PORTLAND WATER DISTRICT
ABC PROJECT
ASSET MANAGEMENT, BILLING, AND CUSTOMER SYSTEM

RFP No. PWD-17-002ABC

ADDENDUM NO. 1
May 18th, 2017

ITEM 1:   **Pre-Proposal Meeting Attendance**

As promised here is a list of those individuals and their company that attend the mandatory pre-proposal meeting. The Companies in this list are the only ones eligible to submit a proposal as the Primary Contractor.

First Name	Last Name	Email Address	Organization
Marie	Giannangeli	marie.giannangeli@us.abb.com	ABB
Tony	Phipps	Tony.Phipps@ca.abb.com	ABB
Brenda	Klem	bklem@advancedutility.com	Advanced Utility
Greg	Mack	gmack@cayenta.com	Cayenta
Josh	Stroessner	jstroessner@cityworks.com	Cityworks
Shelley	MacLeod	shmacleod@cogsdale.com	Cogsdale Corporation
Frank	Fata	ffata@cogsdale.com	Cogsdale Corporation
Patrick	Kenney	pkenney@cohesivesolutions.com	Cohesive Solutions, Inc.
Peter	Kraft	peter@confluencegroup.com	Confluence Group
Kimberly	Evert-Kuhn	kevert@cusi.com	CUSI
Mike	Petrarca	mpetrarca@denovo-us.com	Denovo
Chris	Lund	clund3@dxc.com	DXC
Bob	Carroll	rcarrol1@csc.com	DXC
Bryan	Hale	bryan.hale@emaint.com	eMaint
Dawn	Siegel	Dawn.SIEGEL@GISINC.COM	GISinc
Tom	Wassell	tom.wassell@infor.com	Infor
Kevin	Clancey	kevin.clancey@itineris.net	Itineris
Ric	Glowienka	ric.glowienka@itineris.net	Itineris
Tom	Martland	tmartland@mainsaver.com	Mainsaver
Leslie	Faulkner	lfaulkner@northstarutilities.com	NorthStar Utilities Solutions
Mac	Campbell	mcampbell@northstarutilities.com	NorthStar Utilities Solutions
Peter	Godfrey	peter.godfrey@powereng.com	POWER Engineers, Inc
Steve	Kerr	steve.kerr@powereng.com	POWER Engineers, Inc.
John	Bastian	jbastian@smartgridcis.com	SmartGridCIS
chris	mcatee	chris.mcatee@superion.com	Superion
Kyle	Rainey	Kyle.Rainey@ssivt.com	Systems & Software
Lou	Garcia	louis.garcia@timmons.com	Timmons Group
Glenn	Mathes	gmathes@truepointsolutions.com	TruePoint Solutions
Christine	Lyden	christine.lyden@tylertech.com	Tyler Technologies
Ericka	Miller	ericka.miller@vertexgroup.com	Vertex
Deanna	Belle	aibaugh@dtsgis.com	VueWorks

| John | Sala | jsala@watersmartsoftware.com | WaterSmart Software |
| Peter | Vandergraaf | pvandergraaf@wonderwarenorth.com | Wonderware North |

ITEM 2: **Bid Checklist**

- 15 printed copies
- 1 digital copy on a thumb drive
- Price form signed and in a sealed envelope
- Use Forms provided:
  - Form A – Vendor Background for both primary and significant subs
  - Form B – Software Offerings
  - Form C – Implementation History for both primary and significant subs
  - Form D – References for both primary and significant subs
  - Form E – Questions and Information Items
  - Form F – System Requirements in spreadsheet format
  - Form G – Price forms signed and in sealed enveloped clearly labeled
  - Form H – Task and Effort Projections
- Signed transmittal Letter (see Section VI.1)
- Section VI provides detail on submittal needs
- 100 pages or less excluding Forms E & F

ITEM 3: **Mailing / Shipping Address**

Due Date: Wednesday, June 14th, 2017, 2:00 p.m. EST **at the District Office**

USPO: 225 Douglass St, Box 3553, Portland, ME 04104-3553
FedEx etal: 225 Douglass St, Portland, ME 04102

ITEM 4: **Bidders Questions**

Question: Can you clarify Batch Job Scheduling for billing?

Answer: **We would like to see this in the new system. Vendor to describe their batch job scheduling functionality as part of Proposal Form E – Questions and Informational Items, question I-10.**

Question: Can you clarify NASSCO PACP certification requirement?

Answer: **NASSCO PACP has established data and value standards for TV inspection of Sewer Mains and Manholes. Service companies who provide TV inspection services deliver the resultant data following the NASSCO PACP standard. Vendor to describe their ability to upload or import sewer inspection data that follows the NASSCO standard as part of Proposal Form F – System Requirements, requirement T-7.**

Question: Would we accept the digital file on a CD or DVD?

Answer: **No, digital file must be on a thumb drive.**

Question: Do we have a cloud strategy?
Answer: **The District has not established a formalized cloud strategy. If you are proposing one then you should address concern regarding the reliability and accessibility to it and how District would continue to conduct business (taking calls from customers or coordinating work in field, for example) when the cloud connection is severed.**

Question: Please explain the GIS system in place today.

