

LEGAL NOTICE : The City of Bellmead, Texas, seeks sealed proposals (RFP No. 2024-4) for reviewing and correcting unbilled or misbilled utility services to enhance revenue. Proposals are due by 2:00 P.M. (CST) on October 30, 2024, at the City Secretary's Office, 3015 Bellmead Drive, Bellmead, Texas 76705 or through DemandStar. RFP documents are available on DemandStar or for review at City Hall. Questions must be submitted by October 23, 2024, to Karen Evans at kevans@bellmeadtx.gov. The City reserves the right to reject any proposals.

**REQUEST FOR PROPOSALS
REVIEW OF UNBILLED OR MISBILLED UTILITY SERVICES
FOR THE
CITY OF _____**

SUBMISSIONS ARE DUE AT THE ADDRESS SHOWN BELOW
NO LATER THAN

FRIDAY, _____, 2024 at 1:00 PM

AT

CITY OF _____
PURCHASING DEPARTMENT

_____, _____

THE RESPONSIBILITY FOR SUBMITTING A RESPONSE TO THIS PROPOSAL AT THE OFFICE OF THE PURCHASING MANAGER ON OR BEFORE THE STATED TIME AND DATE WILL BE SOLELY AND STRICTLY THE RESPONSIBILITY OF THE PROPOSER. THE CITY WILL IN NO WAY BE RESPONSIBLE FOR DELAYS CAUSED BY THE UNITED STATES POSTAL SERVICE OR CAUSED BY ANY OTHER OCCURANCE. A LATE SUBMISSION OF THIS PROPOSAL WILL NOT BE CONSIDERED.

REVIEW OF UNBILLED OR MISBILLED UTILITY SERVICES

- I. PURPOSE: The City of _____, hereinafter referred to as the City, seeks proposals in response to this Request for Proposals (RFP) from firms specializing in the analysis and correction of utility system (examples include: water, wastewater, stormwater, solid waste) under billings and miss-billings, with the intent of improving accountability and rate payer equity, thereby increasing revenue for the City.
- II. SCOPE OF PROJECT
 - A. TITLE OF PROJECT – *REVIEW OF UNBILLED OR MISBILLED UTILITY SERVICES.*
 - B. OBJECTIVE - The proposer, in conjunction with the Customer Service Staff and Utility Operations staff (hereinafter “City Staff”), will examine certain utility billing and metering functions to identify causes of, and remedies for, inaccuracies in all functions related to utility billings. The proposer will provide the software to analyze raw unjoined account data provided by the City; at no time will the City be responsible for providing data manipulation of any sort. The proposer will provide experienced multidiscipline field personnel capable of evaluating all aspects of utility usage; provide turnkey flow metering (Transit Time, open channel sewer, Doppler) where necessary including associated data analysis, thereby identifying variances with the account record; at no time will the City be responsible for providing field personnel for the performance of this function. The City is seeking performance fee based proposals. Specifically, the proposer will identify opportunities for revenue recovery/enhancement through the correction of problems associated with such inaccuracies. The following areas are to be addressed:
 1. BILLING SYSTEM DEFICIENCIES AND UNBILLED SERVICES - Billing system deficiencies are defined as any factor adversely affecting total collected revenue by the City on an account. Examples of these factors are:
 - misapplication of the City rate structure
 - billing system accuracy
 - unknown connections
 - account coding errors
 - chronic meter reading errors
 - credits for water not returned to sewer
 - incorrect impervious area records
 2. UNMETERED FIRE LINES - Fire protection systems are to be used within the guidelines of City Ordinance. Fire lines that are used for any unauthorized non-emergency service represent lost revenues to the City. The proposer will be required to have the requisite experience to determine if any unauthorized use of existing fire lines is occurring. The proposer, in conjunction with the City Staff, will develop and implement a program to correct all identified deficiencies and to limit reoccurrence of revenue loss related to fire lines.

