Town of Huntington

Town Hall · 100 Main Street
Huntington, NY 11743-6991

Phone: (631) 351-3177
Fax: 631) 351-2833
http://HuntingtonNY.gov

LORI E. FINGER, CPPB
Director of Purchasing

SENT VIA EMAIL **November 15, 2024**

REQUEST FOR PROPOSAL
DIX HILLS WATER DISTRICT
TOWN OF HUNTINGTON, NEW YORK
UTILITY BILLING SYSTEM AND CUSTOMER ENGAGEMENT PORTAL
RFP NO. 2024-12-008

<u>Addendum #1</u>

Attached please find questions and responses that need to be incorporated into the RFP.

Please review the addendum carefully and include your acknowledgement of addendum with your RFP submittal.

The RFP due date of Friday, December 6, 2024 until 12:00 noon, Prevailing Time and all other terms and conditions of this RFP remain the same.

Sincerely,

Lori E. Finger, CPPB
Director of Purchasing

LEF:jr
Attachment

purchasing@huntingtonny.gov

REQUEST FOR PROPOSAL
DIX HILLS WATER DISTRICT
TOWN OF HUNTINGTON, NEW YORK
UTILITY BILLING SYSTEM AND CUSTOMER ENGAGEMENT PORTAL
RFP NO. 2024-12-008

Addendum #1

1. **QUESTION:** Please list the existing Town software systems that will require integration with the new UBS:
ANSWER: Advanced Metering Infrastructure (AMI).

a. **QUESTION:** ERP/Financial Systems for General Ledger & Accounts Payable
ANSWER: We are currently using Tyler/Munis.

b. **QUESTION:** Metering Systems
ANSWER: We are currently using Tyler/Munis.

c. **QUESTION:** Geographic Information Systems
ANSWER: Town of Huntington GIS.

d. **QUESTION:** Payment Processing Partners
ANSWER: Stripe is our payment processing partner.

e. **QUESTION:** Energy Assistance Providers
ANSWER: PSEG.

f. **QUESTION:** Third Party Credit Service Providers
ANSWER: None.

g. **QUESTION:** Banking and Payment Files
ANSWER: Chase.

h. **QUESTION:** Mobile Field Service
ANSWER: None.

i. **QUESTION:** Work Orders & Asset Management
ANSWER: Tyler/Munis.

2. **QUESTION:** What is your anticipated timeline for award?
ANSWER: January 2025.

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3. **QUESTION:** Do you have an anticipated project start date?
ANSWER: February 2025.

4. **QUESTION:** Does the Town have an anticipated Go-Live target date(s)?
ANSWER: October 2025.

5. **QUESTION:** Has the Town identified the budget range for the current project's implementation cost and annual cost? If so, is it possible to share?
ANSWER: The Town does not share this information.

6. **QUESTION:** I am Blocked from accessing the RFP on https://www.huntingtonny.gov/Bids/RFPs. It mentions a registration form but it's not attached, is this required for access?
ANSWER: Yes, it is required. If you need assistance accessing the online RFP, please email purchasing@huntingtonny.gov and our IT Department will assist you.

7. **QUESTION:** What is the current billing / CIS system in use by the DHWD?
ANSWER: Tyler/MUNIS.

8. **QUESTION:** Has the Town and/or water district looked at any commercial off the shelf utility billing cis system demonstrations in the last few years? If so, which systems/firms and did those firms provide cost quotes?
ANSWER: SpryPoint and MUNIS/Tyler.

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9. **QUESTION:** Can the following customer account volumes / quantities be provided:

	Residential	Commercial/Industrial
Electric	N/A	N/A
Gas	N/A	N/A
Water	8241	88
Stormwater	N/A	N/A
Refuse	N/A	N/A
Broadband	N/A	N/A
Cable	N/A	N/A
Telecom	N/A	N/A

ANSWER: See information provided in chart above.

10. **QUESTION:** Does the Town / Water District have a budgetary range for implementation of the solution and annual SaaS fee?
ANSWER: No.

11. **QUESTION:** Has the Town / Water District received any vendor presentations, demonstrations, or proposals in advance of the release of the RFP?
ANSWER: Yes, SpryPoint and Tyler/MUNIS.

12. **QUESTION:** Would the Town / Water District consider replacing Invoice Cloud with a proposing vendor's native payment processing solution?
ANSWER: No.

13. **QUESTION:** Also, can the Town clarify the need for a solution that tracks all the services listed above? It is our understanding electric and gas services are provided by LIPA and only water services are provided by the Town / DWHD.
ANSWER: That is correct water only.

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14. **QUESTION:** Does the District currently manage an efficiency program offering? If this is a future requirement, when do you plan to start? Is this a required feature or one that is a good-to-have?

ANSWER: Yes, we do. ASAP January/February. Required feature.

15. **QUESTION:** Does the District currently share consumption goals with customers? If this is a future requirement, when do you plan to start? Is this a required feature or one that is a good-to-have?

ANSWER: No, we do not share our goals. Yes, it is required, January/February. Required feature.

16. **QUESTION:** Does the District provide electric or gas to the residents of the Town of Huntington, NY? If not, do you plan to start billing for electric or gas in the future? When?

ANSWER: No.

17. **QUESTION:** Does the District provide cable, broadband, or telecom billing to the residents of the Town of Huntington, NY? If not, do you plan to start billing for cable, broadband, or telecom billing in the future? When?

ANSWER: No.

18. **QUESTION:** The RFP mentions interval reads and time of use billing as a requirement. Do you currently bill any services based on interval reads or time of use (peak / off-peak) usage? If not, do you plan to start? When do you plan to start billing based on interval reads or time of use?

ANSWER: We currently do not offer interval reads.

19. **QUESTION:** How many users will need full access to the new solution?

ANSWER: Up to 10.

20. **QUESTION:** What other software does the District plan to integrate with the new solution?

ANSWER: AMI, GIS.

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TOWN OF HUNTINGTON, NEW YORK
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21. **QUESTION:** How many years of data does the District plan to migrate to the new solution?
ANSWER: 3 to 5 years.

22. **QUESTION:** What meter reading system does the District currently use?
ANSWER: Versaterm and MUNIS billing.

23. **QUESTION:** In an effort to follow Federal Government climate change and reduced carbon emission policies would the Town consider email submissions of the proposal and waive the requirement for mailed hard copies/USB?
ANSWER: Electronic submissions are not acceptable.

Notice to Prospective Proposers

In order to properly expedite the receipt and processing of the proposal that you are submitting, you must affix the "IDENTIFICATION LABEL" below to the **outer** envelope of your sealed proposal, and deliver it by U.S. Mail, public carrier—such as UPS, FEDEX— or by hand delivery to be dropped off in the White Mailbox outside the main entrance of Town Hall.

Affix the IDENTIFICATION LABEL to the sealed outer envelope.

FAXED OR ELECTRONIC PROPOSALS SHALL NOT BE ACCEPTED.

DELIVERY BY SUCH METHODS SHALL RESULT IN AUTOMATIC DISQUALIFICATION.

For current bid information and awards, please visit our website at: *http://huntingtonny.gov*

Thank you for your cooperation.
Town of Huntington
Division of Purchasing

IDENTIFICATION LABEL

TOWN OF HUNTINGTON
PURCHASING DEPARTMENT, ROOM 209

100 Main Street, Room 209, Huntington, NY 11743

Vendor's Name_______________
RFP No.: 2024-12-008
RFP Name: Dix Hills Water District, Town of Huntington, New York – Utility Billing System and Customer Engagement Portal
Due Date: **12/06/24** AT 12:00 PM, Noon

SEALED RFP ENCLOSED

Proposer's Name ____

Town of Huntington
100 Main Street
Huntington NY 11743

Request for Proposal
RFP No. 2024-12-008

Dix Hills Water District
Town of Huntington, New York
Utility Billing System and
Customer Engagement Portal

DUE DATE: FRIDAY, DECEMBR 6, 2024, 12:00 P.M., NOON

NOTICE OF REQUEST FOR PROPOSAL

The Director of Purchasing, The Town of Huntington, 100 Main Street, Room 209, Huntington, New York 11743, will receive sealed Proposals until 12:00 noon, Prevailing Time, Friday, December 6, 2024, for the following items:

Dix Hills Water District
Town of Huntington, New York
Utility Billing System and
Customer Engagement Portal

RFP NO. 2024-12-008

The right is reserved by the Town to waive any informalities in, to reject any or all proposals submitted, or to accept the proposal and award the contract to a responsible formal Proposer, in the best interests of the Town.

A proposal submitted by a proposer who is not in full compliance with the provisions of Huntington Town Code at the time of submission will be denied.

Complete specifications for the above item(s) may be downloaded at http://huntingtonny.gov under Bids/RFPs. All other inquiries should be directed to purchasing@huntingtonny.gov or fax us @ 631-351-2833.

LORI E. FINGER, CPPB
DIRECTOR OF PURCHASING

DATED: OCTOBER 31, 2024

TOWN OF HUNTINGTON
DEPARTMENT OF AUDIT & CONTROL
PURCHASING DIVISION
SPECIAL INSTRUCTIONS TO PROPOSERS

STANDARD TERMS AND CONDITIONS

All proposals are subject to the following terms and conditions unless modified in writing at the time of proposal submission. Upon acceptance of a proposal by the Town the financial terms of the proposal shall apply to all orders issued as a result of such acceptance. Each proposal received shall be considered an offer to the Town and upon acceptance shall be a part of the final agreement and shall be attached to the agreement as an exhibit.

Proposals properly completed and executed on the forms provided by the Town for that purpose may be delivered in person by the proposer or his agent or may be mailed to the office of the Director of Purchasing. The Director of Purchasing or her designee must receive all proposals, ***without exception***, at or before the time specified for the proposal being opened and read aloud in the Notice to Proposers. All proposals must be submitted in ink or may be typed.

It is the proposer's responsibility to ensure that their proposal is received by the Purchasing Department in a timely manner. All proposals received after the time stated in the Notice to Proposers will not be considered and will be returned unopened to the proposer. Whether it is mailed utilizing the U.S. Postal Service or any other mail carrier or if by personal delivery, the proposer assumes responsibility for having his proposal deposited on time and time stamped at the place specified. The proposer assumes the risk of any delay in the mail, including holidays and possible building closures, delays upon entering the building at security, or in the handling of the mail by employees of the Town.

1 - AWARD WILL BE MADE BY ITEM OR CLASS

When Class proposals are indicated, proposers must propose on each item in the class. A Proposer desiring to propose "no charge" on an item in a class must so indicate; otherwise proposal for that class will be construed as incomplete. Items may be combined and awarded as a group if there is a saving in ultimate cost by the reduction of the number of orders issued.

2 - AWARD

(a) The Director of Purchasing reserves the right to make awards within forty-five (45) days after the date of the proposal opening, during which period proposals shall not be withdrawn. This period may be extended, for the benefit of the Town by mutual agreement between the proposer and the Director of Purchasing.

(b) The placing of an order by the Director of Purchasing with the proposer for material described in the Request of Proposal shall constitute a legal and binding contract.

(c) Any contract created shall be deemed executory only to the extent of the monies appropriated and available for the purpose of the contract. No liability on account thereof shall be incurred by the Town beyond the amount of such monies. It is understood that neither this contract nor any representations by any public employee or officer creates any legal or moral obligation to request, appropriate or make available monies for the purpose of this contract.

(d) As part of the process for evaluating Requests for Proposals, the criteria for selecting the successful proposer may include a local vendor option, for those proposers whose business is located within the Town of Huntington, NY. In accordance with Huntington Town Code, as part of the evaluation process for Request for Proposals, in considering cost, any person or other entity which has maintained a place of business, staffing and an operational office at an address located within the Town of Huntington for at least one year prior to the date of making the proposal, may, in the discretion of the evaluator(s), be considered to have proposed the lowest price, if that price is not more than 5% over the price quoted by a business not maintaining an office within in the Town of Huntington.

(e) The Town reserves the right to award future contracts/purchase orders to the next low bidder in the event of default or cancellation of a previously awarded contract/purchase order.

3 - PERFORMANCE BONDS

If the specifications require the posting of a performance bond, then within one week after awarding of the contract a performance bond of 100% of the amount of the award, unless an alternate amount is otherwise specified, shall be posted as security for faithful performance, with the understanding that the whole or any part thereof may be used by the Town of Huntington to supply any deficiency that may arise from any default on the part of the proposer. Such Bond must meet all the requirements of the Proposal Specifications and the Town Attorney.

4 - GUARANTEES BY PROPOSER:

Proposer hereby guarantees:

(a) To save the Town, its agents and employees harmless from liability of any nature or kind for the use of any copyrighted or non-copyrighted composition secret process, patented or unpatented invention, article or appliance furnished or used in the performance hereof of which the Proposer is not the Patentee, assignee or licensee and to defend any action brought against the Town in the name of the Town and under the direction of the Town Attorney at the sole cost of the Proposer or in the sole option of the Director of Purchasing to pay the cost of such defense to the Town.

(b) His/her products against defective material or workmanship and to repair or replace any damages or marring occasioned in transit.

(c) To furnish adequate protection from damage for all work to repair damages of any kind, for which the Vendor's workmen are responsible, to the building or equipment, to his/her own work or the work of other Vendors or in the opinion of the Director of Purchasing to pay for the same by deductions in payments due under this contract.

(d) To pay for all permits, licenses and fees and give all notices and comply with all laws, ordinances, rules and regulations of the Town and of the County of Suffolk and the State of New York.

(e)- INSURANCE - To maintain Workers Compensation and Disability Benefits Insurance during the term of the contract. The Contractor further agrees to conform to all of the requirements of the New York State Workers Compensation Law.

