

# Request for Proposal

For Purchase, Installation, Configuration and Training on a  
Customer Engagement and Data Analytics Software

April 7, 2017

South Tahoe Public Utility District (District)

1275 Meadow Crest Drive  
South Lake Tahoe, CA 96150-7401



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<b>Confidentiality Statement</b>
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All correspondence, including suggestions regarding this RFP and contract shall be directed to the District's Customer Service Manager or other District designee.

The issuance of this solicitation does not constitute an award commitment on the part of the District, and the District shall not pay for costs incurred in the preparation or submission of quotes. The District reserves the right to reject any or all quotes or portions thereof if the District determines that it is in the best interest of the District to do so.

It is understood that in the course of carrying out the duties of this proposal (if awarded), vendors and contractors may from time to time become aware of matters of a proprietary or confidential nature and that such information is not for general dissemination and shall remain confidential.

Thank you for your consideration,

South Tahoe Public Utility District

## **Submission Details and Deadlines**

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

All submissions for responding to this request can be submitted on paper and delivered to our office at 1275 Meadow Crest Drive, South Lake Tahoe, CA 96150, or submitted electronically as stated below, no later than:

**Friday, May 12, 2017  
5:00pm PDT**

## **Submission Questions and Clarifications**

You may contact the following person if you have any questions or require clarification on any topics covered in this Request for Proposal:

Jessica Henderson  
Customer Service  
Office: (530) 543-6235  
Email: [jlhenderson@stpud.dst.ca.us](mailto:jlhenderson@stpud.dst.ca.us)

## **Electronic Submissions**

Electronic submissions in response to this Request for Proposal will be accepted as long as they meet the following criteria:

Sent via email to: [jlhenderson@stpud.dst.ca.us](mailto:jlhenderson@stpud.dst.ca.us)

Document standards:

- Must be in Microsoft Word 2007-10 or Portable Document format
- File name must end in “.docx” OR “.pdf”

## **Statement of Purpose**

The District is looking for software and a service provider to build a program that engages customers with the goals of:

- Improving customer satisfaction
- Converting customers from print communications to digital communications
- Making use of Automated Metering Infrastructure (AMI) Data, in particular in alerts
- Aiding in the transition from quarterly to hourly (AMI) data
- Increasing conservation
- Increasing program participation

The contractor shall provide personalized communications to customers, a customer-facing web-based application, a utility-facing web-based analytics dashboard, and the ability to send a range of automatic and manual digital alerts and notifications. The District is considering a 60 month contract for the initial program that includes 10,000 metered accounts.

## **Business Overview & Background**

The South Tahoe Public Utility District, located at 1275 Meadow Crest Drive is a public agency chartered in 1950, and operates at the south shore of Lake Tahoe in El Dorado County in California. The District supplies drinking water and provides wastewater collection and treatment. In addition, the District recycles 100 percent of its wastewater and pumps it to Alpine County where its application benefits agricultural land. Lake Tahoe's seasonal tourism and the large number of part-time residents cause wide fluctuations in both daily water production and wastewater flows.

The District serves water to approximately 14,000 homes and businesses. Annual water production is nearly 2.5 billion gallons. Sixteen active wells, 21 water tanks, 16 booster stations, 23 pressure-reducing valves, and 253 miles of water mainline make up the District's water system. The sewage collection system consists of more than 314 miles of gravity collection lines, 22 miles of pressure force mains, and 42 lift stations, providing service to more than 17,800 homes and businesses.

The District intends to install 5,100 water meters over the next four construction seasons, and intends to allow the additional residents access to the awarded Customer Software Portal. New accounts are expected to be added each October until all customer accounts are metered in late 2020.

## **Scope of Services**

The contractor shall provide a customer-facing web-based application, personalized outgoing communications and alerts, and a Utility-facing web-based dashboard and reports to track the program. The District is considering a 60 month contract for the initial program that includes 10,000 metered and 4,119 non metered accounts including:

- 12,317 residential
- 1,159 multifamily
- 643 commercial/institutional

The District currently reads its meters on a quarterly basis, and has plans to transition to monthly billing in the future.

