Request for Proposals

For

Utility Billing System

2251 Belknap Avenue, Billings, MT 59101

Request For Proposals
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SECTION 1: GENERAL INFORMATION

1.1 Purpose

The City of Billings is soliciting proposals from qualified Vendors to provide a comprehensive utility billing system. The City is interested in entering into a five-year contract with the successful vendor. The City reserves the right to exercise the option to renew the contract for additional five year terms by mutual agreement of both parties.

1.1 General Submission Information

The City intends to award a single contract for the utility billing system. The proposal should address the Vendor's capabilities for performing all aspects of the scope of work.

1.2 Questions

Questions regarding this proposal shall be submitted to

Public Works Department
Christina Fox, Utility Business Manager
2251 Belknap Avenue
Billings, MT 59101
406-657-8306
foxc@billingsmt.gov

from 8:00 a.m. to 5:00 p.m., MST, Monday through Friday.

1.3 Preparation Costs

The City shall not be responsible for proposal preparation costs, nor for costs including attorney fees associated with any (administrative, judicial, or otherwise) challenge to the determination of the highest-ranked Proposer and/or award of contract and/or rejection of proposal. By submitting a proposal each Proposer agrees to be bound in this respect and waives all claims to such costs and fees.

SECTION 2 – RULES GOVERNING COMPETITION

2.1 Examination of Proposals

Proposers should carefully examine the entire RFP, any addenda thereto, and all related materials and data referenced in the RFP. Proposers should become fully

aware of the nature of the Work and the conditions likely to be encountered in performing the Work.

2.2 Proposal Acceptance Period

Award of this proposal is anticipated to be announced within **forty-five (45) calendar days**, although all offers must be completed and irrevocable for **ninety (90) days** following the submission date.

2.3 Confidentiality

The content of all proposals will be kept confidential until the selection of the Contractor is publicly announced. At that time the selected proposal is open for review. After the award of the Contract, all proposals will then become public information.

2.4 Proposal Format

Proposals are to be prepared in such a way as to provide a straightforward, concise delineation of the Proposer's capabilities to satisfy the requirements of this RFP. Emphasis should be placed on:

- Conformance to the RFP instructions
- Responsiveness to the RFP requirements
- Overall completeness and clarity of content

2.5 Signature Requirements

All proposals must be signed. An officer or other agent of a corporate vendor, if authorized to sign Contracts on its behalf; a member of a partnership; the owner of a privately owned vendor; or other agent if properly authorized by a Power of Attorney or equivalent document may sign a proposal. The name and title of the individual(s) signing the proposal must be clearly shown immediately below the signature.

2.6 Proposal Submission

One electronic copy (PDF or similar) or two (2) hard copies with one electronic copy (PDF on flash drive or similar), of the proposal must be received by the City prior to 5:00 PM, Friday, August 26, 2022. Proposals shall be e-mailed, mailed or delivered to:

Public Works Department
Christina Fox, Utility Business Manager

2251 Belknap Avenue, Billings, MT 59101

2251 Belknap Avenue
Billings, MT 59101
foxc@billingsmt.gov

Questions may be directed to the same address or by phone at 406-657-8306 or email at foxc@billingsmt.gov.

2.7 News Releases

News releases pertaining to the award resulting from the RFPs shall not be made without prior written approval of the Public Works Department.

2.8 Disposition of Proposals

All materials submitted in response to this RFP become the property of the City of Billings. One copy shall be retained for the official files of the Public Works Department and will become public record after award of the Contract.

2.9 Modification/Withdrawal of Proposals

A respondent may withdraw a proposal at any time prior to the final submission date by sending written notification of its withdrawal, signed by an agent authorized to represent the agency. The respondent may thereafter submit a new or modified proposal prior to the final submission date. Modifications offered in any other manner, oral or written, will not be considered. A final proposal cannot be changed or withdrawn after the time designated for receipt, except for modifications requested by the City after the date of receipt and following oral presentations.

2.10 Oral Change/Interpretation

No oral change or interpretation of any provision contained in this RFP is valid whether issued at a pre-proposal conference or otherwise. Written addenda will be issued when changes, clarifications, or amendments to proposal documents are deemed necessary by the Municipality.

