

City of Montrose  
Purchasing Division  
433 South First Street  
PO Box 790  
Montrose, CO 81402



# REQUEST FOR PROPOSAL

## Customer Portal

**Issue Date:** August 24, 2021

**Bid Number:** 21-026

**Agent/Contact:** David Bries, Utilities Manager

**Submissions Must Be Received by:** Thursday September 9, 2021 at 2:00 pm Colorado Time

### ADMINISTRATIVE INSTRUCTIONS

The City of Montrose is requesting formal bids through the Request for Proposal process for providing a customer portal for the water usage information. Proposals will be publicly received and registered on Thursday September 9, 2021 at City Hall, 433 S. 1st Street, Montrose, Colorado 81401. Bids will be received no later than 2:00 P.M. on the above date.

Complete bid packets can be downloaded from the City web page at [www.cityofmontrose.org](http://www.cityofmontrose.org) under Department Services, Purchasing, and Open Bids. Addenda will be posted to the website and it is the bidder's responsibility to download, review, sign, and include addenda with their bid.

The City reserves the right to accept or reject any or all bids, to waive irregularities and/or informalities and to disregard all non-conforming, non-responsive, unbalanced or conditional bids. The City of Montrose complies with all Equal Opportunity requirements. All qualified bidders will receive consideration without regard to race, creed, color, national origin, sex, marital status, religion, ancestry, mental or physical handicap or age.

## **GENERAL TERMS AND CONDITIONS**

These General Terms and Conditions apply to all Offers made to the City of Montrose (hereafter "City") by all prospective vendors (herein after referred to as "Bidder") regarding City Solicitations including, but not limited to, Invitations to Bid, Requests For Proposals, Requests for Quotes, and Requests For Qualifications (hereafter "Solicitation" or Bid Solicitation).

### **A. CONTENTS OF BID**

1. Bidders shall thoroughly read the project requirements and specifications, and shall examine any drawings and documents which may be incorporated into the Bid documents. As Bid documents frequently change for each Solicitation, veteran Bidders shall not assume that this Solicitation contains the same terms and conditions that were supplied in prior Solicitations. The City is not obligated to identify either minimal or substantial modifications to Bid documents.
2. Bidders shall make all investigations necessary to thoroughly inform themselves regarding the plant and facilities affected by the delivery of services, materials and equipment as required by the Bid conditions. No plea of ignorance by the Bidder of conditions that exist, or may hereafter exist as a result of failure to fulfill the requirements of the contract documents, will be accepted as the basis for varying the requirements of the City or the compensation to the Bidder.
3. Bidders are advised that all City contracts are subject to all legal requirements contained in City Ordinances and State and Federal Statutes governing purchasing activities.
4. Bidders are required to state the exact intentions of their offer to the City via this Solicitation and must indicate any variances to the terms, conditions, and specifications of this Solicitation, no matter how slight. If variations are not stated in the Bidder's Offer, it shall be construed that the Bidder's Offer fully complies with all conditions identified in this Solicitation.

### **B. CLARIFICATION AND MODIFICATION OF BID SOLICITATION**

1. Apparent silence or omissions within this Bid Solicitation regarding a detailed description of the materials and services to be provided shall be interpreted to mean that only the best commercial practices are to prevail and that only materials and workmanship of first quality are to be used.
2. If any Bidder contemplating submitting a Proposal under this Solicitation is in doubt as to the true meaning of the specifications, the Bidder must submit a written e-mail request for clarification to the City's Agent/Contact. The Bidder submitting the request will be responsible for ensuring that the City receives the request at least seven (7) calendar days prior to the scheduled bid opening.
3. Any official interpretation of the Bid Solicitation must be issued in writing by the agent/contact of the City who is authorized to act on behalf of the City, or by the City's Legal Department. The City shall not be responsible for other interpretations offered by employees of the City who are not authorized to act on behalf of the City for this project.

4. If necessary, the City may issue a written addendum to clarify or inform of substantial changes which impact the technical submission of Bids. Addenda will be posted to the website and it is the Bidder's responsibility to download addenda. The Bidder shall certify its receipt of the addendum by signing the addendum and returning it with its Bid. In the event of a conflict with the original Bid Solicitation documents, addenda shall supersede all other documents to the extent specified. Subsequent addenda shall govern over prior addenda only to the extent specified.