Answer: **We are in process of updating ESRI to version 10.4.1 on Oracle 11, running on a Windows 2012 OS.**

Question: Regarding price forms, can you clarify the per 100 users stipulation?

Answer: **We used the "per 100 users" as a way to normalize the pricing for comparative purposes similar to what you may see in a grocery store. In addition to the per 100 user value, the vendor can include site license cost and or other licensing schema. The District has 178 employees, each of whom uses the current Hansen software in some capacity. Approximately 80 users connect concurrently. Regarding software licensing, support and maintenance, etc., please refer to Section III.H, Section VI.A.9, and Form G Note 1 for more considerations.**

Question: Is there an order of preference in terms of how these systems are placed in terms of billing, asset management, the mobile or customer facing piece? How do you see this unfolding from a priority standpoint?

Answer: **The District is looking to the vendor and their experience and success for recommendations on the implementation sequence. Vendor should be thorough in their explanation of methodology and plan.**

Question: Does the 100-page limit include attachment and supplemental information?

Answer: **That was the original intent. Upon further discussion the District has revised this to state "Proposals shall be limited to 100 pages total inclusive of all forms and any supplemental information, optional items, and appendices – EXCLUDING FORMS E and F."**

Question: How many field personnel, technicians are there that you expect to equip with technology to execute work in the field?

Answer: **The District expects to equip 95 field staff with mobile technology when fully deployed.**

Question: You've stated that the District has 178 employees. Are you expecting that virtually all of these employees will be a user of one or more of these systems?

Answer: **Yes. All employees today interact with the Hansen system at some level.**

Question: Regarding the mobile workforce, does the District utilize a device strategy to date and does the District desire to retain those devices? Or should the response include a proposal for a new device strategy?

Answer: **The District has installed laptops in most of our vehicles and the mobile work force is arriving on the scene with those. However, the laptops are securely mounted in the vehicles and not the most portable. The District is looking for more mobility for our workforce, so we would need to know the platform upon which we would deliver that mobility.**

Question: Would the District accept a URL link to system documentation and training material requested in the RFP?

Answer: **Yes, that would be acceptable. Our current system provides a detailed data element dictionary, entity relational diagrams, a search index (field and table), an online reference with explanations of the application forms, a visual help that presents the form and allows user to click in box for explanation as well as table and field residence and any key relation or validation that applies, a how-to guide for all the key set up forms or processes in Hansen. We expect no less in newer systems. So this is not something out there for public consumption. You will have to give us a glimpse under the hood.**

Question: Will Portland Water District extract the data into a location to be used for transformation?

Answer: **Yes.**

Question: Please describe the systems and/or your processes in use today for asset management, billing, and mobile work force management.

Answer: **As discussed during meeting, this is a really big question. Hansen is a modular enterprise system for us today. With Hansen we record our asset registries, create work orders or service requests to care for the assets, set up scheduled preventative maintenance programs, and generally handle the asset life cycle. Hansen also stores all our rate paying customer information, handles move in/move out, records the meter reading data and generates bills and service requests. All customer financial transactions are recorded to reflect key transactional events such as billing, adjustments and payments.   As to mobile workforce, the District installed laptops in our vehicles years ago. Those users see the full Hansen applications the same as anyone in our office. We are hoping for an improvement in this area to tailor the application presentment to a mobile worker based on the asset and job at hand. We believe this has significant benefits with regard to data collection quality and more comprehensive work processes in the field. In this vision the mobile end user's system experience is vastly different from the office worker who may see the entire application. The selected vendor will be provided with background information about current processes.**

Question: Does Hansen do all of that for you now regarding the asset management, CIS, providing the scheduling, mobility in the field?

Answer: **Yes, Hansen performs all of the existing core asset management, billing, and customer service system functions.**

Question: Are we still mostly paper processes or using outdated IT systems?

Answer: **The District uses a combination of manual and system based processes.**

Question: Does the District have an asset management approach or developing a strategic asset management plan?

Answer: **The District completed a Comprehensive Water System Strategic Plan (CWSSP) in 2000. The selected vendor will be provided this as background information.**

Question: Are you leveraging your GIS?

Answer: **Yes. Currently, asset attributes reside in Hansen and the spatial attributes reside in GIS. District is open to revisiting the role GIS has in asset management, billing and customer relations.**

Question: Have you developed registries for your key assets?

Answer: **Yes, vertical and linear.**

Question: Are you using other inspections besides NASSCO PACP to get condition on other assets?

Answer: **Yes, Hansen has a few predefined inspections such as Water Backflow Assembly or Hydrant Flow tests, but the District has also leveraged the work management system to conduct inspections both reactively and proactively.**

Question: Recognizing that the District is 2/3 unionized; does the District anticipate any issues to changes in procedures and equipment as you move into a new platform and applications?

Answer: **The District anticipates adjusting to the configuration options of the new applications and delivery platforms.**

Question: Do you have integration between your Hansen product and your hydraulic modeling and/or other planning related applications such as forecasting and risk assessment? What is the current state of integration and what are the expectations moving forward?

