

Commissioners

Linda Oosterman – District 1
Russell E. Olsen – District 2
Chris Stearns – District 3



Providing safe, reliable, affordable, and sustainable service.

October 31, 2018

Subject: Water Utility Meter Collection and Route Management Software

Public Utility District No. 1 of Thurston County invites you to submit a competitive proposal of qualifications to be evaluated for a Water Utility Meter Collection and Route Management Software project.

Attached is a copy of the Request for Qualifications (RFQ). The RFQ is also published on the Thurston PUD website at www.ThurstonPUD.org. Any addenda issued for the RFQ will be published at the same website address.

Sealed submissions are requested in one unbound original and four bound copies of the information requested in the RFQ and must be received at the PUD's Office at 1230 Ruddell Road SE, Lacey, WA 98503-5748 **by no later than 3:00 p.m., Pacific Standard Time, on November 20, 2018**. We will also accept electronic submissions sent to rclemens@thurstonpud.org.

For technical questions regarding this RFQ, please call Erica Schilt at 360.357.8783, extension 122 or email at eschilt@thurstonpud.org.

We look forward to receiving your qualifications and thanks in advance for your interest.

Sincerely,

A handwritten signature in blue ink that reads "John Weidenfeller".

John Weidenfeller
General Manager
Thurston PUD



Request for Qualifications

Water Utility Meter Collection and Route Management Software

Public Utility District No. 1 of Thurston County is an Equal Opportunity Employer and welcomes participation from minority, women-owned and veteran-owned firms.

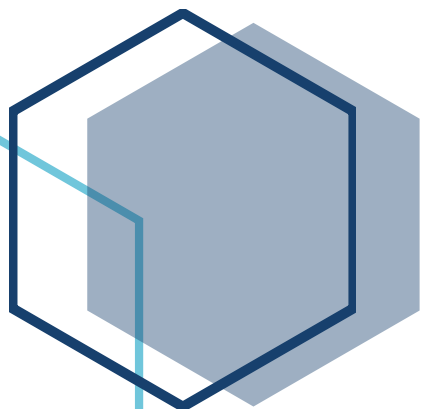




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Invitation to Submit Requests for Qualifications (RFQ)

Thurston Public Utility District through its General Manager will receive RFQs from responsible and responsive parties for materials, supplies, equipment and services for the period of October 30, 2018 through November 20, 2018 for the following items in the quantities and to the specifications as indicated in this RFQ:

- Water Meter Reading Data Collection and Route Management Software
- Handheld Computers for Meter Data Collection

Sealed bids properly marked as identified in the bid specifications shall be accepted at the Thurston PUD office, 1230 Ruddell Road SE, Lacey, WA 98503 on the approved bid forms until 3:00 p.m. PST on November 20, 2018. All bidders must complete the attached forms:

- Non-Collusion Statement
- Tax Compliance Certificate

Specification and qualifications forms may be obtained from the Thurston PUD office, 1230 Ruddell Road SE, Lacey, WA 98503 during regular business hours on or after 8:00 a.m. on October 30, 2018. Office hours are Monday-Friday, 8:00 a.m. to 4:30 p.m., excluding legal holidays. Bid packages are also available online at www.ThurstonPUD.org.

Thurston PUD reserves the right to reject any or all bids should it be deemed in the best interest of the District.

Technical questions should be referred to Erica Schilt at telephone number, 360.357.8783, extension 122, or at eschilt@thurstonpud.org.

RFQs will be submitted to:

General Manager
Thurston PUD
C/O Ruth Clemens
1230 Ruddell Road SE
Lacey, WA 98503-5748
Or to: rclemens@thurstonpud.org

Sincerely,

John Weidenfeller
General Manager
Thurston PUD



Introduction

Thurston Public Utility District (PUD) is requesting sealed qualifications from interested and qualified proposers for Water Utility Meter Collection and Route Management Software. The proposed solution should accommodate all PUD meter reading process and procedures and be flexible enough to accommodate re-engineered processes.

Bids shall be accepted at the Thurston PUD offices, 1230 Ruddell Road SE, Lacey, WA 98503 by **no later than November 20, 2018**. All bidders must verify

- Bidder must be licensed to do business in the state of Washington
- The proposed solution is commercially-available licensed software that currently in use by other water utility organizations
- Bidder must have at minimum five (5) years' experience implementing software similar in size and scope to the system described throughout the RFQ
- Bidders must a minimum of five (5) years of selling and serving the proposed software
- Bidder must provide a list of at least three (3) water utilities of similar sizes or larger where proposed software is currently in use

Thurston PUD reserves the right to purchase only the quantities required by the District.

