



NEW BERN

NORTH CAROLINA

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Department of Public Utilities - Electric
P.O. Box 1129
New Bern NC 28563

**REQUEST FOR PROPOSAL
For Meter Data Management
System (MDM)
Advertisement # 2024052**

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I. PROJECT DESCRIPTION

The City of New Bern is requesting Proposals from qualified service providers with a proven record of delivering and supporting a utility meter data management system (MDM).

II. OBJECTIVE OF THE REQUEST FOR PROPOSALS

The purpose of this RFP is to select the MDM solution that best meets the needs of the utility, not limited to operations, integration, and support. Preference may be given to hosted and/or service as a software (SaaS) solution. The solution should be based on the criteria specified herein and to generally set forth the Terms and Conditions for which the City of New Bern will contract with the selected firm. The Request for Proposal packet submitted, and possible subsequent interviews shall serve as the basis for selection without regard to fees. The information provided in the RFP package from the City is intended to give information to the prospective firms concerning the required services and the basis for awarding a purchase agreement. It is not necessarily intended to completely define the selection criteria or contractual relationship to be entered into by the City of New Bern and the successful firm. All North Carolina General Statutes must be observed.

The scope of contracted services should include the following capabilities:

- Meter Data –
 - a. Utility revenue grade meter data: electric, water and wastewater
 - b. Number of meters: 24,000 electric, 18,000 water
 - c. Number of accounts – 30,000
 - d. Daily, weekly and monthly registers
 - e. Intervals – monthly, daily, hourly and 15 minute

- Billing determinants –
 - a. Water & Wastewater – Gallons, hundreds and thousands
 - b. Electric – kWh, kW, kVA, kVAh, kVAR, kVARh and Power Factor.
 - All quantities both delivered and received.
 - All quantities with a fixed time of use
 - All quantities with a variable user defined month, day, hour.
 - Variable factors are defined after the billing period.

- Integrations –
 - a. MultiSpeak compliant
 - b. Open API's to access third party system data

- Customer Information System (CIS) Integrations –
 - a. System synchronization
 - b. View Service Orders
 - c. Populate Service Orders
 - d. Update Service Order Status
 - e. Meter on-demand read
 - f. Meter remote connect & disconnect

- AMI Integrations –

- a. AMI Electric Import: Cooper/Eaton/Yukon
- b. AMI Water Import: Cooper/Eaton/Yukon
- c. AMI Water Import: Neptun 360
- d. AMR Electric & Water Import: Itron FCS
- e. Manual Electric & Water Import: Hand Keyed
- f. Meter reads – register reads and 5, 15, 60 minute interval reads.
- g. Receive Meter Events and/or flags in near real-time
- h. Receive voltage data
- i. Receive pressure/temperature data
- j. Remote pings via MultiSpeak
- k. Remote on-demand reads via MultiSpeak
- l. Remote connect and disconnect via MultiSpeak
- m. Remote demand reset via MultiSpeak

- Data -

- a. Database designed for multiple commodities, including electric, water, or other commodities tracked and billed periodically.
- b. Solution designed to accommodate multiple meter channels with user-configured units of measure.
- c. Database designed to be accessible by users for use with third party reporting tools.
- d. Database designed to be accessible by users with internal tools for generic querying.
- e. Solution should support both batch import and continual/real-time import of meter data?
- f. Solution should support measurement and tracking of data delivery performance of each meter data source?
- g. Solution should track all versions of meter data, with explanation of data changes.
- h. Solution should include an audit log on the history of:
 1. Meter Data
 2. Validation Configurations
 3. Other Configurations
 4. Other Data
- i. Solution should annotate both meters and their data with notes and later search those notes.
- j. Solution should show the presence of notes on a meter or its data identified when viewing reports or analyses of that meter or data?
- k. Solution should include to import for non-metrology data and reporting
Such as: CSR call information, financial information, social media etc
- l. Solution should include import for user defined information such as equipment to meter relationships, billing rate, read route and cycle etc.

- Meter Attributes –
 - a. Solution should capture meter data from multiple meter reading systems and provide the ability to search and filter reporting by meter data source.
 - b. Solution should track and perform sorting & filtering of reports and views by Location Class or Billing Class?
 - c. Solution should track and perform sorting & filtering of reports and views by bill Cycle and Route?
 - d. Solution should track, maintain and report other data related to meters. Such as meter warranty expiry dates, pipe materials by location, number of occupants at a premises, square footage of premises etc.

- Data Retention –
 - a. Solution should store raw data (in the original time increments) imported from meter data sources to provide a long-term audit trail.
 - b. Flexible storage strategy to retain 3, 4 or 5 years of historical data for immediate online analysis.

- Validation Estimation and Editing
 - a. Solution should have the ability to view validated and unvalidated register reads
 1. By Channel
 2. By Date Range
 3. By VEE Status
 - b. Solution should have the ability to view validated and unvalidated interval reads?
 1. By Channel
 2. By Date Range
 3. By VEE Status
 4. Multiplied Values
 - c. Solution should clearly show the difference between reads that have been estimated, gap filled, or manually edited.
 - d. Solution should have visualizations to help troubleshoot issues with meter reads that have failed validation.

