

Professional and Technical Services

Task Order 2 Statement of Work

For



Utilities Department

Project UT1813
Procurement Management



UtiliWorks[™]

Strategic Utility Consulting

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Task Order Number	Approval Date	
2	6/5/2018	
Work Package Name	Work Package Description	WBS Reference
Procurement Management – Project UT1813	RFP Development and Evaluation	2.1 – 2.2
Task Cost	Target Start Date	Target Completion Date
\$58,600 (includes travel and expenses at cost)	6/5/2018	12/31/2018

Package Includes:

Consultant Services
 Owner Requirements
 Service Fee Applied
 Subcontract
 Material Purchase
 Special Conditions

Resources Assigned	Interdependencies	
KT – Kara Truschel <input checked="" type="checkbox"/> CB – Chris Boyle <input checked="" type="checkbox"/> KS – Kody Salem <input checked="" type="checkbox"/> JM – Jon Mitchell <input checked="" type="checkbox"/> JK – Joe Kelly <input checked="" type="checkbox"/> SN – Steve Nees <input checked="" type="checkbox"/> DP – Dale Pennington <input checked="" type="checkbox"/>	<i>Before</i> Phase 1 Assessment (completed 9/2016)	<i>After</i> Phase 3 Vendor Contract Negotiations (not authorized under this Task Order)

Task Scope Summary:

This Task Order covers Phase 2 of the anticipated phases (see table below). The general scope of work for Phase 2 is to develop a Request for Proposal. A detailed scope of work is attached.

TOTAL PHASE 1 - 6
Phase 1 – Assessment and Pilot Planning (COMPLETE)
Phase 2 – Procurement Management
Phase 3 – Vendor Contract Negotiations and Development
Phase 4 – AMI Deployment Planning
Phase 5 – AMI Pilot and Full Deployment

Schedule of Values:

The schedule of values represents the firm fixed fee cost for each task, to be billed hourly. Project Management services are included in the task values below.

Phase 2 – Procurement Management			
Task ID	Task	Estimated Hours	Cost
2.1	RFP DEVELOPMENT	68	\$13,600
2.2	RFP ADMINISTRATION & RESPONSE EVALUATION SUPPORT	180	\$36,000
	Estimated Travel Related Expenses		\$9,000
	<i>Total</i>	<i>248</i>	<i>\$58,600</i>

There will be up to three onsite trips with two project staff in attendance. The travel will coincide with discovery sessions, a pre-proposal meeting, and short list interviews. Travel and expenses will be billed at cost.

Delivered by 
UtiliWorks Consulting, LLC

Date 5/18/18

Approved by _____
City of Lawrence KS
Utilities Department

Date _____

Phase 2 – Procurement Management

PURPOSE

Procurement Management will include the planning, preparation, and development of a Request for Proposals (RFP) for Advanced Metering Infrastructure (AMI) technology and professional services, in addition to assistance with the evaluation and selection of a preferred solution for City of Lawrence (“City” or “Lawrence”). Specific tasks and deliverables associated with Phase 2 are outlined below.

ASSUMPTIONS

- City will assign Project Manager to participate in regularly scheduled status calls with the UtiliWorks Project Manager to review open issues and remove barriers
- Work will be performed by UtiliWorks resources either on-site or off-site in the completion of task order deliverables
- UtiliWorks will provide structured project management to ensure that all project components are executed in a timely, organized fashion and completed to the project definition and expectations. Project Management activities include: maintaining the overall project schedule; working with all project participants to monitor progress and adjust the work plan as needed to stay on schedule; facilitating regular project progress and other meetings; creating project status reports as required with input from Lawrence; and, tracking project budget.
- UtiliWorks will track project progress to ensure all work stays within scope and initiate change requests for approval by Lawrence if required.