## Tasks

### 1. Overview of Solution and Program Design

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

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

### 2. Web Based Application for Customers

Contractor will configure and host a customer portal that is available online and through a mobile interface for residential, multi-family, commercial, institutional, and irrigation accounts. The application should initially include the features below:

- Secure registration and login for each District account, regardless of meter type, the granularity of meter data or frequency of meter data collection (allowing for use with manual, Automated Meter Reading, and AMI data, and helping ease the transition to an AMI system)
- Dynamic customer profile that customers can update 24x7 to personalize their portal, notifications, and recommendations
- Easily customizable communication preferences – customers should be able to determine how they receive communications including by text/SMS, push notification, email, automated call and mail
- Account management module to set communication preferences for alerts (see Alerts section)
- Personalized consumption displays in gallons per day, seasonal consumption trends, year-over-year usage, and ability to compare use to District goals. Residential accounts shall include water use consumption comparisons to similar households based on occupancy and outdoor area characteristics and residential end-use disaggregation.



- Interactive water-saving recommendation library, customized for each account profile and configurable by the District with step-by-step implementation instructions, informational links and videos, dynamic estimates of savings potential in GPD and dollars per year, and ability to sign up for, and keep track of, water saving activities. Library should highlight and rotate most relevant water saving actions for customers based on the customer's profile and the season
- Users or managers of multiple properties or commercial properties with multiple meters, can view a roll-up of all property consumption data in a unified view
- Ability to give access (create a secondary account login) for other users such as a spouse, roommate, tenant, or property manager
- Ability to automatically detect leak events using AMI or Non-AMI data, automatically notify the customer of suspected leaks, engage the customer to investigate and resolve the leak with step-by-step instructions and resources, and provide resolution details to the District through the Dashboard
- Deliver relevant and timely District-specific news or resources.
- Ability to offer a link from the District website and integrate with District's payment system.

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

### **3. Utility Dashboard**

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

- Unlimited licenses for District staff members and the ability for a District administrator to provision or revoke access with viewer, editor, or administrator roles
- Consumption analytics across all meter types, regardless of meter type, the granularity of meter data, or frequency of meter data collection (allowing for use with manual, AMR, and AMI data, and helping ease the transition to AMI)
- Profiles for each account with the ability to search for a profile by partial or complete account number, name, address, or email address.
  - Ability to record communications with each account, and ability to send an email with relevant data and charts to an individual customer through their profile page.

- AMI data in the profile will be displayed and color-coded based on normal usage, suspected leaks, missing data, and suspected irrigation.
- Customer use disaggregation, seasonal use analysis, an interface to view a satellite image of property, and ability to load the customer's view of their portal
- Reports and maps showing top consumers by meter class and by period. Ability to download consumption into Excel for further analysis
- Group multiple meters (e.g. indoor and irrigation) associated with one master account
- Reports on customer portal use and customer profile statistics, including frequency of portal use, most popular actions taken by customers, method of visit (mobile vs desktop)
- Leak detection module that detects and defines types of leak events with thresholds that can be configured by the District.
- Leak status report with estimates of leak start date, duration of leaks, volume of water lost in leak, whether or not customer has been notified, what actions the customer has taken to resolve, and information on resolution.
- Irrigation detection module that detects daily irrigation events at individual properties and flags properties that are violating the District's day of week irrigation restrictions.
- Ability to compose, send, and track messages to segments of customers within Dashboard
  - Ability to create segments of customers based on popular reports
- Ability to view each customer's up-to-date account balance, water bill, and billing history
- Help site and technical support from Contractor's customer service staff

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

#### **4. Alerts**

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

- Ability to send any alert through email, SMS, or automated call based on the end user preferences

- Ability to detect irregular usage (“possible leak”) for residential and commercial accounts based on thresholds configurable by the Utility. Leak detection should be available for hourly (AMI) data and monthly data.
- Leak alerts should provide instructions and video content for finding the source of irregular use, regardless of whether or not the user has ever logged into the customer portal
- Option to allow customers to set their own consumption threshold alerts based on usage compared to previous periods
- For customers with daily or hourly (AMI) data, option to allow customer to set their own daily or billing period user-defined threshold alert
- Option to allow customer to choose to receive an alert when a bill is available, due or overdue