- Accessibility and Storage -
 - a. Solution should have flexible storage strategy to retain 3, 4 or 5 years of historical data for immediate online analysis.
 - b. Solution should have data archiving for long-term retention.
 - c. Solution should have the ability to rapidly restore archived data for online analysis when needed.

- Billing -
 - a. Calculate and deliver the following ELECTRIC billing determinants:
 1. Register read for a given date
 2. Volumetric consumption for a given period
 3. Volumetric consumption by TOU window calculated from interval data
 4. Volumetric consumption by TOU window calculated and delivered from the meter
 5. Peak demand for the billing cycle calculated by interval usage
 6. Peak demand for the billing cycle calculated and delivered from the meter
 7. Usage during a critical Peak Pricing period.
 8. Usage reduction during a Peak Time Rebate period.
 9. User defined coincident peak demand month, day, hour

- b. Calculate and deliver the following WATER billing determinants:
 1. Register read for a given date
 2. Volumetric consumption for a given period
 3. Volumetric consumption by Usage Tier calculated from interval data

• Reporting –

- a. Solution should have a report to show peak usage over a specified time range for a meter or group of meters
- b. Solution should allow graphing of usage data including TOU/Tier Windows?
- c. Solution should allow graphing of usage data with weather overlays.
- d. Solution should allow graphing of different data sets on the same chart to allow users to look for correlations
- e. Solution should have a heat map analysis tool that allows for viewing of not just usage data but other data sources as well (such as weather, voltage/pressure, etc).
- f. Solution should allow user to configure, edit and manage virtual meters to build aggregated or average usage profiles using virtual meters.
- g. Solution should allow for ad hoc reporting.
- h. Solution should allow for scheduled reports.
- i. Solution should allow for exporting of data from reports to any of the following formats: CSV/XLS, PDF, Text.

• Security –

- a. Solution should have the ability to manage users/groups via Active Directory.
- b. Solution should have the ability to Single Sign On (SSO) via a technology like SAML.
- c. Solution should have allow logs a user out after a predetermined amount of time.
- d. Solution should lock a user account if there are a certain number of failed login attempts.
- e. Solution should undergo penetration testing annually by a third party and provide proof of passing vulnerability tests.
- f. Solution should keep all components up to date with security patches applied in a timely manner.
- g. Solution should allow for a mix of administrator rights.

III. RFP SCHEDULE

RFP Schedule of Events	
September 7, 2023	Advertisement date
September 22, 2023	Last day to accept questions and requests for clarification on the RFP 5:00 PM (local time)
October 6, 2023	Answers to submitted questions provided by addendum 5:00 PM (local time)
October 13, 2023	Proposal due - 4:00 PM (local time)
October 16, 2023	Evaluation period begins

IV. QUESTIONS

All questions shall be in writing and e-mailed to colonl@newbernc.gov by the September 22 2023, by 5:00 PM local time. Contractors will enter "RFP # 2024052 for MDM System for Electric Utility Services Question(s)" as the subject for the email. All questions will be answered by addendum by October 6th, 2023 by 5:00 PM local time.

No information, instruction or advice provided orally or informally by any City personnel, whether made in response to a question or otherwise concerning this RFP, shall be considered authoritative or binding. Firm shall rely only on written material contained in an Addendum to this RFP.

V. SELECTION CRITERIA

Respondents should address each of the evaluation criteria listed below and provide specific examples of projects they have undertaken that demonstrate their qualifications. Response document shall be no more than 25 pages (single sided).

Firms interested in performing the professional services requested must submit the following information:

1. Three (3) copies of their RFP response including name, address, and phone number of contact person. Facsimile and electronic submissions are not acceptable.
2. Proposal may not exceed twenty (25) 8 ½" x 11" pages in length and must have a text size of 11 or greater.
3. Proposal must be in a sealed envelope marked "**Request for Proposal # 2024052 City of New Bern Utility Meter Data Management System (MDM) Services.**" **Due By 4:00 PM on October 13, 2023**

1. Proposals may be mailed or hand delivered to:

Lori Colon
City of New Bern
606 Fort Totten
2nd Floor,
New Bern, NC 28560

2. Questions should be addressed to:

Lori Colon
Purchasing & Warehouse Manager
(252)-639-2800
colonl@newbernc.gov

All questions must be submitted via email by **5:00 pm on September 22, 2023, 2023**. All responses to questions will be answered by addendum by **5:00 pm on October 6th 2023**. RFP responses may be sent via US Mail, FedEx, UPS, or hand delivered. Faxed RFP responses will not be accepted.

Section I: Project Details

A. Work Plan Approach: Provide a narrative or other form to explain your general approach to development of similar projects, development of design specifications, and bid/construction administration services.

