REQUEST FOR PROPOSAL

TO PROVIDE PUBLIC WORKS WATER UTILITY CUSTOMER PORTAL

RFP Issue Date:

July 10, 2019

Request For Proposal

Table of Contents

SECTION 1: GENERAL INFORMATION

Project Name – Request for Proposal (RFP) – Water Utility Customer Portal

THE PROJECT NAME LISTED ABOVE MUST APPEAR ON ALL PROPOSALS AND RELATED CORRESPONDENCE.

Project Deadline – Proposals must be received no later than:

August 12, 2019 at 3:30 pm

SIX COPIES OF THE PROPSAL MUST BE MAILED OR DELIVERED TO THE CONTACT LISTED BELOW AND RECEIVED PRIOR TO THE DEADLINE. PLEASE INCLUDE A FLASH DRIVE WITH A COMPLETE COPY OF THE PROPOSAL.

Project Contact – Send all questions, correspondence, or proposal to:

Steve Olstad
Public Works Customer Service Director
City of Burnsville
13713 Frontier Ct
Burnsville, MN 55337

Email: steve.olstad@burnsvillemn.gov
Phone: 952-895-4481
Fax: 952-895-4531

Project Review Process Anticipated Timeline

City Staff evaluation of proposals – August 13 – 30
Finalists selected and contacted for on-site demo/interview – September 3 – 6
On-site demo/interviews – September 16 – 20
Contract development – September 23 – 30
City Council Approval – October 15

SECTION 2: OBJECTIVES

The City of Burnsville will review and evaluate the proposals received for obtaining information and pricing related to implementing a water utility customer portal. Proposers are expected to provide a complete proposal identifying their product's capabilities and their best and most competitive pricing.

SECTION 3: INFORMATION FOR PROPOSERS

Introduction – The City of Burnsville (City) is a second-tier southern suburb of the Minneapolis and St. Paul, Minnesota metropolitan area. Burnsville is located in Dakota County and has a population of approximately 61,000. The City supplies potable water to residents and businesses. There are approximately 16,750 meters utilized to measure water usage.

The City completed installation of an Advanced Metering Infrastructure (AMI) system in early 2019. Burnsville utilizes Sensus AccuStream, iPerl, and Omni water meters with Regional Network Interface (RNI) Release 3.3 with Flexnet Database along with Logic Data Analytics for customer service support. Using the water usage recorded by the Sensus AMI, utility bills are generated each month for about

16,200 accounts. The on premise utility billing software utilized by the City is Tyler New World ERP located in Detroit, Michigan. The City also utilizes Billtrust hosted Software as s Service (SaaS) as their current vendor to print, mail, and provide eServices including eBills and electronic payment options.

Disclaimer – This RFP does not create or constitute a contractual document or commitment of any kind. The City will not be liable for any loss, expense, damage or claim arising out of the statements included or omitted in connection with this RFP. The City will not be responsible for any expenses that may be incurred in the preparation of a proposal. Failure to read the Request for Proposal and follow instructions will be at the proposer's own risk.

Proposal Expiration – The proposal cost quotation must be honored for a period of ninety (90) days after the RFP due date. A proposal may be withdrawn or modified by email request until the due date for receiving proposals.

Insurance – All insurance must be coverage that applies in the State of Minnesota.

1. General Liability – The proposer certifies that they can comply with the City insurance requirement of $500,000 per claimant and $1,500,000 per occurrence for General Liability insurance. The City shall be named as an additional insured on the general liability policy related to work performed by or on behalf of the Service Provider.

2. Data Breach – Data Breach and Privacy/Cyber Liability Insurance including coverage for failure to protect confidential information and failure of the security of the Service Provider's computer systems, or the City's systems due to the actions of the Service Provider which results in unauthorized access to the City's data. The limit applicable to this policy shall be no less than Two Million Dollars ($2,000,000) per occurrence, and must apply to incidents related to the Cyber Theft of the City's property, including but not limited to money and securities.

3. Technology Errors and Omissions – Insurance for Technology Errors and Omissions with a limit of not less than Two Million Dollars ($2,000,000) for damages arising from computer related services including but not limited to the following:

Consulting	Hardware or Software Development
Data Processing	Installation
Programming	Distribution or Maintenance
System Integration	Systems Analysis or Design
Training	Staffing or Other Support Service

The policy shall include coverage for third party fidelity including cyber theft and protect the City as "Additional Insured". It is acceptable that the Data Breach and Privacy/Cyber Liability Insurance and Technology Errors and Omissions insurance be provided on the same policy. The additional insured protection afforded the City must be on a primary and non-contributory basis. All policies must include a waiver of subrogation in favor of the City.

