

REQUEST FOR PROPOSALS

REQUESTING PROPOSALS FOR A
UTILITY CUSTOMER SELF SERVICE PORTAL (UCSS) SOLUTION

for

GREENVILLE UTILITIES COMMISSION
PO Box 1847
Greenville, North Carolina 27835-1847



***Greenville
Utilities***

ISSUE DATE: July 23, 2019
QUESTIONS RECEIVED BY: July 31, 2019
ANSWERS POSTED BY: August 5, 2019
PROPOSAL PACKAGES SHALL BE RECEIVED BY 3:00 PM (EDST) ON August 14, 2019

Introduction

The Greenville Utilities Commission (GUC) is soliciting proposals from qualified vendors for a commercial off-the shelf Utility Customer Self Service web-based portal and mobile app to replace our existing Oracle Customer Self Service (OUCSS) portal and Oracle Utility Notification Center (OUNC) solutions. The proposal will include implementation services along with integrations to GUC's CCB, print vendor and payment vendor.

Background

GUC provides electric, water, sewer and natural gas services to the City of Greenville and 75% of Pitt County. GUC serves a combined total of nearly 150,000 customer connections.

The current Oracle Customer Care and Billing (CC&B) and Oracle Customer Self Service (OUCSS) was implemented in 2016.

Requirements

GUC is looking for a seamless, sustainable and up to date experience for our customers. We desire an Out of the Box (OOB) solution that continuously grows with our technology and customer needs. The vendor is to comment on what is and is not OOB and any constraints of going with an OOB solution. Response should include a minimum of five OOB screen shots of the customer experience.

GUC is currently running Oracle CCB with AMR meters. Any proposed solution must be able to provide value in our existing environment as well as, future systems and demonstrate this via a current release and roadmap.

To be considered, vendors submitting proposals must have successfully implemented their customer self-service portal solution and integrated it with Oracle CC&B within the last five (5) years. The proposed solution should assist in reducing customer calls for transfer/start/stop service, payments, account management and other activities to meet the customer needs without our Call Center.

Licensing of new software modules required to complete the project will be identified by the Vendor as part of this proposal.

GUC requires the proposed software package to support confidentiality, availability and integrity. Upon selection of the vendor, they will be asked to provide their security measures and level of encryption used in the software to protect data.

Specific requirements can be found in Appendix A.

PROPOSALS SHALL BE RECEIVED BY 3:00 PM (EDST) ON August 14, 2019.

Proposals shall be submitted to Cleve Haddock, CLGPO, Procurement

Coordinator, Greenville Utilities Commission, 401 S. Greene Street, Greenville, North Carolina 27834. GUC reserves the right to reject any and all Proposals.

Questions regarding this Request for Proposals (RFP) should be received by or before 3:00 PM (EDST) on July 31, 2019. Answers should be communicated by August 5, 2019. All questions shall be directed to the attention of Cleve Haddock, CLGPO, Procurement Coordinator, (252)551-1533, at haddocgc@guc.com.

Implementation Plan

GUC requires that each vendor prepare a detailed implementation plan outlining the required tasks, estimated hours, responsibility, major deliverables, and timing. At a minimum, the RFP response will cover the following areas:

- Implementation approach
- Environment Installation, including supporting software (OS, DBMS, etc.) and hardware platform installation and configuration, if necessary
- Application setup (tailoring, configuration, end-user set up)
- Application-level security design and configuration

PROPOSAL REQUIREMENTS

All proposals must contain, at a minimum, the information listed below. Vendors are asked not to submit advertising material in substitution for responding to below.

1. A Cover Letter.
2. Brief History of Firm.
3. Statement of Professional Qualifications: Include résumés of key staff proposed to perform consulting and design work. One staff member should be designated as the proposed Project Manager, with supporting staff identification.
4. List of Recent Similar Projects Completed: List should include projects with similar scope proposed for this Project, and indicate which staff from the proposed team, if any, participated in the design of each project. List must also include clients' names, contact person, addresses, and telephone numbers for each project for reference.
5. List of Subconsultants: If any subconsultants are used to assist with the services, list the names of the firms along with professional qualifications and recent similar projects completed.
6. Schedule of Rates: List rates charged on an hourly basis for each classification of personnel.
7. Conceptual Project Schedule: Include a conceptual project schedule from project kickoff to completion and total number of hours estimated to complete.