Thurston PUD reserves the right to issue contracts to vendors for multiple manufactures or to issue additional procurement for additional manufactures during the contract period.

Thurston PUD reserves the right to reject any or all qualifications bids should it be deemed in the best interest of the District to do so.

Schedule of Important Dates

The tentative schedule for this RFQ is as follows. Thurston PUD reserve the right to change the schedule of dates as it deems necessary.

Event	Time	Date
Release RFQ to Vendors and begin advertisement	8:00 a.m.	October 30, 2018
Deadline for Questions and Inquiries	4:00 p.m.	November 1, 2018
Qualifications Submission Deadline	3:00 p.m.	November 20, 2018
Earliest Invitation to Submit an RFQ to Thurston PUD	8:00 a.m.	November 30, 2018

Background

Thurston Public Utility District is one of 28 public utility districts in the State of Washington governed by Revised Code of Washington Title 54. The PUD currently owns and operates 273 water systems serving a population of approximately 20,000. Thurston PUD provides water planning and utility services to the citizens of Thurston County, and also owns and operates



water systems in Pierce, Lewis, Grays Harbor, Kitsap, and King counties. The PUD also manages water systems for other cities, private companies and homeowner associations.

The PUD is governed by three Commissioners, elected by voters of Thurston County to serve at term of office for 6 years. The Commissioners represent the three districts in Thurston County.

The PUD's day-to-day operations are overseen by a General Manager. The PUD currently has 25 employees, an annual operating budget of over \$5.5 million and a 2019 capital budget projected at over \$2.7 million. The PUD is actively expanding to serve the needs of the people and provide professional water service management where needed and we expect to grow and serve another 5,000 families businesses or other organizations over the next five years. While RCW Title 54 entitles PUD's to provide electric power, water, sewer and septic systems and wholesale telecommunications, Thurston PUD currently only provides water service.

Current State

The information below will give you a brief synopsis of current state and a high-level overview of the business processes that we currently have in place. The District's Customer Service team performs billing for water utility accounts and uses the meter reading data uploaded to our current billing system to bill customers. We have five full-time customer service representatives and two water meter readers. The current business processes have been outlined and are found at the end of this document for your review.

Meters

The majority of our customers are single home family residents that use either a 5/8" or 3/4" meter. We have 69 commercial meters and 83 multi-family residences that use between a 1 ½" up to a 3" meter. We have 150 connections that are unmetered and receive a flat rate. We are currently in the process of metering those customers and our metering project will be completed by the end of 2020. The new software should allow for the expansion of our customer base as we meter unmetered customers, and acquire new water systems.

We utilize an array of brands and models of meters ranging from:

- Badger
- MasterMeter
- Elster/AMCO
- Sensus
- Hersey
- ABB Kent

Meter Reading Devices

We currently use several different meter reading devices that vary in manufacturer, models and types. The proposed software must allow for compatible interfacing between a multitude of devices. Listed below are the types of meter reading devices we use and their

Request for Qualifications



manufacturers. Note: Flat rate customers are automatically identified by the current billing system.

Handheld

- iTron FC300
- Northrop Grumman VersaTerm CE/XM
 - Currently the NG VersaTerm/Probe are used only for collection in the field. Meter readers manually enter the reading into iTron.

Radio-Read

- iTron FC300
- Northrop Grumman VersaTerm CE/XM

Touch-Read

- Northrop Grumman Versa Probe

Cellular Read

- Reads are retrieved by logging into meter manufacturer's website and converting data into a .csv file. File is printed manually or emailed to meter readers who will input manually data into iTron.

Meter Reading Schedule

Currently, meter reading is divided into 24 read routes with 1 monthly billing cycle generating bills on the last day of each month.

Meter readers have 13 days to complete reading 7,770 meters in 273 water systems that span over 6 counties.

Meter information is exported from the Springbrook billing software by route into MVRS software for loading on to the iTron handheld computer. Each of the iTron handheld computers are loaded weekly, with approximately five routes.

Upon completion of meter reading, data from the iTron handhelds is manually exported using the MVRS software from a desktop computer into .txt file and then converted and uploaded into our billing system. More information on this transfer protocol can be provided upon request.

Springbrook is the current utility billing provider and has been for 13 years.