### **C. PRICING, COLLUSION, AND TAXES**

1. Current Prices. Bid Proposals must be fixed and firm unless stated otherwise in the Bid Solicitation.
2. Discounts. Discounts shall not be considered in determining the lowest net cost for Bid evaluation purposes. Payment terms shall be as set forth in any contract executed between the City and the Bidder. Payment by the City is deemed to be made on the date of the mailing of the check, or as otherwise set forth in any contract executed between the City and the Bidder.
3. Collusion. The Bidder, by affixing its signature to this Proposal, certifies that its Proposal is made without previous understanding, agreement, or connection either with any persons, or entities offering a Bid for the same items, or with the City. The Bidder also certifies that its Bid is in all respects fair, without outside control, collusion, fraud, or otherwise illegal action. To ensure integrity of the City's public procurement process, all Bidders are hereby placed on notice that any and all Bidders who falsify the certifications required in conjunction with this section shall be prosecuted to the fullest extent of the law.
4. It shall be understood and agreed that Bid Offers submitted by persons and entities are done so independently of any other offers, and that Bidders will not knowingly participate in solicitations where there exists a conflict of interest with their entity and a member of City staff or their immediate family.
5. Taxes. Bidders will neither include Federal, State nor applicable Local excise or sales taxes in bid prices, as the City is exempt from payment of such taxes. The Colorado Department of Revenue, Certification of Exemption for Colorado State Sales/Use Tax account number for the City of Montrose is 98-01805-0000. An exemption certificate will be provided, where applicable, upon request.

### **D. PREPARATION AND SUBMISSION OF BID**

1. The Proposal must be typed or legibly printed in ink. The use of erasable ink is not permitted. All corrections made by the Bidder must be initialed in ink by the Bidder or its lawful agent.
2. Bid Proposals must contain a manual signature of an authorized agent of the Bidder in the space provided on the Bid Proposal Form. If the Bidder or its lawful agent fails to sign the Bid Proposal Form, its Bid shall be considered non-responsive and ineligible for award.
3. Unit prices shall be provided by the Bidder on the Bid Proposal Form when required in conjunction with the prescribed method of award. The Bidder shall enter "No Bid" for each item where a unit

price will not be offered. Where there is a discrepancy between the unit price and the extension of prices, the unit price shall prevail.

4. The delivery and/or completion date(s) provided by the Bidder, if required, must be stated in calendar days, following receipt of order/contract or official notice to proceed.
5. All information and supplemental documentation required in conjunction with this Bid shall be furnished by the Bidder with its Bid Proposal. If the Bidder fails to supply any required information or documents, the city, in its sole discretion, may consider the Proposal non-responsive.
6. The accuracy of the Bid is the sole responsibility of the Bidder. No changes in the Proposal shall be allowed after the submission deadline, except when the Bidder can show clear and convincing evidence that an unintentional factual mistake was made, including the nature of the mistake and the price actually intended.
7. The Bid Proposal Form shall be enclosed in a sealed envelope and addressed to the City. The envelope shall clearly identify the Bid Number, Title and Due Date when submitted to the City. The Bidder shall also include its name and address on the outside of the envelope.
8. The City's Bid Proposal Form, which is attached to this Bid Solicitation, must be used when the Bidder is submitting its Bid Proposal. The Bidder shall not alter this form unless instructed to do so in writing by the City. Failure to use the City's Bid Proposal Form may result in the Bid being considered non-responsive.
9. Offers in response to formal Bid Solicitations will not be accepted by facsimile or electronic transmission. Only signed written offers will be considered responsive, and eligible for possible award. Bidders shall provide Proposal Forms, Statement of Work/Technical Offer Section, Special Conditions, Specifications and Pricing Form, and any other mandatory submittals with the bid.
10. Bidders who qualify their Proposals by including alternate contractual provisions should be aware that the City does not negotiate the terms of its contracts, and will ordinarily declare such Bid Proposals non-responsive. Once bids have been opened, the City shall not consider any subsequent submissions of alternate terms and conditions.
11. Bid Bonds (5% of total bid price) and performance and payment bonds (100% of total bid price) are required on construction projects over \$50,000.
12. Insurance certificates are required after a Notice of Award has been issued. Costs for additional coverage must be accounted for in the Bidder's proposal cost.
13. Bid Proposals received after the submission due date and time prescribed for the solicitation shall not be considered.

#### **E. VENDOR APPLICATION AND RETENTION ON BIDDERS' LIST**

The City does not maintain a bidder's list. Register to receive an automated email notification of new bids by visiting [www.cityofmontrose.org](http://www.cityofmontrose.org) - Department Services - Purchasing – Bid Notification.