2.11 Late Submissions

PROPOSALS NOT RECEIVED PRIOR TO THE DATE AND TIME SPECIFIED IN THE ADVERTISEMENT (5:00 PM, AUGUST 26, 2022) WILL NOT BE CONSIDERED AND WILL BE RETURNED UNOPENED AFTER RECOMMENDATION OF AWARD.

2.12 Rejection of Proposals

The City of Billings reserves the right to reject any or all proposals if determined to be in the best interest of the City.

SECTION 3 – SCOPE OF WORK

3.1 Background

The City of Billings Public Works Department provides water, wastewater, and solid waste services to approximately 118,000 residents within the City of Billings. While the current billing system currently bills for water, wastewater, and solid waste, stormwater will likely be billed on utility bills in the near future. Stormwater fees are currently billed as an assessment on property tax statements. The Public Works Department also provides bulk water services to the County Water District of Billings Heights (CWDBH). CWDBH then resells the water to approximately 10,000 of its customers. Public Works provides direct wastewater service to the majority of properties within the CWDBH. Public Works provides water services to approximately 33,000 metered customers and bills approximately 39,000 utility accounts monthly.

The City of Billings Public Works Department is responsible for all utility billing functions including reading water meters, billing preparation and payment processing. The City utilizes 4 primary billing cycles and bills a different cycle each week, resulting in monthly billing for all customers.

Public Works currently utilizes CitySuite CIS, a Harris product, for its utility billing system. Thus, CIS is fully integrated with financials in CitySuite. Meter reading software is provided by Neptune Technology Group and read information is provided through Neptune 360 and imported into the CitySuite CIS. Public Works provides a customer service portal, WaterSmart, to customers. Customer account information is sent daily to WaterSmart from CitySuite through a file transfer process and AMI data is sent directly to WaterSmart from Neptune Technology Group. Public Works uses Invoice Cloud as its payment processor. Invoice Cloud has integrated with CitySuite to provide real time data (RTD) on customer balances. Solid Waste customer information and service levels are sent through an API to our solid waste collection routing software, Routeware. This information includes customer names, addresses, account numbers, and service type with service collection levels.

Public Works is looking to procure a fully supported and configurable cloud-based solution that can be configured to our growing needs.

Public Works is looking to identify a new customer information system (CIS) to replace our current system. It must have the ability to fully integrate with the current technology and systems utilized by Public Works.

The software should encompass customer service and utility billing for water, sewer, and solid waste services, as well as the ability to add additional services in the future. The CIS will provide a platform to support operations and management of Public Works 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, both in office and the field, billing multiple cycles with multiple rates for water, sewer, and solid waste, and enabling access to a variety of customer account information.

The City of Billings also has issued a request for proposals for community development/permit software. The City may select the same vendor for both proposals or select different vendors, depending on the responses.

3.2 General Scope of Work

The City of Billings seeks to replace its utility billing software with a fully integrated, comprehensive utility billing system.

Specifically, the requested services include, but are not limited to the following:

System Functional Requirements

1. Describe general functionality of solution including items below:

    a. Include a user-friendly, browser-based user interface.
    b. Include user defined fields with parameters defined by the user.
    c. Use efficiencies to expedite processes such as setting up new accounts, meter changes, creating service orders, delinquencies and penalties, and billing.
    d. Provide various levels of security. Access should allow each user group to be granted full access, read only access to limited access, and allow for administration of user access and password administration.
    e. Provide administration including the ability to change or update field values within the system.
    f. Provide technical support for software and hardware between 8:00 and 5:00 Mountain Standard Time Monday through Friday.

g. Interface with cash receipts, general ledger, meter reading software, remittance processing, Routeware, GIS mapping and web application.
h. Identify if product is address based or parcel based.
i. Product should link address and parcel including stacked parcels.
j. Vendor should describe how PCI-DSS compliance is maintained. Vendor should identify and PII data that should be protected.