Billing Cycles

The District has over 7,700 water accounts and could expand its customer base into more water systems. It produces over 7,700 bills per month that includes regular monthly billing, penalty/late fee notices and final bills. The District has one billing cycle each month with the exception of a small number of accounts that are read and billed on a quarterly basis. We are currently in the process of phasing these accounts out.



The District bills water usage on a 4-tiered billing structure based on meter size with separate usage level consumption for quarterly and monthly customers. We currently have 150 connections that are unmetered and expect to meter those connections at the latest by the end of 2020. Our customer base and number of meters are anticipated to increase as our utility district is not confined to serve any specific city or county.

Computer Programs/Software

Current meter reading data collection software is MVRs. Data is manually uploaded and there is no direct upload into our current billing system. Currently we use Window 7 Pro version 1709 Client/Server environment PC computers equipped with a minimum Intel Core i5-7400 3.0 GHz Processor with 238 GB of local storage and 8.0 GB of installed RAM, VGA (1920 x 1808 or higher resolution) video adapter and monitor, keyboard and mouse or compatible device, 24X minimum CD-ROM drive with network printing compatibility. We operate on Windows 10 Professional or later operating system. We contract for IT services from Thurston County, Washington and are connected to Thurston County servers through an Ethernet network that connects both our headquartered offices and satellite location. The county has upgraded its firewall properties and when needed will upgrade or replace depending on security needs.

Scope of Services

Thurston PUD is seeking a configurable, commercial off-the-shelf meter data management application that can validate, format, and store a high volume of meter reads and must interface with the current customer information system and billing software. The selected software system will be capable of meeting the current and future needs of Thurston PUD and its customers also providing a clear migration path to a larger, more robust automatic meter reading system.

Thurston PUD seeks to implement a software solution that can perform in the following manner:

1. Facilitate most-effective reading process possible
2. Perform advanced data analysis of incremental meter readings
3. Maximize existing investments in meter reading technology
4. Support conservation monitoring and enforcement
5. Provide accurate meter reading to billing software

Meter Reading Devices

The proposed software should interface with multiple meter reading devices from multiple meter manufacturers including, but not limited to Badger, Elster/AMCO, MasterMeters, Sensus.

- Handheld computers or other type of field deployable meter reading device
- Optical Probes or other types of Touch-Read interfaces



- Radio equipped handheld computer, capable of use with multiple meter manufacturers, for Automatic Meter Reads

Software/Program Compatibility

- Must work with current customer information system and billing software – Springbrook Software v7.16.00 and future updates and versions by Accela. *(Failure to meet this requirement will result in disqualifications).*
- Software must be compatible with current Thurston County Information Technology host server system requirements including, but not limited to
 - a. Microsoft Windows 7 Pro or older versions
 - b. Internet Explorer
 - c. Google Chrome
 - d. Office Suite 2013
 - e. Adobe Acrobat
 - f. Thurston County-issued firewalls or other security measures

More county system requirements can be gathered, but overall, the proposed software must be compatible and interface with these programs, that is, if the propose software is web browser-based, it must have defined applications with standard interfaces to allow for existing and planned software applications.

Any upgrades, operating system changes or integrated features to the proposed software in the future should still be compatible and be able to interface with our billing software.

Meter Reading Routes

The proposed software shall be used to optimize meter reading routes and cycles. The solution should be straightforward and user-friendly. Bidder should include previous experience optimizing meter reading routes.

- Ability to load multiple meter reading routes on a handheld computer or field deployable reading device
- Ability to easily upload and revise meter reading routes
- Back-up and Restore function to ensure data integrity
- Field notes feature, using alpha numeric text to allow for comments and instructions to be transferred between meter readers and billing administrators
- Un-read Meter feature to filter out completed readings, and display only the unread accounts
- Visual read ready for manual entry of meter reading



Reports

Standard reports should include a custom report generator that allows the user to select and order specific fields from the database to be printed. Identified fields will be compatible with the current billing software or in the least, provide a renaming function.

Special Reports will also be considered that will detail meter reader productivity information. Information can include, but is not limited to total number of readings for a specific meter reader, elapsed time between each read, etc.

- Historical meter data, if necessary
- Supports and conforms to current billing software customer identifiers and reports
- Allows PC operator to review and edit any account in the meter reading database
- Generate route and activity report defined by the user
- Enables the user to setup and save custom report formats
- Enables the user to specify the data to be exported from the database to the billing system
- Allows user to search the database for records matching specified information

Identifiers and Fields

Thurston PUD uses identifiers and fields as determined and used in our billing system. If the proposed software has different identifiers or fields, then once data is converted into the billing system must meet the billing system standard. Fields, identifiers and language have already been implemented and adopted by the organization.

