



CITY OF NEWBERG, OREGON

Request for Qualifications (RFQ)

Automated Utility Billing System and Customer Care Services

The City of Newberg is soliciting sealed responses from qualified and experienced Consultants to provide professional services for establishing a turn-key Automated Utility Billing System and Customer Care Service System. Scope of services shall include, but is not limited to, billing and collection, on-line bill presentment, enhanced payment options, mobile customer payment applications, customer care and related support activities, including field customer care work order management. The City will require the Proposer to bill the City's utility customers in accordance with the meter reading and the usage tariffs and/or rates as well as perform other support functions while maintaining an efficient use of available technology. The Proposer will be responsible for most customer care activities relating to the City's utility bill collection and the development and maintenance of electronic payment capabilities. The purpose of this procurement is to identify the most qualified Proposer to provide turnkey solutions and services for the City's automated utility billing and customer care needs for Council approval.

A copy of the **RFQ– Automated Utility Billing System and Customer Care Services** may be obtained from the Finance Department at:

Newberg City Hall
414 E. First Street
Newberg, Oregon 97132

Or

www.newbergoregon.gov/finance

The deadline for submitting a response to this RFQ is April 30, 2013.

Sincerely,

CITY OF NEWBERG

SECTION I GENERAL INFORMATION

RELEASE DATE:	March 29, 2013
CLOSING DATE:	April 30, 2013 - 5:00PM PST
INTERVIEWS:	Week of May 27, 2013 (tentative)
CONTRACT AWARD:	June 17, 2013 (tentative)

1. INTRODUCTION

The City of Newberg is soliciting sealed responses from qualified and experienced Proposers to provide professional services for establishing a turn-key Automated Utility Billing System. Scope of services shall include, but is not limited to, billing and collection, field customer care work order management, customer care, on-line bill presentment, enhanced payment options, mobile customer payment applications and other support related work. The City will require the Proposer to bill the utility customers in accordance with the meter reading and the usage of tariffs and/or rates as well as perform other support functions while maintaining an efficient use of available technology. The Proposer will be responsible for most customer care activities relating to the City's utility bill collection and the development and maintenance of electronic payment capabilities. The purpose of this procurement is to identify the most qualified Proposer to provide turnkey solutions and services for the City's automated utility billing and customer care needs for Council approval.

2. BACKGROUND

Currently the City utilizes city staff to perform billing and customer care. The City is looking to improve the following types of processes: payment options (i.e. credit card payments, internet billing, payment over the phone), ability to rapidly incorporate new and unique rates, ability to incorporate e-mail with billing and customer care, data management (collection, reporting and record keeping), web-based and mobile functions for customer account access, efficiency in generating required reports, software applications/systems that receive responsive support and exhibit a software maturation process that will integrate new technologies and processes as they become available in the industry, automation and streamlining of the utility billing processes, real-time access on customer account activity, and solutions to reduce operational hours due to economic conditions while still maintaining a high level of customer support.

3. SCOPE OF WORK

The City is interested in purchasing proven technologies and contracting with companies with excellent track records in commissioning and bringing technology systems into full operation. The City desires an integrated system and is interested in procuring technologies, and the related services that shall ensure a full functioning set of technologies meeting the requirements of today and the future. The Proposer shall be responsible for all aspects of the installation and will perform any import/conversion of data from the City's existing systems. Other specific requirements are listed below:

- All proposers shall have been providing automated customer care and utility billing services to utilities for 3 years and to a minimum of 10,000 connections.
- All information technology shall be cloud-based.
- The project shall include an automated revenue assurance program.
- The project shall include a geospatial audit that is integrated to the billing system.
- All data shall be hosted in a tier 3 – SAS 70 data center.
- All payment types shall be able to be processed with front counter staff, but all systems shall be designed to reduce this traffic to the front counter.
- The Customer Information System shall be geospatially based with ESRI technology.
- The system shall include a live field deployed work order system based on geospatial technology.
- The system shall be capable of supporting unique rate structures such as personalized water budgets.

Utility Billing

Monthly bills must be mailed within five working days of meter reading and in accordance with the actual meter readings and prevailing usage tariffs/rates. Customers' bills will be printed on billing stock with the "City of Newberg" logo printed at top of bill.