B. Experience: Provide examples of project related experience. Evaluation of experience will be based on the following:

- a) Resumes of the proposed members of the program and design team who will be committed to the project(s). Resumes must include a description of the person's qualifications, professional licensing and past experience with similar projects. The project manager and other key team members should be clearly identified. If subcontractors are to be used for any portion of the work, they should be identified and their qualifications included.
- b) Project related experience of the managing firm and subcontractors. Provide specific examples of similar or larger projects and all applicable contact information, including owner, contractor, and other parties.

C. Schedule: Provide the following:

- a) Discussion of current workload including current project commitments for the project team and resources available for the projects.
- b) Provide a sample project schedule based on your recommended project approach. Project schedule should include key milestones, reasonable review times for the City, and estimated man-hours per task.

D. Price: Provide detailed price for scope of service.

Section II: General Management

- A. Project Management and Implementation: Describe your process for project management and implementation and ensuring that the project stays within budget and is completed within the contract time.
- B. Quality Assurance and Quality Control: Discuss the firm's quality control/quality assurance procedures related to management of data collection and condition ratings.
- C. Legal Issues: Note if any lawsuits; Federal, State or Local tax liens; or any potential claims or liabilities pending against you, your firm, or the officers of the firm at this time. If yes, please explain.

VII. EVALUATION CRITERIA

1. Consultant selection will be conducted in accordance with NCGS 143-64-31. Statements of Qualifications received by the deadline and prepared in accordance with RFP

instructions will be reviewed to determine the level of service considered most advantageous to the City.

2. The City will select the consultant considered best qualified to provide the desired level of service, with consideration for the long-term interest of the City's efforts based on demonstrated competence and qualifications without regard to fee other than unit price information.
3. After selection of the best qualified consultant to meet City's needs, the City shall negotiate a fair and reasonable fee with the consultant for the desired level of service.
4. Proposals will be reviewed and evaluated by City staff familiar with the existing facilities, in accordance with the following criteria:
 - a. General Qualifications, Competence & Reputation of Firm (35 points)
 - Age, size, staff qualifications and stability of firm
 - Projects to illustrate competence in similar electric utilities projects
 - Availability of staff to handle the projects
 - Reputation with previous clients
 - b. Experience of Involved Staff (50 points)
 - Experience with similar type improvements
 - Key personnel – roles and experience
 - Subconsultants, if any
 - c. Ability to Address Local Needs (35 points)
 - Grasp of projects requirements
 - Design approach/methodology
 - Completed similar project(s) in the local area
 - d. Availability (15 points)
 - Ability to provide access to qualified projects team members on a continual basis
 - Ability to commit available resources (current workload) to the projects
 - e. Project Delivery Timeline (20 points)
 - Provide an estimated timeline for the completion of the design, plans, and documents suitable of bidding purposes for Phase I

VIII. METHOD OF AWARD

1. Contractor selection, RFPs received by the deadline and prepared in accordance with RFP instructions will be reviewed to determine the level of service considered most advantageous to the City.
2. The City will select the contractor considered best qualified to provide the desired level of service, with consideration for the long-term interest of the City's efforts based on demonstrated competence and proposal.

3. After selection of the best qualified firm to meet the City's needs, the City shall negotiate a fair and reasonable fee with the consultant for the desired level of service.
4. Proposals will be reviewed and evaluated by City staff familiar with the existing facilities, in accordance with the following criteria:

IX. EQUAL OPPORTUNITY RIGHTS

The City does not discriminate in any of its projects and activities. The Consultant awarded the contract for work will be required to assure that no person shall be denied employment or fair treatment, or in any way discriminated against, on the basis of race, sex, religion, age, national origin, or disability.

X. CITY OF NEW BERN RIGHTS

The City reserves the right to reject all or portions of any or all responses, to waive irregularities and technicalities, to re-advertise, or to proceed to provide the services otherwise, in the best interest of the City. The City may, at its sole discretion, modify or amend any and all provisions herein. The City will not pay for any information herein requested, nor is it liable for any costs incurred by the participating firm.

XI. INSURANCE REQUIREMENTS

Prior to the commencement of performance, the successful firm / joint venture Shall maintain at its own expense (a) Commercial General Liability Insurance in an amount not less than \$1,000,000 per occurrence for bodily injury or property damage; "City of New Bern", PO box 1129, New Bern, NC 28563, shall be named as additional insured. (b) Professional Liability insurance in an amount not less than \$1,000,000 per occurrence – if providing professional services; (c) Workers Compensation Insurance, as required by the general statutes of the State of North Carolina, and Employer's Liability Insurance not less than \$500,000 each accident for bodily injury by accident, \$500,000 each employee for bodily injury by disease, and \$500,000 policy limit; (d) Commercial Automobile Insurance applicable to bodily injury and property damage, covering all owned, non-owned, and hired vehicles, in an amount not less than \$1,000,000 per occurrence as applicable. Certificates of Insurance shall be furnished prior to the commencement of