CITY OF COLUMBIA, SOUTH CAROLINA

Request for Proposal
RFP 011-15-16
Automated Meter Reading (AMR) & Advanced Metering Infrastructure (AMI)
Feasibility Study and Project Management Services

Date: March 31, 2016

Non Mandatory Pre-Proposal Meeting: April 8, 2016 at 10:00 A.M.

Response Deadline:
April 19, 2016
3:00 P.M. (EST)

Send Hard Copies and CD’s to:
City of Columbia/Purchasing Division
Attention: RFP011-15-16 AMR/AMI Feasibility Study and Project Management Services

1136 Washington Street – 4th Floor
Columbia, S.C. 29201

Questions must be submitted using Bid Online.
Deadline for additional information and questions is:
April 11, 2016
12:00 P.M. (EST)

LaWana Robinson-Lee, Senior Buyer
LaWana Robinson-Lee, CPPO, CPPB
CERTIFICATION

I certify that this proposal is made without prior understanding, agreement, or connection with any corporation, firm, or person submitting a bid for the same materials, supplies, or equipment, and is in all respects fair and without collusion or fraud. I agree to abide by all conditions of the proposal and certify that I am authorized to submit this proposal. In submitting a proposal to the City of Columbia, the respondent offers and agrees that if the proposal is accepted, the respondent will convey, sell, assign or transfer to the City of Columbia all rights, title, interest in and to all causes of action it may now or hereafter acquire under the Anti-trust laws of the United States and the State of South Carolina for price fixing relating to the particular commodities or services purchased or acquired by the City of Columbia. At the discretion of the City of Columbia, such assignment shall be made and become effective at the time the purchasing agency tenders final payment to the respondent.

The respondent’s final response as accepted by the City of Columbia shall mean: the final cost and technical proposals submitted by the awarded respondent and any subsequent revisions to the awarded respondent’s cost and technical proposals and the contract terms and conditions due to negotiations, written clarifications or changes made in accordance with the provisions of the RFP, and any other terms deemed necessary by the City of Columbia, except that no objection or amendment by the respondent to the RFP requirements or the contract terms and conditions shall be incorporated by reference into the contract unless the City of Columbia has explicitly accepted the respondent’s objection or amendment in writing.

Additionally, by signing you agree to the above and to all the terms and conditions set forth in this document and if awarded this proposal shall become the final contract.

WITNESSES AS TO RESPONDENT:  
______________________  BY:  _______________________________  
______________________  TITLE: _____________________________  
DATE:  _____________________________

WITNESSES AS TO CITY:  
______________________  CITY OF COLUMBIA  
______________________  BY:  _______________________________  
______________________  TITLE: City Manager  
DATE:  _____________________________
TABLE OF CONTENTS

I. GLOSSARY OF TERMS .................................................................................................................. 4

II. GENERAL INFORMATION ......................................................................................................... 7

III. PROJECT DESCRIPTION AND SCOPE OF SERVICES .............................................................. 10
    System Evaluation and Feasibility Study .............................................................................. 11
    Task 1: Assessment of Existing Metering System ............................................................... 11
    Task 2: Compatibility Assessment of Existing Billing System ............................................. 11
    Task 3: Evaluation of Advanced Metering Infrastructure System Technologies ............... 11
    Task 4: Financial Analysis .................................................................................................... 11
    Task 5: Meter Data Management System ........................................................................... 12
    Task 6: AMR/AMI Implementation Plan ............................................................................. 13
    Task 7: Business Case Recommendations ......................................................................... 13
    Deliverables .......................................................................................................................... 14
    Project Management Services .............................................................................................. 14
    Task 1: Planning Services ..................................................................................................... 14
    Task 2: Acquisition Services ............................................................................................... 15
    Task 3: Installation Services ................................................................................................ 16
    Task 4: Maintenance, Support and Warranty .................................................................... 16

IV. EXPERIENCE .......................................................................................................................... 16

V. RESPONSE REQUIREMENTS AND SUBMITTAL FORMAT .................................................... 16

VI. EVALUATION CRITERIA .......................................................................................................... 20

VII. TENTATIVE SCHEDULE OF EVENTS ................................................................................ 22

VIII. PROPOSAL SELECTION PROCESS .................................................................................. 22

IX. GENERAL INFORMATION AND INSTRUCTIONS .................................................................. 23

X. TERMS AND CONDITIONS .................................................................................................... 28

XI. APPENDICES ......................................................................................................................... 36

APPENDIX I- QUALIFICATION STATEMENT (LBE) ................................................................. 37

APPENDIX II- CONFLICT OF INTEREST .................................................................................. 38

APPENDIX IV- NON-COLLUSION AFFIDAVIT ......................................................................... 39

APPENDIX V- PRE-QUALIFICATION QUESTIONNAIRE – RFP011-15-16 ............................. 40

APPENDIX VI- REFERENCE QUESTIONNAIRE ......................................................................... 51

APPENDIX VII- RATE SCHEDULE ............................................................................................ 52
I. GLOSSARY OF TERMS

Actual Cost: All direct and indirect costs incurred for services, supplies, or construction, as distinguished from estimated or forecasted costs.

Addendum/Addenda: A written change, addition, alteration, correction or revision to a bid, proposal or contract document. Addendum/Addenda may be issued following a pre-bid/pre-proposal conference or as a result of a specification or work scope change to the solicitation.

Advancement Metering Infrastructure (AMI): The full measurement and collection system that include meters at the customer site, communication networks between the customer and a service provider, such as an electric, gas or water utility, and data reception and management systems that make the information available to the service provider.

Allowable Costs: Costs that are recognized by law, regulation, or the contract. A cost that is reasonable.

Amendment: An agreed addition to, deletion from, correction or modification of a document or contract. To revise or change an existing document; a formal revision, improvement or correction.

Assignment: Legal transfer of a claim, right, interest or property.

Audit: A detailed review and examination of records, documents and the business processes with the confirmation by outside experts of a situation or condition concluding with a detailed report of findings. A formal examination or verification of financial accounts or other business operations. Examples include financial, compliance and management audits.

Automatic Meter Reading (AMR): The technology of automatically collecting consumption, diagnostic and status data from water meter or energy metering devices (gas, electric) and transferring that data to a central database for billing, troubleshooting and analyzing.

Bill: A bill refers to a periodic statement of charges (volumetric, surcharges, and taxes) for utility services.

Billing cycle: The regular interval of time when customer’s meters are read and bills are issued, generally every month for the City of Columbia’s customers.

Billing period: The lapsed time between two specific consecutive meter reads for billing purposes.

Capability: The ability of a bidder to fulfill the contract at time of award.

City: City of Columbia, SC, also known as the “Owner” or “Utility”

Consultant: 1. To work or serve in an advisory capacity. 2. A person or company that possesses unique qualifications that allow them to perform specialized advisory services usually for a fee.

Contractor: Any individual or business having a contract with a governmental body to furnish goods, services, or construction for an agreed-upon price.

Cost: The actual expenses incurred in delivering a product, service, or construction; includes both direct and indirect costs, but does not include fee or profit for the contractor.

Deliverable: The completion of a milestone or the accomplishment of a task. Deliverables are used to measure successful performance.
Descriptive Literature: Information, such as charts, illustrations, brochures, and technical data, furnished by a bidder, on request as part of a bid, to describe the items offered; shows the characteristics or construction of a product, or explains its operation to determine the acceptability of the item.

Functional Specification: A specification setting forth the results required from the supply or service.

Late Bid/Proposal: A bid, proposal, withdrawal, or modification received, at the designated place for receipt, after the established due date and time. Procurement policies should be established in order to provide guidance regarding how late bids/proposals are handled administratively. In most public entities, late bids/proposals are not opened and may be returned to the bidder/proposer advising that the bid was received late (after the due date and time) and cannot be accepted.

Mandatory: Obligatory, required by order, a provision that may not be waived.

Mandatory Requirements (Conditions): Conditions set out in the specifications/statement of work that must be met without alteration. Not meeting mandatory requirements may be grounds for disqualification.

Offeror: The person/entity who submits a proposal in response to a Request for Proposals (RFP). One who makes an offer in response to a solicitation. Term Bidder is interchangeably throughout this RFP. Also see definition of a Responsible and Responsive Offeror/Bidder.

Pre-Bid/Pre-Proposal Conference (Meeting): A meeting held by the buyer with potential bidders/offerors, prior to the opening of the solicitation for the purpose of answering questions, clarifying any ambiguities and responding to general issues in order to establish a common basis for understanding all of the requirements of the solicitation. This may result in the issuance of an addendum to all potential providers. In certain situations, a mandatory conference may be advisable.

Price: The total amount, in money or other consideration, to be paid or charged for a commodity or service; normally includes all costs (direct labor, overhead, materials) and profit or fee.

Principal: One who employs an agent. A person who has authorized another to act for him/her.

Project Manager: Designated individual(s) within the agency to administer a specific task or contract.

Projected Savings: An estimate of the amount of water that will not be used because both suppliers and customers are implementing certain efficiency practices.

Proposal: A proposal is a document submitted by a vendor in response to some type of bid solicitation to be used as the basis for negotiations or for entering into a contract.

Request for Proposal (RFP): The document used to solicit proposals from potential providers for goods and services (Offerors). Price is usually not a primary evaluation factor. Provides for the negotiation of all terms, including price prior to contract award. May include a provision for the negotiation of Best and Final Offers. May be a single step or multi-step process. Introduced in the Armed Services Procurement Act of 1962 as well as by the Competition in Contracting Act of 1984.

Responsible Bidder/Offeror: Also referred to as Responsible Proposer or Respondent. A contractor, business entity or individual who is fully capable to meet all of the requirements of the solicitation and subsequent contract. Must possess the full capability, including financial and technical, to perform as contractually required. Must be able to fully document the ability to provide good faith performance.
Responsive Bidder/Offeror: Also referred to as Responsive Proposer or Respondent. A contractor, business entity or individual who has submitted a bid or proposal that fully conforms in all material respects to the IFB/RFP and all of its requirements, including all form and substance.

Savings: That part of disposable income not spent on current consumption; disposable income less consumption; any income that is not spent. *(Bishop, 2002)*

Service/Services Contract: An agreement calling for a firm’s time and effort. The furnishing of labor, time, or effort by a firm, which may involve to a lesser degree, the delivery or supply of products.

Short List: Names of candidates that have been narrowed considerably from a longer list of top-ranked Offerors.

