

CLAYTON COUNTY WATER AUTHORITY

Request for Proposal

ENTERPRISE PLATFORM SOFTWARE

CIS, MWM, and CSS

Proposal Opening: Friday, August 19, 2016 at 2:00 p.m. (local time)
1600 Battle Creek Road, Morrow, Georgia 30260

A D D E N D U M # 2

Dated: August 10, 2016

Acknowledgment of receipt of this addendum **MUST BE SIGNED AND INCLUDED** IN YOUR RESPONSE TO THE RFP.

REVISIONS:

1. Addendum 1, question #5: "I am writing to request a soft copy of the functional and technical requirements in MS Excel format."

Corrected Answer: *There is a link within the Appendix A section to download a softcopy.* Please note the fields for entering data in Excel have been unprotected for data entry.

2. Replace the Table of Contents page ii with the revised Table of Contents iiR provided with this addendum.
3. On page 1-2.6 of the RFP, item 2, replace paragraph "a." with the revised paragraph "a" below:
 - a. *Provide at least three utility customer references with similar implementation as CCWA.*

Revised page 1-2.6R is provided with this Addendum.

4. Replace page 2-8.2R provided with Addendum 1 with page 2-8.2R2 provided with this addendum to revise first paragraph of item 8.4 to read as follows:

"SLBE Utilization Points for this procurement are incentives that range between 0 and 10 points for the utilization of a certified SLBE (prime or sub-contractor) in the provision of services only. The SLBE Utilization Points will be applied as follows:"

5. Division 4 – Sections 2.15 – 2.18 represent the "Technical Documentation and Requirements" that should follow as items A – D under section 2.14 on pages 4-2.9 through 4-2.12. Replace those pages with pages 4-2.9R through 4-2.12R provided with this addendum.

Additionally, please note that item 11 on page 4-2.12 has been revised on page 4-2.12R to read as follows:

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- 11. Not less than 70% of the personnel resources of proposers to be assigned to these tasks must all be physically located within North America. Project Management Personnel dedicated to this project have to be physically present in North America.***
- 6. Each proposer should adjust the printing setup for Appendix A in Excel (Functional Requirements) to minimize the number of pages to print and submit.**

QUESTIONS:

- 1. Can you please confirm that your desire is to replace CityWorks or do you plan to keep it in place? Some of your requirements imply that it is to stay in place.**

Answer: No. We are not in the market to replace CityWorks and will continue to use it for work orders.

- 2. Please confirm 76,000 meters. How many of those customers are residential and how many are commercial/Industrial?**

Answer: Approximately 70,000 residential and 6,000 commercial.

- 3. To ensure proper pricing for the MWM piece we need to know the following:**

- a) Number of mobile technicians.**

Answer: Estimated number of 30.

- b) Number of Dispatchers.**

Answer: Estimated number of 5.

- c) Number of End Users.**

Answer: Estimated number of 40.

- 4. For Asset management system, how many users?**

Answer: If by asset management system, you are referring to the Mobile Workforce Management system, see answer to question 3 above.

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5. **For mobile work management solution, how many total users?**

Answer: See answer to question 3 above.

6. **Does CCWA have a preference between SaaS or On premise for MWM and CSS functionality?**

Answer: CCWA realizes that there are advantages and disadvantages to each model, and does not have a preference between SaaS and On Premise.

7. **Is it CCWA preference to have a single vendor provide CIS, MWM and CSS functionally?**

Answer: CCWA does not have a preference for this. Overall, CCWA is looking to have an integrated solution either way.

8. **Does the RFP accurately reflect the specific needs of CCWA?**

Answer: Yes, CCWA believes this to be true.

9. **This question regards the Work Mobile part of the RFP. Has CCWA evaluated the CityWorks mobile solution? If so, could it be used in conjunction with a CIS system to provide a complete solution for WFM by interfacing to the CIS via the inbound/outbound APIs? Is that an option for our response? If not, is it an option to respond to the RFP with our inbound/outbound APIs and have CCWA consider a MWFM solution separately? Or is that noncompliant to the RFP?**

Answer: CCWA is expecting vendors to propose an MWM solution.