#### **F. MODIFICATION OR WITHDRAWAL OF LEGITIMATE OFFERS**

1. Bidder offers may be modified in the form of an official written notice, and must be received prior to the due time and date set forth the Bid Solicitation. Each modification submitted must have the Bidder's name and return address and the applicable Solicitation Number and title clearly marked on the face of the envelope. If more than one modification is submitted, the modification bearing the latest date of receipt by the City will be considered the valid modification.
2. Bids may be withdrawn prior to the due time and date set for the Solicitation, provided it is in the form of an official, authorized written request.
3. Proposals may not be modified or withdrawn after the due date and time set for the Bid opening for a period of ninety (90) calendar days. If a Bid Proposal is modified or withdrawn by the Bidder during this ninety (90) day period, the City may, at its option, place the Bidder on suspension and may not accept any further Bid Proposals from the Bidder for a period set by the City following the Bidder's modification or withdrawal of its Proposal. The City may reject an offer, in whole or in part, as set forth in the City of Montrose Municipal Code and the City's Procurement Manual.

#### **G. EVALUATION OF OFFERS**

1. Offers shall be evaluated based upon their responses to the questions and requests for information in this Bid Solicitation, and based upon whether and to what degree they comply with the instructions set forth herein. Thoroughness, accuracy, veracity, and professionalism in the responses shall be taken into account.
2. The City may, in its sole and absolute discretion:
  - a. Reject any and all, or parts of any or all, Bid Proposals submitted by prospective Bidders;
  - b. Re-advertise this Solicitation;
  - c. Postpone or cancel the Bid process for this Solicitation;
  - d. Waive any irregularities or technicalities in proposals received in conjunction with this Solicitation;
  - e. Determine the criteria and process whereby Proposals are evaluated and awarded.
3. A Proposal may not be accepted from, nor any contract be awarded to, any person or entity which is in arrears to the City upon any debt or Contract or which is in default as surety or otherwise upon any obligation to the City.
4. No Contract shall be awarded to any person or entity which has failed to perform faithfully any previous contract with the City, the State or Federal government for a minimum period of one (1) year after said previous Contract was terminated for cause.
5. A Proposal may not be accepted from, nor any Contract awarded to, any person or entity which has pending litigation against the City at the date and time of the Bid Opening.

#### **H. AWARD OF CONTRACT**

1. The City's Agent/Contact is authorized to handle initial contacts regarding any protest of the solicitation or award of a City contract, or any claim arising out of the performance of a City contract, with the City Manager's approval. Any actual or prospective Bidder or Contractor who has a grievance in connection with the solicitation or award of a contract shall first seek resolution of the matter with the City's Agent/Contact.
2. If the City Manager or City designee does not, within thirty (30) days after receiving a protest, or within such longer period as may be agreed upon by the parties, issue a written decision on the protest or make a determination that award of the contract is necessary, the protest shall be considered denied.
3. By law, the City reserves the right to accept or reject any or all proposed bids, or any combination of them, and to waive any informality or irregularity in the bid or in the bidding.
4. Successful Bidders shall comply with all local, state, and federal directives, ordinances, rules, orders, and laws as applicable to, and affected by, the Bid Proposal.
5. No Bidder shall be excluded from consideration for award in conjunction with this solicitation on the basis of race, color, creed, national origination, handicap or sex, or be subjected to discrimination under any contractual award administered by the City.

#### **L. CONTRACTUAL OBLIGATIONS**

1. In order to ensure the efficient utilization of tax dollars, successful Bidders shall comply with all contractual obligations contained in the Contract Documents, as set forth in the contract signed by the City and Bidder. A sample contract that Bidder will be expected to sign is supplied with these Bid Documents.

## **SPECIAL CONDITIONS**

**Company Name:** \_\_\_\_\_

### **A. PRE-BID CONFERENCE IS NOT PROVIDED**

### **B. CONTACT PERSON**

During the course of this request process, from issuance until a recommendation for award, Bidders shall not initiate contact related to this request with anyone other than the officially designated individual:

For this bid the contact is David Bries at (970) 240-1448 or email: [dbries@ci.montrose.co.us](mailto:dbries@ci.montrose.co.us)

Failure to abide by this requirement may result in disqualification from further participation in this process.