During the term of the contract, the Contractor shall secure and maintain bodily injury and property damage liability insurance. This insurance must be Occurrence coverage; policies in the Claims Made format are not acceptable. The limits of liability insurance shall be $2,000,000. for any one person and $2,000,000. for any one occurrence for bodily injury. Automobile Liability insurance with the same limits shall be maintained by the Contractor on all automotive equipment used in connection with the contract.

Certificates of Insurance reflecting the above coverage shall be provided to the Town prior to commencement of any work by the Contractor. These certificates shall be in the name of the Town and shall further name the Town of Huntington as Additional Insured **by endorsement**. The Contractor/Vendor shall be solely responsible for providing the Town of Huntington with thirty (30) days prior written notice of any cancellation, non-renewal or material change of action with regard to the required insurance coverage. Failure to notify the Town of a change in policy coverage is valid grounds for the Town to void the agreement. The Contractor/Vendor is required to present the Town of Huntington with an updated insurance certificate as part of its invoice backup for payment processing. Failure to do so will result in non- payment and the Town may choose to void the agreement.

During the entire term of the Contract, the Contractor shall also have and maintain professional liability insurance in the amount of $1 million per claim / $ 2 million in aggregate, and for three (3) years following the term, extended reporting / tail insurance in the required coverage amounts covering against all losses occurring during the term. The Contractor shall furnish a Certificate of Insurance evidencing such coverage issued by an insurance carrier duly licensed to operate within the State of New York, naming the Town of Huntington as certificate holder. The Contractor shall be solely responsible for providing thirty (30) days prior written notice to the Town of Huntington of cancellation or non-renewal of, or any material change in, the foregoing coverage.

(f) that he/she will keep him/herself fully informed, of all municipal ordinances and regulations, State and National Laws in any manner affecting the work or goods herein specified, and any extra work contracted for by him/her and shall at all times observe and comply with said ordinances, laws and regulations, including all provisions of the Workmen's Compensation and Labor Laws. The contractor agrees to defend, indemnify and hold the Town, its officers, agents and employees harmless from any liability and attorneys’ fees, imposed upon or incurred by the Town, its officers, agents and/or employees arising from the negligence, gross negligence, recklessness, malpractice, or intentional tort of the contractor.

(g) That the items furnished shall conform to all of the provisions of the proposal and this warranty shall survive acceptance, or use of any material so furnished.

(h) That all deliveries will not be inferior to the accepted proposal sample.

5 - <u>ASSIGNABILITY OF CONTRACTS</u>

In the event the Contractor assigned, transfers, conveys, sublets, or otherwise disposes of the contract without written consent of the Town of Huntington, said contract shall be null and void and not binding upon the Town. General Municipal Law 109 is incorporated herein by reference as if fully set forth at length.

6 - LIMITATION OF ACTION

No action for any cause whatsoever arising out of this order shall be maintained against the Town by the Vendor, or anyone claiming under the Vendor, unless such action shall be commenced within six months:

(a) after expiration of this order or

(b) after the date of written notice to the Vendor from the Town of complete rejection or withheld acceptance or

(c) after the date of written notice to the Vendor from the Town of a deduction from the agreed price on the order, whichever of the events shall be the latest in time.

7 - LABOR LAWS AND DISCRIMINATION IN EMPLOYMENT

All proposers must comply with N.Y.S. Labor Law requirements and specifically without limitation:

(a) Pursuant to Sections 220 (e) and 239 of the Labor Law, in the hiring of employees for the performance of work under this contract or any subcontract hereunder:

(I) No contractor, subcontractor, nor any person acting on behalf of such contractor or subcontractor, shall by reason of race, creed, color, national origin, age or sex discriminate against any citizen of the state of New York who is qualified and available to perform work to which the employment relates;

(II) No contractor, subcontractor nor any person on his behalf shall in any manner, discriminate against or intimidate any employee hired for the performance of work under this contract on account of race, creed, color, national origin, age or sex;

(III) There may be deducted from the amount payable to the contractor by the Town penalty of fifty dollars for each person for each calendar day during which such person was discriminated against or intimidated in violation of the provisions of this contract; and

(IV) This contract may be canceled or terminated by the Town and all monies due or to become due hereunder may be forfeited, for a second or any subsequent violation of the terms or conditions of this section of the contract.

(b) Pursuant to Section 220 (2) of the Labor Law, no laborers, workmen, or mechanics in the employ of the contractor, subcontractor or other person doing or contracting to do all part of the work contemplated by the contract, shall be permitted or required to work more than eight hours in any one calendar day or more than five days in any one week except in cases of extraordinary emergency including fire, flood or danger to life or property as provided therein.

(c) For every contract for the construction, reconstruction, maintenance and/or repair of public work, every laborer, workingman or mechanic shall be paid not less than such hourly minimum rate of wage and supplements not less than the prevailing wage supplements, all as provided in Article 8 of the Labor Law.

(d) Preference in Employment of Persons Upon Public Works - Every contractor and/or subcontractor agrees to give preference to citizens of the State of New York who have been residents for at least six consecutive months immediately prior to the commencement of their employment, as provided in Section 22 of the Labor Law.

(e) For every contract involving building service work as defined in Article 9 of the Labor Law, the contractor and/or its subcontractors shall be obligated to pay each employee on such work not less than the wage specified for his craft, trade or occupation in the prevailing schedule wages made part or to be made part of the specifications hereto, and agree to be bound by all of the provisions of Article 9 of the Labor Law.

8. - APPRENTICESHIP PARTICIPATION CONSTRUCTION CONTRACTS:

(A) In the event this bid is for work to be performed pursuant to a construction contract, during the entire term of the contract, the winning bidder and its general contractor and subcontractor(s), as applicable (collectively, the "Contractor") must be in compliance with the apprenticeship requirements set forth in New York State Labor Law § 816(b) and Huntington Town Code Section 87-55.1. More specifically, as of the effective date of the construction contract, Contractor shall provide the Town of Huntington:

(i) A list of all trades or classifications of workers it anticipates engaging in connection with the work to be performed under this agreement, given the type and scope of work to be performed (the "Work"), and documentation to show that it has apprenticeship agreements appropriate for said Work which have been registered with, and approved by, the New York State Commissioner of Labor in accordance with Article 23 of the New York Labor Law (each an "Apprenticeship Agreement"); and

(ii) At least one Certificate of Completion from each apprenticeship training program with which Contractor has an Apprenticeship Agreement in place. Contractor must also submit current New York State Department of Labor approved Form AT-401 certificates, or equivalent certificates, demonstrating that pursuant to said Apprenticeship Agreements there is at least one apprentice currently enrolled in each apprenticeship training program. If Contractor is a signatory to a sponsored apprenticeship training program, it must also submit to the Town of Huntington a letter from the sponsor of the apprenticeship training program(s), verifying the Contractor's signatory status as a participating entity approved by the Commissioner of the New York State Department of Labor to employ New York State registered apprentices.

(B) For purposes of request for proposal, a "construction contract" shall mean any contract with a value in excess of $250,000 to which the Town of Huntington is a party or for work to be performed on Town of Huntington-owned property that concerns the design, construction, reconstruction, improvements, rehabilitation, maintenance, repair, furnishing, equipping of or otherwise providing for any building, facility or physical structure of any kind, and a "Certificate of Completion" shall mean a certificate issued by the New York State Department of Labor which recognizes a person's successful completion, within the twelve (12) month period immediately preceding the effective date hereof, of a qualified apprenticeship training program registered and approved by the Commissioner of the New York State Department of Labor in accordance with the New York Labor Law and 12 NYCRR §600, et seq., and any amendments thereto.

9 - SALES AND EXCISE TAXES

Unless the proposal indicates otherwise, the Town is exempt from the payment of any sales, excise or Federal transportation taxes and will be so construed. A vendor desiring refunds of, or exemptions from taxes paid on merchandise accepted by the Town, must submit the proper forms, and the Director of Purchasing, if satisfied as to the facts, will approve or issue the necessary certificates.

10- AUDIT

Purchase orders and contracts are subject to audit by the Comptroller of the Town of Huntington.

11- PAYMENT AND COLLECTION OF CHARGES

(a) The Town will make every effort to pay vouchers within thirty (30) days after (1) proper delivery of merchandise (2) receipt and approval of a properly executed claim voucher submitted to the Town Comptroller by the receiving Town departments or agencies; voucher forms shall be obtained from such departments or agencies.

(b) In any case where a question of nonperformance of a contract arises, payment may be withheld in whole or in part by the Town.

(c) All charges against a Vendor shall be deducted from current obligations that are due him/her or shall become due. In the event that there are no current obligations, the Vendor shall pay the Town the amount of any such charges.

(d) The Town will also avail itself of cash discounts for payments within prescribed times whenever possible.

(e) Upon receipt of written notice that the construction phase of a contract has been fully performed, the Contractor shall file the itemized voucher pursuant to (a), above, and the Town will pay the Contractor the consideration due under the construction portion of the contract, *however consideration attributable to post-construction inspection services performed under the contract shall be paid upon completion of the inspection phase of the project.*

12- FUEL SURCHARGES

Town of Huntington will not pay any type of fuel surcharge on any item or contract unless specifically indicated as such by the Town in the solicitation or contract. Any fuel charges added and not authorized by the Town will be deleted from any payments made to the vendor.

13-VENUE

This agreement shall be construed in accordance with the laws of the State of New York. The venue for any action/proceeding regarding this matter shall be the Supreme Court of the State of New York, County of Suffolk and/or the United State District Court, Eastern District of New York.

14- VENDOR RESPONSIBILITY

Pursuant to *General Municipal Law §103*, this contract will be awarded to the *lowest responsive and responsible bidder,* if applicable. A *lowest responsible bidder* has been defined as a bidder that is pecuniarily responsible, morally worthy, skilled, and possesses judgment, integrity, and sufficient financial resources; is "accountable or reliable"; and, has the ability to perform the contract. The determination of who is *responsible* as part of the term *lowest responsive and responsible bidder* shall be made in accord with *General Municipal Law §103*, the rules and regulations promulgated pursuant thereto and the body of decisional law interpreting same; and, without limitation to the foregoing, a bidder may not be deemed *responsible* by the municipal agency, if records indicate that there is a:

- Lack of adequate expertise or experience with comparable projects or financial resources to perform the contract;
- Criminal conduct involving government contracts, business activities or environmental laws;
- Grave disregard for the safety of employees, governmental personnel or the public;
- Lack of proper training of personnel;
- Willful noncompliance with prevailing wage and supplement payment laws;
- Significant labor-law violations, including violations of laws regarding child labor, wage payment and unemployment-insurance tax;
- Significant violations of N.Y. Workers Compensation Laws;
- Failure to make good-faith efforts to comply with laws and regulations regarding minority-owned, women-owned, and disadvantaged business subcontractors, where applicable;
- Failure to make good-faith efforts to provide employee apprentice opportunities through registered apprenticeship-training programs, where applicable;
- Mathematically or materially unbalanced bid;
- An unreasonably low bid; i.e. a bid which is so much lower than the agency's estimate of cost that it appears unlikely that the bidder will be able to perform the contract for its bid price;
- False or misleading statement(s) in connection with a bid or request for approval of a subcontractor;
- Record or history of non-performance on prior town contracts; or
- Any other consideration that the municipal agency deems appropriate, given the facts and circumstances of the contract, including without limitation, the bidder's ability to perform the contract within the required time frame. [33 N.Y. Prac., New York Construction Law Manual §2:4 (2d ed.) (May 2016 update); Opinion of NYS Comptroller 90-48]

15- PROTEST POLICY

It is understood that a party who has responded to a bid, request for proposal, or request for statement of qualification issued by the Town of Huntington shall be considered an interested party to the award or failure to award said contract. Such an interested party shall, within five (5) business days following the award of a contract, be permitted to file a written protest to said action (a “Protesting Party”, and “Written Protest”), as set forth below.

Upon the Protesting Party’s (i) filing a Written Protest and (ii) payment of a Two Hundred & XX/100 ($200) Dollar protest fee by certified check or money order made payable to the “Town of Huntington”, with each delivered to the Director of Purchasing of the Town of Huntington (and a copy of said Written Protest delivered to the Town Attorney), the Town of Huntington’s Director of Purchasing shall notify the Town Attorney in writing of the foregoing.

Not later than twenty (20) business days following his or her receipt of said written notice from the Director of Purchasing, the Town Attorney shall convene a board of responsibility, which shall be comprised of the following persons, (i) the Town Attorney (or Deputy Town Attorney, as directed by the Town Attorney), (ii) the Director of Purchasing, and (iii) the Department Head involved in the procurement of the contract at issue (or his/her Deputy or designee, as directed by the Department Head) (hereinafter, the “Board of Responsibility”). By written notice delivered pursuant to the contact information provided within the Written Protest, the Town Attorney shall notify the Protesting Party of the date, time and location the Board of Responsibility shall meet to consider the Written Protest (the “Protest Hearing”), which may be adjourned at the Town Attorney’s sole discretion.

The Town Attorney (or the Deputy Town Attorney, as applicable) shall act as Chair of the Board of Responsibility. He/she shall conduct the Protest Hearing in an informal manner, as the Town Attorney or Deputy Town Attorney sees fit. In its deliberations, the Board of Responsibility shall investigate the Written Protest by, among other things, taking evidence relevant to it. The Protesting Party may appear at the time and place designated by the Town Attorney for Protest Hearing, with or without counsel, and he/she/it may testify and/or submit evidence to the Board of Responsibility in support of his/her/its protest. Additionally, the Protesting Party may invite other persons who may have knowledge of the facts and circumstances surrounding the Written Protest, to attend and give evidence. The Town Attorney may call additional parties who shall have knowledge or expertise with respect to the matters at issue, to attend the Protest Hearing.

