



Request for Proposals

RFP # 22-6-5

Software Platform for Water Customer Portal and Mobile App

Deadline to submit proposals:

Thursday, July 28, 2022 4:00 pm CST

Please submit proposals to the below address.

Village of Addison

Attn: Anna Hendrey, Purchasing Agent

1 Friendship Plaza

Addison, IL 60101

(630) 693-7507

ahendrey@addison-il.org

Request for Proposal 22-6-5

Software Platform for Water Customer Portal and Mobile App

STATEMENT OF PURPOSE

The Village of Addison (Utility) is looking for a software-as-a-service provider to build a program that engages customers with one or more of the following goals:

- Improving customer satisfaction
- Converting customers from print communications to digital communications
- Making better use of AMI Data, in particular in alerts
- Improving water-use efficiency
- Increasing program participation
- Implementing a comprehensive payment processing service
- Increasing electronic billing adoption

SCOPE OF SERVICES

The contractor shall provide a customer-facing web-based application, a range of personalized outgoing communications and alerts, and a Utility-facing web-based dashboard and reports to track the program. The program must be compatible with the Village's current AMI/AMR system (Sensus) and with our financial software product (Tyler New World). The initial program will last 12 months and include 10,109 metered accounts including:

- 8,016 residential
- 598 multifamily
- 545 commercial
- 14 irrigation only
- 936 industrial
- 0 other accounts.

The Utility currently reads its meters on a bi-monthly basis, and bills half the users each month.

TASKS

1. Overview of Solution and Program Design

Contractor should provide an overview of their proposed program, including information on how the program will be designed. Please include brief descriptions of:

- Program goals
- Implementation approach, program launch timeline and responsibilities
- What accounts will be involved in program and what they will receive
- What utility staff will receive
- Training and support
- Ongoing program responsibilities
- How program results are tracked and measured

2. Web Based Application for Customers

Contractor will configure and host a customer portal that is available online and through a mobile interface for all accounts. The application should initially include the features below:

Registration and Basic Information

- Secure registration and login for each utility account, regardless of meter type, the granularity of meter data or frequency of meter data collection (allowing for use with manual, AMR, and AMI data)
- Ability to configure the main tiles of the Home Page based on Utility priorities.
- Ability to add items to the Home Page based on common requests to the Utility.
- Ability to communicate AMI data interruptions to your customers through their data feed to decrease the number of customer calls.
- Dynamic customer profile that customers can update 24x7 to personalize their portal and recommendations
- Ability to fill out web forms designed by the Utility from within the Customer Portal and view previously submitted forms

Notifications and Alerts

- Easily customizable communication preferences – customers should be able to determine how they receive outgoing communications including by text/SMS, email, automated call and mail

- Ability to automatically detect leak events using AMI or Non-AMI data, automatically notify the customer of suspected leaks, engage the customer to investigate and resolve the leak with step-by-step instructions and resources, and provide resolution details to Utility through the Dashboard
- Ability to view dynamic, account-specific information on why a bill might be high (irrigation, leaks, days in billing cycle, etc.) and what can be done to reduce future consumption

Personalized Data and Insights

- Personalized consumption displays in gallons per day, seasonal consumption trends, year-over-year usage, and ability to compare use to utility goals.
- Display water consumption data in context of temperature and precipitation data to inform users of how weather impacts water use
- Ability to view water consumption by rate tiers and to forecast end-of-period total consumption levels
- Ability to view current and prior period consumption relative to a utility determined water budget, consumption goal, or usage allocation
- The ability to display missed meter reads
- The ability to estimate and display irrigation events in the consumption graph view
- Interactive money-saving recommendation library, customized for each account profile and configurable by the Utility with step-by-step implementation instructions, informational links and videos, dynamic estimates of savings potential in GPD and dollars per year, and ability to sign up for, and keep track of, money saving activities. Library should highlight and rotate most relevant savings actions for customers based on the customer's profile and the season

Multiple Users and Accounts

- Users or managers of multiple properties or commercial properties with multiple meters, can view a roll-up of all propriety consumption data in a unified view
- Ability to give access (create a secondary account login) for other users such as a spouse, roommate, tenant, or property manager
- Deliver relevant and timely utility-specific news or resources.
- Ability to export consumption data into standard data display format (i.e. csv)

Billing and Payments

- Ability to offer a link from the Utility website and integrate with Utility's payment system.
- Ability to view bills securely directly through the Portal (PDFs available).

- Ability for end users to sign up for bill alerts including when a bill is available, due, or overdue.

Contractor must provide sample format, design and content of the web-based application and functionality in the proposal. Contractor should also provide information on safety and security features of online application (see Security and Privacy Controls).