### **C. QUESTION DEADLINE**

All questions regarding this Request for Proposal shall be directed by email to David Bries [dbries@ci.montrose.co.us](mailto:dbries@ci.montrose.co.us). All inquiries shall clearly identify the name of the firm and the authorized representative, the RFP number, and RFP title.

The deadline for receipt of questions from Bidders in regards to this RFP is Wednesday September 1, 2001.

Responses will be prepared by the City in an addendum and published on the City of Montrose web site at: [www.cityofmontrose.org](http://www.cityofmontrose.org) under Department Services, Purchasing, Open bids, under this bid name. The responses in writing are the only official answers.

### **D. SUBMITTAL INSTRUCTIONS**

The City desires to receive a clear, concise, economical presentation of the vendor's proposal. Bidders should submit the following with their bid:

1. One copy and one original of the bid packet
2. One copy and one original of the completed bid form
3. One copy and one original of the proposed project schedule (see statement of work)
4. One copy and one original of signed bid addenda
5. One copy and one original of the bidder's proposal

Submit all of the above in a sealed envelope with the bid number and project name in the lower left hand corner of the envelope, with the bidder's name clearly written on the envelope. Failure to submit a proposal in the manner indicated may be cause for it to be considered 'non-responsive' and ineligible for consideration and subsequent award.

## **PROPOSAL FORM - PAGE 1**

### **SUBMITTED BY:**

Company Name: \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_

State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_ Email: \_\_\_\_\_

### **CERTIFICATION:** (if a Submission is Offered):

The undersigned hereby affirms that:

- He/she is a duly authorized agent of the Bidder,
- He/she has read the General Terms and Conditions, the Special Conditions and any technical specifications that were made available to the Bidder in conjunction with this Bid and fully understands and accepts these terms unless specific variations have been expressly listed on the Bid Proposal Form;
- The Submission is being offered independently of any other Bidder and in full compliance with the collusive prohibitions specified in the General Terms and Conditions of this solicitation; and
- The Bidder will accept any awards made to them as a result of this Solicitation for a minimum of ninety (90) calendar days following the date and time of the bid opening.

By: \_\_\_\_\_  
Manual Signature of Agent

\_\_\_\_\_  
Date

\_\_\_\_\_  
Typed/Printed Name of Agent

\_\_\_\_\_  
Title of Agent

Include Original with Submission

Affix Manual signature of authorized agent.

### **NO OFFER:**

Indicate reason(s) why no offer is being submitted at this time.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_



## PROPOSAL FORM - PAGE 2

**Company Name:** \_\_\_\_\_

**PROMPT PAYMENT TERMS:**

Discount: \_\_\_\_\_ % \_\_\_\_\_ Days

Net: \_\_\_\_\_ Days

**VARIATIONS:**

The Bidder shall identify all variations and exceptions taken to the General Terms and Conditions, the Special Conditions and any Technical Specifications in the space provided below; provided, however, that such variations are not expressly prohibited in the Bid documents. For each variation listed, reference the applicable section of the bid document. If no variations are listed here, it is understood that the Bidder's Proposal fully complies with all terms and conditions. It is further understood that such variations may be cause for determining that the Bid Proposal is non-responsive and ineligible for award:

Page #: \_\_\_\_\_ Item # of Section: \_\_\_\_\_

Variance

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Page #: \_\_\_\_\_ Item # of Section: \_\_\_\_\_

Variance

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Page #: \_\_\_\_\_ Item # of Section: \_\_\_\_\_

Variance

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## **STATEMENT OF WORK**

### **1. GENERAL**

The City of Montrose operates a water distribution, wastewater collection and treatment system as well as a solid waste collection system that are billed to the customers on a monthly basis. Solid Waste and Residential Sanitary Sewer costs are fixed, but Water use patterns can create significant changes in water charges as well as commercial/industrial sanitary sewer charges. The current number of customers are as follows:

- 6,696 Residential Water meters
- 933 Commercial Water meters
- 308 Irrigation Meters
- 7,162 Residential Sanitary Sewer Services  
Some residential customers get water service from other local water providers, residential sanitary sewer service is a fixed price per month.
- 949 Commercial/Industrial Sanitary Sewer Services  
Some sanitary sewer customers get water from other local water providers and the City gets monthly water usage data to calculate sanitary sewer charges
- 7,340 Residential Solid Waste Customers  
Some Solid Waste Customers may only be billed for solid waste services
- 589 Commercial Solid Waste Customers  
Some Solid Waste Customers may only be billed for solid waste services

The purpose of this project is to provide an integrated customer portal to provide customers with access to their City of Montrose water usage information on a near real-time basis, allowing them to set limits for notification of abnormal or unusual water usage and to view their usage and usage patterns, estimate their monthly bill based on leakage or seasonal changes in water usage and to engage the customer to manage and wisely use water resources. Projected monthly charges need to include sanitary sewer charges, solid waste charges, and possibly storm sewer charges in the future, to accurately project the total monthly bill.