10. **How many field service staff?**

Answer: See answer to question 3 above.

11. **If the CIS is built on an Oracle database, does CCWA have a preference for a hosted solution or an on-Premise bid?**

Answer: CCWA is asking for vendors to provide their thoughts on the best solution for CCWA based on the information provided in the RFP.

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12. For Work management, GIS, which will be the system of records?

Answer: This has not been determined at this point in time. CCWA does not believe this to be material to the response, and will decide during detail design.

13. Is 2.14 missing a list of tech documents that should be provided? The verbiage indicates that a list of documents should be included in the question.

Answer: Refer to Revision No. 5 above.

14. Division 3, Section 1, ARTICLE 10. ATTACHMENTS, SCHEDULES AND SIGNATURES.

Does this need to be included in the proposal or is this for the company that is awarded contract?

Answer: This is only for the company awarded the contract.

15. Div 4 section 2 Methodology and Planning. Do these documents only need to be filled out by the company that is awarded the contract?

Answer: The response format is defined in Division 1 / Section 2 of the RFP. This section is only provided for background information.

16. Is there a preferred response format to APP-A Functional Requirements? For example, just X where we comply or Yes/No/Partial? Also the RFP states that these are current and future requirements. Is it possible to notate that? Lastly, is there a score for items that are under development?

Answer: An 'X' should be used to indicate how / if each requirement will be met. Requirements will not be notated as current or future. There is not a score for items under development but this should be noted in column L – "Describe What Your Software Provides to Meet this Requirement".

17. How many users are currently set up on (web) customer self-service? What are the biggest limitations of the CSS?

Answer: Approximately 10,000 users. The CSS functional requirements define CCWA's desired functionality.

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- 18. Are there specific services in mind which would use API provided by Microsoft?**

Interface	Maintain Customer and Account Data	Describe how you provide for MS Office User Interface
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Answer: CCWA expects each proposer to describe how your application provides seamless intergration with Microsoft Office products.

- 19. One quick question on the SLBE requirement. I read the table and see how the points are awarded but I just need to get one item clarified. The 5%. Is this based on the total project (license, services, and maintenance) or is it calculated just based on services? We are hoping it is just based on the total services otherwise it would be difficult to fulfill the 5% requirement without impacting the project.**

Answer: Refer to Revision 4 above.

- 20. ‘Section 2, point 2.a’ of General Information in RFP which says: “Provide at least three references from North America, preferably utility customers with a similar implementation as CCWA.”. Can this be changed to read “Provide at least three utility customer references with similar implementation as CCWA”?**

Answer: Refer to Revision 3 above.

- 21. ‘Section 2, point 11’ of Project Scope which says: “Not less than 70% of the personnel resources of proposers to be assigned to these tasks must all be physically located within North America. All management personnel of proposers to be assigned to these tasks must be physically located within North America.” Can this be relaxed to say that all “Project Management Personnel dedicated to this project have to be physically present in North America”?**

Answer: Refer to Revision 5 above.

- 22. Section 2.19, Sub-Point #8 – “The Proposer must have acted as the prime contractor with a successful implementation of the Solution Set for a utility, preferably a water and sewer utility in the North America.” Can this be**

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changed to “The Proposer must have acted as the prime contractor with a successful implementation of the Solution Set for a utility, preferably a water and sewer utility”.

Answer: The main requirement is a successful implementation of the solution set as a prime contractor.

23. Can you please confirm number of concurrent users (meaning how many end users who must be on the system at any given time – not counting casual users). From your size, I would estimate about 25 concurrent users with additional casual users who many need access occasionally throughout the day/week.

Answer: Estimated number of 60.

24. I am wondering if there is an attendance sheet available that shows who participated in the pre bid meeting conference call for this project on July 29th?