3. Utility Dashboard

Contractor will configure and host a utility analytics dashboard with data from all meter classes and types within the utility: residential, multi-family, commercial, industrial, and irrigation accounts. The application should initially include the features below:

Data and Access

- The ability to store and display at least 10 years of AMI data for immediate real-time access in both the reporting engine and the customer presentment interface
- Ability to export data in standard data presentment format (i.e. csv)
- Unlimited licenses for Utility staff members and the ability for a Utility administrator to provision or revoke access with viewer, editor, or administrator roles
- Consumption analytics across all meter types, regardless of meter type, the granularity of meter data, or frequency of meter data collection (allowing for concurrent analysis of manual, AMR, and AMI data)
- Profiles for each account with the ability to search for a profile by partial or complete account number, meter number, customer name, address, or email address.
 - Ability to record communications with each account, and ability to send an email with relevant data and charts to an individual customer through their profile page
 - AMI data in the profile will be displayed and color-coded based on normal usage, suspected leaks, and suspected irrigation.
 - Customer seasonal use analysis, temperature and precipitation information, an interface to view a satellite image of property, and ability to load the customer's view of their portal in impersonation mode

Reports and Modules

- Reports and maps showing top consumers by meter class and by period. Ability to download consumption into Excel for further analysis
- Group multiple meters (e.g. indoor and irrigation) associated with one master account

- Reports on customer portal use and customer profile statistics, including frequency of portal use, most popular actions taken by customers, method of visit (mobile vs desktop)
- Leak detection module that detects and defines types of leak events with thresholds that can be configured by the Utility, including volume, duration, and alert method (email, text, or voice)
- Leak status report that estimates of leak start date, duration of leaks, volume of water lost in leak, whether or not customer has been notified, what actions the customer has taken to resolve, and information on whether the customer has resolved the leak
- Messaging module to allow for utility staff to mass customize customer communications over email, text, and automated voice
- List creation feature by meter or account id, polygon selected map interface, GIS shape file, or external csv file upload
- Irrigation detection module that detects daily irrigation events at individual properties and flags properties that are violating utility day of week irrigation restrictions (where needed)

Messaging and Communications

- Ability to compose, send, and track messages to segments of customers within Dashboard
 - Ability to create segments of customers based on drawing shape over map of accounts within service area
 - Ability to create segments of customers based on popular reports
 - Ability to support multiple communications channels, including SMS and automated voice calling.
- Ability to create, publish and deactivate custom forms for use internally or by end customers through Portal, and manage responses in report view.
- Ability to view each customer's up-to-date account balance, water bill, and billing history
- Help site and live chat feature with Contractor's customer service staff

Contractor must provide sample format, design and content of the web-based application and functionality in the proposal. Contractor should also provide information on safety and security features of the online application.

4. Alerts and Notifications

Contractor must have the ability to send identify certain events and send alerts, including the following capabilities:

- Ability to send any alert through email, SMS, or automated call based on the end user preferences
- Ability to detect irregular usage (“possible leak”) for residential and irrigation-only accounts based on thresholds configurable by the Utility. Leak detection should be available for hourly (AMI) data and monthly data.
- Digital leak alerts should provide instructions and video content for finding and resolving the source of irregular use, regardless of whether or not the user has ever logged into the customer portal
- Option to allow customers to set their own consumption threshold alerts based on usage compared to previous periods
- Ability to set threshold notifications based on monthly customer spend
- Ability to view mobile and web based hourly, monthly, and bi-monthly AMI/AMR consumption graphs including the ability to overlay weather data.
- For customers with daily or hourly (AMI) data, option to allow customer to set their own daily or billing period user-defined threshold alert

Contractor must provide sample format, design and content of the alerts including screenshots.

5. Payment Processing

Contractor must provide a convenient option for Utility customers who want to view and pay their bills online. Contractor should configure this capability in one of the following ways:

- Single Sign On between Utility’s existing payment website **Paymentus** and Customer Portal. See Section 6 below for details on required Single Sign On capabilities.
- Ability to include an embedded payment page within the Customer Portal. Customers should be able to view and pay bills from within the Customer Portal including by credit card, debit card and ACH. Autopay and saving payment methods is also desired.
- Redirect link to outside payments page. Customer Portal sends visitors to an outside payment website. Once customers arrive to the website, they will be prompted to log in as usual.

If contractor utilizes a secondary vendor to provide one of the above solutions, the vendor must be PCI compliant and ensure a secure method of payment.

6. Single Sign On

Contractor will have the ability to work with Utility or Utility's existing contractors to implement a single sign on (SSO) capability using SAML 2.0 or OAUTH 2.0 protocols to existing Utility websites or portals.