Solicitation: An invitation for bids, a request for proposals, telephone calls or any document used to obtain bids or proposals for the purpose of entering into a contract.

System Evaluation (Used interchangeably with Feasibility Study) - is an assessment of the practicality of a proposed plan or method

Technical Specifications: Specifications that establish the material and operating requirements of products and services.

Unsuccessful Bidder: A vendor whose bid was not accepted for reasons of price, quantity, or failure to comply with specifications.

Value Added:

1. The increase in worth of a product or service as it moves through various stages of production and distribution.

2. What contribution a service function within an organization can make toward return on investment, increased productivity, or improved customer service.

*(Definitions above provided by the National Institute of Governmental Purchasing & Free Dictionary.com)*
II. GENERAL INFORMATION

The City of Columbia, SC, is soliciting proposals for Automated Meter Reading (AMR) / Automated Metering Infrastructure (AMI) feasibility study and project management services. The study will be to determine the feasibility of implementing an AMR/AMI system in the water utility service area and, if determined feasible and approved by City, provide project management and technical support to City staff through the acquisition and installation of an operational AMR/AMI system. The City anticipates using a Consultant/Project manager approach to project delivery.

A. PURPOSE

The purpose of this request for proposal is to solicit sealed proposals from qualified Consultant/PMs to perform a feasibility study that will guide the City of Columbia in developing a comprehensive plan and components required for the implementation of an Automated Meter Reading and/or Automated Meter Infrastructure (AMR/AMI) system. The consultant will also serve as the project manager and assist the city throughout the entire project.

The City will select one Consultant/PM to provide the services described in Section III. The tentative start date for this contract is June 2016. It is anticipated that this project will take five (5) years to complete.

Some of the expected outcomes for the feasibility study and project management services:

- Improve operational efficiency and reduced costs through remote transmission
- Improve customer service (ability to communicate more information and collect more timely information such as leak detection, abnormal usage patterns, and real-time consumption date, etc.)
- Improve water accountability
- Interface with Computer information system (CIS) and other necessary applications
- Increase safety in the field
- Reduce adjustments
- Optimize revenue
- Reduce field work costs
B. BACKGROUND

The City of Columbia, South Carolina, hereinafter called “City” owns and operates a public water system that is one of the largest in the state of South Carolina. The City water system services the incorporated areas of Columbia, Irmo, Forest Acres, Arcadia Lakes, and Chapin. The water system also serves several military installations including Fort Jackson and McEntire Air National Guard. A large portion of unincorporated Richland County as well as a small area of northeast Lexington County is also served by the City’s water distribution system. The water distribution system covers an area of approximately 320 square miles and serves a population of 400,000 through 145,000 metered accounts ranging in size from 10-inch to 5/8-inch meters. Meter ages and manufactures vary greatly throughout the system. The City is currently utilizing Hansen Technologies / Banner CIS.

In 2011, the City issued an RFP pilot project solicitation for AMR and AMI product installation and training services. This project resulted in piloting a fixed network automated meter reading system for 595 meters and an advance metering infrastructure for 197 meters. The AMR/AMI pilot project provided insight into the world of AMR/AMI technology. The City became familiar with this technology and had an opportunity to see it implemented on a small portion of the City’s distribution system. The City is now interested in implementing this technology system-wide; however, there are some concerns and questions on how to accomplish this goal. A sample of these questions may include, but are not limited to:

- What is the cost benefit to the City and customer on implementing this system-wide?
- The City has a variety of meters and differing manufacturers. Does implementing a project like this require a change-out to 1 meter type?
- What technology is available for reading multiple types of meters?
- Is a system-wide AMR, system-wide AMI, or hybrid system the best fit for Columbia?
- What grant funding / financing options are available?
- How does this project impact City rates, fees, charges?
C. UTILITY OVERVIEW

The City supplies potable water to approximately 146,000 meters throughout its water system.

Current City staffing includes:

<table>
<thead>
<tr>
<th>Position</th>
<th>NUMBER</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meter Technicians (reading, collections, and maintenance)</td>
<td>27</td>
</tr>
<tr>
<td>Meter Service Managers</td>
<td>6</td>
</tr>
<tr>
<td>Water Customer Service Representatives</td>
<td>21</td>
</tr>
</tbody>
</table>

All Accounts by Premise Type

<table>
<thead>
<tr>
<th>Premise Type</th>
<th>Number (Approximation)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Commercial</td>
<td>25,929</td>
</tr>
<tr>
<td>Residential (Single &amp; Multi)</td>
<td>112,030</td>
</tr>
</tbody>
</table>

The City uses a variety of meters, to include but not limited to Neptune, Badger, Sensus and Hersey, and sizes.

Current Meter Inventory

<table>
<thead>
<tr>
<th>Meter Size</th>
<th>Number of Meters (Approximation)</th>
</tr>
</thead>
<tbody>
<tr>
<td>5/8&quot;</td>
<td>124,730</td>
</tr>
<tr>
<td>1&quot;</td>
<td>5,818</td>
</tr>
<tr>
<td>1 ½&quot;</td>
<td>3,538</td>
</tr>
<tr>
<td>2&quot;</td>
<td>3,558</td>
</tr>
<tr>
<td>3&quot;</td>
<td>302</td>
</tr>
<tr>
<td>4&quot;</td>
<td>528</td>
</tr>
<tr>
<td>6&quot;</td>
<td>807</td>
</tr>
<tr>
<td>8&quot;</td>
<td>247</td>
</tr>
<tr>
<td>10&quot;</td>
<td>28</td>
</tr>
</tbody>
</table>

Distribution of Meters by Reading Method

<table>
<thead>
<tr>
<th>Reading Method</th>
<th>Number of Meters (Approximation)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manual</td>
<td>145,800</td>
</tr>
<tr>
<td>AMR</td>
<td>595</td>
</tr>
<tr>
<td>AMI</td>
<td>195</td>
</tr>
</tbody>
</table>

The distribution of meter boxes varies throughout the City and is not standardized. The selected Consultant/PM will be expected to make a recommendation for meter box standardization.
Current Meter Reading Process
The current meter reading process utilizes handheld electronic devices to enter meter reads directly from the existing meters. Itron is the handheld device and system used for processing water meter reading information. This system interfaces with our customer information and billing system (CIS) Banner from Hansen Technologies. The City is divided into ten billing cycles. It takes approximately one week to read a cycle resulting in monthly billing to utility customers.

D. PROJECT SCHEDULE
The feasibility study shall be completed four (4) months from the issuance of the Notice to Proceed.

III. PROJECT DESCRIPTION AND SCOPE OF SERVICES
The City requires a professional project management methodology and seeks to hire an experienced Consultant/Project Manager or firm (hereinafter referred to as “Consultant/PM”) as described in this Request for Proposal (RFP). The Consultant/PM will organize the City’s project into a multi-phase approach that will include, but not be limited to evaluating cost, feasibility, viability, and relative advantages and disadvantages of installing an AMR system-wide, AMI system-wide or a hybrid approach; identifying potential funding; identifying functional and technical requirements; producing a project plan, which consists of the work breakdown roles and structure, schedule, budget, staff requirements, risk plan, communication plan, quality plan, procurement plan, meter change-out program development and warranty documentation development; overseeing an implementation process, which consists of vendor/contractor selection and AMR/AMI installation; as well as specifying a maintenance program.

The Successful Consultant/PM shall develop a “Road Map” for the City to follow as it sets out to implement the AMR/AMI system. A wide variety of alternatives shall be proposed and evaluated to determine the best possible option for the City. Options shall include a basic description of how AMR/AMI would be deployed in a phased approach within the entire City water service area. A schedule for implementation of the project shall be developed based upon financial considerations including available capital funds and the determined rate of return on the investment.

The City desires to contract with one (1) Consultant/PM for the system evaluation/feasibility study and project management. The selected Consultant/PM shall assist in the progress from initial system evaluation to final AMR/AMI technology implementation, if it is feasible to do so.
System Evaluation and Feasibility Study

Each Respondent/Offeror must properly evaluate the current water distribution system needs, water customer service infrastructure, cost, feasibility, viability and relative advantages and disadvantages of installing an AMR/AMI system citywide. The Respondents may propose a hybrid approach where existing meters are not replaced but AMR/AMI technology is added to them and present the findings based on a cost benefit analysis back to the City for consideration and evaluation purposes. The City will work closely with the successful Consultant/PM to determine the most appropriate selection method which is the most advantageous for the City.

Task 1: Assessment of Existing Metering System
The selected Consultant/PM will perform an assessment with the Water Engineer and the Water Maintenance Superintendent of the City’s current water system infrastructure, billing system integration and IT requirements. The Consultant/PM shall conduct data gathering meeting / interviews with various City departments including but not limited to Engineering, Water Maintenance, Finance, Human Resource, Program Management and Information Technology (IT). The purpose of this task is to familiarize the selected Consultant/PM with the current system conditions as well as the needs and expectations of the end-users after successful implementation of a new AMR/AMI system.

Task 2: Compatibility Assessment of Existing Billing System
The City currently uses Banner as its customer information and billing system. The selected Consultant/PM will be expected to verify compatibility with the Hanson Technologies Banner system. As part of this task, the Consultant/PM shall evaluate how the proposed new meters will be incorporated into the current billing system while ensuring a smooth and successful transition plan.

Task 3: Evaluation of Advanced Metering Infrastructure System Technologies
The Consultant/PM shall evaluate available AMR/AMI technologies and provide recommendations on the best use of technology given the City’s operating environment. This evaluation shall include:

- Evaluate the performance of alternative meter reading technologies (system-wide AMR, system-wide AMI, and a hybrid system) in comparison to the base case (current methods) and determine the relative advantages and disadvantages of each alternative.
- Determine if multiple AMR/AMI systems are available to meet City’s needs ensuring that a fair, open and competitive process can be used to select a responsible vendor/Consultant/PM.
- Provide recommendations for an AMR/AMI technology system, billing system integration, staffing evaluation, and other technology issues.

Task 4: Financial Analysis
The Consultant/PM shall include an estimate for infrastructure cost associated with the recommended AMR/AMI improvements as well as annual operation and maintenance cost for
the first ten years of operation. A full economic analysis will be completed including a full cost/benefit analysis, revenue recovery and payback, return on investment, life cycle cost, and net present value. The final financial analysis should address how the system will reduce any billing issues.