### **2. CONTRACTOR RESPONSIBILITIES**

The contractor shall develop, implement and provide a web-based application that provides access to the customer's individual hourly water usage data through ITRON hosted fixed network solution, current bill balance information from Caselle Clarity, provides personalized outgoing communications and alerts through emails, text messages, and voice messages and is mobile device friendly.

Contractor shall have the ability to work with the City's existing online and electronic payment provider to implement a single sign on (SSO) using SAML2.0 or OAUTH2.0 protocols to existing Utility websites or portals.

The proposal shall include the following as a minimum:

Detailed Scope of Services and Customer Portal capabilities

#### Provide access to Water Usage Information to customers

Secure registration and login for each utility account

Ability to aggregate or group multiple accounts with the same customer (ie. School District, hospital, etc) and view water usage data as an aggregate or individually by meter or location.

Ability to have multiple log-ins to each account for landlord/tenant/spouse situations.

Ability for the customer to set notification thresholds for daily, weekly or monthly usage and/or for a projected bill amount.

Ability for customers to select preferred notification method(s).

Ability for the customer to view the data in graphic form for various time frames; hourly, daily, weekly, monthly, or custom defined time frame.

Ability for customers to view up to data account balance and make payments using electronic payment methods using Single Sign On between the current City's current payment website (Xpress Bill Pay) and the Customer Portal.

Ability to store and see up to 10 years of hourly water usage data.

#### Information available to Utilities staff

Ability to see customers view

Ability to compare previous year's data

Ability to report data gaps in AMI data

Reports of top water users by meter size, by customer name, and by address including annual usage and peak hour demand.

Leak status reports that estimate leak start date, volume of water lost in leak, customer notification status, and estimated cost of the water lost due to the leak.

Unlimited Utility staff licenses

Ability to download or export data into EXCEL or similar program for further analysis, graphing, etc.

Ability to view customer notifications sent by system and ability for Customer Service staff to add verbal communication notes. Ability to view notes from Caselle Clarity CIS and billing system.

#### Proposed program implementation timeline

Targeted implementation goal by the end of the calendar year

Proposed program Implementation plan including:

Customer outreach and signup plan

Responsibilities and Expectations of owner

Program success targets

Provide targeted information on the availability and value of using the Customer Portal to 100% of the Customers.

Contractor to propose a target participate rate based on their previous experience with similar programs as part of the Proposal.

Provide comparison of water usage trends with those customers using the Customer Portal compared to those who are not enrolled.

Training and Support

Provide On-site training to Customer Services and Utilities Management staff on use of the Customer Portal for resolving customer issues and providing usage information to customers

Provide on-line and phone based support for Customer Services and Utilities Management staff as well as 24/7 customer support for accessing and using the Customer Portal.

Cost of Service

Provide breakdown of implementation costs and annual subscription and support costs

## **10. QUALIFICATIONS**

The contractor shall demonstrate successful implementation of customer portal for providing utility usage information to customers with at least 10 entities within the previous 3 years.

## **11. ASSISTANCE PROVIDED BY THE OWNER:**

a. The City of Montrose utilizes an ITRON Automated Meter Infrastructure (AMI) system that is hosted on ITRON's Servers.

b. The City of Montrose, in coordination with ITRON and Caselle Clarity will provide access to the hosted data and data needed for successful implementation of the Customer Portal.

## **12. CONTRACT PERIOD**

The initial term of the Contract shall be for the period of one year. The Contract may be extended annually on a monthly subscription basis.

### **13. PAYMENT**

Payment to the Contractor shall be made after all work specified by the Contract has been completed to the Owner's satisfaction, and all reports and submittals requested by the specifications or the Owner have been received by the Owner.

### **15. RELATED DOCUMENTS**

The following data and documents are being provided for use during the bidding process. These data are provided solely for use in preparation of the bidder's proposal and should not be used for any other purpose. Additional data and documents for use in design will be provided to the successful bidder following award.

- Sample professional services contract

**END OF SECTION**

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