Should any of the above policies be cancelled before the expiration date, the Service Provider shall deliver notice to the City thirty (30) days prior to cancellation.

SECTION 4: RFP EVALUATION AND PROCESS

RFP Evaluation

The evaluation team will use the following criteria in ranking and selecting finalists for a follow up interview and product demonstration. Price will not be the sole deciding factor.

1) Past experience with delivering similar services for similar sized and complexity projects
    a) Experience with providing a water utility customer portal
    b) Years of experience
    c) References of current clients
2) Ability to meet requirements detailed in the RFP
    a) Ability to fulfill Scope of Work
    b) Additional Features of proposed portal
    c) Software security
3) Project Planning
    a) Technical details of the implementation including the expected input and support from City staff
    b) Availability and qualifications of assigned personnel
    c) Proposed implementation timeline
    d) Training plan
4) Cost
    a) Cost to provide services including deployment/one-time costs, per account or use costs, and annual costs
    b) Proposals will be evaluated compared to other proposals
5) Ongoing Support and Maintenance
    a) On-going customer support and maintenance provided by proposer

The City reserves the right to accept or reject any or all proposals received. The City also shall have the right to waive any informality or technicality in proposals received if it is in the best interest of the City.

SECTION 5: SCOPE OF WORK

The City is seeking proposals for a vendor to provide a customer-facing web-based application, a utility-facing web-based analytics dashboard, and the ability to send a range of automatic digital alerts and notifications. The proposed portal must be able to receive and display the City's consumption data, which is reported at an hourly rate of usage. The Vendor will provide a secure interface to present the customer with consumption information in months, days, and hours; leak detection assistance; service interruption notification; and water efficiency options. The portal, at a minimum, would also support a single sign-in link to Billtrust for payment options, other links to leak detection videos, and the City website. The City will be able to send service interruption notifications, view customer pages for support, and view analytics. The preferred customer portal offering would be a SaaS hosted solution with stated SLA metrics for up-time availability and support.

The RFP response will provide detailed information on the proposer's ability to:

1. **Provide a customer facing portal that is available online and through a mobile interface for residential, multi-family, commercial, industrial, and irrigation accounts that provides:**

   1.1 Registration and Basic Information
   - a) Secure registration and login for each utility account regardless of meter type or the granularity of the meter data.
   - b) Ability to configure the home page based on Public Works priorities.
   - c) Ability to add items to the Home Page based on common customer requests.
   - d) Ability to communicate AMI data interruptions to customers through their data feed to decrease the number of customer calls.
   - e) Dynamic customer profile that customers can update 24x7 to personalize their portal and recommendations.
   - f) Provide customers the ability to enter information about home size, square footage, number of persons in the home and other useful information in comparing water usage of similar properties.

   1.2 Notifications and Alerts
   - a) Easily customizable communication preference – customers will be able to determine how they receive outgoing communications including by text/SMS, email, automated call and mail.
   - b) Account management module to set communication preferences for alerts and the ability to automatically notify the customer of suspected leaks, engage the customer to investigate and resolve the leak with step-by-step instructions and resources, and provide resolution details to Public Works through the dashboard.
   - c) Ability to view dynamic, personalized information on why a bill might be high and what can be done to reduce future consumption.

1.3 Personalized Data and Insights

a) Personalized consumption displays in gallons per day, seasonal consumption trends, year-over-year usage, and the ability to compare usage to goals. Residential accounts shall include water use consumption comparisons to similar households based on occupancy and outdoor area characteristics and residential end-use disaggregation.
b) Disaggregated water consumption estimates for indoor and outdoor usage.
c) Display water consumption data in context of temperature and precipitation data to inform user of how weather impacts water use.
d) Ability to view water consumption by rate tiers and to forecast end-of-period total consumption levels.
e) Ability to view current and prior consumption relative to a customer determined water budget, consumption goal, or usage allocation.
f) The ability to display missed meter reads.
g) Ability to estimate and display irrigation events in the consumption graph view.
h) Interactive money-saving recommendation library, customized for each account profile and configurable by Public Works with step-by-step implementation instructions, informational links and videos, dynamic estimates of savings potential in gallons per day and dollars per year, and the ability to sign up for and keep track of money saving activities. Library will highlight and rotate most relevant savings actions for customers based on the customer's profile and the season.