Some of the items to be addressed in the financial cost benefit analysis are:

- Years to Payback
- Net Present value
- Return on Investment
- Cash flow analysis
- Funding options/recommendations, funding schedule by fiscal year and source of funding including private financing options
- Assessment of the impact of the project on City’s rates, fees and charges
- Ensures that all required IT, communications and other hardware and software needed for a successful implementation are detailed and included in the price structure

The Consultant/PM shall also identify and evaluate any grant, rebate, or other alternative funding source for implementation of an AMR/AMI system that the City would be eligible to apply for and obtain.

**Task 5: Meter Data Management System**

The Consultant/PM shall provide a recommendation for a Meter Data Management System (MDMS). This system will be critically important to the City’s AMR/AMI project to support the collection and storage of the meter data including meter reads, meter events, reading events, meter change-out and warranty documentation and other meter reported information. The MDMS must have the capability to interface with the City’s current billing and work order systems.

The MDMS shall include but not limited to:

1. A formal meter change out program.
2. A warranty documentation program of inventory as meter change out occurs.
3. Single repository for all metering data.
4. Provision customer meter data to a web portal for individual customer information, analysis, and response.
5. Provide future capability for water utility meters. MDMS shall have comprehensive capabilities that allow for the application of consistent processes and the maintenance of consistent interfaces independent of how, when, or where various meter reading technologies, including AMI, are deployed.
6. Support the most cost-effective AMR and AMI technologies to be deployed, without affecting upstream billing processes.
7. Provide long-term storage of register, interval, tamper, outage and meter event data in a fully versioned database.
8. Additional functionality shall include extensive validation, estimation, and editing capabilities; aggregation and calculation services; request brokering among multiple meter data collection systems (legacy or AMR systems); sophisticated export management capabilities; and auditable change tracking.

Respondents are requested to provide recommendations regarding the following: storage SLA, backup, redundancy, failover, capacity, processor speed and number of processors, data transfer mechanisms, cyber security, access methods, and other important considerations. MDMS shall utilize the Microsoft SQL Server database to provide a central repository for integration, and access by all business and analytical systems, and users of meter data throughout the utility.

Task 6: AMR/AMI Implementation Plan
The Consultant/PM shall develop a “Road Map” for the City to follow as it sets out to implement and maintain an AMR/AMI system. A review of different alternatives shall be evaluated to determine the best possible option for implementation of an AMR/AMI system. Options shall include a basic description of how AMR/AMI would be deployed in a phased approach within the entire City water service area. The implementation options shall address project planning, budgeting, and overall system performance. A schedule for implementation of the project shall be developed based upon financial considerations including available capital funds and the determined rate of return on the investment.

Task 7: Business Case Recommendations
The Consultant/PM shall provide recommendations that include the optimal AMR/AMI system to be implemented. This consists of the types and brands of water meters to compliment the recommended system, a baseline implementation plan based upon the options identified in Task 6, and a summary of the financial analysis as well as a forecasted schedule for installation.

As part of the Business Case development, assess and report on the organizational impact of potential AMI/AMR solutions on applicable City business processes, personnel, and technology.

Develop an effective communications plan that keeps all City AMR/AMI Team members and subject matter experts informed of project issues and status as the AMR/AMI initiative moves forward. Help forge consensus and buy-in among City staff.

Within ten working days from issuance of the Notice to Proceed, the Consultant/PM shall schedule a “kickoff meeting” to discuss the chain of command and communication matrix between the City and the Consultant/PM; determine procedures for data acquisition, and review target dates for initiation and completion of tasks.
Deliverables

- Guide the City in objectively assessing the criteria and conditions that must be addressed with respect to existing systems within the City to successfully deploy an automatic metering system.

- Identify and recommend potential synergies and/or modification of current City business processes to ensure operational efficiency and maximize return on investment (ROI).

- Quantify specific operational benefits to be realized through AMR/AMI implementation.

- Identify qualified AMR/AMI manufacturers and technologies that will meet the City’s needs, including assessment of their long-term viability.

- Identify AMR/AMI technology alternatives that present reasonable options for the City.

- Educate the City on the functionality of current systems available in the market, the tradeoffs among those systems, and how the various functionalities of the systems can lead to operational benefits.

- Review, evaluate, and report on potential initiatives or opportunities for the City to partner with local electric power company (SCE&G), utility, municipality, or others, to collaborate on AMI infrastructure costs.

- Conduct a risk assessment of available alternatives and recommend strategies to minimize AMR/AMI implementation risks. Provide alternatives and strategies to reduce the impact and risk in operations, customer service, AMI installation, and management.

- Evaluate applicable existing City IT hardware and software systems for required interface with AMR/AMI. Assess if meter data management (MDMS) system upgrades are required and make recommendations.

Project Management Services

Task 1: Planning Services
The selected Consultant/PM must provide project management support, including participation in at least monthly meetings with the Water Engineer and the Implementation Team, overseeing project schedule, tracking task status, and reporting issues. The selected Consultant/PM will be required to assign a dedicated Project Manager for the duration of the project to manage the assigned resources and ensure the requirements of this project are fully satisfied. In addition, the selected Consultant/PM will develop and maintain a schedule
illustrating the work plan for executing the necessary activities to complete the delivery of products and services in this Scope of Work. This schedule must be updated monthly.

- Develop a proposed schedule with major milestones for the procurement and implementation phases, if approved.
- Recommend the makeup of City’s project team for AMR/AMI implementation.
- Assess the capacity of City’s staff to adequately support the implementation project and ongoing operations after implementation.
- Determine the probability of the project’s goals and objective being realized.
- Define the risks this project poses to the organization and the required mitigation strategies. Provide information on the critical success factors of projects similar in size and scope.
- Provide an objective opinion as to how the City should proceed with the project.

Task 2: Acquisition Services
The successful Consultant/PM shall assist the City in preparing specifications and requirements for a solicitation to procure the technology, meters and all required accessories needed for the proposed AMR/AMI solution based on the City’s goals and objectives, long-term strategic plans, IT and billing interfaces and all other necessary components. This work may include providing guidance during the formulation of specifications. The Consultant/PM will work closely with the City’s IT staff to provide any technical information and overall system specification / requirements related to installation and implementation of a distribution system wide AMR/AMI system as well as any key performance-based indicators.

This information includes but are not limited to:

- System description
- Equipment details and description
- Layout of installation
- Layout of equipment
- Selection of key equipment
- Specifications for equipment procurement and installation
- All engineering associated with structural and mounting details
- Performance of equipment components, and subsystems
- Controls, monitors, and instrumentation
System performance monitoring

Assist the City in identifying potential funding for program costs

Plan the public outreach for the implementation of infrastructure changes

**Task 3: Installation Services**
The Consultant/PM shall oversee the development of the solution and control the changes to align with the City’s expectation. Consultant/PM will provide technical and business support to assist with the management of the system’s installation. The Consultant/PM shall oversee the installation process with the selected Contractor to assist with the integration of the metering system.

**Task 4: Maintenance, Support and Warranty**
The successful Consultant/PM will provide all available options for maintenance, support and warranty with the selected technology, meters and accessories. This includes maintenance and warranty for the actual products and offerings of the manufacturer in addition to service components.

**IV. EXPERIENCE**
The successful Consultant/PM shall be required to have extensive, verifiable experience in performing the scope of services for utilities having a water distribution system similar to the City’s system in magnitude and at a minimum of 75,000 metered accounts. The City will not consider any responses that have not performed the services described with a minimum of 75,000 metered accounts. Additionally, the Consultant/PM shall provide a detailed list of other similar clients and the scope of services that were provided. The respondent’s qualification and experience will be evaluated by the Pre-Qualification Questionnaire (Appendix V).

**V. RESPONSE REQUIREMENTS AND SUBMITTAL FORMAT**
To standardize responses and simplify the comparison and evaluation of responses, all proposals must be organized in the manner set forth below, separated into sections, and appropriately entitled. All information and materials requested shall be provided in the Proposal under a single cover.

Submittals shall be no more than 50 pages (duplexed). The page limit does not include the work sample product. Print size shall be 12-point font minimum, on 8½ by 11 paper, one sided or two, one page printed on both sides counts as two pages. Local Business Enterprise (LBE) certification should be submitted if applicable. Covers, dividers, equipment data sheets, financial information and LBE certification do not count toward the page limit. However, other supporting documentation, such as promotional literature and resumes, will be considered as part of the page limit.
Required Information: The following must be included in your response in order for a respondent to be considered responsive:

Section 1: Cover Letter and Summary.

1.1 Cover letter summarizing why the firm should be selected.

1.2 Sign and submit page 2 of this RFP

1.3 Identify the entity that would enter into the contract by including the address of the company headquarters and local office, the type of business (corporation, limited liability corporation, other), state of incorporation or organization and Federal Employer Identification Number and the name and title of the person authorized to enter into contract.

1.4 State any conflicts of interest your firm, or any key individuals, may have with projects of the type discussed herein.

1.5 State any exceptions (if any) made to the Terms and Conditions included herein to be reviewed in the contract negotiation period for the successful respondent.

Section 2: Qualifications & Experience. Qualifications should provide a straightforward, concise description of the contractor’s capabilities to satisfy the scope of services identified within this Request for Proposals (RFP) and contain the following requested information:

2.1 General overview of firm’s and potential teaming partners with public experience, if any, experience/qualifications with AMR/AMI systems and related technology.

2.2 Indicate the firm’s and key project team members (at minimum the Project Manager) prior experience successfully completing one AMR/AMI project with a public utility with a minimum of 75,000 metered accounts. Indicate the team’s prior implementation experience with AMR/AMI systems. Indicate the Consultant/PM experience with a singular public utility to validate this requirement.

2.3 Describe the project team’s experience with customer billing system interfaces as well as other information technology systems.

Pre-Qualification Questionnaire
The Pre-Qualification Questionnaire (Appendix V) must be completed and submitted with your response. The selection committee and the Purchasing Division will thoroughly review each
questionnaire based upon the criteria listed below which is founded on the Prequalification Questionnaire (Appendix V). Contractors who are awarded an evaluation score of 80 and above will be determined as **RESPONSIVE**.