Answer: **We currently use H2O Map from Innovyze for modeling. We do not use a live integration, nor do we anticipate doing so. We update the GIS on a daily basis and model annually. Looking ahead we are interested to see what new systems offer and how systems position the District for these advanced asset management tools.**

Question: If can't satisfy mandatory requirement does that eliminate vendor?

Answer: **No, all requirements will be scored and considered in the overall evaluation.**

Question: Will you be using your 2017 budget for this project or a future budget?

Answer: **A future budget.**

Question: With all these limitations to the Pentamation system did you also consider replacing additional systems?

Answer: **The District can look at that for future considerations but the focus on this RFP must remain on the ABC elements.**

Question: How long does the District anticipate this project will take? 12 months? 24 months?

Answer: **Vendors to propose the implementation schedule, as described in Section VI.8 of the RFP.**

Question: The Hansen product you have today has been acquired and is now part of Infor products and suites. Have you had any discussion with existing Infor representatives about potential upgrade of Hansen to Infor EAM?

Answer: **No.**

Question: Attachment #2 is missing in the Word document.

Answer: **See the PDF version for the supplemental information. This was not included in Word version. The Word version was included to assist in your use of the forms.**

Question: Is the funding for this project already secured capital funding or is a future state funding request that still has to be reviewed and approved?

Answer: **Funding has been included in the 2018 and 2019 capital improvement program. Final approval by the Board of Trustees will still need to occur based on the proposed product and implementation costs and any other contract negation considerations with the awarded vendor.**

Question: Regarding these and other related systems, are there District plans for the depreciation of any systems that would influence the vendor proposal as they consider how to best meet the District needs? Is there any IT roadmap that would suggest any of these systems being inoperable in advance of others?

Answer: **There are no planned retirement or replacement of related systems. Any upgrades are expected to be minor and non-disruptive to interfaces. More detail will be shared with the selected vendor.**

Question: Will be provided a list of all attendees and their companies?

Answer: **Yes, sent 5/15/2017.**

Question: There are a lot of current interfaces. This project won't be awarded until November. Of all the systems intended to be interfaced, are there any plans for any modifications or will they stay in their current state?

Answer: **For those interface within the District control, things will remain the same.**

Question: Has the District designated key leaders, stakeholders to be involved with the awarded group to be part of the process and allocate the appropriate time so that we truly working together?

Answer: **Yes. Peter Cutrone is full time on this project as the Project Manager. A core team has been named for the implementation representing key areas in the company (Water, Wastewater, Engineering, Customer Service and IT). Additional subject matter experts will be recruited as needed. We have a Steering Committee comprised of Senior Managers who will plan for, monitor and ensure levels of effort needs are met. Form H in the RFP should be filled out listing the level of effort for the tasks listed for the vendor and the District.**

Question: Are references (Form D) required of sub-contractors?

Answer: **Yes for the critical sub-contractors fulfilling ABC functionality. For example if you as the primary vendor are an EAM solution provider, we will need to see your references as well as those for your CIS partner. Form A and Form C should also be filled out in similar fashion.**

Question: Pricing of individual customizations is required, where is that on the pricing form?

Answer: **See Form G, Section 5, page 5 of 8. Pertains to custom code being recommended.**

Question: Can you clarify the 15-year life cycle cost (Section IV.4) versus Form G, Section 6 Support and Maintenance costs for 5 years?

Answer: **The District along with Arcadis will calculate the 15 year life cycle cost. The vendor is required to fill out From G. If you have a declining or inclining support and maintenance cost then we need to understand that.**

Question: What type of payments does the District accept?

Answer: **At our front desk, customers can pay by cash or check. Our lockbox provider processes checks only. Our EBPP service provider accepts ACH from Checking or Savings or credit cards (MasterCard and Visa only).**

Question: What is the preferred RDBMS?

Answer: **Our current database for ABC functions is Oracle. The District will also consider MS SQL Server.**

Question: What solutions has the District seen demonstrations of over the past 3 years?

Answer: **The District has seen various demonstrations at utility conferences over the past three years.**

Question: Is the organization open to a GIS-Centric Asset Management solution? One that leverages ESRI Geodatabase as the asset database of record?

Answer: **Yes.**

Question: What SCADA solution is currently in place?

Answer: **Intellution and OSI PI historian. However, vendor should consider interface to Hach WIMS.**

Question: *How will the budget be determined and approved? Is there $ already allocated in 2018 budget for this project? (we notice the FY starts in July for PWD).*

Answer: **The 2018 budget is currently under development and will be approved by the Board of Trustees in November. The District fiscal year coincides with the calendar year.**

Question: *How many total users of the system are expected (company-wide) and how many of these will be casual/read only users versus creating and managing work (rough % breakdown).*

Answer: **All employees are expected to be using some of the system. As discussed in meeting, all employees enter their time into Hansen (work order or service requests) as a means of generating a time card. Creation of assets, addresses and accounts are restricted.**

Question: *Please confirm all types of work you intend to use the mobile workforce management solution for – all work? i.e. maintenance, repair, inspections, construction, customer service? Others?*

Answer: **The District envisions tailored mobile solutions for all work processes where an employee is on site to perform work, including the list above.**