1.4 Multiple Users and Accounts

a) Users or managers of multiple properties or commercial properties with multiple meters can view individual meters or a roll-up of all property consumption data in a unified view.
b) Ability to give access (create a secondary account login) for other users such as a spouse, roommate, owner, tenant, or property manager.
c) Deliver relevant and timely utility-specific news or resources.
d) Ability to export consumption data into standard data display format (i.e. csv file).

1.5 Billing and Payments

a) Ability to offer a link to the portal from the City website.
b) Ability to integrate with the City's payment system vendor. The current payment system provider is Billtrust. Company information for Billtrust is available at www.billtrust.com.

2. Provide an analytical dashboard with data from all meter classes that provides:

2.1 Data and Access

a) The ability to store and display at least 5 years of AMI data for immediate real-time access in both the reporting engine and the customer presentment interface.
b) Ability to export data in standard data presentment format (i.e. csv).

c) Unlimited licenses for Public Works staff and the ability for a Utility administrator to provision or revoke access with viewer, editor, or administrator roles.
d) Consumption analytics across all meters, regardless of meter type.
e) Profiles for each account with the ability to search for a profile by partial or complete account number, meter number, customer name, address, or email address.
f) Ability to record communications with each account and the capability to send an email with relevant data and charts to an individual customer through their profile page.
g) AMI data in the profile will be displayed and color-coded based on normal usage, suspected leaks, and suspected irrigation.
h) Ability for customer usage analysis; including seasonal use analysis, temperature and precipitation information, and the ability to load the customer's view of their portal in impersonation mode.

2.2 Reports and Modules

a) Reports and maps showing top consumers by meter class and by the period with the ability to download consumption into Excel for further analysis.
b) Group multiple meters (e.g. domestic and irrigation) associated with one master account.
c) Reports on customer portal use and customer profile statistics, including frequency of portal use, most popular actions taken by customers, method of visit (mobile vs desktop).
d) Leak detection module that detects and defines types of leak events with thresholds that can be configured by Public Works.
e) Leak status report that provides an estimate of leak start date, duration of leak, volume of water lost during leak, whether or not customer has been notified, what actions the customer has taken to resolve, and information on the resolution.
f) Messaging module to allow Public Works staff to mass customize customer communications over email, text, and automated voice.
g) List generator feature by meter or account number, polygon selected map interface, or external csv file upload.
h) Irrigation detection module that detects daily irrigation events at individual properties.

2.3 Messaging and Communications

a) Ability to compose, send, and track messages to segments of customers within Dashboard.
b) Ability to create segments of customers based on drawing shape over map of accounts with service area.
c) Ability to create segments of customers based on popular reports.
d) Ability to support multiple communication channels, including SMS and automated voice calling.
e) Ability to create, publish and deactivate customer forms for use internally or by end user through Portal, and manage responses in report view.
f) Ability to view each customer's up-to-date account balance, water bill, and billing history.

g) Help site and live chat feature with vendor's customer service staff.

Proposer must provide sample format, design and content of web-based application and functionality in the proposal. Proposer will also provide information on safety and security features of online application.

3. **Provide the ability to identify certain events and send alerts, including the following capabilities:**
    a) Ability to send any alert through email, SMS, or automated call based on end user preferences.
    b) Ability to detect irregular usage (possible leak) for domestic and irrigation meters based on thresholds configurable by Public Works. Leak detection will be available for hourly (AMI) data and monthly data.
    c) Digital leak alerts will provide instructions and video content for finding and resolving the source of irregular use, regardless of whether or not the user has ever logged into the customer portal.
    d) Option to send automated Print Leak Alerts to customers with continuous use detected from hourly meter reads when email and telephone numbers are not available.
    e) Option to allow customers to set their own consumption threshold alert based on usage compared to previous periods.
    f) Ability to set threshold notifications based on monthly customer cost.
    g) Ability to view mobile and web based hourly or monthly AMI consumption graphs including the ability to overlay weather data.
    h) Option to allow customer to set their own hourly, daily, or monthly user-defined threshold alert.
    i) Option to allow customer to choose to receive an alert when a bill is available, due, or overdue.