<table>
<thead>
<tr>
<th>1. GENERAL INFORMATION –This section will be reviewed but is not evaluated</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.a. General Company Information</td>
</tr>
<tr>
<td>1.b. Evidence of Insurance</td>
</tr>
<tr>
<td>1.c. Size/Capacity: Questions 1, 2 &amp; 3</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>2. MANDATORY REQUIREMENTS</th>
<th>This section will be evaluated and scored</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.a.(1) # years under current name</td>
<td></td>
</tr>
<tr>
<td>2.a.(2) Date, state, type of establishment</td>
<td></td>
</tr>
<tr>
<td>2.a.(3) Names of principals</td>
<td></td>
</tr>
<tr>
<td>2.a.(4) Previous experience w/ municipality and/or large governmental agency with 75,000 metered accounts</td>
<td></td>
</tr>
<tr>
<td>2.a.(5) Prequalified and failed to submit bid w/o notice of good cause</td>
<td></td>
</tr>
<tr>
<td>2.b.(1-2) Current Workload &amp; Availability based on Workload</td>
<td></td>
</tr>
<tr>
<td>2.c.(1) Feasibility Study for similar services</td>
<td></td>
</tr>
<tr>
<td>2.c.(2) Feasibility Study highlights and issues Described</td>
<td></td>
</tr>
<tr>
<td>2.d.(1) Litigations/Claims Failure to Complete Work</td>
<td></td>
</tr>
<tr>
<td>2.d.(2) Paid liquidated damages?</td>
<td></td>
</tr>
<tr>
<td>2.d.(3) Filed claim(s) against previous Owner on projects within the past 5 yrs.</td>
<td></td>
</tr>
<tr>
<td>2.d.(4) Convicted of charges</td>
<td></td>
</tr>
<tr>
<td>3.a. References</td>
<td></td>
</tr>
<tr>
<td>3.b.(1) Staff Qualifications</td>
<td></td>
</tr>
<tr>
<td>3.b.(2) Staff availability</td>
<td></td>
</tr>
</tbody>
</table>

All scores of 80 and above will be qualified

**Section 3: Proposed Project Approach.** Provide a detailed description of the proposed approach to the project towards meeting the Scope of Services. At a minimum, the proposed approach should address the following:

3.1 Proposed plan for reviewing the current metering, billing systems, IT requirements and developing recommendations from this information.

3.2 Proposed evaluation criteria for evaluation of various AMR/AMI technologies.

3.3 Management of the project, including coordination of activities and communication with City staff.
3.4 Plan to address how the project will be staffed, the location of proposed staff members, and anticipated level of effort from both the firm and the City staff.

Section 4: Past Performance and References

4.1 Provide a list of three (3) related AMR/AMI projects that involved a feasibility study of this technology. Include a description of the project, the name of the City or public utility, the size of the City or public utility (number of users), and the year the work was completed.

4.2 Provide a Reference Questionnaire (Appendix VI) for each project listed in section 4.1. Reference Questionnaires should be completed for members of the firm that had key roles in that project.

4.3 Provide the name of the primary project manager to be assigned to this work along with a description of his/her experience. Include an organizational chart depicting the roles and key staff, along with current resumes of each, including sub-consultants. If selected, the naming of personnel reflected in the organizational chart will be considered by this office to be the AMR/AMI Business Case Support Team and will be expected to be assigned to the project for its duration.

Note: These team members will be expected to participate in the interview, if required, and perform the work. The Consultant/PM must notify the City of any request to change personnel. The request must include the position or team member, the reason for the change, and the replacement member. Final approval will be at the discretion of the City.

Section 5: Cost Proposal (to be submitted in a separate sealed envelope)

The respondent is to prepare a cost proposal for the services being proposed broken down by feasibility study, project management services and deliverables. A firm fixed price for the feasibility study shall be submitted. Include any assumptions made in developing the pricing. Only the feasibility study cost proposal will be used for evaluation purposes. Appendix XX, Rate Schedule, must be submitted with your response and will be reviewed prior to negotiations if necessary.
Section 6: Financial Information

Provide the most current year-end audited financial statement or Statement of Financial Responsibility.

Section 7: Appendices

The following Appendices shall be included in one’s submittal:

Appendix I- Local Business Enterprise Qualification Statement (submitted ONLY if the entity meets the qualifications)
Appendix II- Conflict of Interest Statement
Appendix III- Sub-contractor/Sub-contractor Business Information Form (submitted ONLY if the contractor plans to utilize subcontractors)
Appendix IV- Non-Collusion Affidavit
Appendix V- Pre-qualification Questionnaire
Appendix VI- Reference Questionnaire
Appendix VII- Rate Schedule (to be submitted in a sealed envelope)

All responses should be submitted to Bid Online at https://bidonline.columbiasc.gov/ifas7/bidonline/ no later than March 21, 2016 at 3:00 PM. Contractors shall deliver one (1) original UNBOUND copy, six (6) hard copies and one (1) digital copy of the information requested above. Proposals should be prepared simply and economically, providing a straight forward and concise response to satisfy the requirement of this Request for Proposal. All submittals must be clearly labeled on the outside of the envelope with the following wording: “RFP#011-15-16: Feasibility Study and Project Management Services.” All late proposals will be rejected. The City is not responsible for late RFP’s caused by delays in mail delivery or a delay in any other method of delivery.

VI. EVALUATION CRITERIA

The committee comprised of City employees will review each submittal based upon the criteria listed below. The written evaluation will produce a list of the top rated proposals (short list) that will be selected for possible interviews. Respondents may or may not be interviewed and the City reserves the right to conduct interviews at its sole discretion. Oral interviews will be conducted April 27 - April 28, 2016, in order to make a final decision. The short listed contractors will be contacted by the Buyer via telephone or e-mail to determine their interview date and time. Proposers should plan to have available, in person, key personnel who will be assigned to work on the proposed project. Individuals who fail to attend the interview may not be given a score which could jeopardize the contractor’s competitiveness. If awarded the project, all interview statements will become part of the final contract.
<table>
<thead>
<tr>
<th>RFP Evaluation Criteria</th>
<th>Rating Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. <strong>Project Understanding and Approach</strong></td>
<td>Max. 35%</td>
</tr>
<tr>
<td>a. Approach to methodology and understanding of the proposed scope of work</td>
<td></td>
</tr>
<tr>
<td>b. Recommendations of anything the City may be leaving out this contract that may help the City’s needs</td>
<td></td>
</tr>
<tr>
<td>2. <strong>Past Performance/ References</strong></td>
<td>Max. 30%</td>
</tr>
<tr>
<td>a. Three past client references with similar services provided to the clients within the last 5 years. The client references submitted by each Respondent must be directly related to the services as outlined in the Scope of Services</td>
<td></td>
</tr>
<tr>
<td>b. Reference questionnaire</td>
<td></td>
</tr>
<tr>
<td>c. Clarity and completeness of information provided by Respondent in the written proposal to validate client references to the extent possible.</td>
<td></td>
</tr>
<tr>
<td>3. <strong>Financial Stability</strong></td>
<td>Max. 10%</td>
</tr>
<tr>
<td>a. Current year-end audited financial statement or Statement of Responsibility</td>
<td></td>
</tr>
<tr>
<td>4. <strong>Cost</strong></td>
<td>Max. 25%</td>
</tr>
<tr>
<td>a. This will be calculated separately after the panel evaluation.</td>
<td></td>
</tr>
<tr>
<td>b. LBE Certification (5 additional points will be given to certified LBE approved prior to the submission deadline)</td>
<td></td>
</tr>
</tbody>
</table>
VII. TENTATIVE SCHEDULE OF EVENTS

The following is a proposed schedule of events as it relates to this solicitation:

<table>
<thead>
<tr>
<th>Event</th>
<th>Date and Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>RFP Issue Date</td>
<td>March 31, 2016</td>
</tr>
<tr>
<td>Non-mandatory Pre-Proposal Meeting*</td>
<td>April 8, 2016 at 10:00 AM</td>
</tr>
<tr>
<td>Questions Deadline</td>
<td>April 11, 2016 at 12:00 PM</td>
</tr>
<tr>
<td>Submittal Deadline</td>
<td>April 19, 2016 at 3:00 PM</td>
</tr>
<tr>
<td>Interviews (tentative)</td>
<td>April 27 - April 28, 2016</td>
</tr>
<tr>
<td>Intent to Award</td>
<td>May 6, 2016</td>
</tr>
<tr>
<td>Anticipated City Council Review/Approval</td>
<td>May 17, 2016</td>
</tr>
</tbody>
</table>

*The City has elected to host a pre-proposal meeting to all interested respondents. The non-mandatory pre-proposal meeting will be held on April 8, 2016 at 10:00 AM in the Purchasing Division located at 1136 Washington Street, 7th floor. Teleconference will be used for Consultant/PMs who are unable to physically attend. Contact LaWana Robinson-Lee at lcrobinson@columbiasc.net for information and reference RFP011-15-16 Feasibility Study and Project Management Services Teleconference attendance in the subject line. Your participation in this meeting is HIGHLY encouraged.

VIII. PROPOSAL SELECTION PROCESS

A. Acceptance and Rejection

Any proposals that do not conform to the essential requirements of the RFP shall be rejected. The City reserves the right to waive informalities and minor irregularities in submittals and reserves the sole right to determine what constitutes informalities and minor irregularities. The City also reserves the right to accept or reject any or all proposals received in response to this RFP and to negotiate separately with competing respondents. The City is not obligated to enter into any contract on the basis of any submittal in response to this RFP. The City reserves the right to request additional information from any firm submitting under this RFP if the City deems such information necessary to further evaluate the firm's qualifications.
B. Selection

It is to the sole discretion of the City to determine the award method. Awards will be made to the highest ranked, responsive and responsible offeror whose offer is determined to be the most advantageous to the City. Negotiations will be entered into with the highest ranked contractor in an effort to confirm a pricing structure that is acceptable to all and address any questions remaining after the selection process. If an appropriate contract can be successfully negotiated between the parties, it will be taken to City Council for approval. If a successful contract cannot be negotiated with the highest ranked firm, negotiations will be undertaken with the next contractor in order of ranked preference.

The City reserves the right to hold interviews in addition to proposal document review in order to select a top ranking firm if it is determined to be needed.

IX. GENERAL INFORMATION AND INSTRUCTIONS

A. Request for Proposal Process

The RFP is not a bid. In the event that the City elects to negotiate a contract with the successful respondent, any contract shall contain at a minimum the terms and conditions (or substantially the same terms and conditions) as hereinafter stated. The City reserves the right, in its sole discretion to reject all submissions, reissue a subsequent RFP, terminate, restructure or amend this procurement process at any time. The final selection and contract negotiation rests solely with the City.