The Board of Responsibility shall render a decision on the merits of the Written Protest, with a copy thereof delivered to the Protesting Party not more than twenty (20) business days following the date (and closing) of the Protest Hearing. The Protesting Party may request a copy of any transcript made of the Protest Hearing, which if provided shall be furnished at the Protesting Party’s sole cost and expense.

16- FORCE MAJEURE

Unless otherwise expressly provided herein, no Party hereto shall be deemed to be in default of this Agreement (including any modification hereto) due to a delay by it in the satisfaction of an obligation to be performed hereunder, provided said delay can be reasonably shown to have resulted, directly or indirectly, from circumstances beyond its control (and not from its own negligence or willful misconduct), including, without limitation, strikes; work stoppages; power or other mechanical failure; computer virus and/or computer failure; accidents; epidemics, pandemics, endemics or outbreaks; natural disaster; acts of war, terrorism or sabotage; civil or military disturbances; government action; or acts of God (an “Excused Delay”). In the event of an Excused Delay, the time to satisfy said obligation shall be extended for a period equal to the time lost by reason of said delay. Moreover, if the Excused Delay causes the purpose underlying the obligation to be completely frustrated, then the obligation itself shall be excused and its performance requirement cancelled, without recourse or damages. The aforementioned notwithstanding, a Party claiming the benefit of this provision shall, as soon as is reasonably practicable following when such a delay can be anticipated, (a) provide written notice to the other Party of (i) the nature and anticipated duration of the Excused Delay and (ii) the specific cause for said Excused Delay, and (b) if practicable, shall commence using commercially reasonable efforts to resume performance under this Agreement, and to mitigate any damages caused by the Excused Delay

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17- COVID-19

Unless otherwise expressly provided herein, no Party hereto shall be deemed to be in default of this Agreement (including any modification hereto) due to a delay by it in the satisfaction of an obligation to be performed hereunder, provided said delay can be reasonably shown to have resulted, directly or indirectly, from circumstances caused by the COVID 19 pandemic and related factors (an “Excused Delay”). In the event of an Excused Delay, the time to satisfy said obligation shall be extended for a period equal to the time lost by reason of said delay. Moreover, if the Excused Delay causes the purpose underlying the obligation to be completely frustrated, then the obligation itself shall be excused and its performance requirement cancelled, without recourse or damages. The aforementioned notwithstanding, a Party claiming the benefit of this provision shall, as soon as is reasonably practicable following when such a delay can be anticipated, (a) provide written notice to the other Party of (i) the nature and anticipated duration of the Excused Delay and (ii) the specific cause for said Excused Delay, and (b) if practicable, shall commence using commercially reasonable efforts to resume performance under this Agreement, and to mitigate any damages caused by the Excused Delay.

18- CONTRACT EXECUTION

The successful proposer shall be required to execute the Town’s standard agreement as it relates to the RFP which shall be prepared by the Town Attorney’s Office. The agreement will include all of the Town’s standard provisions and will also state that in the event of a conflict between the proposal, the RFP and the agreement the terms of the agreement and RFP shall control. The successful proposer should not expect the Town to enter into an agreement that the proposer has prepared.

IRAN DIVESTMENT ACT

As a result of the Iran Divestment Act of 2012 (Act), Chapter 1 of the 2012 Laws of New York, a new provision has been added to the State Finance Law (SFL), §165-a. effective April 12, 2012. Under the Act, the Commissioner of the Office of General Services (OGS) will be developing a list (prohibited entities list) of “persons” who are engaged in “investment activities in Iran” (both are defined terms in the law). Pursuant to SFL §165-a(3)(b), the initial list is expected to be issued no later than 120 days after the Act’s effective date, at which time it will be posted on the OGS website.

By entering into this Contract, Contractor (or any assignee) certifies that once the prohibited entities list is posted on the OGS website, it will not utilize on such Contract any subcontractor that is identified on the prohibited entities list. Additionally, Contractor agrees that after the list is posted on the OGS website, should it seek to renew or extend the Contract, it will be required to certify at the time the Contract is renewed or extended that it is not included on the prohibited entities list. Contractor also agrees that any proposed Assignee of the Contract will be required to certify that it is not on the prohibited entities list before The Town of Huntington (Town) may approve a request for Assignment of Contract.

During the term of the Contract, should Town receive information that a person is in violation of the above referenced certification, the Town will offer the person an opportunity to respond. If the person fails to demonstrate that it has ceased its engagement in the investment which is in violation of the Act within 90 days after the determination of such violation, the Town shall take such action as may be appropriate including, but not limited to, imposing sanctions, seeking compliance, recovering damages, or declaring the contractor in default.

The Town reserves the right to reject any request for assignment for an entity that appears on the prohibited entity list prior to the award of a contract, and to pursue a responsibility review with respect to any entity that is awarded a contract and appears on the prohibited entities list after contract award.

CONTRACTS INVOLVING INSTALLATION

1. Contractor shall clean up and remove all debris and rubbish resulting from his work from time to time as required or directed. Upon completion of the work premises shall be left in a neat unobstructed condition, the buildings broom clean, and everything in satisfactory repair and order.
2. Installation shall also include the furnishing of any rigging necessary to move equipment into the building; also the removal and resetting of any removable windows used for moving equipment into building and removal of any trade-ins, if any.
3. Proposers shall acquaint themselves with conditions to be found at the site and shall assume all responsibility for placing and installing equipment in the locations required.
4. Contractor shall furnish adequate protection from damage for all work and shall repair damages of any kind for which the Contractor or his/her works are responsible.

VEHICLES

5. All equipment proposed must be in production and have had in use experience. Any and all equipment listed by the Manufacturer as "Standard" for the model offered shall be provided on the delivered vehicle.
6. The Manufacturer's Standard Warranty shall cover all equipment delivered.
7. Vehicles shall be completely serviced including cleaning (outside and inside) prior to delivery.
8. Award will not be made to any dealer who cannot provide warranty repairs and services within the County of Suffolk. Vendor not having a place of business in the County of Suffolk shall provide in writing the name and location of the agency within the County of Suffolk where such services will be performed.
9. No name other than the Manufacturer's shall appear on the Vehicle.
10. Any deviations from these Specifications will be considered cause for disqualification unless fully explained in the bid. Acceptance of such deviations shall be within the discretion of the Director of Purchasing.
11. Bids will be considered only from Equipment or Vehicle Manufacturers or their Authorized Dealers.
12. All vehicles shall be painted the color as specified. All paint shall be factory applied at the time of vehicle manufacture. Dealer painted vehicles will not be accepted.

SAFETY DATA SHEETS (SDS)

13. As the Town is required to be in compliance with Federal OSHA Communication Standard 29CFR1910.1200 all classes of materials covered by the specification that are purchased by the Town shall, no later than the time of delivery, receive a copy of the SDS appropriate to the ordered material. Failure to comply with this requirement shall be construed as improper or incomplete delivery and payment will be withheld until all terms and conditions of the purchase contract are met to the satisfaction of the Director of Purchasing.

NEW YORK: CONTRACTUAL NON-DISCRIMINATION PROVISION

To be included in every contract for the construction, alteration or repair of any public building or any public work or for the manufacture, sale or distribution of materials, equipment or supplies (performed within the state):

*** * ***

(a) In the hiring of employees for the performance of work under this contract or any subcontract hereunder, neither the Contractor, nor any subcontractor engaged by the Contractor, nor any person acting on behalf of the contractor, shall by reason of race, creed, color, disability, sex or national origin discriminate against any citizen of the State of New York who is qualified and available to perform the work to which his or her employment relates.

(b) Neither the Contractor, nor any subcontractor engaged by the Contractor, nor any person acting on behalf of the Contractor or any subcontractor engaged by the Contractor, shall, in any manner, discriminate against or intimidate any employee hired for the performance of work under this contract on account of race, creed, color, disability, sex or national origin.

(c) The Town may deduct from the amount payable to the Contractor under this contract a penalty of fifty dollars ($50.00) for each person for each calendar day during which such person was discriminated against or intimidated in violation of the provisions of this contract.

(d) The Town may cancel or terminate this contract, and all monies due or to become due hereunder may be forfeited for a second or any subsequent violation of the terms or conditions of this section of the contract.

(e) The aforesaid provisions of this section, insofar as they apply to the manufacture, sale or distribution of materials, equipment or supplies shall be limited to operations performed within the territorial limits of the State of New York.

SPECIAL INSTRUCTIONS TO PROPOSERS

If you wish to retain copies of your submission for your records you may photocopy any pages you require. The successful low proposer will be issued a notice of award.

In the case of inclement weather or a declared emergency go to the Town website for information: http://huntingtonny.gov

In the event that the Town of Huntington Purchasing Office is closed on the Due Date of the RFP, the RFP(s) will be due at the same time the next day that the Town of Huntington Purchasing Office is open.

PLEASE TAKE NOTE OF THE

NON-COLLUSIVE and the PUBLIC DISCLOSURE STATEMENTS

Completion of these sections of the proposal are *required* each and every time a proposal is submitted.

Completion of these sections any time in the past does not relieve the proposer from completion of these pages with this proposal.

Financial documents as specified in paragraph nine (9) of the Public Disclosure Statement must accompany this proposal. If you wish these financial statements to remain confidential, please so indicate at the time of submission.

If you fail to complete these sections and to have them properly notarized as required, ***you may be judged non-responsive and not be awarded the contract,*** even if you are the lowest proposer.

Under §53-3 through §53-8 of the Code of the Town of Huntington and GML §103 the Town requires that this document be re
turned intact and that it be filled out completely as part of your formal sealed proposal response.

Please do not remove any pages from this proposal package.

Questions During the Bidding Period: Questions, requests for information or interpretations concerning the drawings or specifications, or any aspect of the project must be addressed in writing to the DIRECTOR OF PURCHASING, TOWN OF HUNTINGTON, Town Hall, 100 Main Street, Room 209, Huntington, New York 11743, Fax # (631) 351-2833 or email at purchasing@huntingtonny.gov and to be given any consideration, must be received by the close of business, 4:30 p.m. EST, at least five (5) business days prior to the date fixed for the opening of request for proposal.

REQUEST FOR PROPOSAL

Dix Hills Water District
Town of Huntington, New York
Utility Billing System and
Customer Engagement Portal

RFP NO. 2024-12-008

General Information

General Information and Background

The Dix Hills Water District has been divided into six water meter reading and billing districts/sections, with an account number assigned to each water meter for billing purposes. Please refer to the table below for current meter numbers by size and type.

Meter Name	Meter Size	Count
IPERL ¾	3/4	6775
IPERL 1	1	1497
OMNI+1-1/2	1 1/2	68
OMNI+2	2	88
OMNI+3	3	2
OMNI+4	4	29
OMNI+6	6	2
OMNI+8	8	6
Total	Total	8,467

Purpose

The purpose of this Request for Proposal (RFP) is to procure a fully supported and configurable Software as a Service (SaaS) Customer Information System (CIS) to meet the needs of the Dix Hills Water District, (DHWD), Town of Huntington, New York which will minimize the need for any custom modifications for the DHWD.

The CIS should encompass all customer care and utility billing capabilities to support at a minimum - electric, gas, water, sewer, stormwater, refuse, broadband, cable, telecom, and other municipal services. The CIS will provide a platform to support operations and management of all customer related utility services, which includes, but is not limited to:

- enrolling new customers,
- generating billing,
- managing payments,
- administering customer service transactions,
- tracking meter reading and consumption,
- generating service orders,
- billing multiple cycles,
- flexible and configurable rate engine to support services including electric, gas, water sewer, stormwater, refuse, broadband, cable and telecom.
- enabling customer self -service access to a variety of customer account information as well as e-billing, payments, usage, efficiency program offerings, consumption goals, alerts and notifications to customers and more.

Flexibility regarding integration is a key requirement. It is imperative that the new CIS platform have well documented APIs with a proven track record of integrating with other core common utility systems including:

- ERP/Financial Systems for General Ledger & Accounts Payable
- Metering Systems
- Geographic Information Systems
- Payment Processing Partners
- Energy Assistance Providers
- Third Party Credit Service Providers
- Banking and Payment Files
- Mobile Field Service
- Work Orders & Asset Management

Note: All billing systems must be compatible with a Sensus FlexNet Advanced Metering Infrastructure (AMI) System and have the ability to send and receive data via a csv file, txt file, or via a Sensus secure site. The billing system must be capable of storing two meter ID’s and a radio ID. The billing system must be capable of performing bulk updates to the billing account data with new meter data during a mass meter changeout.

The DHWD has identified needs from our internal staff and customers which include but are not limited to:

Greater transparency and visibility into the CIS system:

- User-friendly reporting tools and queries built directly from the application
- Dashboards and Key Performance Indicators specific to different users and roles (e.g. Customer Service, Cashiering, Collections, etc.)
- Flexible Rate Engine which can support Net Metering, Time of Use, and other complex rates across all service types.
- A clear audit trail which identifies all changes and updates made within the platform.
- Embedded communication tools to allow utilities to communicate directly with customers via Email, SMS, or outbound voice on demand.
- Greater data integrity checks during meter reading, billing, collection processes
- Meter and equipment lifecycle management to improve processes across utility departments
- Flexibility in the account/customer/premises/services data model to better handle the many scenarios the DHWD is faced with in delivering its services to citizens.

Additional areas of improvement the DHWD has identified for the new solution:

- Expect a true SaaS solution where the chosen vendor will manage all application, upgrades, environment, uptime, security, redundancy, and performance monitoring.
- All application updates to be managed by the CIS vendor with a preference towards frequent updates on at least a quarterly basis if not more frequent.
- Flexibility in the account/customer/premises/services data model to better handle the many scenarios the DHWD is faced with in delivering its services to citizens.
- Inherent Workflow to streamline key processes such as Billing and Collections.
- Less work arounds and more configurable processes to meet different business processes
- Limited ability to generate a listing of impacted customers from a particular event (i.e., using GIS tools, lists, queries) and manage outbound communication customers through the platform.
- The overall goal of this project is to enhance existing business processes through the use of modern SaaS technology and progressive vendor service delivery models. The primary objective is to procure, implement, and jointly manage with the Vendor a system that achieves the goals listed above.

