

Coconut Creek Automated Meter Reading (AMR) and Automated Metering
Infrastructure (AMI) Consulting Services
Statement of Work
Issued 4/24/2023

This Statement of Work document supplements the Quanta Technology Automated Meter Reading (AMR) and Automated Metering Infrastructure (AMI) Consulting Services document, Version 1.0 dated September 19, 2022. Items in this document are most current and supersede those items stated in the submitted proposal.

1.1 Project Scope

1.1.1 Phase 1: Requirements and Readiness

#	Service Items	Deliverables	Clarifications
1	Project Initiation	<ul style="list-style-type: none"> Kickoff Meeting Notes 	
2	Business Process Review	<ul style="list-style-type: none"> Key findings and notes Process Impacts / Gaps Avoiding Pitfalls Report Data flows CIS meter data summary 	<ul style="list-style-type: none"> Quanta will include in its analysis and recommendation consideration for an AMR solution including indicative pricing
3	Smart Grid Strategy	<ul style="list-style-type: none"> AMI Priorities Report 	
4	Field Studies	<ul style="list-style-type: none"> Summary of Findings Report 	<ul style="list-style-type: none"> Quanta to audit a minimum of 300 accounts and not to exceed 400 accounts over a 20-working day period Audit will document field conditions and will not involve physical meter exchanges or remediation of encountered conditions Quanta will provide a proposed meter sampling list to the City to allow the City (or approved third party) to perform calibration testing in line with the City's budget for these activities
5	Customer Outreach & Education	<ul style="list-style-type: none"> Customer Outreach Plan 	
6	RFP Technical Specification Development	<ul style="list-style-type: none"> RFP Technical Specification 	<ul style="list-style-type: none"> Quanta understands that GPS coordinates are not currently available for meter locations and will geo-code meter location addresses to support the RFP development at no added expense Two review cycles of the RFP are considered in scope

#	Service Items	Deliverables	Clarifications
			<ul style="list-style-type: none"> Quanta will include MDM-lite requirements in the RFP Technical Specification and request demonstration of MDM-lite capabilities during the Vendor Selection process
7	Qualified Vendor List	<ul style="list-style-type: none"> Qualified Vendor List 	<ul style="list-style-type: none"> Up to three approved vendors are considered in scope
8	City Council Presentation Support	<ul style="list-style-type: none"> Council Presentation Material 	

1.1.2 Phase 2: Vendor Selection

#	Service Items	Deliverables	Clarifications
1	Issue RFP / Responses to Vendor Questions	<ul style="list-style-type: none"> Issued RFP Bid Package to Pre-Qualified Vendors Consolidated questions/ responses sent to all Bidders 	<ul style="list-style-type: none"> City to issue the RFP bid package through preferred means
2	Bid Evaluation and Ranking	<ul style="list-style-type: none"> Compliance Review Report Evaluation Tool Matrix with vendor bid rankings 	<ul style="list-style-type: none"> Quanta to evaluate bid responses utilizing its proprietary evaluation tool with City parameter inputs. Quanta will provide an overview of the evaluation tool and its parameters to the City as part of the Vendor Selection process Up to three bid response evaluations are considered in scope
3	Vendor Shortlist Interviews / Presentation	<ul style="list-style-type: none"> Shortlist meeting for two vendors 	<ul style="list-style-type: none"> Quanta has budgeted travel included in the fixed price for one onsite trip for shortlist presentations
4	Final Recommendation to Support City Selection	<ul style="list-style-type: none"> PPT package with a final recommendation and supporting documentation 	
5	Contract Development / Negotiation Support	<ul style="list-style-type: none"> Technical advisement and support 	
6	City Council Presentation Support	<ul style="list-style-type: none"> Council Presentation Material 	

1.1.3 Phase 3: Project Implementation

#	Service Items	Deliverables	Clarifications
1	Vendor Kickoff	<ul style="list-style-type: none"> Meeting notes 	
2	Demo Test Board Development	<ul style="list-style-type: none"> Technical advisement to ensure functioning demonstration board 	
3	System Integration & FSAT Support	<ul style="list-style-type: none"> System Integration Plan Vendor to provide FSAT test plan 	
4	Limited Deployment Evaluation	<ul style="list-style-type: none"> Evaluation results summary 	<ul style="list-style-type: none"> Quanta will help the City select an appropriate limited deployment area, define the evaluation period/scope and provide advisory/technical support during the period (2 – 3 billing cycles estimated)
5	Mass Deployment Preparation	<ul style="list-style-type: none"> Mass Deployment Checklist 	
6	Field Rollout / Commissioning Support	<ul style="list-style-type: none"> Technical advisement during field rollout 	
7	Project Management Oversight		<ul style="list-style-type: none"> Quanta will provide PM oversight during the project implementation period (up to 362 hours over 15 months is considered in scope)
8	Business Readiness Evaluation	<ul style="list-style-type: none"> Readiness Assessment Summary 	
9	Project Close	<ul style="list-style-type: none"> Administrative Closure 	

1.2 Proposed Pricing

Quanta Technology offers the scope of work, deliverable items, and project team described in the submitted proposal and subject to documented assumptions on a Fixed Price basis with Milestone Billing as detailed below