Customers must be able to review bills online, review history of use, payment history and consumption for up to 60 months when the system is fully implemented. The Proposer shall include the usage history of the existing customers and billing information for the previous 12 months as part of the initial setup. Customers must be able to pay the bills online or set up automatic bill payments if they wish and the Proposer shall support this service and train City staff to provide such service also. For customers using online bill pay and automatic bill pay, the Proposer shall send an e-mail to customers each time a bill is available for viewing and payment. Utility account information is confidential, so the customer's utility bills and payment information must be secure at all times. Unauthorized users shall not be able to access utility account data, bank account and credit card numbers, and other payment information.

The proposed utility billing system and operation shall need to provide the ability to charge special fees and/or penalties relating to customers whose check or automatic bill payment or online payment is rejected, and add these fees to the customer's account in addition to the

original payment amount. The Proposer shall also identify and explain how their system will deal with delinquent customers and the collection of outstanding utility bills. It is required that the Proposer establishes a process and verifies the addresses by checking the USPS change of address database every month and report all address and service changes to the City of Newberg on a monthly basis.

As part of the utility billing system, the Proposer shall have the ability to insert notices (i.e. newsletters, reports) provided by the City to customers.

As part of the response to the RFQ, the Proposer shall detail how payments are to be collected and how collected funds are to be remitted to the City of Newberg. Additionally, the Proposer should identify all safe guards and security systems to ensure collected funds are protected.

Customer Care

City customers shall be able to pay their bill in the following ways:

- With credit, debit, cash or check at City Hall or designated local payment areas
- With credit, debit, or check via an on-line website
- With credit, debit or check via a 24/7 automated phone system
- Direct draft (ACH) from their bank account
- Via their personal on-line bank bill pay site (City of Newberg – Utilities shall be a registered payee)
- With credit, debit or check via an iPhone Application
- With credit, debit or check via a web enabled Smartphone browser
- With credit, debit or check via a live customer care representative

City customers shall be able to access customer care representatives from 7:30 am to 5:30 pm PST. These calls shall be routed through an Interactive Voice Response (IVR) system, prior to being presented to live customer care representatives. Live calls shall be answered within a satisfactory time frame (answering 70% of calls with 60 seconds and an abandon rate of less than 7%).

Customer care staff shall route emergency calls to the appropriate City personnel and staff a 24/7 Emergency Call Center for customers to report loss of service issues.

Customer care staff shall be capable of resolving minor billing disputes, establishing payment arrangements, and executing work orders to the City's field customer care team. The work order system shall be GIS enabled and updated live in the field on a continuous basis.

Customer care shall include a utility customer website. The website will present the customers' usage history in monthly format, payment history, and account information. The customer will also have the ability to reprint a utility bill, and pay the bill via credit, debit, or check.

The customer care website shall also provide for City of Newberg residences to sign up for electronic alerts regarding their usage to aid in conservation.

Other Proposer Considerations

Training and Support

The City views training as a critical element to the success of the Automated Utility Billing Project. List how much training is recommended, who is to be trained and in what fields. The Proposer will provide technical support on the software and systems to help the City with any issues that may impact the project. Submit with your response the training that is recommended and an anticipated sample curriculum on all aspects of system operation and maintenance. The response shall describe, in detail, all training and implementation services to be provided to the City, and the expected duration and audience required. The Proposer must provide printed training manuals as well as suggestions for use and best practices as part of the training process. The Proposer must provide support for all users through a toll-free phone number as part of the annual services contract. The Proposer must include customer technical support as part of the support program. Additionally, the Proposer must provide and explain in detail their ongoing customer support beyond initial training. Upgrades, updates, and enhancements must be provided, and Proposer must detail its protocol for seamlessly rolling out upgrades, updates, and enhancements into the existing system after sufficient internal quality assurance testing.

Detailed Standard Operational Procedures (SOP) manuals shall be provided for the Automated Utility Billing Systems.

Reporting and Information Technology

The entire solution shall be delivered to the City via the web and shall be operational on the existing City's inventory of computers and internet connections.

Reporting shall be generated and delivered to the City in PDF and excel formats and include items required to operate a utility. Examples include collection and financial reports by geographical areas, by account, by service, largest users, aging reports, delinquencies, type of customer inquiries, complaint tracking, service level reporting, along with number and type of service orders issues.

Information Technology System installed for hosting the information shall be robust and certified as SAS 70 and reside in a minimum Tier 3 Data Center. Disaster recovery planning shall be submitted as part of the response.

Integrations are the responsibility of the Proposer and shall include integration of the Customer Information and Customer Care Systems, the existing manual meter reading system and the development to an interface to the existing City's financial system.