Scope of Work

A. Proposed Solution Overview

This section of the proposal should include a summary of the software modules and the overall requirements for this project to upgrade and maintain a CIS of approximately 9,000 accounts, including both residential and commercial accounts.

B. Implementation/Project Plan

This section should describe the Proposer's implementation and methodology. Proposers should assume that the DHWD will contribute all necessary effort to ensure success in the project.

- Provide overview of methodology for implementation.
- Provide summary of implementation services including at a minimum:
    - Project Management
    - Software Deployment
    - Business Process Analysis
    - Organizational Change Management
    - Integration Development
    - Report and Dashboard Development
    - Configuration
    - Data Conversion
    - System Administration and End-User Training
    - Testing
    - Mock Cutover
    - Cutover
    - Post Implementation Stabilization
- Provide an estimated timeframe for implementation in the form of a Project Plan and Gantt Chart. Proposer is required to use the Town's internal project management system (Monday.com)
- Provide an overview of progress payment milestones and associated deliverables
- Provide a summary of all project assumptions and the assumed responsibilities and roles of the DHWD and proposed project team.
- Provide a summary table of expected client project team including roles, responsibilities and estimated % of dedicated time that will be needed for a successful implementation
- Provide a staffing matrix to help us visualize the effort required.
- Provide project team resumes for key members of the implementation team expected to be on the project.

C. Technical Requirements & Security

This section should describe the Proposer's technology architecture and approach to ongoing support and should include the following:

- Database Overview & Management
- Management of Upgrades & Enhancements
- Summary of Technology Infrastructure Services
- Approach to Backup, Recovery & Data Availability
- Data Center Overview including Security & Monitoring capabilities
- Approach to Single Sign-On
- Summary of Password & Identity Management and Authentication
- Operations & Service Delivery Management
- Approach to PCI Compliancy
- Audits & Certifications such as SOC 2
- Database Ownership:Town retains ownership of Data.
- Overview of Ongoing support including
    - Help Desk
    - Hours
    - Support Portal
    - Contact Types
    - Triage
    - Incident Prioritization and Service Levels

D. Functional Requirements

The following will be considered: The new solution must deliver at a minimum the requirements identified below as representative of a progressive solution DHWD is wishing to procure. Please see a more exhaustive list of technical specifications and complete required Exhibit A and Exhibit B and submit with your proposal.

- Software as a Service
- Secure Registration & Login
- Multi-Factor Authentication
- Active Directory Integration
- Customer Care
- Premise/Meters/Equipment
- Rates
- Billing
- Collections
- Payments
- Service Orders
- Technical & Security
- Customer Self-Service
- Mobile Field Service
- Reporting, Dashboards & Business Intelligence

E. Subcontractors

Vendor shall list all subcontractors used for this project, along with a detailed description of their contribution/responsibility towards this project.

F. Client References

The DHWD considers references to be an important factor in its decision to award a contract. Proposers should supply references that will be available to speak with personnel from DHWD. A minimum of three (3) references should be provided that show similar type of project deployed as Software as a Service in the past five years. (See Appendix 2)

G. Price Proposal

The price proposal cost sheet included as part of this proposal shall be completed and returned with your response in a separate sealed envelope. Any additional services above the base line submission shall be identified by the proposer in a separate document. Pricing should be summarized using the format provided in Appendix 1.

H. Sample Contract and Service Level Agreement Documents

Proposers should include a sample Contract and Service Level Agreement.

I. Value Added Services

Please include any value-added services or additional optional products that your firm can provide in your submittal.

Evaluation Criteria and Selection Process

The Town of Huntington will conduct a comprehensive, fair, and impartial evaluation of proposals received in response to this procurement effort. All proposals will be evaluated by how well the proposal satisfies the described/stated needs. Newly emerging technologies, additional features, and the ability of the proposed solutions to adapt will also be a consideration.

Evaluation Organization

a. An Evaluation Committee will be established to score and evaluate the submitted proposals.
b. The Evaluation Committee may include members from Dix Hills Water District, Engineering Department, Information Technology Department and Purchasing.

Evaluation of the Proposals

The Evaluation Committee will evaluate the Proposers' response and the extent to which it meets the requirements delineated in this RFP. All proposals submitted in response to this RFP will be scored based on the evaluation factors identified below:

Evaluation Factors:

- Implementation services and strategy and Project Schedule – 20%
- Experience and references – 20%
- Cost – 20%
- Compliance with the requirements of the RFP and ability of the proposed software to satisfy requirements and specifications – 20%
- Vendor support and maintenance through implementation and on-going – 20%

The selected vendor must verify and clearly delineate the costs or fees for which consumers will be responsible, including payment gateway transaction fees, as well as those to be covered by the Dix Hills Water District. This ensures transparency and accountability in the financial structure of the proposal.

Interview

DHWD reserves the right, as part of the evaluation process, to ask for additional materials, interview, or schedule site visits to any locations serviced by Proposers. Site visits may be scheduled or unscheduled as determined by DHWD. If applicable, DHWD shall contact Proposers to arrange a demonstration or interview.

Additional Investigations

DHWD reserves the right to make such additional investigations as it deems necessary to establish the competence and financial stability of any firm submitting a proposal.

Intent to Negotiate

DHWD reserves the right to invite the most qualified proposer to negotiate final terms and conditions, finalize scope clarification and confirm final pricing and payment terms. The information received from the negotiation shall be found in the final contract document. If the parties are unable to negotiate a satisfactory contract the negotiations will be terminated. DHWD reserves the right to either begin negotiations with the qualified proposer that is next preferred or non-award the request for proposal.

Contract Term

The term of the contract shall be for three (3) years with an option to renew for two (2) additional years upon mutual consent of the Town and the Proposer. The Town is looking to implement the project within nine (9) months of execution of the contract.

Item	Requirement	Response Included | Optional | Not Offered | Modification | See Comment	Comment	Optional Development Estimate	Time Needed for Optional Development
Technical & Security					
1.1.1	Secure registration and login for all users				
1.1.2	Hashing and securly storing passwords				
1.1.3	Requires users to establish user name and password prior to use				
1.1.4	Option to reset password via an email link				
1.1.5	Integration with standard Single-Sign-On mechanisms including Active Directory, DUO, etc.				
1.1.6	Ability to apply for an account (e.g., new move in or product purchase) for Web access or become a utility contact without any CIS account(s)				
1.1.7	The solution automatically includes all the CIS accounts where the enrolling customer had a relationship (e.g., past accounts)				
1.1.8	Provide Ability for Administrator to set up users and manage all of their security on the Role level.				
1.1.9	Provides configurable auto-logout functionality				
1.1.10	Allowing Multi-factor authentication via Duo Push				
1.1.11	Ability for the customer to add or remove the multi-factor authentication at any time				
1.1.12	Ability to login with a user's Microsoft account credentials.				
1.1.13	Ability to Sync Users and Groups from Azure Active Directory.				
1.1.14	When a user is added to Azure AD, proposed solutions are automatically provisioned				
1.1.15	When a user is removed from Azure Active Directory, access should be automatically revoked				
1.1.16	Ability to export files in an industry standard format (CSV, excel, etc.)				
1.1.17	Define standard data exports such as those required to facilitate data exchanges with other core systems				
1.1.18	Schedule recurring delivery of standard data exports				
1.1.19	Search using multiple user-selectable criteria (compound searches).				
1.1.20	Comprehensive audit trail with all activities logged including date, time and user. Audit Trail should be easily accessible within the application user interface and not managed via database reporting				
1.1.21	All proposed applications should be device agnostic and operate within a responsive design web framework.				
1.1.22	The system and its components should be supported in multiple and current web browsers, including standard browsers, Google Chrome and Microsoft supported browsers.				
1.1.23	The vendor must use best practices for system upgrades and upgrades, including a clear path to perform a control test before applying/releasing maintenance upgrades or upgrades and perform validation tests.				
1.1.24	The system should be able to be updated at least monthly as managed by the vendor in such a way that does not require extensive end user testing.				
1.1.25	System updates and upgrades should be managed and deployed by vendor as part of their SaaS service.				
1.1.26	Any technical support for system updates and upgrades should be provided for by the annual Software as a Service Fee with no additional hidden costs.				

Item	Requirement	Response Included | Optional | Not Offered | Modification | See Comment	Comment	Optional Development Estimate	Time Needed for Optional Development
1.1.27	Vendor should describe how PCI-DSS compliance is maintained. Vendor should identify all PII data that system can safeguard.				
1.1.28	The system has the ability to restrict options on certain fields to items within a drop-down list (e.g. customer type codes, rate codes, etc.).				
1.1.29	The system should include published, documented and accessible APIs. Please briefly explain.				
1.1.30	The system has the ability to automatically assign a unique tracking number for each interaction.				
1.1.31	The system has the ability to automatically assign a date and time stamp for each interaction and all subsequent updates.				
1.1.32	The system has the ability to retain and display (under user control) unlimited history billing and collection history on-line in 'Live' database, preferably an unlimited number of years. Please comment.				
1.1.33	Provide equipment interface with various office devices: ID swiper, scanner, credit card machine, receipt printer, laser printer, ...				
1.1.34	Provide the ability to create customized reports without vendor involvement that are viewable/printable and publishable in image (pdf, tiff) or data (excel, word, ...) formats				
1.1.35	Admin and User Training should be provided				
1.1.36	Security control settings can be customized using individuals, roles or groups, based on predetermined access levels and operational needs				
1.1.37	Audit trails are available, accessible and cannot be altered. Please briefly summarize.				
1.1.38	System Performance should be managed by the Vendor as part of the SaaS Service.				
1.1.39	Ability to offer vertical and horizontal scalability and elasticity in the cloud when running process intensive services (Eg. Automated elasticity of servers spinning up in the cloud)				
Customer Care					
1.2.1	f. Multiple billing calculations per account g. Tracking and display of transaction history h. Tracking and display of historic water consumption i. Tracking and display of financial history including account aging j. Secure storage of customer personal information				
1.2.2	Ability to set up and create a customer billing database that allows for retaining existing account numbers and premise structure				
1.2.3	Ability to set up and create a customer billing database that allows for retaining existing route and sequence structure for customer billing				
1.2.4	Ability to set up and create a customer billing database that allows for retain existing outsourcing specifications				
1.2.5	Ability to set up and create a customer billing database that allows for transferring service between customers				
1.2.6	Ability to set up and create a customer billing database that allows for multiple rates and fees on the same account				
1.2.7	Ability to set up and create a customer billing database that allows for multiple billing calculations per account				
1.2.8	Ability to set up and create a customer billing database that allows for tracking and display of transaction history				

Item	Requirement	Response Included | Optional | Not Offered | Modification | See Comment	Comment	Optional Development Estimate	Time Needed for Optional Development
1.2.9	Ability to set up and create a customer billing database that allows fo tracking and display of historic water consumption				
1.2.10	Ability to set up and create a customer billing database that allows for tracking and display of financial history including account aging				
1.2.11	Ability to set up and create a customer billing database that allows for tracking and display of Secure storage of customer personal information				
1.2.12	Ability to complete billing on a monthly basis for a system of the City’s size with the ability to expand with demand				
1.2.13	Ability to enter transactions directly on accounts; examples include: credit adjustments, payments, fees for service, write offs of bad debt				
1.2.14	Broad search capabilities that quickly narrow searches and filtered records designed like current browser technologies available.				
1.2.15	Embedded communications, including Email/Text bidirectional communications from customers directly in CIS;				
1.2.16	Efficient delivery of customer communications from CIS including options to create templates and attached reports with click of a selection; all messages back from customer are brought into CIS.				
1.2.17	All Audit logs of changes, both systemic and manual edits from users are logged for easy viewing				
1.2.18	Log of Screen views by user and date tracked				
1.2.19	Logging of note categories with embedded task and order initiation from the note comments				
1.2.20	Record the results of customer contact (IVR, print notice, etc.) in associated account				
1.2.21	GIS integration on the Account and Premises with overlay of GIS attributes available within a Map in the CIS application.				
1.2.22	Services views include installed all meter and equipment and consumption history				
1.2.23	Search queries across entities, responsive lists and filters				
1.2.24	System allows for new customer deposits.				
1.2.25	System automatically reallocates deposit upon relocation or applies to final bill if moving out of service area.				
1.2.26	Easy editing of customer and account attributes from main screens				
1.2.27	Provide the ability to easily transition accounts from a current status to a terminated status				
1.2.28	Flexible Wizard based processes such as move in/move out, allowing for configuration of process flows based on frequent types, accounts, etc. and the flexibility to determine on a service-by-service basis what action to include in the move process.				
1.2.29	Determine additional or new deposit(s) for an existing account based upon: actual usage, payment history, etc.				
1.2.30	Record customer contact independent of any other customer-related activity.				
1.2.31	Designate and capture information for an alternate contact for each account.				