No questions may be directed to or contacts made with the Mayor, other members of City or County Council, the City Manager, County Administrator and other City or County staff not identified in this RFP as points of contacts during the period of time that this RFP is made public until the final selection is made, except as otherwise provided for herein. Violation of this prohibition may disqualify the contractor and/or consulting firm from further consideration.

B. Questions

Requests for additional information and questions must be submitted to: https://bidonline.columbiasc.gov/ifas7/bidonline/

Using Bid Online, the user must be logged in, and under the Bid tab, click “Bid Questions and Answers.” The deadline for additional information and questions is April 11, 2016 by 12:00 P.M. (EST). The City will not accept telephone calls or visits regarding this RFP. No interpretation shall be binding unless in writing from the City of Columbia.
C. Confidentiality

Unless otherwise required by law, and until the public opening of the proposals, all information, materials and other documents submitted by a respondent shall not be released or made available to any person or entity except City representatives assisting in this procurement process. Unless required by law, proprietary or financial information submitted to the City by a respondent will not be disclosed if the respondent visibly marks each part of the proposal that the respondent considers confidential, financial or proprietary information with the word “Confidential.”

D. Respondent’s Duty to Inspect, Advise and Declare All Costs

Each respondent shall become fully acquainted with the City’s requirements and the scope of the services to be provided. Respondents have a duty to request any information from the City as it deems necessary to prepare the RFP. Such requests shall be made in compliance with Paragraph B of this section. No change order will be granted or additional compensation permitted if it is based upon information that the respondent knew, or should have known, as part of the respondent’s duty to become acquainted with the City’s circumstances and requirements.

E. Time for Receiving Proposals

Proposals submitted online prior to the time of opening will be encrypted and kept unopened. The official whose duty it is to open them will decide when the specified time has arrived, and no bid there-after will be considered.

F. Submittal of Proposals

All responses to this RFP must be clearly marked RFP011-15-16: Feasibility Study and Project Management Services. A minimum of one (1) original UNBOUND copy, six (6) hard copies and one (1) digital copy containing the proposal shall be submitted. All RFP’s shall be submitted using Bid Online no later than April 19, 2016 at 3:00 P.M. and the CDs and hard copies shall be submitted to City of Columbia Purchasing Division, 1136 Washington Street, 4th Floor Columbia, SC 29201. All late proposals will be rejected. The City is not responsible for late RFP’s caused by delays in mail delivery or a delay in any other method of delivery.

G. Acceptance and Rejection

Any proposals that do not conform to the essential requirements of the RFP shall be rejected. The City reserves the right to waive informalities and minor irregularities in submittals and reserves the sole right to determine what constitutes informalities and minor irregularities. The City also reserves the right to accept or reject any or all proposals received in response to this
RFP#011-15-16
AMR/AMI Feasibility Study and Project Management Services

RFP and to negotiate separately with competing respondents. The City is not obligated to enter into any contract on the basis of any submittal in response to this RFP. The City reserves the right to request additional information from any firm submitting under this RFP if the City deems such information necessary to further evaluate the firm's qualifications.

H. Acceptance Period

Any proposal in response to this solicitation shall be valid for 120 calendar days. At the end of this time the proposal may be withdrawn at the written request of the respondent if no award has been made. If the RFP is not withdrawn at that time, the proposal in its entirety, including the price structure, shall remain in effect.

I. Cancellation of Proposals

Proposals may be cancelled prior to the time fixed for opening. Negligence on the part of the bidder in submitting the proposal confers no right for the withdrawal of the proposal after it has been opened.

J. Bidders Present

At the time fixed for the opening of proposals, their contents will be made public for the information of bidders and the general public. Offerors will not be permitted to examine the proposals until award is made.

K. Alternate Proposals

Any proposal which does not conform to the specifications contained or referenced in the invitation for Bids may be rejected unless the invitation authorized the submission of Alternate Proposal and the equipment or supplies offered as alternates meet the requirements specified in the invitation.

L. Ambiguous Proposals

Bids which are uncertain as to terms, compliance to requirements and/or specifications shall be rejected.

M. Conflict of Interest

Respondents shall promptly notify the Contracts Administrator, in writing, by certified mail, of all potential conflicts of interest for any prospective business association, interest, or other circumstance, which may influence or appear to influence the respondent’s judgment or quality of services being provided hereunder. Such written notification shall identify the prospective business association, interest, or circumstance, the nature of work that such a person may
undertake, and request an opinion of the City as to whether the association, interest, or circumstance would, in the opinion of the City, constitute a conflict of interest. The City will respond to such notification by certified mail within thirty (30) days. By submitting this proposal, the respondent certifies that it has no conflict of interest with any employee, agent, elected official or officer of the city or any other conflict as may be set forth herein.

No direct or indirect contact with the mayor of the City of Columbia or City of Columbia Council members will be allowed. If such contact is made, the city reserves the right to reject the proposal.

N. Collusion

More than one proposal from an individual, firm partnership, corporation, association or related parties under the same or different names will not be considered. If the City believes that collusion exists among respondents, all proposals from the suspected firms will be rejected. “Related parties” means respondents or the principals thereof, which have a direct or indirect ownership or profit sharing interest in another respondent.

Respondents shall comply with all local, state, and federal directives, orders, and laws as applicable to this RFP and any resulting contract.

By responding to this RFP, respondents certify that the response is made without previous understanding, agreement, or connection with any person, firm or corporation making a proposal for the same item, and they certify the knowledge that this would constitute an illegal action.

O. Force Majeure

Neither the City nor the contractor shall be liable for any excess costs if failure to perform the contract arises out of causes beyond the control and without the fault or negligence of either party. Such causes may include, but not restricted to acts of God or of the public enemy, acts of government in either its sovereign or contractual capacity, fires, floods epidemics, quarantine, restrictions, strikes, freight embargos, and unusually severe weather conditions; but in every case, the failure to perform is caused beyond the control of both the City and the contractor, and without the fault or negligence of either of them.

P. Sales Tax and/or Use Tax

Do not include any taxes that the City may be required to pay in the quote price. All prices and notations should be printed in ink or typewritten. Upon submission of a quote, the Purchasing Division will compute 8% sales and use tax when applicable (service and labor excluded), in determining the low bidder. This procedure conforms to the SC Tax Commission Sales and Use Tax Regulation 117-174-95.
Q. Assignments

No contract may be assigned, sublet, or transferred without a written consent of the purchaser.

R. Manufacturers Brochures and Specifications Data

Bidders shall submit manufacturer’s brochures and specifications data as part of bid response. Submittal of such data shall not be deemed a counter offer unless so noted on bid response sheet. Bidders failing to comply will be deemed non-responsive.

S. Default

In case of Contractor default, the City reserves the right to purchase any or all items and/or services on the open market, charging contractor with any excessive costs. Should such charges be assessed, no subsequent bids and/or proposals submitted by the defaulting Contractor shall be considered until the assessed charges have been satisfied.

T. Non-Acquisitions

Any contract entered into by the City resulting from this request for proposal shall be subject to cancellation without damages or further obligation when funds are not appropriated or otherwise made available to support continuation of performance in a subsequent fiscal period or appropriated year.

U. Bid Opening Delay

If it becomes necessary to postpone a bid opening, the procurement officer shall issue the appropriate amendments to the solicitation postponing or rescheduling the bid opening. When the purchasing agency is closed due to force majeure, bid opening will be postponed to the same time on the next official business day.

V. Exceptions

Not withstanding any prior negotiations, the specifications and terms and conditions provided herein take precedence. Formal objection is hereby made to any or different terms proposed by bidders unless listed on a separate sheet labeled “Exceptions”, and agreed to in writing by the City of Columbia.
X. TERMS AND CONDITIONS

A. Commencement of Services

The successful respondent shall commence the project and prepare the recommendations upon receipt of a Notice to Proceed or upon the commencement date stated in the Notice to Proceed.

B. Non-Discrimination in Contracting Policy

In fulfilling the Contract, the Contractor shall not discriminate against any employee or applicant for employment because of race, color, religion, sex, sexual orientation or national origin. The Contractor shall take affirmative action to ensure equal employment opportunities for all applicants for employment, without regard to their race, creed, color, religion, ancestry, sex, sexual orientation, national origin, disability or other handicap, age, marital status, or status with regard to public assistance. Such action shall include, but not be limited to, the following: employment, upgrading, demotion, or transfer; recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship. The Contractor shall post in conspicuous places, available to employees and applicants for employment, notices to be provided by the government setting forth the provisions of this nondiscrimination clause. The Contractor will incorporate these nondiscrimination requirements in all subcontracts for program work.

C. Indemnification

The Contractor shall agree to indemnify, defend, hold harmless and reimburse the City, its agents, and employees from and against any and all losses, liabilities, expenses, and all claims for damages of any nature whatsoever relating to or arising out of any action or failure to act by respondent, its subcontractors, officers, agents and employees of any of the obligations under the contract. Losses, liabilities, expenses and claims for damages shall include, but will not be limited to, civil and criminal fines and penalties, loss of use or services, bodily injury, death, personal injury, or injury to real or personal property, defense costs, legal fees and costs, and attorney's fees for an appeal.

The Contractor shall also promptly notify the City of any civil or criminal actions filed against the Contractor or of any notice of violation from any federal or state agency, or of any claim as soon as practical as relates to the services provided. The City, upon receipt of such notice, shall have the right at its election to defend any and all actions or suits or to join in defense.
D. Bonding, Licenses, Permits and Taxes

It shall be the responsibility of the Contractor to secure all Local, State, and/or Federal License and Permits required by law, state or ordinance to perform work.

All costs for required bonding, permits, licenses and taxes shall be borne by respondent prior to executing a contract with the City.

Where proposers are required to enter or go onto City of Columbia property to deliver materials or perform work or service as a result of a proposal award, the successful proposer will assume the full duty, obligation and expense of obtaining all necessary licenses, permits and insurance and assure all work complies with all applicable Richland County and City of Columbia building requirements and State of South Carolina Building Code. The bidder shall be liable for any damages of loss to the City occasioned by negligence of the bidder (or agent) or any person the bidder has designated in the completion of the contract as a result of his or her bid.

E. Ownership of Data

All data and other information generated by or used by the respondent in any form whatsoever, is the property of the City and shall not be used by the respondent for any purpose whatsoever except to perform the requested service.