SECTION II RESPONSE SUBMITTAL

FAILURE TO COMPLETE ALL ITEMS IN THIS SECTION MAY INVALIDATE RESPONSE.

1. A PDF formatted electronic copy of the firm's response shall be received no later than the date and time shown on the first page of this RFQ. Late responses may not be accepted.
2. Transmit the response to Janelle.nordyke@newbergoregon.gov with the RFQ title and proposer's name in the subject line.
3. Cost of preparation of the response will be borne by the Proposer.
4. The response shall be signed by an authorized employee or officer in order to receive consideration.
5. The City shall not be responsible for responses delivered to a person/location other than that specified.

Response Submitted By:

Name of Company _____

Address _____

City/State/Zip Code _____

Telephone Number/Fax Number _____

Email Address _____

Printed Name/Title _____

Signature _____ Date _____

Contact for Additional Information:

Please provide the name of the individual at your company to contact for any additional information.

Full Name _____

Title _____

Telephone Number/Fax Number _____

Email Address _____

Form of Business Organization: Please indicate the following (check one):

Corporation ____ Partnership ____ Sole Proprietorship ____ Other:

Business History:

How many years have you been in business under your current name and form of business organization?

If less than three (3) years and your company was in business under a different name, what was that name?

Addenda Received:

Please indicate addenda information you have received regarding this RFQ:

Addendum No.	_____	Date Received	_____
Addendum No.	_____	Date Received	_____
Addendum No.	_____	Date Received	_____
Addendum No.	_____	Date Received	_____

_____ No Addenda received regarding this RFQ.

References:

Please supply the names of five (5) companies/agencies for which you recently supplied comparable services as requested in this RFQ.

Name of Company/Agency	Address	Person to Contact/Telephone No.
1.	_____	_____
2.	_____	_____
3.	_____	_____
4.	_____	_____
5.	_____	_____

RFQ- Submittal Requirement Acknowledgement

Proposer must complete each item in the Proposer’s Comments Column by answering the question in the space provided or by indicating the item is answered on an additional sheet and referencing that page number.

Requirement	Proposer’s Comments	Additional Reference Page Number
General		
Provide your company background. Include length of time you have provided proposed services and number of connections. Describe the proposed team.		
Demonstrate proof of financial stability (financial statements – past two years) and your ability to control account aging balances.		
Describe your proposed delivery and installation schedule.		
Describe your team’s organization and how you will provide support over the life of the agreement.		
Describe, if applicable, your approach to an automated revenue assurance program.		
Describe the firm’s quality control procedures.		
Describe your Quality Assurance Program.		
Provide a detailed work plan that describes your approach to the project and the transitions between various portions of the work.		
Describe any other key features your system provides to streamline utility operations and enhance customer care.		
Describe your approach to customer involvement during the transition.		
Customer Care		
Provide call center metrics for the past six months: dropped calls, answer times, call volume and call times.		

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Requirement	Proposer’s Comments	Additional Reference Page Number
Document your ability to receive at least 1,000 calls per day.		
Describe your company’s call center, including scalability and the maximum number of calls which can be accommodated.		
Describe your company’s Interactive Voice Response (IVR) System and the outbound capability for collections and customer notifications.		
Describe how you will provide a customer care level where you respond and answer customer inquiries within the required time frame (70% of the answered calls within 60 seconds and must maintain fewer than 7% of dropped calls.)		
Describe how you will route telephone calls and emergency work orders to the appropriate City staff.		
Describe how you will provide the City with access to account information, including the ability to add notes and customer accounts.		
Describe how your system will provide electronic submission (via IVR, email, etc.) of customer care requests to the City using either City approved form or in a format that can be interfaced.		
City requires a designated staff person as a service coordinator/liaison to the City, describe their role.		
Describe how you will receive payments 24 hours a day, seven days per week.		
Describe how you will provide customer care hours of operation at a minimum, from 7:30am to 5:30pm Monday through Friday, Pacific Standard Time.		

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Requirement	Proposer’s Comments	Additional Reference Page Number
Explain your ability to provide an answering service for non-operating hours that will notify the appropriate City staff and your ability to handle after hours turn-ons.		
Describe and provide samples of your customer complaint tracking system.		
Describe your live work order management system for providing field customer care.		
Describe your data analytics for enhancing customer care and utility operations.		
Utility Billing		
Describe your ability to provide monthly residential billings for water, sewer and other services.		
Provide a sample of a user friendly bill.		
Document your ability to distribute messages, notifications, and bill inserts.		
Describe your ability to customize bills and/or management reports (unit of measure, quantities, and dollars).		
Describe how your system accommodates multi-tiered billing and complex rate structures such as personal water budgets, including conservation measures and/or changes in the rate structure, including proration of rates.		
Describe how your system accommodates a discount rate structure for senior citizens/ low income, disabled customers or other special rates.		
Describe your ability to provide wire-transfer daily cash collections.		