Answer: Below is the participants list. Check marks represent confirmation of attendance by companies who identified themselves. Please note some callers may have entered the conference meeting after their names were called, therefore, they could not be confirmed.

Company Name	Representative	Phone No.	Email Address	Attendance
Advanced Utility Systems	Brenda Klem	416 496 0149 ext. 286	bklem@advancedutility.com	✓
Bethea and Associates, LLC.	YoLanda Bethea	404.388.9437	bethea_ba@msn.com	✓
Blue Cypress Consulting, LLC	John Evans	404-824-6581		
Blue Cypress Consulting, LLC	Peggy Duszynski	404.772.8369	peggy.duszynski@bluecypress-consulting.com	
Cayenta	Barry Dunphy	604-570-4300 ext. 416		✓
Cayenta	Greg Mack	604-570-4300 ext. 513	GMack@cayenta.com	✓
Cogsdale	Shelley Macleod	902.892.3101	shmacleod@cogsdale.com	✓
Diversified Technologies LLC	Kenya Whitfield	678.471.0827	kwhitfield@dt-llc.com	
Emtec Inc.	Bill Silkett	415-902-5974	Bill.Silkett@emtecinc.com	✓

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Participants list (cont'd):

Company Name	Representative	Phone No.	Email Address	Attendance
Enterprise & Data Center Infrastructure	Maria K Porter	678.699.9565	Maria.Porter@panduit.com	
Enterprise Solutions Consulting (ESC-Partners)	Valerie Ross	(585) 413-4302 X 105	valerie@esc-partners.com	✓
Fluentgrid	Sid Ganapathiraju	91 98487 98486	Sidharth.g@fluentgrid.com	✓
Hansen Technologies	Christian Roberts	917-497-8457	Christian.Roberts@hsntech.com	✓
Hansen Technologies	John Garofalo	732-996-7969	john.garofalo@hsntech.com	✓
Hansen Technologies	Jonathan Pilouare	646-392-9640	Jonathan.Pilouare@hsntech.com	✓
Hansen Technologies	Lynn VanTiem	843-343-1385	Lynn.VanTiem@hsntech.com	✓
Hansen Technologies	Micah Frick	803-307-4924	Micah.Frick@hsntech.com	✓
HiperWeb	Kelly Ball	850.217.6340	kball@hiperweb.com	
Itineris	Kevin Clancey	404 481 8227	Kevin.Clancey@itineris.net	✓
Itineris	Mike Foley	613-868-5594	Mike.foley@itineris.net	✓
KPMG LLP	Nixon, Matthew D	404-979-2306	mdnixon@kpmg.com	
Oracle	Carol Farmer	404.915.3238	carol.farmer@oracle.com	✓
Oracle	Stephen Mooney	703-364-4661	stephen.mooney@oracle.com	
Origin Consulting	Jan Ferro	802.999.4940		✓
Origin Consulting	Kimberly Williams	404.423.4949	kwilliams@originconsults.com	✓
Origin Consulting	Pamela Glanvill	973.727.8732	pglanvill@originconsults.com	✓
Scope IT Consulting	Nadir Noorani	980-254-1232	nadir.noorani@scopeitconsulting.com	✓
Systems & Software	Kyle Rainey	802-865-1170	KRainey@harriscomputer.com	✓
TTR ENTERPRISES INC.	Tova T. Reeder	404-781-3255	treeder@ttrenterprisesinc.com	
UNYTER Enterprises	Tony Rayfus	678-439-6789	trayfus@unyter.com	✓
Vertex	Shannon Glen	(203) 558-0192	shannon.glen@vertexgroup.com	✓
Water Smart Software	Frances Yuhas	410-375-9420	fyuhas@watersmartsoftware.com	✓
WaterSmart Software	Shana Sharp	314-497-2197	ssharp@watersmartsoftware.com	✓
XEROX	Glenn Campbell	706-860-8284	glenn.campbell@xerox.com	✓

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25. Mobile Workforce Management -

How do you use your current mobile workforce management solution? Do you still rely on paper work orders?