8. Location of Office: Geographic location of office assigned to perform work with listing of key staff who work at that location on a permanent basis.
9. Your project management responsibilities.
10. Any assumptions made for this project.
11. Expectations of GUC.
12. Product support and maintenance programs.
13. Define any training provided for the project.
14. List any associated User Groups.
15. Provide an overview of the customer experience.
16. Completion of Appendix A - Requirements Matrix.
17. Provide all legal and compliance reports.
18. Special Considerations: Include any special considerations, conditions, or other circumstances that is foreseen affecting the project.
19. Responses must be double-sided and are limited to a total of 40 pages. The font size shall not be smaller than 11-point. An electronic pdf format of your Proposal must be e-mailed to: haddocgc@guc.com.

SELECTION PROCESS

- Proposals should be received no later than 3:00 PM (EDST) August 14, 2019. All firms submitting proposals must be duly licensed to practice business in the State of North Carolina. **Late Proposals will not be considered.**
- Screening of proposals by a staff committee should be completed by August 30, 2019. The staff committee will review the potential firm's recent specialized experience, firm's staff qualifications, firm's capacity to accomplish the work, firm's past performance, location of the firm, ability to meet the requirements with base product and other considerations when screening proposals.

EVALUATION AND AWARD:

Proposals will be evaluated by GUC personnel. Selected vendors may be requested to present formal presentations/unit demonstrations on site on a date and time mutually agreeable by both parties.

Evaluation Criteria:

Vendor/unit selection shall be based on evaluation and rating of Vendor's demonstrated competence and qualifications/performance for the type of unit/services/products to be offered. The following guidelines will be used as minimum criteria for rating the Vendor:

- The quality of references from past customers of vendor.

- Quality of approach and methodology that demonstrates an understanding of the unit's requirements
- Quality, extent and relevance of vendor's staff to the project.
- Vendor's response time
- Overall Costs
- Ability of base product to meet requirements

If a proposal is to be awarded, it will be awarded to the responsible, responsive respondent whose evaluation by GUC indicates that the award will be in GUC's best interests.

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TERMS AND CONDITIONS

GUC reserves the right to reject all Proposals or accept such Proposals, as appears in its own best interest, and to waive technicalities or irregularities of any kind in the proposal. GUC is not obligated to accept the lowest cost proposal.

CONFLICT OF INTEREST

In general, conflicts of interest relate to the potential for self-gain usually, but not always, of a fiscal nature. Potential for self-gain can serve to undermine the judgment or objectivity of Proposers providing consultation services. A potential or actual conflict of interest exists when commitments and obligations to GUC are likely to be compromised by a Proposer's other interests or commitments, especially economic, particularly if those interests or commitments are not disclosed. Not all conflicting interests are necessarily impermissible. Timely and complete disclosure of potential conflicts of interest may be a satisfactory remedy and protects the consultant from suspicion and accusations of breach of professional integrity. Proposers are asked to disclose any situation or relationship that might be regarded as potential conflict of interest with, but not limited to, their expected duties and recommendations as defined in this RFP.

PROPOSER INCURRED COSTS

All costs that may be incurred to prepare qualifications, attend meetings, attend site inspections, provide requested follow-up information, make formal and informal presentations, and for the entire contract negotiations process if applicable, shall be the sole responsibility of each Proposer. GUC is not responsible under any circumstances for reimbursement of any costs that may be incurred by Proposers during the proposal preparation, subsequent selection or negotiation stages.

MINORITY BUSINESS PARTICIPATION PROGRAM

GUC has adopted an Affirmative Action and Minority and Women Business Enterprise Plan (M/WBE) Program. Firms submitting a proposal are attesting that they also have taken affirmative action to ensure equality of opportunity in all aspects of employment, and to utilize M/WBE suppliers of materials and/or labor.

PROPOSAL WITHDRAWAL

A proposer must notify GUC in writing of its request to withdraw a proposal within seventy-two (72) hours after the proposal opening, not including Saturdays, Sundays, or holidays. In order to justify withdrawal, the proposer must demonstrate that a substantial error exists, and that the proposal was submitted in good faith.

AFFIRMATIVE ACTION

The Provider will take affirmative action in complying with all Federal and State requirements concerning fair employment and employment of the handicapped, and concerning the treatment of all employees, without discrimination by reason of race, color, religion, sex, national origin, or physical handicap.

