



REQUEST FOR QUALIFICATIONS  
DESIGN AND IMPLEMENTATION OF AN  
ADVANCED METERING INFRASTRUCTURE  
SYSTEM

SOLICITATION NUMBER: AMI\_2023  
Response Due: 5:00PM May 29, 2023

May 3, 2023

Request for Qualifications (RFQ)

Advanced Metering Infrastructure (AMI) System

The City of Concord is conducting a qualification-based selection process for consulting services to support the procurement and implementation of an Advanced Metering Infrastructure (AMI) solution for its water and electric utilities. Interested consultants are invited to submit a Statement of Qualifications (SOQ) package for consideration no later than 5:00PM May 29, 2023.

The selected consultant will become familiar with the City's needs, develop an RFP for procuring an AMI solution, provide a recommendation for the AMI Vendor selection, assist the City with contract negotiations with the selected vendor, and manage the implementation of the selected AMI solution.

Each consultant submitting a SOQ must independently evaluate all information provided by the City. The City makes no representations or warranties regarding any information presented in this RFQ, or otherwise made available during the procurement process, and assumes no responsibility for conclusions or interpretations derived from such information. In addition, the City will not be bound by or be responsible for any explanation or conclusions regarding this RFQ or any related documents other than those provided by an addendum issued by the City. Consultants may not rely on any oral statement by the City or its agents.

If a consultant identifies potential errors or omissions in this RFQ or any other related documents, the consultant should immediately notify the City of such potential discrepancy in writing. The City may issue a written addendum if a clarification is determined necessary. All questions or requests for interpretations or additional information should be provided in accordance with the instructions herein.

If the City amends this RFQ, an addendum will be posted to the City's website, at: <https://concordnc.gov/Departments/Finance/Purchasing/RFPs-RFQs-and-Bids>. Consultants are required to acknowledge receipt of each addendum within the cover letter to the SOQ.

#### Background Information

The City of Concord provides water and/or electric service to a population of approximately 108,000 residents. There are approximately 46,000 water and 34,000 electric services. The City has experienced steady growth over the last decade. This growth is expected to continue; thus expandability of a potential AMI solution is an essential concern. The City's service areas for water and electric service vary greatly, so there are current and future service areas that will have water service only and do/will have an alternate electric utility provider.

The City's approximately 45,000 existing water meters include residential, commercial, and industrial meters ranging from ¾-inch to 10-inch. For 2-inch and smaller, the City's current preferred meter is Badger. For 3-inch and larger, the City's preferred meter is the Octave. While not essential, it is generally preferred to utilize these assets with the new AMI system. However, meter age and new meter warranty will be a consideration as well.

Most of the existing meters are one of these two models, equipped with Itron ERTs drive-by Automatic Meter Reading (AMR) or Nexgrid AMI, the City's original AMI vendor.

Residential electric meters will be replaced as part of this project. Residential meters include approximately 30,433 Form 2S/240V/CL200, 27 Form 1S/120V/CL100, 345 Form 2S/240V/CL 320, and 551 Form 12S/120-208V.

Commercial meters include approximately 1,207-Form 16S/120-480V/CL 200, 158-Form 16S/120-480V/CL 320, 254-Form 4S/240V/CL 20, 11-Form 5S/120-480V/CL 20, and 1,242-Form 9S/120-480V/CL 20.

The following is a list of relevant software currently utilized by the City:

Harris/Northstar – Customer Information System/Utility Billing

CityWorks – Asset Management/Work Order System

ESRI/ArcGIS, ArcMap, ArcMap Pro, WindMil Map – Mapping & GIS Analytics

Electric: SCADA Outage Management – Milsoft (DisPatch)

Water/Sewer: Rockwell Factory Talk – SCADA

### **Scope of work**

The following scope of work is currently envisioned for this project. The intent is to award the entire scope to one qualified firm or team of firms; however, the City reserves the right to contract separately for any portion of the project. This may include issuing a subsequent RFQ for certain tasks or assigning tasks to the City's on-call firms.