Answer: CCWA does not rely on paper.

26. Written Response -

Please expand upon/clarify what sort of response you are looking for in the following sections:

Section C-1) Solution Set Implementation – we have interpreted this is general implementation methodology.

Section C-5) Solution Design – we have interpreted this as methodology for design/blueprint phase of project.

Answer:

Section C-1 documents two components:

- a) The solution set (software products) that are being proposed to fulfil the requirements outlined in the RFP
- b) The general implementation methodology (waterfall, iterative, Agile, etc.) being proposed to implement the solution set.

Section C-5 - That is correct. A description is provided in 4-2.2B of the RFP.

27. Functional Matrix -

Requirement: System will indicate relationships between the accounts covered by the "blanket" deposit.

Question: What is a Blanket deposit? Could you explain with an example?

Answer: This is a deposit taken at the customer level that can be used across multiple accounts. An example is a landlord that provides a single deposit to cover multiple properties.

28. Requirement: Ability to cancel altogether or suspend for a specified period of time (by start date and end date or by billing cycle) disconnect orders after being produced en masse, by specified criteria (zip code, town code, route, cycle, etc.) or one-off.

Question: In which scenario this functionality could be used?

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Answer: The collections process may create more disconnect orders than the field staff can work in a given timeframe. This requirement will allow CCWA to cancel a group of these orders instead of accessing each order and canceling them on an individual basis.

- 29. Requirement: Ability to provide for daily automatic booking to the appropriate G/L account of all CIS financial transactions.**

Question: Could it be clarified what an automatic booking means? If possible with an example?

Answer: The CIS sub ledger should be updated in real time when financial transactions are made within the CIS system. Financial transactions should not be held from the sub ledger and updated by a batch process. CCWA realizes that the transfer from the CIS sub ledger to the overall general ledger will likely happen in batch mode.

- 30. Requirement: Ability to provide third party (Valor) with daily meter readings and historical billing and usage data to allow Valor to identify potential problem accounts based on existing tests.**

Question: Could you clarify this requirement with an example and relate it to the existing tests?

Answer: CCWA wants the ability to extract and provide meter reading and usage data to third-party vendors.

- 31. Requirement: Ability to effective date (in the future) or memo post payments initiated through third party vendors that <Utility> will not receive for 1 to 3 days. Track actual payment receipt and notify appropriate department of any unpaid.**

Question: Would this require the documents to be posted with future dates? Could we get a simple example of what is required?

Answer: Not necessarily. This could be handled by a note on the account that would inform system users that a payment is pending.

- 32. Requirement: Ability to support a gift certificate program based on user defined criteria.**

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Question: What is the actual process for posting this Gift certificates or how would you like to see this functionality in the new CIS?

Answer: This could be implemented in multiple ways. When a gift certificate is sold it could be treated as a liability, similar to a deposit. When it is received it could be processed like a check and offset the liability account instead of cash.

33. Cost Matrix -

How do you plan to conduct an apples-to-apples comparison of on-premise vs. hosted solutions? Do you plan to compare cost at a consolidated level or is the expectation to compare the costs for the granular sub components which are included with a hosted model?

Answer: There will be cost comparisons done at the consolidated level as well as at the detail component level that are included in the cost worksheets.

34. General Questions -

Given the short turn-around time between the last addendum, in which these questions will be answered, and the proposal due date - would Clayton County consider giving a proposal extension to all bidders?

Answer: The response timeline has been a little over six weeks, which we believe is sufficient. CCWA will provide responses to questions early, but does not have the ability to extend the due date.

SIGNATURE

COMPANY NAME

DATE

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Appendixes APP-A Functional Requirements – Functional requirements workbook. This list is representative of both current and future requirements and CCWA does not expect all of them to be included in the initial implementation. CCWA is expecting to work with the chosen Proposer during an analysis and functional design phase to determine the specific requirements that will be included in scope. This workbook includes the following information:

- CIS Functional Requirements.
- CSS Functional Requirements.
- MWM Functional Requirements.