MEDIATION/BINDING ARBITRATION

In the event of any dispute between the Parties, the Parties agree to submit any dispute to nonbinding mediation before a mutually agreeable Mediator prior to initiating litigation. If the Parties are unable to agree upon a Mediator within thirty (30) days after demand therefore, either Party may petition a Court of competent jurisdiction for the designation of a qualified Mediator for these purposes. Each Party shall bear its own costs and expenses of participating in the mediation (including, without limitation, reasonable attorneys' fees), and each Party shall bear one-half (1/2) of the costs and expenses of the Mediator. Unless otherwise agreed, the Parties will hold the mediation in Greenville, North Carolina. The matters discussed or revealed in the mediation session shall not be disclosed in any subsequent litigation. In the event the matter is not resolved in mediation, either Party may request arbitration. The parties shall jointly select an Arbitrator and shall be bound by the decision of the Arbitrator with respect to any dispute between the parties with respect to this Agreement. If the parties are unable to mutually agree upon an Arbitrator, the Parties shall each select an Arbitrator, and the two Arbitrators so selected shall select a third Arbitrator, and the decision of the majority of the Arbitrators shall be conclusive and binding upon the Parties. The Parties at all times agree to equally split the costs of any Arbitrator(s) selected in an effort to resolve the dispute between the Parties. Any party desiring to resolve a dispute under the terms of this Agreement shall notify the other Party in writing, and the Parties shall seek to agree upon a mutually agreed upon Arbitrator within a period of ten (10) days from the date of such written demand. If the Parties are unable to agree within such ten (10) day period, the Parties shall each select an Arbitrator, and the two (2) Arbitrators so selected shall select a third Arbitrator within fifteen (15) days from the date of the written demand for arbitration, and a decision shall be rendered by the Arbitrator(s) so selected within five (5) days after such Arbitrator(s) is selected.

INDEMNITY PROVISION

Provider agrees to indemnify and save GREENVILLE UTILITIES COMMISSION of the City of Greenville, Pitt County, North Carolina, and the City of Greenville, North Carolina, its co-owners, joint venturers, agents, employees, and insurance carriers harmless from any and all losses, claims, actions, costs, expenses including reasonable attorney fees, judgments, subrogations, or other damages resulting from injury to any person (including injury resulting in death), or damage (including loss or destruction) to property of whatsoever nature of any person arising out of or incident to the performance of the terms of this Contract by Provider, including, but not limited to, Provider's employees, agents, subcontractors, and others designated by Provider to perform work or services in, about, or attendant to, the work and services under the terms of this Contract. Provider shall not be held responsible for any losses, expenses, claims, subrogations, actions, costs, judgments, or other damages, directly, solely, and proximately caused by the negligence of Greenville Utilities Commission of the City of Greenville, Pitt County, North Carolina. Insurance covering this indemnity agreement by the Provider in favor of Greenville Utilities

Commission of the City of Greenville, Pitt County, North Carolina, shall be provided by Provider.

GOVERNING LAWS

All requests, contracts, transactions, agreements, etc., are made under and shall be governed by and construed in accordance with the laws of the State of North Carolina.

UNIFORM GUIDANCE

Contracts funded with federal grant or loan funds must be procured in a manner that conforms with all applicable federal laws, policies, and standards, including those under the Uniform Guidance (2 C.F.R. Part 200).

ADMINISTRATIVE CODE

Proposals, bids, Qualifications, and awards are subject to applicable provisions of the North Carolina Administrative Code.

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COMPLETE BELOW FORM(S)

Letter of Compliance to E-Verify for Greenville Utilities Commission

1. I have submitted an RFP for contract or desire to enter into a contract with the Greenville Utilities Commission of the City of Greenville, NC;
2. As part of my duties and responsibilities pursuant to said RFP and/or contract, I affirm that I am aware of and in compliance with the requirements of E-Verify, Article 2 of Chapter 64 of the North Carolina General Statutes, to include (mark which applies):
3. ____ After hiring an employee to work in the United States I verify the work authorization of said employee through E-Verify and retain the record of the verification of work authorization while the employee is employed and for one year thereafter; or
4. ____ I employ less than fifteen (15) employees in the State of North Carolina.
5. As part of my duties and responsibilities pursuant to said RFP and/or contract, I affirm that to the best of my knowledge and subcontractors employed as a part of this RFP and/or contract, are in compliance with the requirements of E-Verify, Article 2 of Chapter 64 of the North Carolina General Statutes, to include (mark which applies):
6. ____ After hiring an employee to work in the United States the subcontractor verifies the work authorization of said employee through E-Verify and retains the record of the verification of work authorization while the employee is employed and for one year thereafter; or
7. ____ Employ less than fifteen (15) employees in the State of North Carolina.
Specify subcontractor: _____

_____(Company Name)

By: _____(Typed Name)

_____(Authorized Signatory)

_____(Title)

_____(Date)

It is certified that this Proposal is made in good faith and without collusion or connection with any other person submitting a proposal on these services. It is also certified that this proposal is made in good faith and without collusion or connection with any GUC employee(s).