Item	Requirement	Response Included | Optional | Not Offered | Modification | See Comment	Comment	Optional Development Estimate	Time Needed for Optional Development
1.2.32	Collect multiple contact information (3rd-party) related to the service address (owner, manager, management company, etc.).				
1.2.33	Ability to track unlimited contacts associated with key commercial and industrial accounts and to designate the type of contact.				
1.2.34	Search by person on account whether or not primary, secondary or other.				
1.2.35	Record multiple addresses and designate an address type for any given contractor or customer (types might include: billing, location, in care of, corporate, etc.).				
1.2.36	Capture notes associated with a customer (person), independent of account or location.				
1.2.37	Ability for notes to automatically create follow through business processes such as tasks, service orders, account alerts without additional user intervention.				
1.2.38	Create unique classifications and tags and associate with customer record (e.g., green power, electric vehicle, etc.) for segmentation and reporting purposes.				
1.2.39	Provides view of current and historical customer data, regardless of account status (e.g., all of the locations that a given customer has resided).				
1.2.40	Provides customer attributes (not premise or account) indicating special consideration for special circumstances such as medical conditions.				
1.2.41	Configure customer-related alerts (outstanding service order, collection action pending, etc.) and display them on the "primary" customer screen.				
1.2.42	Search for customers by the following attributes (but not limited to): name, street address, customer number, premise ID, service point ID, or phone number.				
1.2.43	Search for customer account transactions using attributes such as date, amount, check number, etc.				
1.2.44	Configure customer's account to allow automatic deduction from a given bank account or credit card. (EFT)				
1.2.45	Identify location of service connection (overhead or underground).				
1.2.46	Indicate connected pole number and transformer, GPS location (lat, long)				
1.2.47	Identify or designate if a service should automatically revert to a landlord or property manager.				
1.2.48	Designate appropriate action on rental accounts when not occupied, including disconnection and reversion to landlord.				
1.2.49	Maintain multiple phone numbers for each customer or contractor account and indication of phone number type (mobile, home, business, etc.).				
1.2.50	Accommodate multiple customer premises for a single legal parcel (e.g. shopping mall).				
1.2.51	Provide or interface with postal address validation software to check for valid address.				

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1.2.52	Functionality to identify potential duplicate customers by evaluating designated fields (passport, drivers license, national ID, etc. already exists for another customer).				
1.2.53	Attach scanned document or other electronic file to the person record (such as driver license) to be secured securely in an encrypted manner.				
1.2.54	Establish master account where the master does not have a premise in the service area.				
1.2.55	Designate single master account as responsible for the receivables of the sub-accounts.				
1.2.56	Produce a summary bill for master account with all detail bills for related sub-accounts.				
1.2.57	Distribute customer/premise notes with service orders or provide to meter reading handheld devices.				
1.2.58	Capture notes associated with site or premise that is independent of account and customer.				
1.2.59	Create customer account without a meter number or site (premise) information (e.g. street lights)				
1.2.60	Capture load information such as heating type, sq footage, water heater type, etc.				
1.2.61	Mass import features using spreadsheet like entry of entities such as premises, meters, equipment, payments, etc. to more efficiently manage City data into the CIS.				
1.2.62	GIS based map views on premise page with WMS integration layers to display equipment and infrastructure on the map.				
1.2.63	Manually adjust standard deposit, with approval and audit trail.				
1.2.64	Capture reason for over-ride of deposit.				
Meters & Equipment					
1.3.1	Mass import features using spreadsheet like entry of entities such as premises, meters, equipment, payments, etc. to more efficiently manage DHWD data into the CIS.				
1.3.2	GIS based map views on premise page with WMS integration layers to display equipment and infrastructure on the map.				
1.3.3	Extensible attributes per entity type; prepopulated drop-down fields relevant per sub-type (eg. electric meter vs water meter attributes)				
1.3.4	Premise services entity allow for consistent history of services provided, meters and equipment attached over history, unique service and billing attributes to that service point.				
1.3.5	Equipment and equipment types allow for intelligent relationships per type and if rate impacting (chargeable equipment, credits on installed equipment such as Behind the Meter Storage Devices)				
1.3.6	Set validation thresholds by account type, such as commercial versus residential.				
1.3.7	Provide an online queue or report listing all meter readings that have failed validation.				
1.3.8	Establish validation thresholds based on anticipated peaks, valleys, and annual consumptions for premises based on size, general area, equipment, heat factors, etc.				

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1.3.9	Establish validation parameters to compare current seasonal usage with previous seasonal usage (e.g. March usage of current year is validated against previous March consumption, not August consumption).				
1.3.10	Import meters from the manufacturer into a "pending inventory" with bulk assignment of sequential meter numbers.				
1.3.11	Mobile Field Service App (Responsive Web App or IOS)				
1.3.12	Provide automatic notification to meter readers and service personnel regarding a theft-of-service condition or recent Disconnect for Non-Pay.				
Rates, Penalties & Fees					
1.4.1	Ability to define, add, change, and delete an unlimited number of rate code types and amounts.				
1.4.2	Ability to accommodate multiple billing rate structures that would be required to the different categories of services, including fixed and variable rates, tiered rates, and specialty fees such as sub meters, grinder pumps.				
1.4.3	Ability to automatically adjust previous bills for leak adjustment purposes based on previous billing history and leak type formula.				
1.4.4	Ability to automatically calculate a fee based on a formula (ex. connection fees based on number of fixture units).				
1.4.5	Ability to define an effective date for rate tables and prorate charges based on the effective date, with unlimited date range.				
1.4.6	Ability to create bill that incorporates old/new rates .				
1.4.7	Ability to maintain a test environment for testing new rates and billing procedures.				
1.4.8	Ability to allow the user to implement rate changes quickly, to include the ability to establish new rates, where programming is not necessary.				
1.4.9	Ability to define distribution of fees to multiple general ledger accounts based on user-defined account type, fee category, service type, or reason code.				
1.4.10	Ability to provide for one-time charges (ex. reconnect charge, turn-on fee, late charge, return check fee, after hours fee, meter accuracy test fee, tampering fee, etc.).				
1.4.11	Ability to assess various types of penalties for overdue bills.				
1.4.12	Ability to enter stop and start dates for individual fees on an account (ex. grinder pump fees, sub meter, etc.).				
1.4.13	Ability to identify accounts by rate classification (ex. residential, commercial, tax exempt, etc.) or by independently identified and selected fields.				
1.4.14	For situations where an adjustment has to be made to a customer's bill during a time period that an older rate was in effect, automatically calculate the adjustment based on the old and new rates.				
1.4.15	System can provide a mechanism to input collection contacts/notices and/or notes into the billing system.				
1.4.16	System supports automatic calculating and billing of late payment charges (penalties), including the ability to identify to the system which customers and/or services are subject to late charges based on partial payments, payment arrangements, etc.				

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1.4.17	Set late payment fee as either a fixed amount OR a percent of amount owed.				
1.4.18	Define circumstances under which a misc. fee will be applied (e.g. high-use).				
1.4.19	Apply charges associated with a specific premise.				
1.4.20	Ability to automatically add late penalties or interest to delinquent accounts according to a flexible age structure determined by the user.				
Billing					
1.5.1	System can provide a complete or exception only billing pre-list for review prior to bill printing.				
1.5.2	System allows printing of multiple cycles in one billing run (monthly vs. quarterly).				
1.5.3	Ability to generate one utility bill covering all services and charges, and itemizes charges separately.				
1.5.4	System allows for user-defined free form message on bills.				
1.5.5	Bills format is user definable, to include billing date, account number, service period, current read, prior read, consumption billed, itemized charges, balance forward, amount due, due date, numerical and graphical prior-same period usage, and/or average gallons used per day.				
1.5.6	Unlimited history of the PDF copy of the Bill that is generated should be maintained with the account				
1.5.7	Ability to view and reprint a past bill at any time.				
1.5.8	Once a bill is reprinted, system has ability to automatically send it to a customer via email or SMS.				
1.5.9	Ability to produce statements for customers with multiple utility accounts.				
1.5.10	Ability to provide CASS Certification and sort bills by zip plus four to take advantage of postage discounts.				
1.5.11	Ability to create a file to exports bills for 3rd party printing.				
1.5.12	Ability to send a PDF copy of bills to 3rd party printer via FTP				
1.5.13	Ability to automatically prorate bills for new and closed accounts.				
1.5.14	Ability to calculate final bills during any cycle based on the internal issuance of a turn off service order or closing a customer account.				
1.5.15	System supports billing adjustments such as read errors, automatically adjusts billing amounts and history.				
1.5.16	Ability to not print a paper bill and email electronic bill to the customer based on customers selection for electronic billing. Option should be available for e-billing to be managed via the vendor and not the payment processor.				
1.5.17	Ability for customers to view and print their bills online, with unlimited history available.				
1.5.18	Ability to adjust a bill. Once the adjustment is made, the bill prints again correctly and a history of this change is maintained in the system.				

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1.5.19	System allows customer selected option for electronic billing within the Self-Service Portal.				
1.5.20	Ability to drive email marketing campaigns to customers to encourage them to sign-up for electronic billing.				
1.5.21	If customer opts for electronic billing, ability for customer to have choices to: 1) still get a paper bill and ebill; 2) stop getting a paper bill and just get an ebill (which the system generates and emails).				
1.5.22	Ability to Combine usage for multiple metered and non-metered service points into a single consolidated account bill. System can combine an unlimited number of user-chosen meters on a single bill.				
1.5.23	System accommodates billing of accounts on different billing schedules such as bi-monthly, monthly, quarterly, semi-annual, and yearly basis.				
1.5.24	Ability to automatically estimate usage for a meter that cannot be read, and estimate based on past usage. Estimates must be able to be modified by users as needed.				
1.5.25	Ability to produce a one-time miscellaneous bill to a current customer. One-time bill is produced in addition to a normal cycle bill.				
1.5.26	System supports an unlimited number of user defined adjustment types (ex. refunds, final bill, leaks, etc.).				
1.5.27	When adjustments are made, system automatically provides notification of prior adjustments.				
1.5.28	System provides multiple capabilities for sorting bills? (ex. zip code, cycle, customer number).				
1.5.29	Ability to input a range of bills to be produced. For example, the entire bill run does not need to be printed all at one time.				
1.5.30	Ability for the system display the number of total bills printed/remaining to be printed.				
1.5.31	System allows for restarting of a bill run from any point within the bill run.				
1.5.32	Ability to send a duplicate copy or portion of the bill or other communications (EG. Collection notices) to any third party defined for the account (ex. renter, landlord, etc.).				
1.5.33	System allows certain services to be billed to a tenant while other services can be billed to a landlord.				
1.5.34	System maintains a file of standard messages for inclusion on utility bills (ex. reminder notices, shut off notices, etc.).				
1.5.35	System provides user defined automatic customer notification of billing/consumption anomalies (ex. high users compared to prior history).				
1.5.36	Billing				
1.5.37	Intelligent meter validation rules checking against multiple configuration variables (consumption same period last year, last month, last 3 months, last 3 years same period) to refine the potential alerts on high usage or incorrect reads.				
1.5.38	Proven interface to meter reading system,				

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1.5.39	Dynamic reading validation page to manage estimates, initiate orders, comment and approve readings for billing				
1.5.40	Holistic view of metering, billing, penalty dates, final billing processes on a dynamic user interface				
1.5.41	Intelligent user interface on processes (calculation, posting, generation of statements, etc) to view and see status of processes. Dynamically manage the exceptions and action items				
1.5.42	Ability to support multi-service billing, including electric, gas, water, sewer, stormwater, cable, broadband and telephone billing.				
1.5.43	Provide flexible budget billing options				
1.5.44	Provide Levelized billing as an option.				
1.5.45	complex billing such as net metering, Electric thermal storage electric rates and large industrial electric programs.				
1.5.46	Logical rate schedule program to reduce the complexity of variants of rates currently managed at the city.				
1.5.47	Run any process at any time of day without impacting users in application; User can also access and perform other actions in system at same time processes are running				
1.5.48	Smart statement generation that segments electronic billing batches from print batches, automatically storing all statements as attachments to the account statement records in the CIS for easy retrieval/view/reprint as needed.				
1.5.49	Provide reference/view of customer billing history.				
1.5.50	Manage discounted rates according to account type (X% discount on the total bill before taxes).				
1.5.51	Produce an extract for use in producing invoice statements by third-party Bill printer.				
1.5.52	Consolidate multiple customer accounts into a single bill upon customer request.				
1.5.53	Estimate billing reads for meters with multiple registers including including KWH, KW, KVAR with on and off-peak time of use.				
1.5.54	Produce a one-time miscellaneous item on the cycle bill.				
1.5.55	Estimate an entire reading route or billing cycle.				
1.5.56	Correct estimated bills when an actual reading is received, by recalculating and performing a cancel/rebill OR adding credit/debit adjustment.				
1.5.57	Accommodate blended rates within a billing period (e.g. mid-month rate change).				
1.5.58	Designate creation of duplicate bills for 3rd-party customer entities.				
1.5.59	Produce a one-time miscellaneous bill to a current customer outside of normal cycle bill.				

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1.5.60	Print targeted messages on a bill to an individual customer or groups of customers based on customer segmentation tags.				
Collections					
1.6.1	Intelligent user interface on collections processing, responsive processing speeds and views of returned values, easy filtering on values				
1.6.2	Multi-media delivery of collection steps; define delivery methods (Email, Text, IVR, Letter, Service Order)				
1.6.3	Wizard based actions on accounts: payment plans, extended due dates, payments, transfer balances, etc to efficiently action collections				
1.6.4	Bankruptcy processes specific to utility configuration				
1.6.5	Transfer delinquent balances between a customer's accounts.				
1.6.6	Cross-reference new service requests against inactive accounts with outstanding balances or accounts disconnected for non-payment.				
1.6.7	Generate off-cycle collections notices.				
1.6.8	Override (remove) or add to system-generated "cut-list."				
1.6.9	Override collections actions.				
1.6.10	Produce list and phone numbers to support outbound communication to customers via mail, email, SMS our outbound voice directly from within the CIS platform.				
1.6.11	Suppress or issue disconnect notices and orders either individually or in groups.				
1.6.12	Apply adjustments to accounts that have been written-off.				
1.6.13	Capture reason for writing-off the balance of an account.				
1.6.14	Produce approval report that lists accounts to be sent for collection (for management)				
1.6.15	Configure collections to allow distinct notices to be sent at varying days past due.				
1.6.16	Automate phone calls for queue to non-pay customers.				
1.6.17	Configure threshold arrears amount to trigger suspension of the collection process (i.e., no notice if not >$25 owed).				
1.6.18	Set unique disconnect date for a given customer when generating notices (e.g., specify a 7-day allowance for payment instead of 15 days).				
1.6.19	Record that a customer contact (e.g. phone call) has been made prior to disconnect as part of collections routine.				
1.6.20	System supports automated payment plan arrangements allowing customer to pay amount due over time.				