APP-B Business Applications Inventory – Current application inventory, including expected disposition as it relates to the Enterprise

Division 1

General Information

Section 2: Project Overview - Revised

1. Company Information for Prime Contractor and each subcontracted organization.
 - a. Provide legal name of organization, address, telephone and fax numbers.
 - b. Provide name of primary contact, title, telephone number and email address.
 - c. Type of organization (corporation, partnership, proprietorship or joint venture).
 - d. Date Proposer entity was founded.
 - e. Proposer's corporate mission and vision statements.
 - f. The industry or regional focus that the firm's services partnership is based upon.
2. References for Prime Contractor and each subcontracted organization.
 - a. Provide at least three utility customer references with similar implementation as CCWA.
 - b. Additional references are to be provided for each subcontracted organization that will add five or more resources to the project ("material subcontractors"). These references should preferably be utility clients with similar implementations as CCWA. The references for subcontractors must show the scope of work they provided for the referenced account, and it should be similar to the scope of work the subcontractor is being proposed to do at CCWA.
 - c. Reference information to be provided for the Prime contractor and each material subcontractor should include:
 - Client name, type of utility (water, sewer, and/or storm water) and customer base.
 - Contact name, title, address, telephone and email address.
 - Prime contractor or subcontractor.
 - Project details including duration (days), functional areas (modules implemented by contractor), prime contractor or subcontractor's roles and installation date.
 - Current product version in production.
 - Performance / cost saving metrics (if available).
 - Appropriate software/tools certifications for Prime Contractor and each partner/subcontractor.

Division 2 **Proposal Requirements**

Section 8: Small Local Business Enterprises (SLBE) Information – Revision 2

work; and whether the SLBE intends to purchase commodities and/or services from a non-SLBE and simply resell them will be considered in determining if the SLBE is performing a commercially useful function.

8.2 SLBE Required Forms

This package contains the following forms that Proposers are required to submit along with their proposals (in addition to general contractor forms):

- A) SLBE-1 – Covenant of Non-Discrimination: The signed agreement stating that the firm will not discriminate on the basis of a firm's size (revenue or employee count) with regard to prime contracting, subcontracting, or partnering opportunities.
- B) SLBE-2 – Sub-Contractor Contact Form: A list of all firms contacted to participate as SLBE sub-contractors/suppliers on a contract.
- C) SLBE-3 – SLBE Sub-Contractor/Supplier Utilization Form: A list of all firms procured as SLBE sub-contractors/suppliers to be utilized on a contract.

8.3 SLBE Optional Forms

The following form is for information and tracking purposes only, to be provided post award, at the proposer's option:

- A) SLBE-4 – Post-Award–Monthly SLBE Participation Report–RFP Preference Points: Report detailing amount paid to SLBE sub-contractor on the contract.

8.4 Overview of SLBE Utilization Points and Percentages

SLBE Utilization Points for this procurement are incentives that range between 0 and 10 points for the utilization of a certified SLBE (prime or sub-contractor) in the provision of services **only**. The *SLBE Utilization Points* will be applied as follows:

<i>Proposed SLBE Utilization</i>	<i>Points</i>
Proposed Utilization of less than 2.5%	0
Proposed Utilization of 2.5% - 4.99%	5
Proposed Utilization of 5% or greater	10

Division 4

Project Scope

Section 2: Scope of Work

- D. The Proposer shall be responsible for reporting and obtaining approval from CCWA to proceed on any event that materially affects scope, schedule, cost, or quality.

2.13 Work Schedule

- A. CCWA projects the full Implementation to run approximately 1.5 years. This projection can be adjusted based on input from the Proposer.
- B. Normal hours of work are Monday through Friday 8:00 a.m. to 5:00 p.m. Eastern time. The Proposer shall not schedule any activity involving CCWA personnel outside this timeframe without prior CCWA approval.