Certified check or cash for \$ n/a or bid bond for \$ n/a attached.

Firm Name _____ Phone (____) _____

Address _____

City _____ State _____ Zip Code _____

Fax (____) _____ E-Mail _____

Authorized Official _____ Title _____
Typed Name

Signature Date _____

**Your proposal should be received no later than
August 14, 2019 at 3:00 pm (EDST).**

APPENDIX A REQUIREMENTS MATRIX

FUNCTIONAL

Requirement	Response (OOB - Out of Box CUST - Custom)	Vendor Comments
Responsive Design - Same look and feel regardless of device		
Needs to appear seamless to WWW.GUC.COM website, using same color scheme and logo.		
Browser Independent		
Display Usage graphs		
Ability to Lock Out/Remove Customer Access Via ADMIN Rights		
Ability for Customer Service Rep to view a customer account via the web using an administrative account.		
Invite Additional User Access - Owner/Guest		
Allow Multi-Accounts for Registered User		
Allow Multi-Account Search Feature (For those not in Account Set)		
View/Update Personal Information including email address – CCB should remain the system of record		
Create Nickname for Account		
Allow Multiple Email Addresses for Multi-Accounts		
View Bill PDF via link passing information to outside vendor		
Display Financial History and Historical Bills		
Update Bill Delivery Method		

Create ToDo in CCB for Start, Stop and Transfer Service Requests		
Create ToDo in CCB for New Budget Sign Up Request		
Request Pay Plan for CCB based on CCB configuration/rules		
Make a Credit Card Payment via a link to payment vendor passing information.		
Make One Time Payment		
Retain Routing and Bank Account Information		
CASH ONLY customers should only have access to Credit Card Payments.		
Customer can enroll for Auto Pay		
Email Validation - New Registered User. Message should include userid they registered with.		
Display GUC Outage Information via a link.		
Email Notifications - Late Payment Notification		
Email Notifications - Payment Received Notification		
Email Notifications - Bill Due Notification sent only if balance due on the account		
Email Notifications - Bill Ready Notification		
Receive Text Alerts (Without Having to Purchase Additional Service/Contract)		
CSS Administrator have the ability to Add/Update Messages easily on CSS Screens		
Allow Customer to Update/Reset Password		
Password Reset should allow for unlock		
Require specified information to register an account		
A mechanism to easily administer the solution. Such as changing messages, verbiage, links etc.		

ADA Compliant		
Future		
Allow for payment pages from payment vendor to be embedded providing a seamless experience.		
Retain Routing and Bank Account Information working with payment vendor		
Start Service for New Customer Realtime		
Start Additional Services - Existing Customer Realtime		
Stop All Services - Existing Customer Realtime		
Transfer All Services - Existing Customer Realtime		

ADDITIONAL SECURITY

Requirement	Response (OOB - Out of Box CUST - Custom)	Vendor Comments
Provide a mechanism that would require customer to accept terms and read privacy statement.		
If cloud solution – can you provide a breach notification policy to GUC.		
If cloud solution – acknowledge that GUC retains ownership of all data & derivations under all circumstances.		
If cloud solution – acknowledge you will identify the physical location of any and all data.		

List your systems' compliance with any relevant data protection standards.		
Acknowledge that vendor is obligated to return all data & destroy any copies and is to keep no information that is the property of GUC at any time for any reason.		
Configure system to ensure use of secure transmission for all data in transit.		
Provide policy or procedure as proof to ensure that vendor is able to adopt new security standards in a timely manner.		
Provide specification to prove the system encrypts data at rest.		
Provide potential for use of multi-factor authentication enabled should GUC choose to enable.		
Applications should provide adequate logging for forensic investigation if required		
Provide policy or procedure as proof that security assurances are baked into SDLC		
Provide assurances that GUC instances and data are only be accessible from GUC networks or networks as specified by GUC		
Provide a copy of privacy & data use policies for review by GUC before entering into any contractual agreements		