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1.6.21	Ability to support user defined payment extensions.				
1.6.22	Ability to flag selected accounts as exempt from receiving past due notices.				
1.6.23	Ability to identify accounts for write off and collection.				
1.6.24	System maintains a dynamic shut off list that can be automatically or manually updated.				
1.6.25	Ability to generate a shut-off list.				
1.6.26	Ability for shut-off lists to should show comments from the CSR to the field employee (ex. lock or pull the meter, bad dogs, locked fence, etc.).				
1.6.27	System provides automatic routing of shut off notices and service orders through interface to mobile workforce management system.				
1.6.28	Ability to produce delinquent bills for customers that have already received a final bill but continue to maintain an unpaid balance.				
1.6.29	System automatically produces shut off and restore door tags for accounts that are being shut off.				
1.6.30	System automatically produces final notices.				
1.6.31	Ability to deliver shut off and restore tags to account holders via electronic communication.				
1.6.32	System allows for user definable and changeable forms, letters and notifications (ex. sub meter readings, leak adjustments, new service agreements, shut off notice, etc.).				
1.6.33	System automatically produces final notices.				
1.6.34	Ability to track collection activity for active accounts and closed accounts including Bad Debt accounts. This is to include phone call records, letters sent, agreements made, etc. Onscreen view or report of contacts/notices made to accounts in the collection process.				
1.6.35	System automatically produces final notices.				
Payments					
1.7.1	Receipt Batches overview provides complete view of all batches in progress regardless of source; drill down easily into the batch details				
1.7.2	Ability to process payments from credit/debit cards, checks, cash, and EFT transactions				
1.7.3	Flexible import routine to allow for multiple formatting of import batches and validations				
1.7.4	Support partial payments with an allocation or directed amounts.				
1.7.5	Process Credit Cards / Debit Cards in a PCI Compliant Manner through integration with a payment processor.				
1.7.6	Option to include processing fees when customer pays by credit card				
1.7.7	Set threshold at which credit card payments will not be accepted.				
1.7.8	Accept auto-pay (EFT) payments from customer banks.				
1.7.9	Issue a receipt to a customer at the time of payment according to customer preference (email, text, printed).				
1.7.10	Automatically remove pending cut off orders if payment is received through any payment source.				
1.7.11	Archive electronic receipts issued to customers associated with customer payment.				

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1.7.12	Apply a single payment across multiple accounts.				
1.7.13	Ability to define allocation of single payments across multiple accounts				
1.7.14	For each transaction, capture who (CSR) processed the payment and provide access to the data through the user interface.				
1.7.15	Audit payments so that when an adjustment is initiated, approval or management intervention can occur.				
1.7.16	Receive a mixed payment type on a single transaction (part check, part cash) that generates a single receipt.				
1.7.17	Receive a customer payment and post to customer's account immediately (real time).				
1.7.18	Manage multiple cash drawers for use in taking customer payments, manage balance in the drawer.				
1.7.19	Manage cash drawer assignments to individual cashier and prevent access by other users.				
1.7.20	Apply refund via the following methods: credit directly to the customer account, refund check, or a combination of the two based upon customer preferences.				
1.7.21	Present special payment arrangements on bill statement.				
1.7.22	Record payment commitments ("promise to pay") from the customer WITHOUT using a notes field.				
1.7.23	Accept and post bill payments received from third-party agencies.				
Service Orders					
1.8.1	Customers can request start/stop of service online.				
1.8.2	Designate (via configuration) what information is available/presented to crew members in mobile work solution.				
1.8.3	Schedule orders by service order area based upon order priority, date requested, service department staffing level, and current backlog.				
1.8.4	Capture additional/unplanned service charges that are identified in the field (tampering, collection fees, etc.)				
1.8.5	Generate a service order to investigate stopped meter when no usage is reported for a pre-defined duration.				
1.8.6	Accommodate multiple services for an account on a single service order.				
1.8.7	Designate default priorities to service order categories (Outages).				
1.8.8	Electronically deliver service orders and updates in real-time back to the CIS.				

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1.8.9	Identify customers suspected of tampering (tampering information is captured and updated to the customer, premise, customer account, and/or meter record.)				
1.8.10	Associate a standard fee(s) with selected service orders.				
1.8.11	Support charges/fees based on time of day or day of week associated with service activity (e.g., reconnect fee is higher at night)				
1.8.12	Route interdepartmentally (e.g., Customer Service to Operations) via queue for processing by a defined work group.				
1.8.13	Associate service order history with customer account.				
1.8.14	Provide notification of open service orders for a given customer account on the account summary screen.				
1.8.15	Accommodate the initiation of emergent work, initiated with minimal information, or entered into the system after the fact.				
1.8.16	Record completion status and notes for service orders (e.g., can show "in progress").				
1.8.17	Configure and manage multiple service order types - e.g., re-read, high-bill, connect, disconnect, collection action, trouble-call, etc.				
1.8.18	Include centralized notes (e.g., customer, premise, and/or meter notes) with a service order.				
1.8.19	Designate assignment for service orders based upon service order type.				
1.8.20	View service order's status online (real-time).				
1.8.21	Ability to view Service Order History in the Customer Self Service Portal				
1.8.22	Alert users of possible duplicate service orders or concurrent work at the same address or for the same customer.				
1.8.23	Define service order work areas based on cycle, geography, and similar.				
1.8.24	Provide Spatial view of all Service Orders including ability to dispatch from map.				
1.8.25	Establish relationships/dependencies between service orders.				
Financial Management					
1.9.1	Full financial ledger capabilities, providing complete general ledger balancing and reconciliation views to the exported values provided to City financial system				
1.9.2	Full financial ledger capabilities, providing complete general ledger balancing and reconciliation views to the exported values provided to City financial system				
1.9.3	List view of transactions for easy filtering on type, date, amount, etc to quickly drill to desired query				
1.9.4	Concepts of Fiscal Periods and Service Periods to control the posting and reporting quality in the system				
1.9.5	Generation of Payable vouchers				

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1.9.6	Ability to integrate both General Ledger and Accounts Payable to Financial System				
1.9.7	Calendar view of all reports generated either on schedules or upon process completion; allows users to look up by date the relevant reports at that date				
1.9.8	Ability to age accounts in user defined increments.				
Reporting					
1.10.1	User level security flows through to queries and reports.				
1.10.2	System has ad-hoc query and reporting tools with drill down to source transactions based on multiple parameters / filters.				
1.10.3	System allows ad-hoc query and reporting on real-time data.				
1.10.4	System provides metric-specific reporting (e.g. work order aging, escalations, past due approvals, etc.).				
1.10.5	System has mobile executive dashboards (at-a-glance functionality).				
1.10.6	System supports multiple data output formats (e.g. XML, Excel, CSV, etc.).				
1.10.7	Ability to search and report on all fields, including user-defined fields, with ability to organize, summarize, sort, and sub-total in a variety of ways.				
1.10.8	Intuitive ad hoc query and reporting for users with wild card search and drop down lists.				
1.10.9	Allows easy access to the data for report and query generation without the need for a programming specialist.				
1.10.10	Ability to modify report templates or standard reports and save new format for use in the future, by user.				
1.10.11	Ability to access reports through graphical dashboard display.				
1.10.12	Ability to track and report on key performance indicators, accomplishments, variances, failures and issues.				
1.10.13	Built-in graphing and charting capabilities.				
1.10.14	Ability to drill down from report line item to detail transaction level.				
1.10.15	Ability to search open text and comment fields.				
1.10.16	Ability to report personnel time by the activity performed and the asset it was performed on.				
1.10.17	Ability to have option to send report to the screen, a printer, or to a file as well as send file by email.				
1.10.18	Ability to add customized reports to the standard report menu.				
1.10.19	Ability to access all data, all historical work orders, and work order costs for all assets.				
1.10.20	Ability to select date ranges and other criteria as applicable for standard reports.				
1.10.21	Ability to report on total cost of maintenance for one or many selected assets.				
1.10.22	Ability to create timesheet reports for crews, including overtime and emergency response hours.				
1.10.23	Ability to modify the content and/or format of any standard report.				

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1. Customer Self-Service					
1.1 Secure Registration & Login					
1.1.01	Ability to designate Registration criteria including Name, Email Address, Account Number and Amount on last bill for verification purposes				
1.1.02	Existing integration with Invoice Cloud customer portal username and password for login purposes if the customer is already a registered user				
1.1.03	Secure registration and login for utility accounts				
1.1.04	Hashing and securly storing passwords				
1.1.05	Option to reset password via an email link				
1.1.06	Ability to apply for an account (e.g., new move in or product purchase) for Web access or become a utility contact without any CIS account(s)				
1.1.07	Upon enrollment does the solution provide the customer the ability to view a listing of their account(s) and access information for the individual service addresses				
1.1.08	The solution automatically includes all the CIS accounts where the enrolling customer had a relationship (e.g., past accounts)				
1.1.09	When establishing a new web account, the product forces a customer to verify receipt via an email confirmation link before the final access to the account is granted				
1.1.10	Provide Ability for Administrator to invite specific contacts by email directly from the product				
1.2 Multi-Factor Authentication					
1.2.01	Allowing Multi-factor authentication via email token				
1.2.02	Allowing Multi-factor authentication via hardware token				
1.2.03	Ability for the customer to add or remove the multi-factor authentication at any time				
1.3 Active Directory Integration					
1.3.01	Ability to login with a user's Microsoft account credentials.				
1.3.02	Ability to Sync Users and Groups from Azure Active Directory.				
1.3.03	When a user is added to Azure AD, proposed solutions are automatically provisioned				
1.3.04	When a user is removed from Azure Active Directory, access should be automatically revoked				
1.4 Tour					
1.4.01	Ability to provide an automated click through tour for new users which explains various functions and features of the portal				
1.4.02	Ability to revisit the tour functionality at any time				
1.5 Profile Management					
1.5.01	Allow the customer to add, delete or modify its address				
1.5.02	Allow the customer to add, delete or modify its contact information including phone and email.				
1.5.03	Allow the customer to link new accounts to his profile				
1.5.04	Allow the customer to change his display name				
1.5.05	Ability to view a list of all linked service orders, look at the details and download it				
1.5.06	Ability to view a list of all summited forms, look at the details and download it				
1.5.07	API should be provided to allow Profile updates to integrate with other applications such as a CIS.				
1.6 Consumption Analytics					
1.6.01	Personalized consumption displays including consumption per day, seasonal consumption trends, year over-year usage, and ability to compare use to utility goals. Residential accounts shall include consumption comparisons to similar households based on occupancy and outdoor area characteristics and residential end-use disaggregation				
1.6.02	Display consumption data in context of temperature, precipitation, Heating Degree Days or other data to inform users of the weather's impacts on consumption				
1.6.03	Ability to view current and prior period consumption relative to a utility determined budget, consumption goal, and/or usage allocation				
1.6.04	The ability to estimate and display irrigation events in the consumption graphical view				

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1.6.05	API available to connect to metering system to present interval data.				
1.6.06	Ability to view unlimited consumption data.				
1.6.07	Ability for customers to define what periods they wish to view consumption.				
1.7 Data Download					
1.7.01	Ability to export consumption data into Comma-Separated Value (CSV)				
1.7.02	Ability to export consumption data into PDF				
1.7.03	Ability to export consumption data into Copy Clipboard				
1.8 Bill Presentation					
1.8.01	Ability to view bills securely directly within the Portal (PDFs available). Vendor must provide sample format, design and content of the web-based application and functionality in the proposal. Vendor should also provide information on safety and security features of online application.				
1.8.02	Ability to store copies of bills directly within the solution.				
1.8.03	Ability to provide both options - Bill Representation and Bill Replication				
1.8.04	API's available to link out to an external print provider that is storing electronic copies of the bill.				
1.9 Electronic Billing					
1.9.01	Allow to view and download historical bills and payments details				
1.9.02	Allow paperless billing subscription from the home page				
1.9.03	Allow customers the option to receive both electric and paper bills.				
1.10 PCI Compliant Payments					
1.10.01	Ability to display Invoice Cloud customer portal pages as embedded within your solution for processing payments. Integration wiht Invoice Cloud must be proven.				
1.10.02	Confirmation that the solution does NOT store payment card information locally.				
1.10.03	Vendor will provide support and/or an integration during implementation to ensure the implementation meets PCI DSS requirements				
1.11 Alert Management					
1.11.01	Alert management section to suscribe to alerts based on the customer preferences				
1.11.02	Easily customizable communication preferences – customers should be able to determine how they receive outgoing communications, including by SMS, email, automated call, and mail, select applicable accounts, and set after how many days after an event they will receive the alerts.				
1.12 Guest Management					
1.12.01	Ability to give a guest access to any selected person by the customer in order to view-only the account information				
1.12.02	Ability to give access (create a secondary account login) for other users such as a spouse, roommate, tenant, or property manager to take actions on the account				
1.12.03	Ability to provide security around what a Guest can view.				
1.12.04	Ability to provide security around what a secondary account can do in the portal (EG. Submit Forms, etc...)				
1.13 Program Enrollment					
1.13.01	Ability for Administrators to create and market various programs.				
1.13.02	Ability for Administrators to controll the enrollment process and information that is required.				
1.13.03	Ability for customers to enroll in a program directly from the portal using a form.				
1.13.04	View a list of active and historical program subscriptions				
1.14 Key Account Management					
1.14.01	Users or managers of multiple properties, residential or commercial, with multiple meters, can view a roll-up of all propriety consumption data in a unified view				
1.14.02	User Interface & Experience can be different for Commercial & Industrial Accounts as opposed to Residential customers.				
1.14.03	Ability for C&I customers to view detailed information on the Meter Level.				
1.14.04	Ability fo Utility to assign specific Key Account Manager who is responsible for a specific customer.				
1.14.05	All communications with the customer can be tracked and actioned by Key Account Managers in one central location including notes, calls, texts and emails.				
1.14.06	Ability to track multiple contacts across a single key account including all pertinent contact informatoin such as name, title, phone number, email, etc.				