#	Proposed Milestones	Percentage	Amount
M1	Phase 1: Completion of Project Kickoff	10%	\$28,000
M2	Phase 1: Completion of Field Studies and presentation for options on upgrades/replacements	15%	\$42,000
M3	Phase 1: Completion of Long-Term Smart Grid Strategy & Business Process Reviews	10%	\$28,000
M4	Phase 1: Completion of remaining items; RFP Specification, Vendor Pre-qualification & Research on Current product and service offerings/present to Coconut Creek	15%	\$42,000
M5	Phase 2: Completion of Vendor Selection & Recommendation	15%	\$42,000
M6	Phase 2: Completion of remaining activities (incl. Contract negotiation)	15%	\$42,000
M7	Phase 3: Completion of System Integration & FSAT and Limited Deployment Evaluation (Ready for Mass Deployment)	10%	\$28,000
M8	Phase 3: Completion of Full Deployment and Final System Acceptance Test	10%	\$28,000
	Total	100%	\$280,000

Project Travel is included in the fixed price offering and is based on the following estimates:

Item	Trips	Days	Staff	Cost Estimate
PH1: Business Process Workflows	1	4	2	\$3,140
PH1: Field & Asset Study	1	4	1	\$1,720
PH1: Council Presentation	1	2	2	\$2,070
PH2: Evaluation Results	1	2	1	\$1,110
PH2: Council Presentation	1	2	2	\$2,070
PH3: Vendor Kickoff Meeting	1	2	1	\$1,110
PH3: Integration FSAT testing	1	3	2	\$2,605
PH3: Additional Travel During Deployment (1 yr.)	4	2	1	\$4,440
PH3: Final Acceptance / Business Readiness	1	2	2	\$2,070
			Total	\$20,335

1.3 Assumptions

The following assumptions have been made in developing the cost and schedule for this proposal:

Item	Assumptions
General	
1	There is a fixed start date within 14 days of contract signing.
2	If the project scope or duration changes, we will work with the City team to assess impacts and work through a documented change order process accordingly.
3	Travel is included in the fixed price offering and is estimated at 12 trips which is deemed sufficient for the project. Additional travel beyond what is included must be mutually agreed upon, approved, and is billable at cost with no markup.
4	The City will provide contact points to answer or approve general day-to-day inquiries that may arise as work progresses. These contact points may be one person from each key function or department (e.g., IT, finance, billing, water meter shop, etc.).
5	The City project stakeholders will participate in scheduled weekly status calls and will work on assigned action items in a reasonable timeframe.
6	The City's finance/billing manager and IT staff will also be available as needed.
7	The required City CIS account data, including meter and location data, will be provided to Quanta Technology in a reasonable timeframe and be of reasonable quality. It is assumed that the data provided will be able to be incorporated into the GIS maps and RFP Technical Specifications. Additional data cleansing and delivery rounds may involve unplanned efforts to update the RFP/GIS maps.
8	Out-of-scope activities would be handled via a documented change order.
Phase 1: Requirements and Readiness	
9	Quanta Technology team members will review existing City operations, data, and assets on-site.
10	Quanta Technology will perform a field audit consisting of a minimum of 300 accounts and not to exceed 400 accounts over a 20-working day period.
11	The City will be available for interviews during the on-site operations review and other tasks as required.
12	The presentation of on-site meeting findings will be via a web conference.
13	The City will, at a minimum, provide addresses for each water metering endpoint.
14	Two review cycles for the AMI RFP technical specification are considered in scope. Additional review cycles after the first two are not in scope.
15	Quanta Technology will use existing tools for the bidder RFP evaluation with minimal modification. Customization will be scoped separately.
16	All information required for the RFP will be provided (meter types, sizes, location, etc.).
17	Quanta Technology will provide an RFP technical specification and associated pricing tables. The City will add its legal and commercial terms to create the final bid package. Quanta Technology can provide guidance on resolving conflicts between the Bid Terms and Conditions and the RFP Technical Specification.
Phase 2: Vendor Selection	

Item	Assumptions
18	Up to three approved vendors will be identified. Additional hours will be required and priced separately should more vendors be requested.
19	Quanta Technology will score up to three approved Bidder RFP Response Packages utilizing weight input values provided by City stakeholders (representing customer importance). Bid evaluations scored by City stakeholders can be priced separately if desired.
20	Quanta Technology will make the final vendor recommendation under standard services. The City will make the final Vendor Selection.
21	The City's legal and contracts staff will cover legal and commercial aspects (non-technical or pricing) in negotiations and contract development.
22	Quanta Technology will follow and support the City's required procurement process. Quanta recommends use of its SharePoint approach to bid management if allowed by the procurement process.
Phase 3: AMI Project Implementation	
23	Quanta Technology will provide Project Management (PM) oversight and management during the project implementation period which is estimated to be 15 months (3 months integration/planning, 12 months mass deployment). A total of 362 PM hours have been allotted to this activity. While not anticipated, additional PM hours if required would be provided on a T&M basis using Quanta's Senior PM rate at a discounted rate of \$171/hr.
24	Integration support and FSAT development are scoped solely for integration into the City's billing system, SCADA, and GIS system. Additional systems such as an MDM can be included but must be estimated separately once these systems are identified or applied and not included in provided pricing.
25	Quanta Technology recommends the evaluation of the AMI Vendor's MDM-Lite capabilities, which may fulfill the City's data analytics needs. Following a full understanding of the AMI Vendor's capabilities in this area, Quanta Technology can assist the City in the selection of a full MDM provider if deemed necessary and can scope that effort once a further understanding of system requirements is understood.