REQUEST FOR PROPOSALS
FOR AUTOMATED METERING INFRASTRUCTURE

October 16, 2017
Revised October 27, 2017

Northern Wasco County People’s Utility District (“NWCPUD”) is issuing this Request for Proposal (RFP) to select a meter vendor for supplying and implementing Automated Metering Infrastructure (AMI) within the District’s service territory. The AMI system shall be compatible with NWCPUD’s Customer Information System (CIS), Southeastern Data Cooperative (SEDC) Utility Power Net (UPN) and Futura Systems GIS software.

The services may include, but will not necessarily be limited to:

- Hardware
- Software
- Service
- Software Licensing
- Service Maintenance and Licensing

BACKGROUND

NWCPUD has an electric service territory of approximately 90 square miles located in North Central Oregon consisting of The Dalles, Rowena, Dufur and Tygh Valley areas. NWCPUD’s system consists of approximately 10,000 electrical mechanical and solid-state meters, with 43% being 30 years or older. Electric meters are deployed throughout the service area that measure and record the amount of energy consumed by a residence, business or electrically powered device. The measured amount of energy is used to calculate bills in accordance with the appropriate approved rate schedule, which is repeated monthly.

NWCPUD utilizes SEDC UPN for the Customer Information System and billing. Engineering and Operations utilizes Futura Systems GIS platform for mapping and analysis. The selected
AMI Vendor will need to demonstrate the compatibility with the two separate software platforms.
NWCPUD desires to implement an AMI system to engage customers to deliver greater insights into energy usage, effortless tools to access that information, and more programs to help them manage consumption year-round. Overall goals may include, but will not necessarily be limited to:

- Improvement of meter reading and billing performance
- Use of a remote disconnect on single phase meters to reduce truck rolls
- Better outage identification
- Identifying theft or tampering
- Utilization of data monitoring capabilities to detect and report malfunctioning meters promptly
- Prepayment
- Customer account balance alerts
- Transformer load management
- Voltage optimization

Estimated Proposed Meter Forms and Quantities:

<table>
<thead>
<tr>
<th>Form</th>
<th>Quantity</th>
</tr>
</thead>
<tbody>
<tr>
<td>1S</td>
<td>100</td>
</tr>
<tr>
<td>2S with Remote Disconnect</td>
<td>9,500</td>
</tr>
<tr>
<td>2S - 320 Amp</td>
<td>100</td>
</tr>
<tr>
<td>4S</td>
<td>200</td>
</tr>
<tr>
<td>9S/8S</td>
<td>400</td>
</tr>
<tr>
<td>12S</td>
<td>40</td>
</tr>
<tr>
<td>12S – Network with Remote Disconnect</td>
<td>100</td>
</tr>
<tr>
<td>16S/15S</td>
<td>300</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>10,740</strong></td>
</tr>
</tbody>
</table>

Meter data in Excel.xlsx, substations and main office with X Y coordinates and are available upon request.

**ANTICIPATED SCOPE OF WORK FOR AMI**

The AMI Vendor shall be able to provide the following:

AMI Electric Meters that shall be compatible with proposed system.

AMI Collectors that ensure proper connectivity and coverage to transmit information back and forth from NWCPUD headquarters and staff.

Compatibility with mobile workforce to have real time information for field personnel responding to outages and other requests.
Compatibility with UPN Meter Data Management (MDM) Module or Hosted MDM application for storage.

Compatibility with UPN Customer Portal or Customer Engagement Application.

Training of NWCPUD staff to fully utilize the AMI system.

Software licensing, along with support and service maintenance.

Analytics for Electric Distribution Facilities

- Voltage Optimization
- Outage Monitoring
- Transformer Monitoring
- Network Loss Monitoring

**PROPOSAL CONTENTS**

Each Proposal must meet all the following to be considered for acceptance by NWCPUD:

1. Outline the AMI vendor’s experience in the last three years. Include: location, number of meters, substations, collectors, project attributes, and the total project costs.
2. Specify and describe deployments exclusively to UPN and Futura. Provide contact information for each utility.
3. Specify and provide communication network details required for the AMI system.
4. Provide information, if applicable, on sub-contractors included in the RFP, including meter installation, etc.
5. Specify and describe the ability to support prepayment and compatibility with other prepayment vendors.
6. Availability and delivery schedule.
7. Describe the process and interaction between billing of having a partial AMI deployment with manual read and AMR meters.
8. Describe training required for full utilization of the AMI system.
9. Describe the technology or best practices in data warehouse use and utilization.
10. Total lifetime costs to maintain the system.
11. Versatility and projected lifespan of the proposed technology.
12. Describe the firm’s project management techniques, including software and milestone tracking process.
13. Provide a statement about the firm’s ability to commit the technical and administrative resources required to complete this project.
NWCPUD request the top three scored AMI vendors provide a demonstration of a functioning AMI system that does not exceed two hours in length. Please provide your availability to visit NWCPUD in the third week January of 2018 to present your demonstration. The demonstration will be factored into the final selection of the AMI vendor.