Item	Requirement	Response Included | Optional | Not Offered | Modification | See Comment	Comment	Optional Development Estimate	Time Needed for Optional Development
1.14.07	Ability to view all active and historical service orders across all accounts or for specific accounts.				
1.14.08	Ability to view advanced Consumption Analytics with comparisons including aggregation and disaggregation.				
2. Administration					
2.1 KPI & Dashboard Management					
2.1.01	Utility users should be able to have graphical insights on the form submissions				
2.1.02	Dashboards & KPI's can be configured by department				
2.1.03	Ability to view contact notes directy from the dashboard				
2.1.04	Operational map displaying the distribution of service orders and the ability of drawing polygons on the map				
2.1.05	Ability to manage reminders directly from the dashboard				
2.2 Customer Masquerading					
2.2.01	Customer representatives should be able to masquerade as a user to see exactly what the customer is seeing in the custmer portal in order to provide advanced assistance.				
2.2.02	Masquerading can be accomplished without the customer having to turn over their desktop control to the Utility (the product duplicates the view)				
2.2.03	The system clearly warns that the CSR is in masquerading mode				
2.2.04	The solution allows a CSR the ability to access all the customer's web pages without viewing the customer's security information (i.e., full use guest)				
2.3 Web Form Management					
2.3.01	Users should be able to easily create forms using drag and drop for field types				
2.3.02	Ability to create a Form from an existing template				
2.3.03	Ability to preview a form prior to publishing				
2.3.04	The utility should have tools integrated in the system to create, modify and delete customizable forms				
2.3.05	Ability for Administrators to make certain fields required				
2.3.06	Ability to create Paginated and multi-page forms with "Next" and "Previous" buttons to guide users through the form submission				
2.3.07	Forms can be made available in an unauthentcated experience such as Corporate Website				
2.3.08	Forms should autofill customer information fields within the Customer Portal				
2.3.09	Forms can be routed to specific individuals or departments for actioning				
2.3.10	Utility users should be able to assign submitted forms and tickets to themselves or to other users				
2.3.11	Ability to include link to forms in emails and other communications to existing customers maintained as contacts in the Engagement Portal				
2.3.12	Ability to manage the submission of sensitive and personal information using encryption and other tools				
2.3.13	Sensitive Information can be routed to specific administrative staff with security permissions for review				
2.3.14	Ability for adminsitrators to configure automated responses back to customers upon receipt of a form submission				
2.3.15	Forms should have the ability to collect attachments (Eg. Documents, Images, etc...)				
2.3.16	Notification abilities for the customer on the form updates				
2.3.17	Congifuration of administrator staff who should receive an email or notification upon form submission defined on the form level				
2.4 Calendar management					
2.4.01	Have a calendar view of all reminders that where set in the system				
2.4.02	Allow the utility users to navigate to a reminder direclty from the calendar				
2.4.03	Ability for the CSR to filter the calendar by reminders assigned to himself				
2.4.04	Ability to change the calendar view from monthly, weekly and daily				
2.5 Reminder & Task management					
2.5.01	Ability to create, assign and modify notes that have a follow-up time (reminders)				
2.5.02	Allow multiple filtering options on reminders				

Item	Requirement	Response Included | Optional | Not Offered | Modification | See Comment	Comment	Optional Development Estimate	Time Needed for Optional Development
2.6 Operational Mapping & Communication					
2.6.01	Portal should contain mapping capability that can display layers from the Customer Information System including Customers, Premises, Service Orders or GIS Layers.				
2.6.02	Ability to create mass communication (EG... Flushing Hydrants, boil water alerts, etc...) to customers by SMS, Email or Voice from the map using map based drawing tools.				
2.6.03	Ability to track operational campaigns.				
2.7 Alert Management					
2.7.01	Ability of Customers to sign up for Alerts				
2.7.02	Ability for cutomers to designate their preferred medium for receiving alerts (SMS, Voice, Email) by type of alert.				
2.7.03	Ability fo customers to select multiple methods for alert delivery (Eg. Voice & SMS but not email).				
2.7.04	System should automatically push alerts to customers				
2.7.05	Ability to push various alerts to suscribed customers				
2.7.06	The system should have API's to provide the ability to integrate wiht other systems which might be the source of various alerts				
2.7.07	Record the mean, date and time of an alert sent				
2.7.08	Ability to view the status of an alert (Sent, Received)				
2.7.09	Track all alerts sent to a customer				
2.8 Program Management					
2.8.01	Create, manage and modify available programs				
2.8.02	Create, manage and modify adhesion forms for programs				
2.8.03	Track metrics on programs such as subscription rate				
2.8.04	API integration with program algorithm services				
2.9 Campaign Management					
2.9.01	Ability to create email and SMS campaigns				
2.9.02	Ability to link Contacts from CRM Database to various campaigns.				
2.9.03	Ability to segment customers using Tags when creating targeted campaigns.				
2.9.04	Ability to set start and/or end dates for campaigns.				
2.9.05	Ability to set required fields on Campaigns				
2.9.06	Campaign Contact information should display, Name, email address and phone number.				
2.9.07	Ability to manage Opt-in and or Opt-out for Campaigns and other communications.				
2.9.08	Ability for Contacts to "Unsubscribe" to any campaigns.				
2.9.09	Ability to import contacts for specific campaigns.				
2.9.10	Ability to add contacts by customer.				
2.9.11	Ability to maintain email templates for marketing campaigns.				
2.9.12	Ability to customize reusable templates for campaigns.				
2.9.13	Ability to schedule campaigns to be executed at a date and time in the future.				
2.9.14	Ability to send a test email prior to executing a campaign.				
2.9.15	Ability to measure a compain impact by tracking metrics such as delivered, bounced, opened and clicks				
2.9.16	Ability to edit any campain details at any time such as start and end date				
2.9.17	Ability to view campaign specific statistics including what was delivered, bounced, opened and clicked upon.				
2.10 Customer Tagging & Segmentation					
2.10.01	Allow utility staff to categorise("Tag") customers in order to enable filtering for campaigning				
2.10.02	Allow granular segments with a lot of flexibility based on the CIS data				
3. Technical					
3.1 Software as a Service (SaaS) & true cloud solution					
3.1.01	Offer a Fully hosted enviroment on Software as a Service platforms such a Amazon Web Service (AWS), Heroku, etc.				
3.1.02	High availability application utilizing a top tier cloud platform service such as AWS				
3.1.03	Should provide at least 2 enviroment including a production environment and a staging environment.				

Item	Requirement	Response Included | Optional | Not Offered | Modification | See Comment	Comment	Optional Development Estimate	Time Needed for Optional Development
3.1.04	All upgrades are deployed and managed by Vendor				
3.1.05	Allow access from anywhere with any devices with all the same features and functionalities				
3.1.06	Updates should be pushed automatically to the platform by the vendor				
3.2 Data Ownership					
3.2.01	Data is owned by the DHWD				
3.2.02	Upon termination of the agreement, DHWD still has the right to use the data				
3.2.03	The agreement provides for tools or a method for the City to extract data for local use				
3.3 System Recovery					
3.3.01	The solution provides for automated backup and recovery				
3.3.02	Escalation procedures for access or trouble response are clearly defined. Please describe.				
3.3.03	The provider has a disaster recovery system that will be up and available immediately				
3.4 Mobility					
3.4.01	Responsive Design & Browser-based user interface				
3.4.02	Application should be device and operating system agnostic and work on computers, tablets and phones from any brand				
3.4.03	All pages should addapt to various screen sizes and device displays				
3.5 Reporting & Dashboards					
3.5.01	Embedded Dashboards and business intelligence tools that are configurable				
3.5.02	Provide a business inteligence tool embeded in the solution that is customizable and scalable to the Utility's needs				
3.6 Embedded workflow to distribute, track and complete actions within					
3.6.01	Ability to tag, categorize and assign any tickets or forms				
3.6.02	Track any communications with the customer and allow notes on them with a full history				
3.6.03	Provide a complet history of actions for all customer submitted forms and support tickets on the portal				
3.7 Integrations					
3.7.01	The Application Programming Interfaces (API's) are clearly defined				
3.7.02	The solution include pre-configured web services for integration. Provide list.				

PROPOSER'S NAME: ____

REQUEST FOR PROPOSAL

Dix Hills Water District
Town of Huntington, New York
Utility Billing System and
Customer Engagement Portal

RFP NO. 2024-12-008

APPENDIX 1

Proposal Cost Summary Form

Initial Project Costs	**Year 1 Cost**	**Year 2 Cost**	**Year 3 Cost**	**Total 3 Year Cost**
SaaS Fee				
Implementation Fees				
Travel Costs				
Additional Costs				
Total Project Costs				

Total Cost for Years 1, 2 and 3 (Add Totals for Project Costs)

____Dollars and _______ Cents.
(IN WORDS)

($____)
(NUMERALS)

If any discrepancy exists between the sum in numerals for the RFP Price, and the written sum in word of the RFP Price, the written sum in word shall prevail.

PROPOSER'S NAME: ____

OPTIONAL EXTENSION

Proposal Cost Summary Form

Cost of Operation	Year 4 Cost	Year 5 Cost	Total Cost Years 4 and 5
SaaS Fee			
Additional Costs			
Total Costs			

Total Cost of Operation for Years 4 and 5

____Dollars and _______ Cents.
(IN WORDS)

($____)
(NUMERALS)

If any discrepancy exists between the sum in numerals for the RFP Price, and the written sum in word of the RFP Price, the written sum in word shall prevail.

PROPOSER'S NAME: ____

REQUEST FOR PROPOSAL

Dix Hills Water District
Town of Huntington, New York
Utility Billing System and
Customer Engagement Portal

RFP NO. 2024-12-008

APPENDIX 2

REFERENCES

Reference 1

Name:	
Address	
City, State, Zip Code	
Services Provided	
Accounts Billed	
Contact Person	
Contact Title	
Contact Email	
Contact Phone Number	
Go-Live Date	
System Replaced	

Reference 2

Name:	
Address	
City, State, Zip Code	
Services Provided	
Accounts Billed	
Contact Person	
Contact Title	
Contact Email	
Contact Phone Number	
Go-Live Date	
System Replaced	

PROPOSER'S NAME: ____

REQUEST FOR PROPOSAL

Dix Hills Water District
Town of Huntington, New York
Utility Billing System and
Customer Engagement Portal

RFP NO. 2024-12-008

APPENDIX 2

REFERENCES (cont'd)

Reference 3

Name:	
Address	
City, State, Zip Code	
Services Provided	
Accounts Billed	
Contact Person	
Contact Title	
Contact Email	
Contact Phone Number	
Go-Live Date	
System Replaced	

This RFP constitutes only an invitation to make a proposal to the Town. The Town reserves, holds, and may in its sole discretion exercise the following rights and options with respect to the RFP and subsequent license:

- To waive any informalities with respect to the submission requirements.
- To reject any or all proposals.
- To cancel this RFP with or without the substitution of another RFP.
- To supplement, amend, or otherwise modify this RFP, prior to the time of opening.
- To issue additional and or subsequent RFPs.
- To negotiate with the operators for amendments or other modifications to their proposals.
- To select and enter into a license agreement with an operator whose proposal best satisfies the overall interests of the Town.
- This is an RFP, under which, unlike an ordinary competitive bid, the Town reserves the right to select a proposal, without the amount offered as the cost being the sole determinative factor.

PROPOSAL SUBMISSION:

Proposals, along with a separate sealed fee proposal, must be submitted by the date indicated below. The Town will review the submitted Proposals and make a selection that is in the best interest of the Town.

One (1) copy of the complete proposal including the pricing proposal must be included on a USB drive labeled with your company name and RFP number.

Submit four (4) copies and one (1) original of your proposal and five (5) separate sealed fee proposals to:

Lori E. Finger, CPPB
Director of Purchasing
Town of Huntington
100 Main Street, Room 209
Huntington, New York 11743

by **12:00 PM, Noon, on Friday, December 6, 2024**

PRICES

If a like or lower quantity of any item in this PROPOSAL is sold to any Political sub-division, School District, Fire District or any agency of the State of New York at a greater discount or lower price than the prices quoted herein, the price of the Town of Huntington shall be reduced to that lower price**.**

CANCELLATION

The Town may upon not less than Thirty (30) Days notice to the other party cancel this contract without recourse. Such cancellation shall in no way be deemed a breach of contract.

REQUEST FOR PROPOSAL

Dix Hills Water District
Town of Huntington, New York
Utility Billing System and
Customer Engagement Portal

RFP NO. 2024-12-008

PROPOSAL SUBMITTED BY:

____

(Signature of Proposer)

____

(Printed Name and Title of Proposer)

____

(Company or Corporation) Date

____

Address, City, State, Zip

____

Telephone, FAX, Pager, e-mail address

____

CORPORATE SEAL

____

.