2. Describe how the solution provides customer account and location management including items below:

a. Ability to enforce business rules on all system transactions so that user errors can be minimized.
b. Allow for documents (photos, letters, etc.) to be attached to an account and viewable by authorized system users.
c. Support an unlimited number of accounts.
d. Product should track customer classification and type of services provided.
e. Ability to view all customer account activity in one location, including, but not limited to read history, billing history, payment history, notes, etc.
f. Ability to make changes to customer account from customer account information screen.
g. Ability to define, add, change, and delete an unlimited number of account types.
h. Ability to query an account based on various search criteria such as customer name, account number, parcel number, or service address.
i. Provide summary and detail level inquiry of customer accounts, consumption, and amount paid per year.
j. Provide user defined fields to be maintained for each record.
k. Ability for unlimited notes on accounts with ability to assign alert flags where needed.
l. Ability to track frozen meter accounts.
m. Ability to provide an audit trail for changes to an account.
n. Support unlimited transaction and consumption history.
o. Accommodate new customers at an existing service address through a transfer function.
p. Ability to track property owner as well as tenant.
q. Ability to transfer customer balances and other related information to a new account when a customer transfers to a new service address.
r. Provide ability to attach scanned documents to a customer record.
s. Provide ability to mark an account as an “internal” account.

t. Provide a CASS certification process to insure and maintain accurate postal information.
u. Ability to track information through the system by customer. Ability to view all accounts a customer has had and current status of accounts.
v. Ability to track an unlimited number of user defined events on an account (i.e., late notices, shut offs, sent to collections).
w. Ability to display account information via web application.
x. Ability to track information through the system by contract or property. Ability to see all accounts at a given property and be able to view all accounts associated with a customer.

3. Describe the rates and fee schedules that the solution includes and ability to handle the items below:

    a. Ability to define add, change, and delete an unlimited number of rate code types and amounts.
    b. Ability to define an effective date for rate tables and prorate charges based on the effective date.
    c. Ability to define water and wastewater service rates that are consumption based, fixed, percentage based, tiered or seasonably averaged.
    d. Ability to define storm fees that are fixed or based on square footage of impervious area of the parcel.
    e. Ability to define solid waste rates that are fixed, based on container size, and frequency.
    f. Ability to define distribution of fees to multiple general ledger accounts based on user defined account types, fee category, service type, or reason code.
    g. Ability to prorate customer charges for service to date of occupancy.
    h. Ability to back date the date of occupancy.
    i. Ability to define, add, change and delete an unlimited number of service types.
    j. Ability to calculate industrial pretreatment surcharge (BOD/TSS).
    k. Ability to assess surcharge for groundwater flow into storm sewer based upon surface area of drainage, amount of rainfall and current rate.
    l. Ability to stop and start dates for individual fees on an account.

4. Describe in detail the meter reading functionality of the solution including the items below:

a. Ability to define and add, change, and delete an unlimited number of meter types.
b. Ability to maintain an unlimited number of meters.
c. Ability to identify a meter by type size, serial number, manufacturer, location, install date and test date.
d. Ability to enter meter reading data through data entry screens from handheld devises or automated meter reading system.
e. Service consumption automatically calculated upon entry of meter reading with ability to edit readings.
f. Allow concurrent meter reading data entry of one route while processing billing for another.
g. Ability to maintain a list of “frozen” water accounts and send notice to affected property owners.
h. Ability to list overtime or turn off fees separately on invoice.
i. Maintain meter readings and dates independent of customer or account changes.
j. Provide ability to enter a meter change without interruption of the billing cycle and final billing.
k. Generate work orders based on meter reading exception messages and actions entered along with meter reading.
l. Ability to describe the location of the meter at the service location.
m. Ability to view a history of all meters that have been installed at a service location.
n. Ability to record unlimited notes for a meter.
o. Ability to define meter read types.
p. Ability to estimate meter reads based on user defined history preferences.
q. Ability to estimate reads by route or by cycle, mass estimates.
r. Ability to identify reads that were estimated versus actual.
s. Ability for system to automatically identify roll over readings based on meter setup.
t. Flexible high/low feature that allows the user to set a range of parameters that produce consumption edit.
u. Ability to change out meters at any time. Where meters have been changed out, ability to show separate individual meter readings and consumption and to show total consumption and billing amount on the same bill.
v. Ability to change meter reading sequence without changing customer account number.
w. Ability to graphically display consumption history for an account.
x. Ability to display average consumption by month and day for an account.
y. Ability to view consumption history in numerical and graphical format via web application.

z. Maintains reading instructions, prints instructions on read sheets and provides information in meter reading handheld equipment.
aa. Allows user to flag individual accounts for which zero consumption is not considered to be an exception.
bb. Prints meter route pages in customer number or route sequence number order.