F. Termination

The City may terminate the Agreement at any time upon any of the following grounds:

A. Non Appropriation

Failure by the City to appropriate funds for the performance of any of the services required in this Agreement in any annual budget;

B. Termination of Agreement for Cause

If, through any cause, the Contractor shall fail to fulfill in a timely and proper manner these obligations under the Agreement, or if the Contractor shall violate any of the covenants, agreements, or stipulations of the Agreement, the City shall thereupon have the right to terminate the Agreement by giving written notice to the Contractor of such termination and specifying the effective date thereof, at least five (5) days before the effective date of such termination. In such event, all finished or unfinished documents, data studies, surveys and reports prepared under the Agreement shall become the property of the City. Notwithstanding the above, the Contractor shall not be relieved of liability to the City for damages sustained by the City by virtue of any breach of the Contract by the Contractor and the City may withhold any payments to the Contractor until such time as the exact amount of damages due to the City from the Contractor is determined.
The Contractor fails to perform any of the services required in this Agreement and does not correct such deficiency within fifteen (15) days having been notified by the City of such deficiency;

C. Termination for Convenience of the City
The City may terminate this Contract at any time by giving written notice to the Contractor of such termination and specifying the effective date thereof, at least seven (7) days before the effective date of such termination. In that event, all finished or unfinished documents and other material as described in Access to Records shall, at the option of the City, become its property.

The City shall, at its sole option and discretion, have the right to terminate this contract for any reason whatsoever. A termination for default under the Agreement, if wrongfully made, shall be treated as a termination for convenience under this clause;

D. Force Majeure;

E. Upon expiration of the term of this Agreement; and

F. By mutual agreement.

G. Whole Agreement
The contract shall contain the entire agreement between the City and respondent. In order to be binding, any modification thereof shall be in writing and signed by the City and the respondent.

H. State Law Applicable
The contract shall be construed in accordance with the laws of the State of South Carolina. The respondent agrees to subject itself to the jurisdiction and venue of the Circuit Courts in Richland County, State of South Carolina as to all matters and disputes arising or to arise under the contract and the performance thereof. The City may seek attorney’s fees and the respondent agrees to pay such fees as awarded by the Court or other body. No attorney’s fees may be sought by nor will be paid to the respondent.

I. Breach/Waiver
The failure of either the respondent or the City to insist upon performance of any provisions of the contract shall not be deemed to be a waiver of the right to insist upon strict performance of such provision or of any other provision of the contract at any time. Waiver of any breach of the contract by the respondent or the City shall not constitute a waiver of a subsequent breach.

J. Severability
If any provision of the Agreement is held invalid, the remainder of the Agreement shall not be affected thereby if such remainder would then continue to conform to the terms and requirements of Applicable law.
K. Successorship

The contract shall be binding upon the respondent and upon its successors and assignees. The contract shall be binding upon the City in accordance with its terms and provisions.

L. Protest Procedures

1. Right to protest: Any actual or prospective bidder, offeror, respondent, or subcontractor who is aggrieved in connection with the solicitation or award of a contract may protest to the appropriate procurement officer. The protest setting forth the grievance shall be submitted in writing within five (5) days after such aggrieved persons know or should have known of the facts giving rise thereto, but in no circumstance after 10 days of notification of the award of the contract.

2. Authority to resolve protests: The appropriate procurement officer shall have the authority, prior to the commencement of an administrative review as provided in this article, to settle and resolve a protest of an aggrieved bidder, offeror, respondent or subcontractor, actual or prospective, concerning the solicitation or award of a contract. This authority shall be applied in a manner consistent with regulations or laws governing the procurement of supplies, services and construction for the City.

3. Decision: If the protest is not resolved by mutual agreement, the appropriate procurement officer shall issue a decision in writing within 10 days. The decision shall state the reasons for the action taken.

4. Notice of decision: A copy of the decision under Number 3 above of this section shall be mailed or otherwise furnished immediately to the protestant and any other party intervening.

5. Finality of decision: A decision under Number 3 of this section shall be final and conclusive, unless fraudulent, or unless any person adversely affected by the decision requests a review in writing, setting forth the grievance to the City Manager within 10 days of the decision. The protestant may also request an interview with the City Manager.

6. Request for review. The request for a review shall not stay the contract unless fraudulent.
M. Insurance

The contractor shall procure and shall maintain during the life of this contract, whether such operation be by himself or by a subcontractor or anyone directly or indirectly employed by either of them, such insurance as required by statute, ordinance, or this contract, to adequately protect the owner from any claims or damages including bodily injury or death, which may arise from them during operations under this contract.

Each insurance policy required by these instructions shall be endorsed to state that coverage shall not be suspended, voided, or cancelled by either party, reduced in coverage or in limits, unless thirty (30) days prior written notice, by certified mail, return receipt requested, has been given to the City.

Workers Compensation Insurance - The contractor shall procure and shall maintain during the life of this contract, $500,000.00, Workers Compensation Insurance for all employees to be engaged in work on the project under this contract, and in case any work is sublet, the contractor shall require the subcontractor similarly to provide Worker Compensation Insurance for all of the latter employees to be engaged in such work unless such employees are covered by the protection afforded by the contractor’s Worker Compensation Insurance. The contractor shall not permit any person who is not protected by Workers Compensation Insurance or a properly approved Self-Insured Workers Compensation Program to perform any activity related to this contract.

Liability Insurance - The contractor shall procure and maintain for the duration of the contract insurance against claims for any injuries to persons or damages to property, which may arise from or in connection with the performance of the work by the contractor, his agents, or representatives, employees or subcontractors.

a.) Owner & Contractor’s Protective Liability Policy - Issued in the City of Columbia an owner in an amount not less $2,000,000.00 per occurrence combined single limit for bodily injury, personal injury, and property damage with an aggregate liability not less than $2,000,000.00.

b.) Commercial General Liability Insurance: Coverage in an amount not less the 1,000,000.00 per occurrence, and $2,000,000.00 aggregate combined single limit for bodily injury, personal injury, and property damage, naming the City of Columbia as an additional insured.

c.) Automobile Liability Insurance- $500,000.00 combined single limit per accident for bodily injury and property damage.
N. Delays

If delay is foreseen contractor shall give thirty (30) days prior written notice to the Purchasing Department. The City has the right to extend delivery date if reasons appear, in the sole discretion of the City, to be valid. Contractor must keep the City advised at all times of status of order. Default in promised completion times without accepted reasons) or failure to meet specifications, authorizes the Director of Procurement to purchase supplies, equipment or services elsewhere and charge full increase in cost and handling to defaulting contractor.

O. Subcontractors

The use of subcontractors will not relieve prime contractor of any obligations and the awarding contractor remains liable for full and satisfactory performance per the contract term and conditions.

P. Term of Agreement

Term: The materials, goods, and services to be provided under this contract shall be for a period of three (3) years unless earlier terminated by either party as provided herein. The contract shall expire at the end of the term unless an extension has been requested by either party and agreed to in writing by both parties prior to the expiration of the term. The decision whether to extend the contract, upon written request, shall be in the sole and exclusive discretion of the party receiving the request and neither party shall be under any obligation to agree to an extension of the initial term or any additional term.

Q. Ethics

Vendor is subject to the provisions of the 1991 Ethics Reform Act (8-13-100, et seq, South Carolina Code of Laws, 1976, as amended). Under this Act, City employees are prohibited from accepting anything of value from any person. “Anything of value” includes, but is not limited to, lodging, transportation, entertainment, food, meals, beverages, money, gifts, honorariums, discounts and interest-free loans.

R. Professional Liability

1. The successful offeror shall provide the City with an Errors and Omissions Liability Policy (E&O Policy). The policy shall cover the City for all sources of liability which would be covered by the latest edition of the standard Errors and Omissions Liability Coverage Form, as filed for use by the City of Columbia, without the attachment of restrictive endorsements.

2. The City of Columbia shall be named as an additional insured on the policy.
3. The minimum E&O Policy limits to be provided by the successful offeror shall be $1,000,000 per occurrence and $2,000,000 aggregate limit for bodily injury liability and property damage liability. The limits afforded by the E&O Policy shall apply only to the City and City's officials, officers, agents and employees and only to claims arising out of or in connection with the work under this contract.

4. Notice of Cancellation and/or Restriction: The policy must be specifically endorsed to provide the City with thirty (30) days’ notice of cancellation, non-renewal, change in coverage, and/or restriction.

S. Sub-contractor(s)
The contractor will not assign or sublet its obligations to perform the services required by this Contract without the written consent of the City. The use of sub-contractor(s)/sub-contractor(s) will not relieve prime contractor of any obligations and the awarding contractor remains liable for full and satisfactory performance per the contract term and conditions. The use of subcontractors is not viewed as positive or negative.

T. Miscellaneous

This Agreement is subject to City Council approval.

Nothing in this Contract shall be construed to give any rights or benefits to anyone other than the City and the contractor.

The contractor shall be responsible for performance of all services required by this Agreement. The contractor does not act as the City's agent or employee.

In the event there are any disagreements between the City and the contractor with regard to any of the requirements, specifications or interpretation of this Agreement, the contractor agrees to defer to the reasonable interpretations of the City as, from time to time may be made by the City. Ambiguities in the terms of this Agreement, if any, shall not be construed against the City.

U. Ethics

The Contractor is subject to the provisions of the 1991 Ethics Reform Act (8-13-100, et seq, South Carolina Code of Laws, 1976, as amended). Under this Act, “A person may not, directly or indirectly, give, offer, or promise anything of value to a public official, public member, or public employee with intent to:
(1) influence the discharge of a public official’s, public member’s, or public employee’s official responsibilities;
(2) influence a public official, public member, or public employee to commit, aid in committing, collude in, or allow fraud on a governmental entity; or

(3) induce a public official, public member, or public employee to perform or fail to perform an act in violation of the public official’s, public member’s, or public employee’s official responsibilities. “Anything of value” includes, but is not limited to, lodging, transportation, entertainment, food, meals, beverages, money, gifts, honorariums, discounts and interest-free loans.
XI. APPENDICES

Appendix I- Qualification Statement (LBE)

Appendix II- Conflict of Interest

Appendix III- Business Information Records

Appendix IV- Non-collusion Affidavit

Appendix V- Pre-Qualification Questionnaire

Appendix VI- Reference Questionnaire

Appendix VII- Rate Schedule

Appendix VII- City of Columbia Holiday Schedule
APPENDIX I- QUALIFICATION STATEMENT (LBE)

City of Columbia
Qualification Statement
Local Business Enterprise (LBE)
(DEPARTMENT OF UTILITIES & ENGINEERING)
REVISED 10.15.14

By checking all boxes below, I certify that My Company meets all of the following qualifications below to be eligible for the local vendor preference. I understand qualifications will be researched and verified by the Compliance Team. The City reserves the right to audit the company’s qualifications to be eligible for the local vendor preference as the City deems necessary in the best interests of the City and at least once every four years. A company must be certified PRIOR to bid openings. Yes, my company:

☐ Is independently owned and operated (Ownership of a local business must be direct, independent, and by individuals and/or other businesses within the Columbia-Newberry CSA. Company may be asked to provide additional documented verification including most current individual or corporate state and/or federal tax return, etc.).