Utility or Utility's existing contractor will function as SSO Identity Provider. The SSO should allow for the following functionality:

- Customers should be able to log into utility bill pay website and be able to transfer to customer portal using same credentials
- Customers should be able to log into customer portal directly with same and pre-existing credentials as they use with the utility bill pay website

7. Customer Letter

Contractor will have the ability to provide a print or digital letter that will reach the most customers and drive them to login to the online customer portal. Customer letters, whether electronic or print, should contain the following content:

- Configurable message from the relevant Utility or Utility administrator
- Utility logo and contact information and any Utility programs
- Explanation of benefits of customer portal including access to real-time water use data, ability to pay water bill online conveniently and securely, etc.
- Instructions on how to register for portal

Contractor must provide sample format, design and content of the letter in the proposal.

8. Project Management

In order to ensure adherence to the agreed-upon schedule and budget the contractor will:

- Provide staff training to orient staff to Program components
- Provide project status report updates
- Organize and attend meetings as required (in person, or by phone or web as appropriate)
- Designate an individual to serve as a Project Manager

Contractor should provide information on project management capabilities and experience, in particular with Programs similar in scope, and those involving integration with Sensus AMI, as well as Tyler-New World financial software. Contractor should provide information on training capabilities of staff.

EXPERIENCE AND REFERENCES

Contractor must provide at least five references for water utility customers where similar programs have been implemented for one year or longer. References must include Utility, program manager name, title, and contact information as well as the specific project dates, short description of program and results. References should have at least 5,000 water meters under management, and preferably from the northern Illinois region.

Contractor must provide the time to launch (contract signing to program start) for five programs implemented for water utility customers in past two years. Contractor should include Utility, program manager name, title, and contact information.

Contractor must provide evidence it has sent at least 75,000 abnormal use (“leak”) alerts, and have statistics showing the end result of these leak alerts (whether or not they were resolved, and what the leak source was).

COST PROPOSAL

Each proposal should also identify costs associated with program including all software license fees, printing and mailing costs, travel expenses, and all other fees including payment processing fees if relevant.

Costs for payment processing should be broken out as an optional service. **If costs for payment processing are currently inclusive in the software package, explain the ability to remove or lock this feature.**

SUBMITTAL OF PROPOSALS

Please submit a letter proposal with your proposed approach and fee for completing the work described above. Proposals should identify tasks, provide examples of key product designs and examples of program design where possible. Contractors should also identify key staff to implement program and provide experience implementing similar program, short biography, and contact information for staff. Proposals should also include a timeline for program implementation, and proposed schedule for entire program.

SUBMITTAL DEADLINE

Completed RFP's must be received on or before 4:00 PM CST, Thursday, July 28, 2022.

SUBMITTAL INSTRUCTIONS

You may submit your RFP in person, by carrier (Fed Ex, UPS, USPS) to the Village of Addison, Attention Purchasing Department, 1 Friendship Plaza, Addison, IL 60101, or digitally, prior to the submittal deadline. If submitting in person or by carrier please **clearly mark** your envelope "RFP 22-6-5".

Digital copies may be sent via email to Anna Hendrey, Purchasing Agent, ahendrey@addison-il.org. An email confirmation will be sent once the RFP is received. It is your responsibility to make sure the RFP is received prior to the deadline. We encourage you to call the purchasing agent if you do not receive a confirmation of receipt prior to the deadline. The number to reach Anna Hendrey, Purchasing Agent is (630)693-7507.

CONTACT INFORMATION

Technical questions concerning the RFP may be directed to:

Shawn Campbell, Superintendent of Water and Sewer: scampbell@addison-il.org

Questions concerning the RFP documents and submittal may be directed to:

Anna Hendrey, Purchasing Agent, ahendrey@addison-il.org

SELECTION PROCESS

The Village of Addison seeks to select a proposal submission based upon the following criteria:

1. Responsiveness of the proposal to the scope of work, as demonstrated by providing thorough responses to the scope and project requirements.
2. Past dealings with the Village of Addison, and familiarity with utility apps, and citizen portals.
3. Demonstrated experience in successful integrations with Sensus and New World software.
4. The contractor(s) experience and approach to completing the project in a timely manner.
5. The quality and relevance of project references for projects of similar scope.

The Village reserves the right to conduct pre-award discussions and/or pre-contract negotiations with any, or all responsive and responsible vendors who submit proposals determined to be reasonably

acceptable. Vendors shall be accorded fair and equal treatment with respect to any opportunity for discussion and revision of proposals, and such revisions may be permitted after submission of proposals and prior to award of a contract.

The Village may conduct negotiations with the top Vendor(s) if required to determine the acceptability of the proposal in regards to specifications, terms and conditions and cost; therefore, the proposal(s) submitted should contain the vendor's most favorable terms and conditions as well as cost with detailed specifications as proposed, since the selection and award may be made without discussion.

If the Village finds that all of the proposals submitted fail to meet the needs and requirements, the Village is not obligated to enter into an agreement to purchase.