, and shall be regarded as public records except for those parts of each proposal which are defined by the proposer as business or trade secrets, provided that said parts are submitted in a sealed envelope and clearly marked as "trade secret," "confidential," or "proprietary."

### **6.1.4 Reasonable Inquiry**

The District may conduct any reasonable inquiry to determine the responsibility of the Proposer. The submission of a proposal constitutes permission by the Proposer for the District to verify all information contained therein. If the District deems it necessary, additional information may be requested from any Proposer. Failure to comply with any such request may disqualify a Proposer from consideration.

## **6.3 Conflict of Interest and Proposal Restrictions**

By submitting a response to the RFP, the Proposer certifies that no amount will be paid directly or indirectly to an employee or official of the District as wages, compensation, or gifts in exchange for acting as an officer, agent, employee, subcontractor, or consultant to the Proposer in connection with the procurement under this RFP.

Notwithstanding this restriction, nothing in this RFP will be construed to prohibit another governmental entity from making a proposal, being considered for award, or being awarded a contract under this RFP.

Any individual, company, or other entity involved in assisting the District in the development, formulation, or drafting of this RFP or its scope of services will be considered to have been given information that would afford an unfair advantage over other Proposers, and said individual, company, or other entity may not submit a proposal in response to this RFP.

## **6.4 Contract Negotiations**

After a review of the proposals and completion of the background reviews, the District intends to enter into contract negotiations with the selected Proposer. These negotiations could include all aspects of services and fees. If a contract is not finalized in a reasonable period of time, the District will open negotiations with the next ranked service provider.

## **6.5 Execution of Contract**

If the selected Proposer does not execute a contract with the District within fifteen (15) business days after notification of selection, the District may give notice to that service provider of the District's intent to select from the remaining Proposers or to call for new proposals, whichever the District deems appropriate.

## **6.6 Severability**

If any provision of this RFP is declared by a court to be illegal or in conflict with any law, the validity of the remaining terms and provisions will not be affected; and, the rights and obligations of the District and Proposers will be construed and enforced as if the RFP did not contain the particular provision held to be invalid.

## **6.7 Warranty**

The selected software Proposer will warrant that the proposed software will conform in all material respects to the requirements and specifications as stated in this RFP, demonstrated in both the software demonstration and subsequent proof-of-capabilities. Further, the requirements as stated in this RFP will become part of the selected software Proposer's license and the software Proposer will warrant to the requirements. The selected Proposer must warrant that the content of its proposal accurately reflects the software's capability to satisfy the functional/technological requirements as included in this RFP. Furthermore, the warranty, at a minimum, should be valid for the duration of the implementation and until final acceptance (as will be defined during the negotiation process) of all application modules included in the implementation.

## **6.8 Rights of the District**

The District reserves the right to:

- Make the selection based on its sole discretion;
- Reject any and all proposals;
- Issue subsequent Requests for Proposals;
- Postpone opening proposals, if necessary, for any reason;
- Remedy errors in the Request for Proposal process;
- Approve or disapprove the use of particular subcontractors;
- Negotiate with any, all, or none of the Proposers;
- Accept other than the lowest offer;
- Waive informalities and irregularities in the proposals;
- Enter into an agreement with another Proposer in the event the originally selected Proposer defaults or fails to execute an agreement with the District.

An agreement will not be binding or valid with the District unless and until it is approved by the and executed by authorized representatives of the District and of the Proposer.