☐ Is in good standing with State of South Carolina (LBE firm must be in good standing with the State of South Carolina regarding its payments of taxes and required business licenses).

☐ Has a business license in one of the 7 counties making up the CSA jurisdiction.

☐ Has at least one year of presence within the CSA Jurisdiction (LBE must have presence within any of the 7 CSA jurisdictions for at least one year prior to applying for LBE Certification issued by the City of Columbia).

☐ Has at least 50% of employees residing within any of the 7 CSA jurisdictions. Applicant must attach a list of all owner/employee addresses and submit with this Qualification Statement - Names are optional, give street address, city, state & zip. (This rule applies to full-time, part-time and contract employees.)

Note: Term of certification: Certification is valid for a period of 4 years from issue date. 30 days prior to expiration LBE may submit documentation to re-qualify. The City reserves the right to audit and recertify once every four years.

Company Name: ________________________________________________________________

Address: ___________________________________________________________________

Type of Products or Services: ____________________________________________________

Current Business License Number: _________________ County?_____________________

Phone Number: ___________________ Email: _________________COC Vendor#_________

I certify with my signature below that all of the information given above is true and accurate to the best of my knowledge. I also recognize that by signing that any false information indicated above may lead to penalties or sanctions by any of the 7 CSA jurisdictions.

Owner’s Name: __________________________ (Print) __________________________ (Signature)

NOTARY - Sworn to before me this ______________ day of ___________ 20_____

Notary Public for the State of _____________________ My Commission Expires:_______

Notary Name: __________________________ (Print) __________________________ (Signature)

Please submit this document to:
Department of Utilities and Engineering Tel: (803) 545-3369
Attn: LBE Administrator / Team Fax: (803) 545-4130
1136 Washington Street, 5th Floor Email: agdriggers@columbiasc.net

☐ Qualified / ☐ Not Qualified: __________________________ Date: __________

(Compliance Authorized Signature)
APPENDIX II- CONFLICT OF INTEREST

I, ______________________________________ (contractor) certify, under penalty of perjury, that to the best of my knowledge and belief;

1. No circumstances exist which cause a Conflict of Interest in performing the services required by the Request for Proposal (RFP) or the contract to which this statement is attached, and

2. That no employee of the City, nor any member thereof, nor any public agency or official affected by the RFP or the contract to which this statement is attached, has any pecuniary interest in the business of the responding firm or his sub-contractor(s) has any interest that would conflict in any manner or degree with the performance related to such contract.

3. The contractor warrants that he and his sub-contractor(s) have not employed or retained any company or person other than a bona fide employee working solely for the responding firm or sub-contractor(s) to solicit or secure a contract agreement with the City of Columbia, as related to the RFP or the contract to which this statement is attached, and that he and his sub-contractor(s) have not paid or agreed to pay any person, company, corporation, individual, or firm other than a bona fide employee working solely for the responding firm or his sub-contractor(s) any fee, commission, percentage, gift, or other consideration contingent upon or resulting from the award of such contract.

Contractor Company Name: __________________________________________________

By: ________________________________________________________________

Print Name: _________________________________________________________

Title: ______________________________________________________________

Date: ________________________________________________________________
APPENDIX IV- NON-COLLUSION AFFIDAVIT

State of ________________________________)

County of ________________________________)

________________________________ being first duly sworn, deposes and says that:

(1) He is __________________________ of __________________________, the Respondent
that has submitted the attached Proposal:

(2) He is fully informed respecting the preparation and contents of the attached Proposal and
of all pertinent circumstances respecting such Proposal:

(3) Such Proposal is genuine and is not a collusive or sham Proposal:

(4) Neither the said Respondent nor any of its officers, partners, owners, agents,
representatives, employees or parties in interest, including this affidavit, has in any way
colluded, conspired, connived or agreed, directly or indirectly with any other Respondent, firm
or person to submit a collusive or sham in connection with the Contract for which the attached
Proposal has been submitted or to retain from proposing in connection with such Contract, or
has in any manner, directly or indirectly, sought by agreement or collusion or communication
or conference with any other Respondent, or to secure through any collusion, conspiracy,
connivance or unlawful agreement any advantage against the City of Columbia, S.C. or any
person interested in the proposed Contract; and

(Signed)___________________________________

___________________________________

(Titl)

Subscribed and sworn to before me

this __________ day of ____________, 20____

___________________________________________________

(Notary Public) My commission expires: _________________
APPENDIX V- PRE-QUALIFICATION QUESTIONNAIRE – RFP011-15-16

Failure to answer all of the following questions may result in disqualification and potentially a lower evaluation rating. If interested potential firms or Consultant/PMs have any questions, contact the person listed below under “Submit to” information field. Completing this questionnaire does not guarantee any approval or prequalification of the bidder’s submission. The City of Columbia reserves the right to reject any or all proposals and to waive informalities in accordance with the City’s procurement code and internal policies and procedures.

Project Description:

The major components of the services to be provided for the City of Columbia’s feasibility study and project management services for an Automated Meter Reading and/or Automated Meter Infrastructure (AMR/AMI) system. The personnel employed by the Consultant/PM must be deemed as reliable and capable employees trained and qualified in performing the work stated in the scope of services required to complete assigned tasks.

In addition to above, all other requirements as outlined in RFP# 011-15-16 will be applicable and should be thoroughly reviewed prior to completing this form.
Section 1. GENERAL INFORMATION

1. a. General Company information (Primary/Main office location)

Company Name

Physical Address

Mailing Address

City/State Zip Code + 4

(______)____________________    (______)____________________
Phone number         Fax number

Primary Contact Name      Secondary Contact Name

Primary Contact Email Address     Secondary Contact Email Address

Insurance

1. b. Evidence of Insurance
In order to prequalify, Consultant/PM must indicate that they can provide evidence of insurance coverage, see below, as follows should they subsequently be the successful bidder. Do you agree? ☐ Yes ☐ No

Liability Insurance - The Consultant/PM shall procure and maintain for the duration of the contract insurance against claims for any injuries to persons or damages to property, which may arise form or in connection with the performance of the work by the Consultant, his agents, or representatives, employees or sub-Consultants.
A.) Owner & Contractor’s Protective Liability Policy: Issued in the City of Columbia an owner in an amount not less $2,000,000.00 per occurrence combined single limit for bodily injury, personal injury, and property damage with an aggregate liability not less than $2,000,000.00.
B.) Commercial General Liability Insurance: Coverage in an amount not less the 1,000,000.00 per occurrence, and $2,000,000.00 aggregate combined single limit for bodily injury, personal injury, and property damage, naming the City of Columbia as an additional insured.
C.) Automobile Liability Insurance: $500,000.00 combined single limit per accident for bodily injury and property damage.
D.) Professional Liability: $1,000,000.00 per occurrence and $2,000,000.00 aggregate limit for bodily injury liability and property damage.
Size/Capacity

1. c. (1) How many full-time permanent employees work for the company?
____________________________________

1. c. (2) If the company has more than one office location, how many full-time permanent employees work for the company at the location which will serve this project?
______________________________________________________

1. c. (3) List the annual dollar value of AMR/AMI Service work the company has performed for each year over the last 5 calendar years.

<table>
<thead>
<tr>
<th>Year</th>
<th>Dollar Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
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<tr>
<td>2</td>
<td></td>
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<tr>
<td>3</td>
<td></td>
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<tr>
<td>4</td>
<td></td>
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<tr>
<td>5</td>
<td></td>
</tr>
</tbody>
</table>

Section 2. MANDATORY REQUIREMENTS (to be evaluated)

Experience

2. a. (1) Number of years in business as a Consultant/PM under the company name listed in 1.a., above:
___________ years. List any other names your firm operated under previously.

<table>
<thead>
<tr>
<th>Year</th>
<th>Name</th>
<th>Years</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td></td>
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<tr>
<td>2</td>
<td></td>
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<tr>
<td>4</td>
<td></td>
<td></td>
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<tr>
<td>5</td>
<td></td>
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</tr>
</tbody>
</table>

2. a. (2) List date, State and type of incorporation, partnership, or proprietorship establishment:

Date: __________________________ State/Type: __________________________

2. a. (3) List names of the firm principals appropriate to the type of the firm:
Corporation: President, Vice-president, Secretary, Treasurer
Partnership: Partners
Proprietorship: Owner
Other: List and explain

<table>
<thead>
<tr>
<th>Title</th>
<th>Full Name</th>
<th>Years</th>
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<tbody>
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</tbody>
</table>
2. a. (4) Has your company ever performed substantially similar services and size as the City for a public water and sewer utility with a minimum of 75,000 metered accounts  □ Yes □ No (Attach additional page if necessary)
If your company has performed work for with a minimum of 75,000 accounts do not submit a response to this request for proposals.
If yes, list the name of the agency, dollar value, owner and contact names, contact phone numbers and contract dates for all contracts completed (or current) within the last five (5) years.

<table>
<thead>
<tr>
<th>Entity</th>
<th>Dollar Value</th>
<th>Owner Agency Contact Name</th>
<th>Contact Phone Number</th>
<th>Contract Dates</th>
</tr>
</thead>
<tbody>
<tr>
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</table>

2. a. (5) Within the last 5 years, has your company been pre-qualified to bid on a substantially similar project and failed to submit a bid without notice of good cause before final bid date? ☐ Yes ☐ No If yes, on a separate sheet list name of project and reason you did not submit a bid.

Workload/Capacity

2. b. (1) How many projects does the primary project manager currently have under contract or in progress and what is their total dollar value?
   • $____________________ (Current projects contract amount)

2. b. (2) List the three largest projects currently under contract or in progress for the primary project manager, including for each, the name of the entity, owner and phone numbers, service type and the contract end dates.