By issuing this RFQ, the City is seeking a partner to determine the best path forward towards improving its business and finding ways to utilize current and future technologies to achieve that goal. Part of the scope that will be expected of the selected consultant will be to further identify and refine our goals prior to issuance of an RFP for an AMI vendor. Generally, the City's goals of implementing an AMI system are listed below:

- Improve customer service and customer experience
- Increase billing process efficiency
- Improve planning capabilities
- Improve system monitoring
- Improve asset performance
- Accurately quantify and reduce system losses
- Ensure future and backwards compatibility and minimize risk of obsolescence
- Implementation of Meter Data Management (MDM) system

The project, and consultant proposals, will be defined by three phases. At the completion of each phase, the project and selected consultant will be evaluated, and a determination will be made by the City

whether to proceed to the next phase with the selected consultant. The project phases as currently envisioned are described below. Note that this is not intended to be all-inclusive, nor is it

guaranteed that all the below tasks will be utilized. A more detailed Scope of Work will be developed during negotiation with the selected consultant.

### **Phase I: AMI RFP Development and Vendor Selection**

- Fully define the City's needs across all departments and stakeholders
- Prepare and issue a detailed RFP for an AMI Vendor
- Develop evaluation metrics for ranking proposals
- Provide an initial evaluation report summarizing the AMI proposals and recommend a short list of candidates
- Schedule and facilitate detailed presentations from short-listed candidates
- Provide a final report on the RFP process including a recommendation as to which Vendor's solution best meets the City's needs. The City is open to evaluating separate solutions for water and electric.

### **Phase II: Contract Negotiation**

- Serve as technical advisor in the negotiation of terms and conditions with the recommended vendor(s), including service level agreements, performance criteria, scheduling, warranties, and final pricing
- Perform a technical review of final contract documents and facilitate their execution.
- Provide representation during the approval process.

### **Phase III: AMI System Implementation**

- Manage the implementation of the selected AMI system through start-up and final acceptance.
- Create a project plan that identifies each individual task via a detailed work breakdown structure that includes, at minimum: the level of effort required to complete tasks, a timeline for completion of tasks, dependencies (predecessor and successor relationships), responsible party (vendor, client, consultant, etc.), and the status of each task.
- Develop a Project Communications Plan that defines the methods of information collection and distribution and outlines the understanding among the project team members regarding the actions and processes necessary to facilitate effective communications for all stakeholders.
- Facilitate meetings and provide updates as required to maintain open communications among all stakeholders throughout the implementation process.
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### **SOQ Requirements**

The SOQ should follow the format outlined in this section. Submittals shall be prepared economically and shall be straightforward and concise, avoiding elaborate promotional materials beyond those required to present the firm's capabilities related to this RFQ. All pages shall be 8.5" x 11". Total pages, including all pages should not exceed 15 total pages.

1. Cover Letter: A clear and concise introduction, which shall identify the firm's primary contact person for the SOQ, acknowledge receipt of any amendments to the RFQ, and summarize why the City should select your firm for this project.

2. Firm Profile: Provide the following information:

- a. Brief history of the firm,
- b. Location and contact information for the firm's corporate headquarters,
- c. Location(s) and contact information for any branch office(s) that may be utilized for this project,
- d. Number of employees (overall and for each identified branch office),
- e. Type of ownership and parent company, if applicable, and any pending ownership changes,
- f. Identify any claim or litigation involving the firm within the last five years, or provide a statement that none exist.

3. Project Understanding and Approach: A detailed narrative that demonstrates an understanding of the City's needs and describes how those needs will be met. Identify services that are typically provided in-house by the firm's local or North Carolina offices, services that are available from the firm's out-of-state offices, and services for which a sub-consultant would be utilized.

4. Qualifications and Experience: At least three relevant projects completed by the firm. Include the following information for each listed project:

- a. Project description, including system type(s) (water, electric, gas, etc.) and features (load management, remote disconnect, lighting control, etc.), utility billing software, utility data management system/software, meter counts, list of competing AMI vendors, and winning AMI vendor.
- b. Project start and completion dates (if ongoing, provide the current status and projected completion date),
- c. AMI and Meter Data Management vendor's bid cost and final cost (an explanation to significant differences in cost may be provided),
- d. Scope of services provided by the consultant,
- e. Sub-Consultants utilized (if any),
- f. Summary of the similarities to this project,
- g. Name, title, email address, and phone number of Owner reference, and
- h. Name, title, email address, and phone number of AMI vendor reference.