- 9-digit Customer Account number
- 3-digit water system number
- Meter number
- Meter route
- Sequence number

Additional System Requirements

- Annual maintenance program including but not limited to maintenance and software updates
- Toll-free Customer Support hotline
- Online Context Sensitive help
- Mapping view, ability to view route on map and/or add coordinates in field for ease of locating meters



Training

Thurston PUD requires that its staff is trained prior to the commencement of installations.

Vendor shall perform all training that includes all computer control, data integration, terminology, transferring reads and all information between meter software and billing system, creating reports, troubleshooting and diagnostic procedures, revising and creating new information, registering a new meter reading device, revising and adding new meter reading routes.

Vendor shall provide a checklist in order to review training topics are covered. The cost of training shall be carried in the unit prices proposed on the bid sheet.

Support

Vendor shall provide trained persons to answer technical questions and guide Thurston PUD employees through the use or diagnosis of the software through a toll-free number. Telephone support should be available at a minimum from 8:00 a.m. through 6:00 p.m. Pacific Standard Time.

Vendor should also have online context sensitive help support available to Thurston PUD employees. Online resources should be accessible and accessible via the software itself as well.

Timeline/Schedule

Qualifications must provide a chronological timeline of each task or event and the estimated time required to complete the installation and rollout date.

Project Management

If applicable, the qualifications will also outline the methodology in which the technical approach will be accomplished and a clear understanding of the scope of work in a detailed project plan outlining the major tasks and responsibilities, time frames, and staff assigned for each category of the scope of work.

Qualifications will clearly distinguish the vendor's duties and responsibilities and those duties required by Thurston PUD. Absence of these distinctions will be assumed the vendor is assuming full responsibility of all tasks.

Qualifications should include information relating to hardware, software, installation, testing and training.

Expenses

The bidders shall provide a proposed fee schedule for installation of hardware and/or any other equipment required. All expenses must be listed. Bidder shall quote unit prices for each item on the bid form and include all fees and surcharges. Bidder will also include any anticipated costs such as upgraded features, operating system upgrades.



QUALIFICATIONS FORMAT REQUIREMENTS

RFQs shall be accepted at the Thurston PUD offices, 1230 Ruddell Road SE, Lacey, WA 98503 by no later than 3:00 p.m. on November 20, 2018. All RFQ's must verify the following.

- Bidder must be licensed to do business in the state of Washington
- The proposed solution is commercially-available licensed software and is currently in use by other water utility organizations
- Bidder must have at minimum five (5) years' experience implementing software similar in size and scope to the system described throughout the RFQ
- Bidders must have a minimum of five (5) years of selling and serving the proposed software
- Bidder must provide a list of at least three (3) water utilities of similar sizes or larger where proposed software is currently in use.

We prefer that you respond in writing by sending, one (1) original, five (5) copies and one (1) electronic version (CD-ROM) of the qualifications in a sealed envelope bearing the name and address of the respondent. However, we will accept RFQs electronically if they are sent to rclemens@thurstonpud.org

RFQ's will be sealed and clearly marked with the title "Request for Qualifications: Thurston Public Utility District Water Utility Meter Collection and Route Management Software"

Bids will be addressed to

John Weidenfeller, General Manager
PUD No. 1 of Thurston County
C/O Ruth Clemens
1230 Ruddell Road SE
Lacey, WA 98503-5748

Thurston PUD requires comprehensive responses to every section within this RFQ.

To facilitate the review of the responses, vendors shall follow the described qualifications format. The intent of the qualifications format requirements is to expedite review and evaluation. It is not the intent to constrain vendors with regard to content, but to assure that the specific requirements set forth in this RFQ are addressed in a uniform manner amenable to review and evaluation. Please submit attachments as tabs as outlined below.

TAB A **Qualifications and Experience**

- 1) Describe the qualifications and experience of the vendor in the last 5 years in performing services in similar size and scope.
- 2) Describe the outcomes and experience implementing and serving customers using the proposed software.



3) Describe the current users of the software.

Particular emphasis will be placed on vendors that have provided similar services in water utilities of similar size.

TAB B Rates and Expenses (System)

1) Provide a proposed fee schedule for the software installation, training, additional hardware, testing, and any other expenses included in your service.

2) Expenses not specifically listed will not be considered reimbursable.