5. Describe in detail the billing management capabilities of the system including the items below:

a. Supports single or multi cycle billing system.
b. Provides a complete or exception only billing pre-list for review prior to bill printing.
c. Allows printing of multiple cycles in one billing run.
d. Generates one utility bill covering all services and charges and itemizes charges separately.
e. Maintains a file of comments for inclusion on utility bills, reminder notices or shut off notices.
f. Ability to send automated email or text communications to customers based on city defined parameters (delinquent accounts, late payment notices, readings out of bounds, etc.).
g. Provides user defined free form message on bills.
h. Ability to send bills or messages to customer phones or mobile devices.
i. Capable of including, but not limited to the following information on the bill: billing date, account number, service period, current meter reading, prior meter reading, consumption billed, itemized charges, balance forward, amount due, due date, numerical and graphical prior same period usage and average gallons used per day.
j. Ability to calculate Garbage utility based on garbage can size, number of cans, number of pickups per week, residential versus commercial, garbage and extra pickups separately.
k. Ability to track garbage and recycle routes and their pick up day.
l. Ability to charge add on fees (dumpsters, roll offs, large items).
m. Generates a return stub so that cash receipts can be read with an optical character reader, scanning the account and amount.
n. Ability to view and reprint a past bill at any time.
o. Produces final notices.
p. Ability to produce statements for customers with multiple utility accounts.
q. Ability to export bills to a file for 3rd party printing.
r. Ability to prorate bills for new and closed accounts.
s. Calculates final bills during any cycle based on the internal issuance of a turn off service order or closing a customer account.

t. Supports billing adjustments such as read errors, automatically adjusts billing amount and history.
u. Allows printing of a third party (dual notification) bills during bill run.
v. Ability to not print a paper bill and email the bill to the customer or an option to both print and email.
w. Ability to maintain multiple email accounts.
x. Support budget billing which must also be identified as the amount due when accessing payment amount due.

6. Describe the financial management functionalities of the system including the items below:

a. Allows positive or negative transaction adjustment with a complete audit trail.
b. System automatically prepares transaction batches in a batch format for posting to general ledger including billing, cash receipts, NSF's, adjustments, etc.
c. Provides automatic allocation of payments to billed service with ability to adjust or override the default distribution.
d. Accepts over payment or credit adjustment with amount maintained as unapplied credit balance or to be applied to the next service bill.
e. Provides complete audit trail of payments processed for reconciliation prior to general ledger cash posting.
f. Ability to import payment records from e-payment and lockbox services vendors.
g. Ability to accept full, over, partial and prepayments.
h. Ability to distribute partial payments based on user defined preference (due date, service type or percentage).
i. Provision for data entry correction of any distribution errors.
j. Provide for auto-pay option for customers to pay from customer's bank account or credit card.
k. Ability to scan payment information directly into the system using bar code or OCR scanner.
l. Ability to support payment arrangements for customers to schedule payments for outstanding balances.
m. Ability to display transaction history including bills, receipt adjustments, credits, and refunds for an account.
n. Ability to display details of transaction and drill down to transaction.
o. Accepts only one deposit per customer account.
p. Ability to automatically apply deposits to a final bill or an account that has been in good standing for a user defined period of time.
q. Ability to automate the credit/refund process by batch.
r. Ability to automatically apply deposits to the correct revenue accounts.

s. Ability to display account transaction history via web application.
t. Ability to pay outstanding balances or set up automatic payment from credit card or checking account via web application.
u. Ability to track deposits and interest on all deposits.
v. Provides ability to initiate bankruptcy on account marking previous balance as uncollectable to maintain account history and provide audit trail for uncollectable balance.
w. Provide API/Web Services for posting real-time payments from payment processing vendor(s).