5. Project Team: Identify all personnel, including sub-consultants that will be directly involved in the project. Provide a brief resume for each team member which includes office location, general qualifications (education, professional registrations, certifications, etc.), years of experience (with

current firm and other firms), role for this project, and role for any projects listed in the Qualifications and Experience section of the SOQ. Specifically identify at least one person with expertise in each of the following areas: Water, Electric, Finance, Information Technology, Customer Support, and Systems Integration.

6. Project Management and QA/QC: Briefly describe the firm’s procedures and processes for project management and quality assurance and quality control throughout all phases of a project.

**Evaluation Criteria & Selection Process**

SOQs will be evaluated based on the following criteria:

CRITERIA	POSSIBLE POINTS
Relevant Qualifications and Experience	35
Project Approach Methodology and Timeline	15
Qualifications and experience of the personnel assigned to this project	20
Work Samples and References	20
Office location of project team members	10
TOTAL	100

SOQs will be evaluated by a selection committee comprised of City staff. Following initial evaluation of the SOQs, the committee may conduct interviews with top candidates.

**Submittal Procedure**

As soon as possible, please email Ryan LeClear, Purchasing Manager at [leclearr@concordnc.gov](mailto:leclearr@concordnc.gov) to indicate your firm’s interest in the project and intent to submit a SOQ. Include the firm’s name and the name and email address of the main contact person for the SOQ.

All questions related to the RFQ shall be via email to Ryan LeClear, Purchasing Manager at [leclearr@concordnc.gov](mailto:leclearr@concordnc.gov) from the identified contact person. The deadline for questions is May 15, 2023. The City will provide responses to all questions by May 19, 2023. These answers will be posted on the RFP solicitation page of the City’s website.

Submit the SOQ in pdf format via email to Ryan LeClear, Purchasing Manager at [leclearr@concordnc.gov](mailto:leclearr@concordnc.gov) no later than 5:00 PM on May 29, 2023. No hardcopy submittal of the SOQ is required. Please note that any additional information or amendments to this RFQ will sent, via email, to all firms that have indicated interest in the project and intent to submit, as noted above and posted to the City’s website at: <https://concordnc.gov/Departments/Finance/Purchasing/RFPs-RFQs-and-Bids>

The consultant shall bear full responsibility for all costs incurred in the development and submittal of the SOQ, including costs associated with interviews. All submissions shall become the exclusive property of the City of Concord and may be disclosed to third parties.

**Solicitation Schedule Summary:**

<b>EVENT</b>	<b>DATE</b>
RFQ Released	May 3, 2023
Deadline for Vendor Questions to be submitted to the City	May 15, 2023
Deadline for City to provide responses to questions	May 19, 2023
RFQ Opening (Last day to submit responses)	May 29, 2023 @ 5PM
Finalist Presentations	Mid June-Early July 2023
Final Selection(s)	Late July 2023
Services to begin within 30 days of contract execution	

**Award:** The City reserves the right to enter into an Agreement or a Purchase Order with a single award, split awards, or use any combination that best serves the interest of the City.

1. The City reserves the right to reject any or all responses or delete any portion of the response, or to accept any response deemed most advantageous, or to waive any irregularities or informalities in the response received that best serves the interests and at the sole discretion of the City.

**Agreement Term:** The initial term of the resulting agreement shall be determined by the proposed and agreed upon project timeline.

1. If the Respondent fails to perform its duties in a reasonable and competent manner, the City shall give written notice to the respondent of the deficiencies and the respondent shall have thirty (30) days to correct such deficiencies. If the Respondent fails to correct the deficiencies within the thirty (30) days, The city may terminate the agreement by giving the Respondent written notice of termination and the reason for the termination.
2. If the agreement is terminated for any reason, the respondent shall turn over all records, to include but not be limited to the following: drawings, plans and estimates, to the City within ten (10) working days after completion of duties contained in the agreement.
3. City seeks timely delivery of all elements of the Scope of Work herein. Late delivery penalties may be included in the agreement.

**FORMS:**

A respondent's reference sheet should be included. Should list Company Name, Individual Contact/Title, Email address, Location Address and Telephone Number.

## **Complete Submittal Checklist**

1. Cover Letter
2. Firm Profile
3. Project Understanding and Approach
4. Qualifications and Experience
5. Project Team
6. Project Management and QA/QC