<table>
<thead>
<tr>
<th>#1 –Entity Name</th>
<th>Description/Areas of Work Performed</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Owner Name/ Representative</td>
</tr>
<tr>
<td></td>
<td>Owner Address</td>
</tr>
<tr>
<td></td>
<td>Phone</td>
</tr>
<tr>
<td></td>
<td>Email Address</td>
</tr>
<tr>
<td></td>
<td>Service Type</td>
</tr>
<tr>
<td></td>
<td>Contract End Date</td>
</tr>
</tbody>
</table>
# Feasibility Study

2. c. (1) List a feasibility study that you completed for AMR/AMI services. List the most recent project and provide owner’s contact information below.

<table>
<thead>
<tr>
<th>Feasibility Study Procedures</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Name</td>
<td></td>
</tr>
<tr>
<td>Owner Name/ Representative</td>
<td></td>
</tr>
<tr>
<td>Owner Address/Phone #</td>
<td></td>
</tr>
<tr>
<td>Owner Address, Phone # and Email</td>
<td></td>
</tr>
<tr>
<td>Did a project originate from the study? If not, then why?</td>
<td></td>
</tr>
</tbody>
</table>

#2 – Entity Name

<table>
<thead>
<tr>
<th>Description/Areas of Work Performed</th>
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</tr>
</thead>
<tbody>
<tr>
<td>Owner Name/ Representative</td>
<td></td>
</tr>
<tr>
<td>Owner Address</td>
<td></td>
</tr>
<tr>
<td>Phone</td>
<td></td>
</tr>
<tr>
<td>Email Address</td>
<td></td>
</tr>
<tr>
<td>Service Type</td>
<td></td>
</tr>
<tr>
<td>Contract End Date</td>
<td></td>
</tr>
</tbody>
</table>

#3 – Entity Name

<table>
<thead>
<tr>
<th>Description/Areas of Work Performed</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Owner Name/ Representative</td>
<td></td>
</tr>
<tr>
<td>Owner Address</td>
<td></td>
</tr>
<tr>
<td>Phone</td>
<td></td>
</tr>
<tr>
<td>Email Address</td>
<td></td>
</tr>
<tr>
<td>Service Type</td>
<td></td>
</tr>
<tr>
<td>Contract End Date</td>
<td></td>
</tr>
</tbody>
</table>
2. **c. (2)** Describe the feasibility study performed state the outcome, highlights and issues listed in 2. C. (1).
Litigation/Claims

2. d. (1) Has your company ever failed to complete work awarded to it?  □Yes □No
If yes, please provide project name(s), contact information for owner, year(s), and reason why. Attach relevant documentation._________________________________________________________________________                                                                                     ____________________________________________________________________________
____________________________________________________________________________________

2. d. (2) Have you ever paid liquidated damages on any project? □Yes □No If yes, state the project name(s), year(s), and reason why.                                                                                     ____________________________________________________________________________
____________________________________________________________________________________

2. d. (3) Has your company filed any claims on any previous project management services within the last five years?
□Yes □No  If yes, state the entity name(s), year(s), case number, and reason why.                                                                                     ____________________________________________________________________________

2. d. (4) Has your present company, its officers, owners, or agents ever been convicted of charges relating to conflicts of interest, bribery, or bid-rigging? □Yes □No  If yes, state the entity name(s), year(s), and reason why: ____________________________________________________________________________

Section 3.  PROJECT SPECIFIC REQUIREMENTS

References

3. a. Please identify three (3) references most closely reflecting the scope of services being requested for the currently proposed AMR/AMI project. The substantially similar projects should have been completed within the last five (5) years. The references listed below should be the ones used in Section V. If the Consultant/PM has performed work for the City of Columbia, in the past or currently, the City must be stated as an additional reference (#4) to the three required non-City of Columbia references.

<table>
<thead>
<tr>
<th>#1 – Entity Name</th>
<th>Specify AMR, AMI or both</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Owner Name/ Representative</td>
</tr>
<tr>
<td></td>
<td>Owner Address/Phone #</td>
</tr>
<tr>
<td></td>
<td>Contract Dollar Value</td>
</tr>
<tr>
<td></td>
<td>Contract End Date</td>
</tr>
</tbody>
</table>
## Reference Questionnaire Attached

(y/n)

Performance Rating or Letter of Commendation

### #2 – Entity Name

Specify AMR, AMI or both

Owner Name/ Representative

Owner Address/Phone #

Contract Dollar Value

Contract End Date

Reference Questionnaire Attached

(y/n)

Performance Rating or Letter of Commendation

### #3 – Entity Name

Specify AMR, AMI or both

Owner Name/ Representative

Owner Address/Phone #

Contract Dollar Value

Contract End Date

Reference Questionnaire Attached

(y/n)

Performance Rating or Letter of Commendation

### #4 – Entity Name

Specify AMR, AMI or both

Owner Name/ Representative

Owner Address/Phone #

Contract Dollar Value

Contract End Date

City of Columbia Reference Only, if applicable
Staffing and Organizational Structure

3. b. (1) Staff Qualifications - Provide organizational structure reflecting authority, responsibility and proportion of time dedicated to this contract.

3. b. (2) Staff Availability - Are key personnel also proposed on any other projects for which bidding and contracting is pending? □ Yes □ No   If yes, describe general availability and qualifications of potential substitutes.
Signature

By signing this document, you are acknowledging that all answers are true to the best of your knowledge.
Submitted by:

______________________________________________________________
Company Name

______________________________________________________________
Physical Address

______________________________________________________________
Mailing Address

a. Dated this day of: ________________________________

Submitted by: ________________________________
Signature by Authorized Officer __________________________
Print Title of Authorized Officer __________________________

Phone: ___________________________________________
Contact person’s phone number

Email: ____________________________________________
Contact person’s E-mail address

b. Notary Certification:

South Carolina ________________________ County

I, a Notary Public of the County and State aforesaid, certify that ________________________, personally appeared before me this day and acknowledged the execution of the foregoing instrument. Witness my hand and official seal, this the ________ day of ________________________, 20__.

(Official Notary Seal or Stamp) ______________________________
Signature of Notary Public

My commission expires ________________________, 20 ___
APPENDIX VI- REFERENCE QUESTIONNAIRE

REFERENCE QUESTIONNAIRE

To: ________________________________

Phone: ________________________________ Fax: ________________________________

Subject: Past Performance Survey of:

(Name of Company)

(Name of Individuals)

The City of Columbia is implementing a process that collects past performance information on firms and their key personnel. The information will be used to assist the City in the selection of firms to perform various projects. The firm/individual listed above has listed you as a client for which they have previously performed work. We would appreciate your taking the time to complete this survey.

Rate each of the criteria on a scale of 1 to 10, with 10 representing that you were very satisfied (and would hire the firm/individual again) and 1 representing that you were very unsatisfied (and would never hire the firm/individual again). Please rate each of the criteria to the best of your knowledge. If you do not have sufficient knowledge in a particular area, please leave it blank.

Client Name: ________________________________ Date

Project Name: ________________________________ Installed __________

How many metered accounts for this project: _________________

Is this a public utility? Yes _____ No _____

<table>
<thead>
<tr>
<th>NO</th>
<th>CRITERIA</th>
<th>UNIT</th>
<th>RATING</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Ability to meet customer expectations</td>
<td>(1-10)</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Ability to manage costs (minimal change orders)</td>
<td>(1-10)</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Ability to maintain project schedule (completed on time or early)</td>
<td>(1-10)</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Your comfort level in hiring the firm/individual again based on performance</td>
<td>(1-10)</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Ability to increase value (quality of design)</td>
<td>(1-10)</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Ability to identify and minimize the users risk</td>
<td>(1-10)</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Ability to close out (proper documents)</td>
<td>(1-10)</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Leadership ability (minimize the need of owner direction)</td>
<td>(1-10)</td>
<td></td>
</tr>
</tbody>
</table>

Signature of person completing this questionnaire: ________________________________

Page 51
## APPENDIX VII- RATE SCHEDULE

Please include your hourly rate for the following services:

<table>
<thead>
<tr>
<th>Service</th>
<th>Rate</th>
<th>Unit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Manager</td>
<td>$</td>
<td>Per Hour</td>
</tr>
<tr>
<td>Water Engineer (Junior)</td>
<td>$</td>
<td>Per Hour</td>
</tr>
<tr>
<td>Water Engineer (Senior)</td>
<td>$</td>
<td>Per Hour</td>
</tr>
<tr>
<td>Water Field Technician</td>
<td>$</td>
<td>Per Hour</td>
</tr>
<tr>
<td>Water Meter Foreman</td>
<td>$</td>
<td>Per Hour</td>
</tr>
<tr>
<td>Water Meter Inspector</td>
<td>$</td>
<td>Per Hour</td>
</tr>
<tr>
<td>Water Meter Servicer</td>
<td>$</td>
<td>Per Hour</td>
</tr>
<tr>
<td>Other, if so please add below</td>
<td>$</td>
<td>Per Hour</td>
</tr>
</tbody>
</table>

*If the above titles are not consistent with your firm’s position, please not any exceptions in your response.*
The following is the Holiday schedule for calendar year 2016

<table>
<thead>
<tr>
<th>Holiday- 2016</th>
<th>*Official &amp; Designed Day-Date- 2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Year’s Day</td>
<td>Friday—January 1, 2016</td>
</tr>
<tr>
<td>Martin Luther King, Jr. Day</td>
<td>Monday—January 18, 2016</td>
</tr>
<tr>
<td>Friday before Easter</td>
<td>Friday—March 25, 2016</td>
</tr>
<tr>
<td>Memorial Day</td>
<td>Monday—May 30, 2016</td>
</tr>
<tr>
<td>Labor Day</td>
<td>Monday—September 5, 2016</td>
</tr>
<tr>
<td>Thanksgiving Day</td>
<td>Thursday—November 24, 2016</td>
</tr>
<tr>
<td>Day after Thanksgiving Day</td>
<td>Friday—November 25, 2016</td>
</tr>
<tr>
<td>Day in conjunction with Christmas</td>
<td>Friday—December 23, 2016</td>
</tr>
<tr>
<td>Christmas Day</td>
<td>Monday—December 26, 2016</td>
</tr>
</tbody>
</table>