7. Describe in detail the delinquency management functionalities of the solution including the items below:

    a. Ability to age accounts in 30, 60, 90 and 120 day increments.
    b. Ability to automatically add late penalties or interest to delinquent accounts according to a flexible rate structure determined by the user.
    c. Automatic printing of shut off notices and service orders through interface to service order system.
    d. Ability to produce delinquent bills for customers that have already received a final bill but continue to maintain an unpaid balance.
    e. Automated special payment arrangements allowing customers to pay amount due over time.
    f. Ability to automatically assess a charge to an account if a shut off is processed.
    g. Ability to generate a file to transfer unpaid utility balance to property tax records.
    h. Allows selected account to be flagged as exempt from past due notices for accounts that have made payment arrangements.
    i. Processes account for write off and collection.
    j. Maintain a dynamic shut off list that can be automatically or manually updated.
    k. Ability to populate third party notification system with account holders information so customer can be notified prior to termination of service.

8. Describe the service order management functionalities including the items below:

    a. Ability to define, add, change, and delete an unlimited number of service order types.
    b. Service order system provides automated updates to the utility billing system upon completion of service order.

c. A history of all service orders related to a service address should remain with the service address record. Service orders should provide drill down functionality for detail of actual service order.
d. Ability to automatically update customer, location, meter and account information upon completion of service order action.
e. Ability to print or email service orders based upon a user defined selection criteria or defined workflow.
f. Ability to dispatch or receive completed service orders via email.
g. Ability to track work orders and provide reports for active and completed work orders.
h. Ability to automatically generate service orders for certain situations, included, but not limited to meter turn-on for start service request, meter turn-off for stop service request, and meter turn-on for on after non-pay service request.
i. Ability to create service orders within the utility billing software and then send to a mobile dispatch solution utilizing one of the following options:
    i. Mobile service order system/module included with the utility billing system that provides the following functionality:
        1. User-interface with a Dashboard showing status of open/pending service orders which includes a list of available resources for assignment, list of service orders to be assigned, map view of the open service orders.
        2. A user-interface that enables Public Works users to easily dispatch/assign service orders to field staff, as well as provide exception management capabilities.
        3. Ability to have some Service Orders directly assigned to field staff (i.e., auto-dispatching).
        4. Ability to optimize resource schedules via routing capabilities and provide centralized management of all work, resources, and inventory/parts, if applicable.
        5. Robust mobile capabilities that can be used on most common mobile devices (i.e., Apple, Android, Google, etc.).
        6. Rule-based and have the ability to be configured according to Public Works rules.
    ii. Two-way web services API interface with the City's existing CityWorks system that can fulfill the above requirements via the interface by sending and receiving the required service order data.

9. Describe the reporting capabilities of the solution including the items below:

a. Includes standard financial, operational, service work order reports and audit trails.
b. Provide a report library list – provide a list and report format or a link where reports can be viewed.
c. Includes end user reporting tool to create reports based on any field combination or partial field within the utility billing system.
d. Ability to export reports to Microsoft Excel and Word, PDF, TXT and CSV.
e. Ability to generate Ad Hoc reporting.
f. Ability to generate a list of accounts, customers or meters based on user defined selection criteria.
g. Ability to generate analysis reports with user defined parameters with flexible selection criteria and grouping options.
h. Ability to generate yearend financial reports including top ten consumption report and other information required.
i. Manager configurable dashboard for key operational statistics.
j. Integrated graphics allowing review of data.

10. Describe in detail the system's ability to integrate with third-party systems, have open backend APIs with other systems and how it fully integrates with GIS.

    a. Be currently seamlessly integrated with several third-party systems to demonstrate integration capability.
    b. Have fully open backend APIs to tie into two-way communication with Public Works systems, including but not limited to:
        i. Harris CitySuite Financials
        ii. InvoiceCloud
        iii. RouteWare
        iv. Neptune 360
        v. WaterSmart
        vi. CityWorks (optional in lieu of included mobile service order module
    c. Be a fully integrated GIS solution.