Proposer must provide sample format, design and content of the alerts including screenshots.

4. **Provide a convenient option for utility customers to view, pay their bill or reference other City information:**
    a) Possible option for utilizing a single sign on (SSO) between the portal and the City's eBilling and online payment provider, Billtrust. Option will be able to log into the portal and transfer to utility bill payment site without reentering credentials. Billtrust will not allow a direct sign in to the portal from their site.
    b) Possible option for providing hyperlinks to the Billtrust payment site, the City's web site, and any other link that may be applicable.
    c) Any payment options presented by the proposer must be PCI 3.2 compliant and documented as such via the PCI security standards or affiliated organization.

5. **Project Management to detail implementation schedule and proposed costs:**

a) The proposal will include a staff-training plan to orient city staff to portal components.
b) Provide detail schedule of on-going status updates.
c) Organize and attend meetings as required (either in person, by telephone, or web as necessary).
d) Designate a staff person to serve as Project Manager.
e) Proposer will provide information on their project management experience with projects similar in scope.
f) Proposer will provide information on experience of staff assigned to this project.
g) Provide a minimum of three references from similar sized municipal projects.

6. **Proposer will provide detailed information on how to measure results from using the portal:**
   a) Relevant details will include what information/specifics will be available to Public Works related to water savings, customer satisfaction, cost effectiveness, program participation, and any other efficiencies.
   b) Timelines for the availability and frequency of reporting.

7. **Proposer will provide a description of security and privacy controls for all personally identifiable information provided to proposer in service of this project:**
   a) Proposer shall include evidence of information security consistent with industry standards via a written third-party assessment. The assessment shall include evaluation of the external penetration testing and a web application security assessment.
   b) Vendor must encrypt customer data in transit and at rest.
   c) Any City or customer data utilized will not be exported outside of the United States. Access to data will only be given to US citizens located in the United States.

SECTION 6: PRICING

The City seeks to understand all costs associated with the implementation and ongoing maintenance of the proposed software during the implementation and up to five (5) years of maintenance. In this section, the proposer must summarize all costs associated with all software licensing, maintenance costs, implementation services, professional services, training, travel, etc. Any costs that are on a per meter basis will be calculated using 16,750 meters. Any optional items that are proposed will be listed separately.

SECTION 7: PROPOSAL CONTENTS

The proposal shall be broken into sections as identified below:

1) Cover letter not to exceed two (2) pages.
2) Table of Contents

3) Management Proposal – Include a description of the proposer's qualifications, company history, and experience. Also include the following:
   a) Company Background – Include relevant background and history, company name, address, contact information, years company has been doing business, location of offices, and relevant experience that indicates the qualifications of the company.
   b) Insurance Compliance Statement – Provide a statement certifying compliance with the insurance requirements for general liability, data breach and privacy/cyber liability, and technology errors and omissions coverage as specified in Section 3. The statement will also include that a certificate of insurance with the coverage requirements and a 30-day cancellation notice will be provided prior to contract signatures.
   c) Project Management – Identify key staff who will be assigned to this project and their qualifications/experience.
   d) References – Provide three (3) references for previous implementations of similar scope. Include client name, contact information and a brief project description with implementation dates. Also, include any other Minnesota clients currently utilizing the proposers company.
   e) Legal Issues – Please describe any pending lawsuits against your company.

4) Proposed Solution – Include a comprehensive description of services with specific attention to Section 5 – Scope of Work. Include the following elements:
   a) Project Approach/Methodology – Include a complete description of the proposed approach and methodology for the project. This section will include the proposer's understanding of the project.
   b) Work Plan – Include all project requirements, proposed tasks, services, activities, etc. necessary to accomplish the scope of the project defined in this RFP.
   c) Project Schedule – Include a project schedule indicating a timeline of all the elements of the implementation.
   d) Support – Identify specific implementation support/training and a description of ongoing technical support.
   e) Exceptions to Specifications – Any exceptions to the RFP specifications shall be listed and fully explained on a separate page. The additional page shall be entitled Exceptions to Specifications and submitted with the proposal. Proposers are cautioned that exceptions to the specifications may be cause for rejection of the proposal.

5) Cost Proposal – Provide a detailed list of all costs associated with the implementation and annual operational costs for a five (5) year period.