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Requirement	Proposer’s Comments	Additional Reference Page Number
Describe your ability to provide an interface with the existing manual meter system.		
Describe how you will provide payment service to the City’s customers using the methods listed below: <ul style="list-style-type: none"> • E-Bill Paperless Billing • Pay by Phone • Pay by Mail • Pay by Debit/Credit Card • Pay at City • Pay by Mobile Device and Internet 		
Describe your ability to provide Internet and iPhone app payment and customer inquiry capabilities.		
Describe how you will incorporate the City’s policy for non-payment shut off notices.		
Describe how you will you provide a policy for adjustments, resolutions and/or payment plans.		
Describe how you will provide a payment location at City Hall staffed by City personnel.		
Describe how you will incorporate the City’s payment plan policy for delinquent and or slow moving accounts and incorporate City policies with the company’s existing policies.		
Describe how payments will be credited to the City.		
Describe how you handle the coordination of information into the system (new meters, route changes, customer address changes, water quality, etc.)		
Describe your approach to sending the City daily cash and your policy and procedures on reconciling cash received for the City.		

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Requirement	Proposer’s Comments	Additional Reference Page Number
Describe how you will maintain uncollectible accounts at no more than 0.2% of total monthly revenues.		
Describe in detail your company’s policy on handling aged receivables and collection philosophy, tactics and techniques.		
Describe your ability to conduct a geospatial audit that is integrated to the billings.		
Describe your GIS based approach to ensuring all customer accounts are being properly billed.		
Describe your operating experience with Automated Utility Billing Systems and the number of customers you currently service.		
Describe your approach to ensure all meter exchanges in the billing system are properly performed by your team and tracked over the term of the agreement.		
Training and Support		
Describe what training is recommended and provide a sample curriculum.		
Describe all training and implementation services to be provided.		
Describe the protocol for rolling out upgrades, updates and enhancements.		
Reporting and Information Technology		
Describe how your system will integrate other platforms such as GIS, CMMS, SCADA, etc. Detail the interoperability of the platforms.		

RFQ- Submittal Requirement Acknowledgement

Proposer must complete each item in the Proposer’s Comments Column by answering the question in the space provided or by indicating the item is answered on an additional sheet and referencing that page number.

Requirement	Proposer’s Comments	Additional Reference Page Number
Describe metric and process of how you will provide effective and efficient coordination and communication with the City and maintain a comprehensive list of all actions.		
Describe how you will provide monthly and on demand reports to the City that are “Windows” based and compatible with the City’s current version of Microsoft software, and have an interface link to the City’s financial system.		
Provide sample collection and financial reports, customer care related reports and management reports such as: <ul style="list-style-type: none"> • Geographic Areas • Account • Aging Reports • Service Type • Customer Inquiries by Type • Customer Inquiries by Location • Customer Response Time • Customer Usage • Classification • Customer Billings 		
Describe your information technology environment and how you will protect the City’s and customer’s data.		
Describe your monthly reporting on customer care and system operation for council and/or management review.		
Financing		
Describe financing options, if applicable.		

SECTION III EVALUATION CRITERIA

Responses will be screened by a selection committee and the firms submitting the most highly rated responses may be invited for interviews. The firms shall be rated using the following criteria and rating schedule:

<u>Evaluation Criteria</u>	<u>Weight:</u>
Background and experience of firm and personnel	20%
Past performance and service on similar projects	20%
Ability to comply with the Scope of Work	60%
Total	100%

SECTION IV PROTESTS AND APPEALS

Any actual or prospective proposer or contractor who is aggrieved in connection with the solicitation or award of a contract may appeal to the City Council. The protest shall be submitted in writing to the City Council within three (3) working days after such aggrieved person or company knows, or should have known, of the facts giving rise thereto.

SECTION V INQUIRIES

Direct all inquiries regarding the Request for Responses to:

Name _____ Janelle Nordyke
Title _____ Finance Director
Telephone Number _____ 503-537-1216
Email Address _____ Janelle.nordyke@newbergoregon.gov

*****END OF DOCUMENT*****