System Technical Requirements

1. Cloud-based hosting must be included

    a. The cloud-based hosting proposal must include all hardware/infrastructure and provide for all future capacity growth as part of your proposed hosting fees

b. The bidder must remain on support technology at all times and must perform infrastructure updates and apply patches on a regular basis as part of your proposed fees.
c. The bidder must provide and apply application version/patch updates on a regular basis as part of your proposed fees.
d. Updates must not interrupt service and must be implemented solely by bidder.
e. The system must be secure, meeting the City of Billings IT security specifications.
f. The bidder must provide IT Security services for the cloud-based hosted systems as part of your proposed fees and these services must include intrusion detection, penetration monitoring, vulnerability scanning and annual SOC auditing.
g. Cloud-based hosting must be provided through a reputable data center vendor, preferred servers are AWS, Azure, or comparable.

2. Security

a. Include an overview of the IT Security services.
b. Is the proposer PCI certified? Provide latest PCI Attestation.
c. Are all costs associated with PCI compliance included in the proposer's bid?
d. Does the proposer undergo annual SOC audits? What level of SOC audits do you undergo?
e. Are all costs associated with annual SOC audits included in the proposer's bid?
f. Does the Bidder's proposed services include intrusion detection? If not, please include the additional cost to provide these solutions in Bidder pricing?
g. What tools does the provider utilize in performing IT Security services?
h. Does the Bidder provide validated procedures for security configuration management, security patch installation, and malware prevention on all servers and PCs involved in service delivery?
i. Please describe how the proposer performs the following IT Security Services:
    i. Vulnerability Scanning
    ii. Penetration Testing
    iii. Intrusion Detection
    iv. SIEM monitoring
    v. Software Security patching

j. Does the Bidder utilize an independent third party to conduct annual information security penetration tests of your IT systems?
k. Please describe any expectations proposer has of City of Billings staff related to IT Security Services?

3. System Maintenance

    a. Describe system maintenance included.
    b. Describe how system enhancements are prioritized.
    c. Describe the upgrade cycle.

4. Reliability

    a. Describe how the hosted solution provides for disaster recovery.
    b. Describe the backup process including frequency, if the backup media is stored at an offsite location and how many backup copies are maintained.
    c. Describe redundancy features.
    d. Are all hosting locations within the United Sates? Are hosting locations distributed geographically? What is the physical location of each datacenter? If hosted by a third party list the name of the hosting party?

5. Network Capability and Availability

    a. Describe the backbone connectivity of datacenter(s) to broadband provider(s). Is there physical circuit diversity with respect to how circuits enter the datacenter(s)?
    b. What are the speeds of circuits entering the datacenter(s)?
    c. What measures are in place to mitigate single points of failure in your network connection(s) to broadband providers?
    d. What are the optimal bandwidth recommendations for end-points running your solution?

6. Data Management

    a. Describe the ability and process to return the City's data upon contract termination.
    b. Are copies of backups of the data set available to the City throughout the length of the contract?
    c. The City is requiring that software uses Microsoft SQL Server for its database. Does your software meet this requirement?
    d. Will City IT staff have access to the database(s) for reporting and query purposes?

Value Add

1. Provide a description of optional "Best of Breed" solutions that the proposer believes will give Public Works value-added. Ideas and unique services offered to improve Public Works business practices relevant to the background and scope laid out in this RFP. Items to consider for inclusion:

a. Meter Data Management (i.e., AMI Interval) Storage
b. Document Composition, Print & Mail
c. Electronic Bill Presentment and Payment
d. Outage Mapping and Communication

3.3 Proposed Schedule

- August 26, 2022 @ 5:00pm – Deadline for receiving proposals
- August 29 – September 30, 2022 – Staff evaluation of proposals
- October 24, 2022 – City Council award of Agreement
- October 28, 2022 – Agreement fully executed and formal Notice to Proceed issued to vendor

(actual schedule to be discussed and agreed to with selected consultant)

SECTION 4 – PROPOSAL AND SUBMISSION REQUIREMENTS

To achieve a uniform review process and obtain the maximum degree of comparability, the proposals shall be organized in the manner specified below.

4.1 Title Page

Show the RFP being proposed on, the name of your firm, address, telephone number(s), name of contact person, and date.