TASK 2.1 – RFP DEVELOPMENT

UtiliWorks’ approach to the procurement of technology is premised on the need to identify tight, detailed specifications and requirements. UtiliWorks will begin this task by conducting discovery sessions with the project stakeholders to develop specifications based on Lawrence’s business goals, objectives, current situation, and plans for future changes. UtiliWorks will also leverage information collected and deliverables completed from previous tasks from the AMI Assessment and Pilot Planning work completed in September 2016. The following topics and questions will be addressed as part of discovery that will roll up to the RFP document:

- Functional Requirements – What does the City want this new technology to do?
- Tele-Communications Requirements – Does the City have existing structures to mount communications equipment and what backhaul methods are available?
- Business Requirements – What business needs are fulfilled by AMI?
- Integration Requirements – How does the City want this new technology to interface with other systems, including Advanced CIS and MeterSense MDMS?
- Performance Requirements – What measures of performance should be specified in the RFP / Scope of Work for the vendor to satisfy the business requirements of the City?
- Reporting Requirements – What types of reports and reporting tools will the City need to optimize the information available with AMI?
- Procurement Requirements – What are the rules the City must follow to procure equipment and professional services?

UtiliWorks will prepare the RFP Scope of Work (SOW) with the intent to provide the vendor community with the essential information to prepare a robust response that is tailored to Lawrence. UtiliWorks will incorporate the SOW into Lawrence’s standard RFP boilerplate and review with the Lawrence team (including purchasing and legal) to ensure that all requirements are accurately reflected. It is anticipated that there will be several iterations for the RFP draft creation and the RFP draft review until we reach to the point where the RFP is complete and acceptable for publication.

UtiliWorks will also compile a comprehensive list of potential proposers that would represent viable options to satisfy the goals and requirements of Lawrence.

UtiliWorks will review and discuss key evaluation criteria based on business and technical requirements and will supply sample scoring methodologies. Evaluation criteria will be developed in conjunction with the City’s Evaluation Team to ensure an objective evaluation of all proposals submitted.

Deliverables: AMI Technical Requirements & Capabilities workbook, Publish-ready RFP document, Vendor List and Contact Information, Evaluation Criteria with Draft Scoring Rubric

TASK 2.2 – RFP ADMINISTRATION & RESPONSE EVALUATION SUPPORT

UtiliWorks will assist Lawrence with those tasks that must be managed once the RFP is released including: (a) advertising the RFP; (b) setting the agenda and leading a pre-proposal meeting; (c) receiving and responding to vendor questions; and (d) publishing any necessary addenda.

Prior to the receipt of responses, the UtiliWorks PM will work with the Lawrence PM to organize and schedule the proposal review process. As the responses are received, UtiliWorks’ team of SMEs will immediately start the evaluation process alongside the designated Lawrence Evaluation Team. UtiliWorks will summarize key components of each proposal and analyze each cost proposal. When lining up the cost proposals side-by-side, it is common to discover that each vendor quote differs in some fashion, making it difficult to perform an apples-to-apples comparison. We minimize this challenge with how we structure the RFP response requirements and our analytical approach to cost normalization.

UtiliWorks will work with Lawrence throughout the evaluation process to arrive at a shortlist of recommended candidates. We will work with the Lawrence Evaluation Team to customize the shortlist meeting agenda and outline questions for each vendor interview. Our team will attend the shortlist interviews and ensure that candidates answer questions comprehensively and to Lawrence’s satisfaction. UtiliWorks will also assist with reference checks and potentially arrange site visits, so that Lawrence may obtain useful feedback from the experiences of other utilities.

At the end of the evaluation process, UtiliWorks will guide Lawrence evaluation team through weighing the pros and cons of each shortlist candidate so that Lawrence can arrive at a final selection.

Deliverables: Pre-Proposal Meeting Agenda, Responses to Proposer Questions, High Level Proposal Summary, Cost Normalization, Shortlist Interview Agenda/Questions, Shortlist Interview Summaries

OUT OF SCOPE

- Vendor Contract Negotiations
- Vendor Scope of Work Development
- Deployment Program Management