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

## **5. Single Sign On**

Contractor will have the ability to work with the District or District’s existing contractors to implement a single sign on (SSO) capability using SAML 2.0 or other secure authentication protocol to existing Utility websites or portals. The District’s existing bill pay provider will function as SSO Identity Provider. The SSO should allow for the following functionality:

- Customers should be able to log into utility bill pay website and be able to transfer to the contractor’s customer portal without re-entering any credentials.
- Customers should be able to log into the contractors customer portal directly with same and pre-existing credentials as they use with the utility bill pay website and move to the bill pay website without re-entering a username or password.
- Customers who are not signed up with the District’s current utility bill pay contractor, should still be able to register for an account on the proposed customer engagement portal.

## **6. Customer Letter**

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

- Configurable message from the District
- District logo and contact information and any District programs

- Explanation of benefits of customer portal including access to real-time water use data, etc.
- Instructions on how to register for portal access

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

### **7. Customer Survey**

Contractor must design one survey and develop an implementation strategy for District customers. Contractor must provide an explanation of average customer engagement and survey completion. Key deliverables for this task are:

- Selection of pre-launch and post-launch questions and design of survey.
- Administration of survey, collection of aggregated data and interpretation of results.

### **8. Project Management**

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

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

Contractor should provide information on project management capabilities and experience, in particular with Programs similar in scope. Contractor should provide information on training capabilities of staff.

### **9. Program Measurement and Verification**

Contractor should provide detailed information on how program will be measured and verified. Relevant details will include what information/specific metrics will be available to the District (as relates to water savings, customer satisfaction, cost effectiveness, program participation, staff efficiency, etc.), time frames for availability and frequency of reporting, and statistical methods used to track program. Contractor should also provide information on staff experience and expertise as relates to program measurement and verification.

## Experience and References

Contractor must provide at least three references for water utility customers where similar programs have been implemented for one year or longer. References must include Utility name, program manager name, title, and contact information as well as the specific project dates, short description of program and results.

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

Contractor must provide evidence it has sent at least 10,000 abnormal use ("leak") alerts, and have statistics showing the end result of these leak alerts (whether or not they were resolved, and what the leak source was).

## Company Information

Contractor must provide relevant information on team including resumes for key team members who will work on the project, and name, role, location, and tenure of all other employees who will have access to data.

## Security and Privacy Controls

Contractor must provide short description of security and privacy controls for all personally identifiable information provided to contractor in service of project. Contractor shall include evidence of information security consistent with industry standards via a written third-party assessment. Assessment shall include evaluation of external network penetration testing and a web application security assessment consistent with OWASP Top Ten principles.

Encryption: Contractor must encrypt customer data in transit and at rest.

Export Control: Keeping utility and customer data secure and private is a primary concern. To that end, data should not be exported outside of the United States. Specifically,

1. Data should not be transferred offshore for software development, testing, storage, support or any other purpose.
2. Employees with access to the data should be U.S. Citizens located within the contiguous United States of America.
3. Employees with access to the data should be bound by a non-disclosure agreement and acceptable use policy.

**Proposal Submission**

Proposals shall list any of the features detailed in this RFP document which it cannot provide. Proposals may also identify special features that it can provide that are not listed in this RFP document.

**Cost Proposal**

Each proposal should also identify costs associated with program including all software license fees, integration fees, printing and mailing costs, text/voice charges, travel expenses, and all other fees.

**Selection Criteria**

The District’s AMI Committee will review all proposals received and an award will be based upon the qualifications and availability of staff assigned to the District, anticipated quality of work, references, reasonableness of fees, among other factors. The District specifically reserves the right to award a contract that it feels will best serve the District’s needs currently and in the future regardless of price or brand.

The District may request additional information from any or all submitting proposals after the initial evaluation of the submissions to clarify terms and/or conditions.