TAB C Project Timeline

1) Qualifications must provide chronological timeline of each task or event and the estimated time required to complete the engagement.

TAB D Project Design and Methodology

1) Qualifications must indicate the technical approach used and a clear understanding of the scope of the work, including a detailed project plan for this project outlining major tasks and responsibilities, time frames, and staff assigned for each category of the scope of work identified above.

2) Qualifications shall clearly distinguish the vendor's duties and responsibilities and those of the District. Absence of this distinction shall mean the vendor is assuming full responsibility of all tasks.

3) Describe the process of District staff adding additional meters to the system as new subdivisions are constructed.

TAB E Oversight from Single Vendor

1) The District strongly desires to contract with a single vendor to accomplish all work and/or services outlined in this Request for Qualifications.

2) Any proposed subcontractor must be identified in the qualifications response.

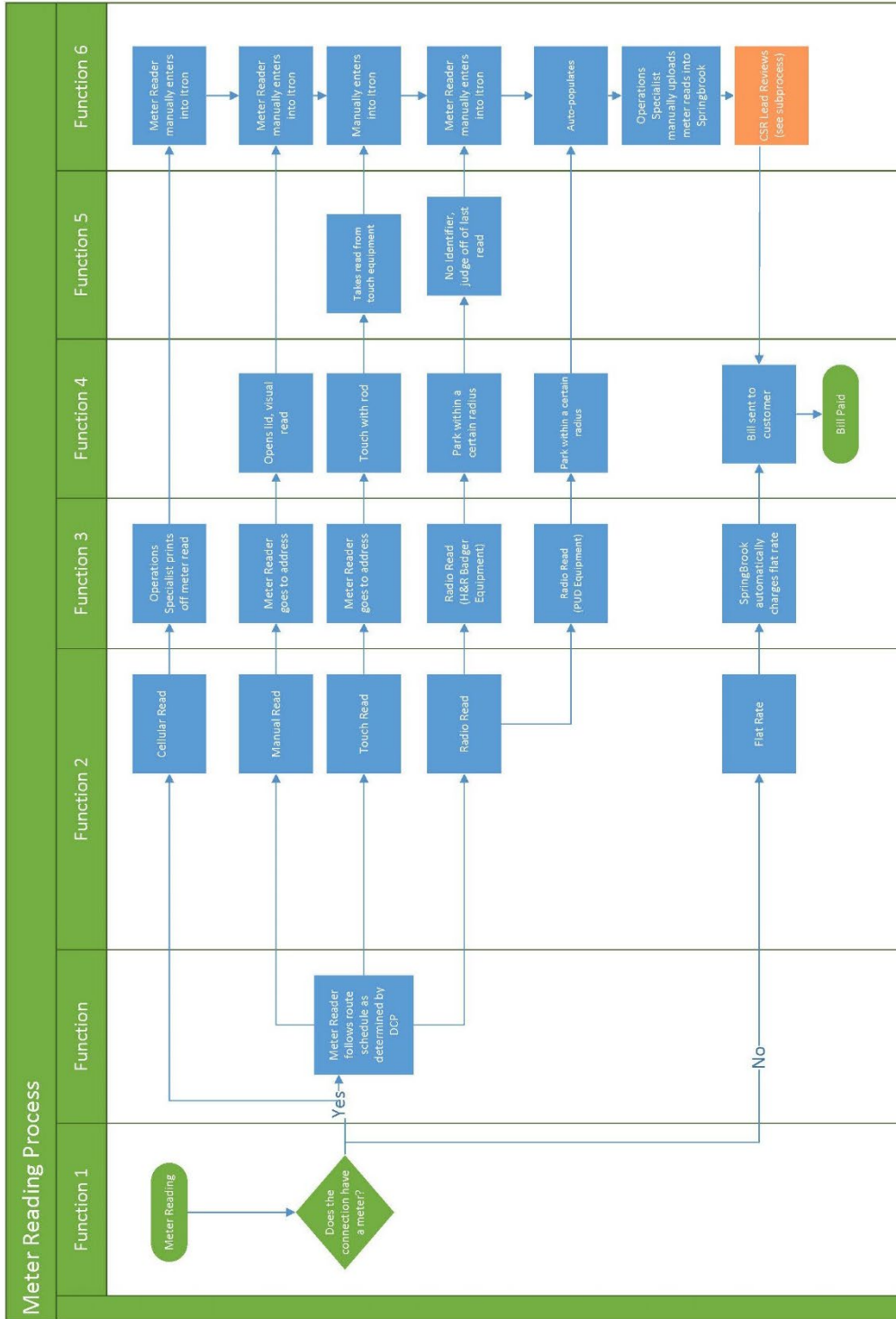
3) Any work not conducted by the Vendor or his subcontractor must be disclosed.