4.2 Letter of Transmittal

A. Identify the RFP project for which proposal has been prepared.
B. Briefly state your firm's understanding of the services to be performed and make a positive commitment to provide the services as specified.
C. Provide the name(s) of the person(s) authorized to make representations for your firm, their titles, address, and telephone numbers.
D. The letter of each proposal must be signed by a corporate officer or other individual who has the authority to bind the firm. The name and title of the

individual(s) signing the proposal must be clearly shown immediately below the signature.

4.3 Table of Contents

Clearly identify the materials by Section and Page Number.

4.4 Proposal Narrative

A. Experience and Key Project Staff (0-30 Points)

1. Provide an overview of the firm, including lines of business, size, length of time in operation, and organizational strengths.
2. Provide an organizational chart with number of employees specified for each work area.
3. Detail the firm's experience in the same or similar areas of expertise, stability, and its adaptability to providing the required services.
4. Provide at least three references for which your firm has provided the same or similar services. Include a point of contact, current telephone number, and a brief description of the services provided.
5. Provide detailed information on at least three customer engagements that reflect experience with projects of a similar type and scope.
6. Identify owners and executives of the firm and key project staff and task leaders expected to provide services on behalf of the firm. Resumes should be included for each of the individuals referenced, which details their relevant experience.

B. Ability to Complete Scope of Work/Functionality (0-30 Points)

Provide information on the vendor's ability in meeting each of the scope of work requirements identified in Section 3. If the vendor cannot provide a service as described in Section 3, but believes it can offer equivalent or superior services by some other means, the proposer must identify the mandatory specifications, state that it is offering an alternative, and provide a description of the proposed alternative.

C. Project Approach (0-25 Points)

1. Provide a project timeline.
2. Provide the implementation approach including installation of proposed application solution in a test, training, and production environment.
3. Provide a systems integration and interfaces plan that includes the integration approach, plan to address any custom code and 3rd party

integrations included in the vendor's overall solution, and types of existing interfaces available, including previously built interfaces to other systems included in this RFP.

4. Provide the vendor's data conversion plan and the maximum amount of data you could import into your proposed system,
5. Identify the vendor's pre-live, post-live, and on-going training plan and documentation available to end users.
6. Provide vendor's post go-live support plan.

D. Cost of Proposal (0-15 Points)

Provide all one-time and on-going costs for five years. Clearly identify what each of the costs is for. The proposal must clearly identify total one-time costs and annual costs. The cost criterion is rated by the total 5 year cost of the proposal.

E. Total Possible Score (100 Points)

SECTION 5 – EVALUATION CRITERIA AND SELECTION PROCESS

5.1 Evaluation Criteria

Submittals will be evaluated in accordance with the following criteria:

A.	Experience and Key Project Staff	**0-30 Points**
B.	Ability to Complete Scope of Work/Functionality	**0-30 Points**
C.	Project Approach	**0-25 Points**
D.	Cost of Proposal	**0-15 Points**
	Maximum Score	**100 Points**

A committee of individuals representing the City of Billings will perform evaluation of the proposals. The committee will rank the proposals as submitted.

The City of Billings reserves the right to select vendors for interviews and software demonstrations solely on the written proposal.

The City will request oral interviews/product demonstrations with the highest-ranked vendors (short-list). The City will also request on-site demonstrations from one of the short-listed vendors references. The City understands that the travel costs of City employees will be paid for by the City.

The final selection will be based on the total of all evaluators' scores achieved on the second rating. The highest-ranked Proposer(s), after the second scoring, if performed, may be invited to enter into final negotiations with the City for the purposes of Contract Award.

SECTION 6 – CONTRACT NEGOTIATION PROCESS

The highest-ranked Proposer(s) may be invited to enter into Contract negotiations with the City of Billings. If an agreement cannot be reached with the highest-ranked Proposer, the City shall notify the Proposer and terminate negotiations. The second highest Proposer may be contacted for negotiations. This process may continue until successful negotiations are achieved. However, the City reserves the right to terminate negotiations with any Proposer should it be in the City's best interest. The City of Billings reserves the right to reject any and all proposals submitted.