**INITIAL AMI VENDOR EVALUATION CRITERIA**

**AMI VENDOR EXPERIENCE (1-40 points)**

Demonstration of AMI Vendor:

- Qualifications to perform work in applicable disciplines.
- Past performance level in completing projects of similar size and scope. Provide details of the project management approach.
- Past performance in meeting cost benchmarks in project execution.
- Meters shall meet current industry standards and provide the following:
  - kWh Consumption (delivered, received, delivered + received, and delivered – received) kVARh or kVAh consumption reporting
  - Energy and demand readings for active power, reactive power, and apparent power for both delivered and received quantities
  - Time of Use (TOU) energy
  - Remote upgradeable
  - Outage and voltage monitoring
    - AMI Support for Outage Management and how the system would operate during and after an outage.
  - Interval data recording
  - Tamper alert
  - Remote disconnect/connect on applicable meter forms
- AMI Data Collector
  - Data collection
  - Device programming
  - Data transmissions
  - Network routing
  - Voltage monitoring
  - Data redundancy
- Describe the AMI support for Distribution Automation (DA) and include the devices that may be controllable.
• Describe the AMI Support for Outage Management and the interaction between office and field personnel.
• Describe the ability of AMI to provide Home Area Networks (HAN), Programable Communicating Thermostats (PCTs), In Home Displays (IHDs) and Load Control Devices (LCDs)

**AVAILABILITY AND COMMITMENT OF RESOURCES (1 to 20 points)**

Demonstration of the AMI Vendor’s ability to commit the technical and administrative resources required to complete projects within established time frames, including responsiveness to specific project technical and administrative requirements.

**POST INSTALLATION SUPPORT (1 to 10 points)**

Demonstration of the AMI Vendor’s ability to provide support after installation of the AMI infrastructure.

**COSTS (1 to 25 points)**

The following for cost will be used in evaluating initial and reoccurring costs.
- Per Unit cost for specific meter forms
- Per Unit cost for collector site
- Initial Licensing cost
- Subscription cost
- Help and Support cost
- Other cost

**WATER METERING EXPERIENCE (1-5 points)**

Demonstration of experience in providing AMI for water infrastructure and compatibility with proposed system.

**ADDITIONAL AMI VENDOR EVALUATION CRITERIA**

**LIVE DEMONSTRATION (1-25 points)**

AMI vendor to present a live demonstration of function AMI system from the top three initial scored proposals and should contain the following, but will not necessarily be limited to:
• Employee Interface
  o Hosted Map
  o In House Map
  o Futura
    ▪ Voltage Detection
    ▪ Outage Map
    ▪ Voltage Optimization
  o Graphs
  o Remote Disconnects
  o Remote Reads
  o Mobile Workforce

• Customer Interface
  o Current billing
  o Prepayment
  o Billing Cycle
  o Graphs
  o Maps
  o Notifications
    ▪ Email
    ▪ Text

• Reports that are available for analysis
• Other information to convey and cover all the attributes of the proposed system.

EVALUATION PROCESS

The Evaluation Committee will evaluate all the proposals based upon the criteria listed above. The Committee may request clarifications or additional information, if needed. A selection may be based on the Evaluation Criteria alone or any combination of the Evaluation Criteria, references, and interviews.

Ties will be resolved based on the total point scores of the evaluation sheets.

SCHEDULE

The schedule is as follows and subject to change in the best interest of NWCPUD.

Release of RFP – October 16, 2017
RFP Response Due – December 1, 2017
RFP Evaluation Completed – December 15, 2017
Top Three Live Demonstration – January 17 & 18, 2018
Selection of AMI Vendor – January 31, 2018
NWCPUD Board of Director’s Approval – February 6, 2018
QUESTIONS

Questions and requests for information regarding this RFP shall be submitted to AMICOMMITTEE@nwasco.com.

DEADLINE FOR SUBMITTAL OF RFPs

One (1) electronic copy provided in Microsoft Office, and/or Adobe PDF formats of the RFP shall be submitted no later than 5 P.M. Pacific Time on November 17, 2017 to AMICOMMITTEE@nwasco.com. Proposals submitted after that time will not be accepted. NWCPUD may reject any or all Proposals submitted or cancel the RFP if NWCPUD deems doing so would be in the public interest. Once a submittal is selected NWCPUD will determine if they desire to enter into negotiations for a final Contract with the highest scoring Proposer. The price, cost and other related matters will be negotiated during this period to the satisfaction of NWCPUD. Any entity responding to this RFP shall do so at its sole expense; Proposer is wholly responsible for any costs it incurs in responding to this RFP.

Additional background information on NWCPUD can be found at www.nwascopud.org.

Proposers may utilize the protest procedures set forth in OAR 137-048.