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Request for Qualifications **(RFQ)**

Advanced Metering System

May 24, 2023

Introduction

The City of Hamlet is conducting a qualification-based selection process for consulting services to support the procurement and implementation of an Advanced Metering solution for its water utility. Interested consultants are invited to submit a Statement of Qualifications (SOQ) package for consideration no later than June 2, 2023.

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

Background Information

The City of Hamlet provides water service to a population of approximately 6,366 residents. There are approximately 4,086 water services, equaling at least 10,200 water users. The City has experienced minimal residential growth over the last decade. However, that is expected to change soon; thus expandability of a potential advanced metering solution is an essential concern.

The City's existing water meters include 3,745 residential and 166 commercial meters ranging from ¾-inch to 6-inch. For 2-inch and smaller, the City's preferred meter is the Neptune. While not essential, it is preferred to utilize these assets with the new system. For 3-inch and larger, the City's preferred meter is the Neptune.

Most of the existing meters are one of these two models, equipped with Itron ERTs for drive-by Automatic Meter Reading (AMR).

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 engineering 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 the vendor. Generally, the City's goals of implementing an advanced metering system are listed below:

- Improve customer service and customer experience
- Increase billing process efficiency
- Reduce operational expenditures over time
- 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

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: RFP Development and Vendor Selection

- Fully define the City's needs across all departments and stakeholders
- Prepare and issue a detailed RFP
- Schedule and facilitate detailed presentations from candidates
- Provide a final report on the RFP process including a recommendation as to which Vendor's solution best meets the City's needs.

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: System Implementation

- Manage the implementation of the selected advanced metering 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.

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".

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 basic overview of the firm including history of the firm, location and contact information, number of employees, etc.
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.
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:

1. Firm experience and reputation
2. Project approach and understanding
3. Qualifications and experience of the personnel assigned to this project
4. Office location of project team members

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 rbrown@hamletnc.us 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 rbrown@hamletnc.us from the identified contact person. **The deadline for questions is June 2, 2023.**

Submit the SOQ in pdf format via email to rbrown@hamletnc.us no later than 5:00 PM on June 9, 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.

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 Hamlet and may be disclosed to third parties.