2.14 Technical Documentation and Requirements

The following describes the minimal set of documentation to be provided by the Proposer during the project. Additional documents based on the Proposer methodology are expected.

A. Design Fit/Gap Workshop Summary

The workshop summary includes a comprehensive listing of each workshop held by functional area and the key objectives of the workshop.

B. To-Be Business Process Maps

Business Process List. The Business Process List identifies a core set of transactions for the baseline implementation of the solution set. Throughout the phases, the project team will adjust the BPL. The BPL serves as the starting point for transaction identification and will also be used for identification of training documentation, customization, interface, conversion, security and testing materials.

C. General Project Management Documentation

1. Phase Startup – Project Charter, Communication Plan, Roles & Responsibilities, Risk Identification & Mitigation Plan.
2. Executing & Controlling Results.
 - a. Outstanding Issues/Resolutions, Change Orders.
3. Project Plan.
 - a. Initial activity level project work plan.

Division 4

Project Scope

Section 2: Scope of Work

4. Necessary Sign Offs by phase.
 - a. Lessons Learned.
- D.** Additional Project Plan Documentation Requirements
 1. Business Transformation Management (BTM) Plan.
 - a. Organizational Alignment Action and Executive Sponsorship Plans.
 - b. BTM Communication Plan.
 - c. Organization Change Management Assessment and Action Plan.
 2. Development Procedures and Conceptual Design of Development.
 - a. Data Migration Plan that includes:
 - Extraction
 - Transformation
 - Load
 - Validation
 3. System Design Standards.
 4. Current application retirement plan.
 5. Conceptual Design of Development.
 6. Software Development Plan.
 7. Alternatives to Custom Development.
 8. Cost Projection for each Approved customization.
 9. Security Requirements
 - a. Authorization Requirements and Design
 - b. Portal User Management Concept
 - c. Security Concept
 - d. User Role Requirements
 10. Technical Architecture Design and Project Installation
 - a. Technical and Integration Design
 - b. System Interface Design Document
 - c. Form and Report Design
 - d. Development Environment
 - e. System Administration Procedures
 - f. Portal User Interface Design and Personalization Concept

Division 4

Project Scope

Section 2: Scope of Work

- g. Mobile Device Management
- h. Support Procedures
- i. Hardware, Network, and Database configurations

2.15 Minimum Qualifications

Proposer shall have the following minimum qualifications to be considered eligible to submit a Proposal. It is the responsibility of the Proposer to ensure and certify that it meets these minimum qualifications. At CCWA's sole discretion, any Proposer not meeting all of the following criteria may be considered non-responsive, and may not have its Proposal considered for award:

1. The Proposer must have a minimum of five years of experience providing the products contained within this RFP.
2. The Proposer must execute a contractual agreement that is acceptable to CCWA for the procurement of the requested products contained within this RFP.
3. The Proposer must provide products that meet CCWA's specifications.
4. The Proposer must be licensed to provide the particular products it includes in its Proposal or note specific products that will need third party licensing.
5. The Proposer must be financially viable, as determined by CCWA.
6. The Proposer must be either a certified North America entity Implementation Partner or the software Proposer.
7. The Proposer must assume responsibility as prime contractor for the contract. Subcontracting is allowed for this RFP, subject to the provisions set forth in this RFP. Proposed subcontractors must be clearly identified in the Proposal.
8. The Proposer must have acted as the prime contractor with a successful implementation of the Solution Set for a utility, preferably a water and sewer utility in the North America.
9. The Proposer must be able to provide certified consultants experienced in the proposed methodology, or equivalently qualified and experienced in a comparable alternate implementation methodology.
10. The Proposer must be able to provide consultants certified and experienced in the utility sector implementation of the Solution Set software.

Division 4

Project Scope

Section 2: Scope of Work

11. Not less than 70% of the personnel resources of proposers to be assigned to these tasks must all be physically located within North America. **Project Management Personnel dedicated to this project have to be physically present in North America.**

END OF SECTION