PUBLIC DISCLOSURE BY CONTRACTOR/VENDORS DOING BUSINESS WITH TOWN OF HUNTINGTON

For use pursuant to Chapter 53 of the Code of the Town of Huntington

1.
Contractor's/Vendor'sName____
Address ____
City and State ____
Zip Code______________

2. Contracting Department's Name
____
(Enter "Purchasing" if Supply or Service Bid)
3.Payee Federal Identification or Social Security No.
____
4. Type of Business: ___ Corporation ___ Partnership
___ Sole Proprietorship ___ Other _________________
5a. Is your firm entering into a contract in excess of $1,000?
___ Yes ___ No
5b. Is your firm entering into more than one contract with the Town of Huntington aggregating more than $1,000?
___ Yes ___ No
5c. Are you making application to the Town Board, Planning Board or Zoning Board of Appeals of the Town of Huntington involving work in excess of $1,000?
___ Yes ___ No.

If you answered "Yes" to part 5a, 5b or 5c, you must complete parts 6 through 8. In any event, you must answer parts 9, 10 & 11.
6. List the names and addresses of all shareholders who hold an actual or beneficial interest in five percent (5%) or more of the outstanding stock issued by the contractor or vendor including the names and addresses of officers and Directors of corporate shareholders.
____
____
____
7. List the names and addresses of any other contractor, vendor or person who has, holds or may derive any actual or beneficial percentage of interest in any other form of ownership (that is, other than stock ownership) of the contractor or vendor in an amount equal to five percent (5%) or more.
____
____
____

8. Table of Organization.

a. List names and addresses of all individuals serving on the Board of Directors or comparable body of the contractor or vendor.

____

____

____

b. List names and addresses of all corporate officers of the contractor or vendor. (Include title of officer.)

____

____

____

c. List the names and addresses of all counsel of the contractor or vendor.

____

____

____

9. *Submit with disclosure statements any one of the following three items:*

1) a complete financial statement listing all assets and liabilities as well as a profit and loss statement for the prior year ,or

2) a letter of reference from a recognized bank or financial institution indicating that you are in a good financial position, or

3) *a certified copy of a credit report from a recognized credit bureau, such as Dun and Bradstreet or TRW*

These statements must be affirmed.(See attached Affirmation)

10. The undersigned shall include the Contractor's/Vendor's Public Disclosure Statement with the contract (describe general nature of the contract).

____

____

____

____

11. VERIFICATION: This section must be signed by an officer or principal of the contractor or vendor authorized as a signatory of the company for the purpose of executing contracts. The undersigned affirms that the foregoing statements are true, under the penalties of perjury.

Dated: _______

Signed: ____

Printed Name:____

Title: ____

NOTARY PUBLIC

STATE OF NEW YORK)
ss:
COUNTY OF ________)

[Proprietorship/ __________________________, being duly sworn, deposes
[Partnership and says; deponent has read the foregoing Contractor's/Vendor's
Verification] Public Disclosure Statement and knows the contents thereof;
the same is true to deponent's own knowledge.

[Corporate The ____________________ of
Verification] a ______________________ corporation;

deponent has read the foregoing Contractor's/Vendor's Public Disclosure Statement and knows the contents of; and the same is true to deponent's knowledge. This verification is made by deponent because _________________________________ is a corporation and deponent is an officer thereof.

Signed:____
SIGNATURE OF NOTARY PUBLIC

Print Name:____
PRINT NAME OF NOTARY PUBLIC

Sworn to before me

on , 20__

WARNING: The failure to file a verified Public Disclosure Statement as required under this local law shall constitute a material breach of contract. Town of Huntington may resort, use or employ any remedies contained in Article II of the Uniform Commercial Code of New York State.

TOWN OF HUNTINGTON
AFFIRMATION OF FINANCIAL STATEMENT
Part of Question 9 of Attached Public Disclosure Statement

I hereby affirm that the financial statement herein submitted is a true and accurate statement.

Company Name ______________________________

Individual Signature ______________________________

Individual's Name ______________________________
(Print or Type)

Title ______________________________

Date ______________________________

Notary Public
State of New York, County of ______________________________

Before me came ______________________ known to me and affirms that he has read the attached financial information and that the attached statement is true to the affirmant's own knowledge.

Notary Public ______________________________Date __________

Notary Seal

TOWN OF HUNTINGTON
PROPOSER'S AFFIDAVIT

At the time of submission of the proposal, the following affidavit must be executed and transmitted to OWNER.

STATE OF NEW YORK)
COUNTY OF SUFFOLK) ss:

____, being duly sworn deposes and says that (Name)

he/she is the _______________________ of ________________________
(Officer) (Proposer)

which company is submitting a proposal for ____________________________ ,
(Project/Proposal Number)

____
(Description of Project/Proposal)

______________________________________, understands and is familiar with
(Proposer)

the provisions of the Huntington Town Code. __________________________
(Proposer)

is currently in full compliance with the provisions the Code of the Town of Huntington

and makes this affidavit in order to induce the TOWN OF HUNTINGTON to award the

aforesaid proposal to ____ with
(Proposer)

full knowledge that the TOWN OF HUNTINGTON is relying on the truth and accuracy of the

statements contained herein. ____________________________ further understands
(Proposer)

and agrees that the proposal will be denied if _____________________________ is
(Proposer)

not in compliance with the Code of the Town of Huntington.

____
Signature Officer)

____
Print Name (Officer)

Dated: ______________________________

Subscribed and sworn to before me

this _______day of ______________, 20__.

____
Notary Public

No verbal changes to, or verbal clarifications or verbal communications of any kind relating to any RFP specification are binding upon the Town. No employee, agent, consultant or representative purporting to be acting on behalf of the Town is authorized to make such communications. All questions regarding the content of any RFP documents must be submitted in writing to the Purchasing Department. If appropriate, responses will be made in the form of addenda, to all parties of interest.

THE APPROPRIATE SECTION OF THIS PAGE MUST BE SIGNED BY ALL PROPOSERS

GENERAL MUNICIPAL LAW - 103-D

Non-collusive certifications:

By submission of this proposal, the proposer certifies that; (A) This proposal has been independently arrived at without collusion with any other proposer or with any competitor or potential competitor; (B) This proposal has not been knowingly disclosed and will not be knowingly disclosed prior to the opening of proposals for this project, to any other proposer, competitor or potential competitor; (C) No attempt has been or will be made to induce any other person, partnership, or corporation to submit to or not to submit a proposal; (D) The person signing this proposal certifies that he has fully informed himself regarding the accuracy of the statements contained in this certification, and under the penalties of perjury, affirms the truth thereof, such penalties being applicable to the proposer as well as to the person signing in its behalf.

If Not A Corporation

____
Proposer's Business Name

____
Signed By

____
Title

If A Corporation

(E) The following is a certified copy of resolution authorizing the execution of this certificate by the signator of this proposal in behalf of the corporate proposer. Resolved that ________________________ be authorized to sign and submit the proposal of this corporation for the project described, herein, in the Notice to Proposers, Item # (where applicable) and to include in such proposal the certificate as to non-collusion required by section one hundred three-D (103-D) of the General Municipal Law as the act and deed of such corporation, and for any inaccuracies or misstatements in such certificate this corporate proposer shall be liable under the penalties of perjury.

The foregoing is a true and correct copy of the resolution adopted by ____ corporation at a meeting of its Board of Directors held on ______ day of ____________________ 202_.

SEAL OF THE CORPORATION____
Signature of Secretary

ACKNOWLEDGEMENT OF RECEIPT OF ADDENDA

The proposer hereby acknowledges that he has received and that he has considered in the preparation of his proposal, all requirements in the following Addenda to this contract:

ADDENDUM	DATE OF ADDENDUM	ACKNOWLEDGEMENT PROPOSER(SIGNATURE)
______________________	______________________	______________________
______________________	______________________	______________________
______________________	______________________	______________________
______________________	______________________	______________________
______________________	______________________	______________________
______________________	______________________	______________________
______________________	______________________	______________________
______________________	______________________	______________________
______________________	______________________	______________________

The indicated acknowledgements are to be by the same persons executing the proposal.

IMPORTANT:

THIS FORM MUST BE FILLED IN BY ALL PROPOSERS. IF NO ADDENDA ARE RECEIVED, INDICATE "NONE", AND SIGN THE ACKNOWLEDGEMENT.

Contracted Entity Third-Party Certification Statement - Stormwater Management Program:

<u>ATTENTION CONTRACTORS</u>: THIS CERTIFICATION APPLIES TO ALL CONTRACTS WITH THE TOWN OF HUNTINGTON WHERE THE CONTRACTOR IS PERFORMING WORK THAT MAY DIRECTLY OR INDIRECTLY CAUSE OR CONTRIBUTE TO POLLUTANT DISCHARGES INTO MUNICIPAL SEPARATE STORM SEWER SYSTEMS LOCATED THROUGHOUT OF THE TOWN OF HUNTINGTON.

I certify under penalty of law that I understand and agree to comply with the terms and conditions of the Town of Huntington's Stormwater Management Program (SWMP)* and Stormwater Management Program Plan (SWMPP)** and agree to implement any corrective actions identified by the Town of Huntington and/or its designated representative(s).

I also understand that the Town of Huntington must by law comply with the terms and conditions of the State of New York's State Pollutant Discharge Elimination System (SPDES) GP-0-15-003 "*Municipal Separate Storm Sewer Systems (MS4) Permit"****** and that it is unlawful for any person employed by or under contract to the Town of Huntington to directly or indirectly cause or contribute to a violation of surface water and/or groundwater quality standards.

Further, I understand that my own responsibility and/or liability to comply with the terms and conditions of the Huntington SWMP and Huntington SWMPP as a condition of performing and being paid for the work pursuant to the subject contract shall be neither diminished, eliminated nor lessened by any MS4 program non-compliance by the Town of Huntington with respect to said contract or any other element of the Town's MS4 Program.

____
(Name of Contractor)
____
(Signed By)

Contact Information	
Business/Firm Name:	______________________________
Address:	______________________________
	______________________________
Telephone Number:	______________________________

* - http://www.huntingtonny.gov/content/13749/16439/16577/16591/default.aspx

** - http://www.huntingtonny.gov/filestorage/13749/16439/16577/16591/26387/Town_of_Huntington_SWMP_Plan_031413_Rev3.pdf

*** - http://www.dec.ny.gov/docs/water_pdf/ms4permit.pdf

STATE OF NEW YORK)
: SS.:
COUNTY OF SUFFOLK)

On this ___________ day of ___________ , 20__, before me personally came ____ , to me known, who being by me duly sworn, did depose and say that he/she resides at _______________________ , that he/she is _________________ of the corporation described herein and which executed the foregoing instrument and that he/she signed his/her name thereto by order of the Board of Directors of said corporation.

____
Notary Public

STATE OF NEW YORK)
: SS.:
COUNTY OF SUFFOLK)

On this _________ day of _____________________________________ , 20__ , before me came _____________________________________, to me known and known to me to be the individual described in, and who executed the foregoing instrument, and acknowledged that he/she executed the same.

____
Notary Public

BIDDER'S STATEMENT ON SEXUAL HARASSMENT

IN ACCORDANCE WITH NEW YORK STATE FINANCE LAW §139-l

In keeping with the provisions of State Finance Law §139-l, competitive bidders for public contracts shall be required to sign and submit under the penalty of perjury the following certification affirming compliance with the requirements of New York Labor Law §201-g:

> By submission of this bid, each bidder and each person signing on behalf of any bidder certifies, and in the case of a joint bid each party thereto certifies as to its own organization, under penalty of perjury, that the bidder has and has implemented a written policy addressing sexual harassment prevention in the workplace and provides annual sexual harassment prevention training to all of its employees. Such policy shall, at a minimum, meet the requirements of Section 201-g of the Labor Law.

Dated: ____________, New York
____________, 20_____

____
Name of Bidder

____
Signature of Authorized Official

____
Printed or Typed Name of Official and Title

Sworn to before me this
_______ day of________, 20______

____
Notary Public

Insurance Certification Affidavit

REQUEST FOR PROPOSAL

Dix Hills Water District
Town of Huntington, New York
Utility Billing System and
Customer Engagement Portal

RFP NO. 2024-12-008

Proposer's Acknowledgment:

I acknowledge that I have reviewed the insurance requirements of this proposal and have considered the costs of procuring the required insurance. I hereby certify that if my company is awarded the contract, I will be able to supply the insurance required in accordance with the proposal.

I understand that a Certificate of Insurance must be submitted if awarded the contract; and if it is not, the Town of Huntington may reject my proposal and award to the next lowest responsive, responsible proposer.

Firm Name: ____

Address: ____

____

Date: ____________________ **____**

Proposer's Signature

RETURN THIS PAGE IF YOU ARE SUBMITTING A "NO PROPOSAL"

STATEMENT OF NO PROPOSAL

REQUEST FOR PROPOSAL

Dix Hills Water District
Town of Huntington, New York
Utility Billing System and
Customer Engagement Portal

RFP NO. 2024-12-008

Attention Prospective Proposer:

In the event your firm declines to propose, please advise this office to that effect by completing the following and **returning via fax to (631)-351-2833 or email to purchasing@huntingtonny.gov.**

We, the undersigned, have declined to propose for the following reasons (please check all that apply):

_________ We do not offer this product / service.

_________ Our work schedule would not permit us to perform.

_________ We are unable to meet specifications.

_________ We do not have a representative in this area.

_________ We are unable to meet your bond requirements.

_________ Other: ____

_________ Please remove our firm from the Town's bidders list.

_________ Please keep our firm on the Town's bidders list

Company Name: ____

Address: ____

Authorized Representative (print): ______________________________

Title: ____

Signature: __________________________ Date: ____________________

Telephone Number: ___________________ Fax: ________________________

E-mail: ____