TAB F References

1) Provide references for similarly successful projects from three water utilities agencies, including the name of the agency, contact name, telephone, fax and email address. Reference listings should also include any relevant project numbers and contract prices.



Figure 1: Current Meter Reading Process



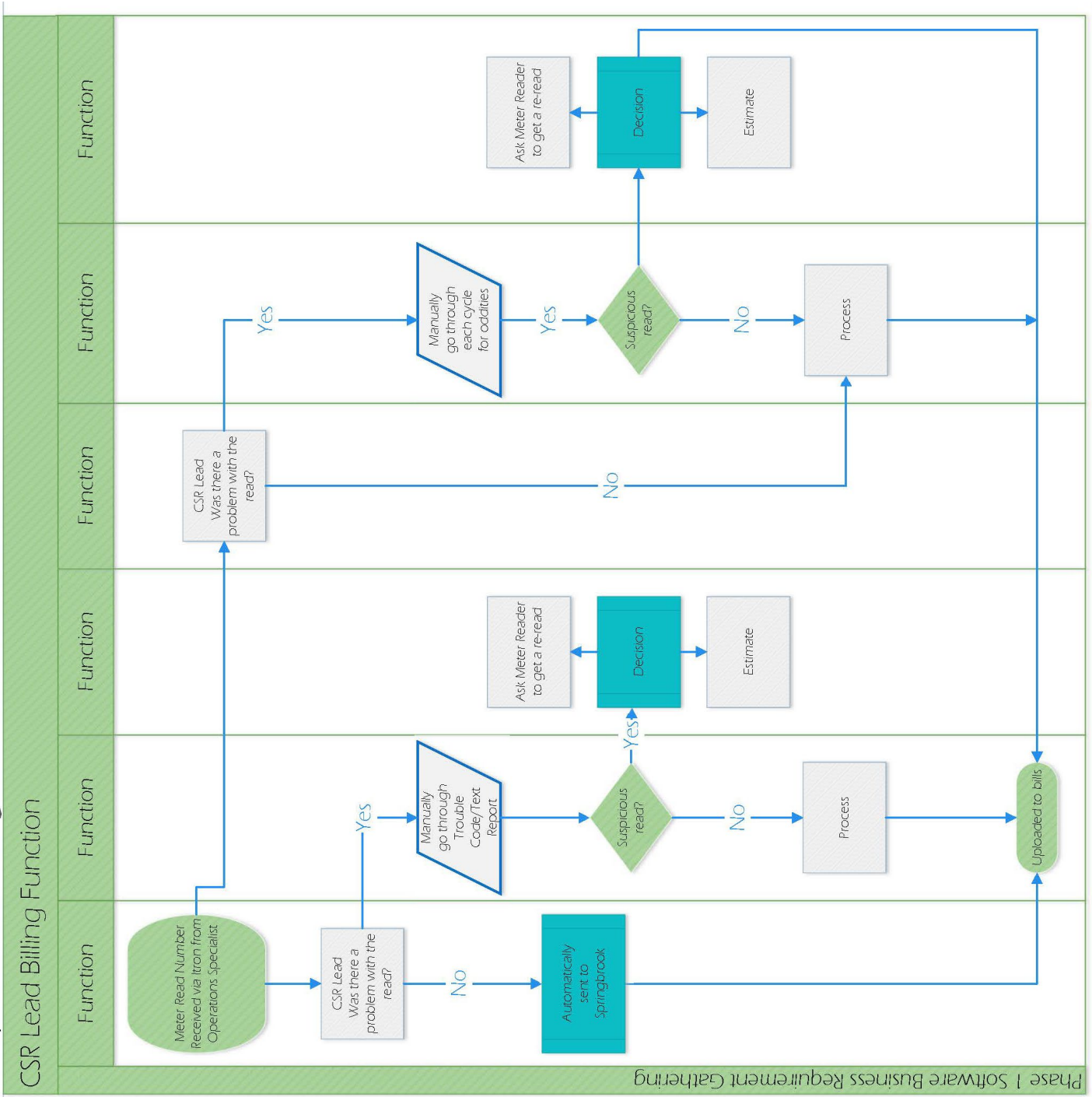


Figure 2: Billing Process