3. **METERING** - The City routinely conducts testing and repairs of meters within its system. It is anticipated that despite the utility's diligence, additional field investigation may result in the discovery of potentially problematic situations. The proposer will be provided billing and consumption history related to known utility consumers so that the proposer may review and research these consumers to verify correct billings. The proposer will provide the requisite manpower, portable Transit Time Flow Meter, hand tools, vehicle and equipment to identify problematic conditions in the field.
 4. **SERVICE THEFT** - Theft of service includes illegal connections made to the utility's water distribution and wastewater collection systems and on open meter bypasses in the system. An illegal connection, for example, could consist of a straight pipe connection rather than a metered connection. Locations of all authorized meters and connections will be provided to the successful proposer. To facilitate detection of unauthorized meter bypass use, the Utility will provide information related to those accounts which are "locked", and their associated addresses.
- C. **SYSTEM CONCEPT AND SOLUTION** - Define in detail your understanding of the issues presented in section B., and your recommended means of addressing them. In addition, provide any other facts or alternative information you deem necessary to evaluate your proposal. Responses to the following questions must be answered in order for your submission to be deemed responsive.
1. What is the relevance of the Utility's historical data to this project.
 2. What is your plan to accomplish the stated project objective.
 3. Describe within your program the criteria to evaluate City billing policy as it relates to the end users of water and wastewater service of the City.
 4. Describe in detail the methodologies and procedures for documentation of revenue recovery attributable to the proposer's actions.
 5. How will your program impact the allocation of City Staff time.
 6. What equipment or facilities will you require from the City.
 7. How long after the award of a contract will you require for mobilization.
- III. **RESPONSE FORMAT** - In order to be considered responsive, the proposer shall organize the response in the following manner:
- A. **TECHNICAL PROPOSAL RESPONSE FORMAT**
1. Transmittal letter - This letter shall be no longer than one page in length, addressed to the Director, and signed by the representative of the proposer authorized to represent the firm contractually.
 2. Table of Contents - A table of contents should follow the transmittal, should list all titles, sections, and major subsections. All pages of the Proposal should be sequentially numbered.
 3. Executive Summary - This shall be of three pages or less, and shall provide a summation of the Proposal in succinct terms.
 4. Business Organization and Project Management Structure - State the full name and address of your organization and identify the parent company

if you are a subsidiary or division of a larger organization. Specify the branch office or other subordinate element that will perform or assist in performing the necessary work. Indicate whether you operate as a partnership, corporation or individual. Provide a general explanation and chart which specifies project leadership, reporting responsibilities and how the proposer will interface with City Staff.

5. Prior Experience - The City requires the proposer to have successfully engaged in a minimum of three (3) projects of this nature within the last ten years. Respondents shall submit reference information (name, telephone number and address) related to each project. Only projects equivalent to that contemplated by the City in this RFP shall be listed.
 6. Personnel - Identify all key personnel who will be involved in the project, and include resumes. List only those persons who will be directly involved.
 7. Implementation Plan - Define in detail your understanding of the System Concept and Solution as described in this RFP. Include your work program, by task, as well as any related charts, diagrams, etc. helpful in understanding the proposed operational methodology.
 8. Authorized Negotiator - Include the name and title of the individual within the company who is authorized to negotiate contract terms and render binding decisions of contract matters.
- B. PRICE PROPOSAL RESPONSE FORMAT - Detail your proposal for compensation for the work to be performed by completing the attached price proposal included in this RFP. Compensation will be based on a specified percentage of documented future and retroactive revenue recovery resulting from the project. The Price Proposal is a presentation of the Proposer's total offering price which is to include all costs for providing each component of the required goods or services. The Proposer is responsible for all direct and indirect costs associated with the performance of the work necessitated under this RFP, except for service and meter installations and replacements, which shall be performed by the City. Proposers must utilize the format attached hereto entitled "Price Proposal".

IV. PROPOSAL EVALUATION - This procurement will comply with the applicable City policies.

- A. This evaluation will include all pertinent matters contained within this RFP. Award of a contract may be made without discussions with firms after Proposals are received. The City reserves the right to accept or reject any recommendations made and/or solutions proposed, or reject all Proposals and to resolicit for Proposals in such an event. Proposals should therefore be submitted on the most favorable terms.
- B. The City intends to receive, review, and evaluate Proposals according to the general procedures as outlined in this RFP. The evaluation will determine if proposer has met the criteria of the RFP to be considered as "qualified to perform the work". The items to be considered are not limited to, but include the following:

1. System Concept and Solution Proposed - The grasp of the issues and their solutions, responsiveness to terms and conditions, completeness and thoroughness of the technical data and documentation.
 2. Demonstrated Applicable Experience - This will include documentation of successful revenue recovery in three or more previous engagements and also include total years performing this service.
 3. Personnel Qualifications.
 4. Evidence of good organization and management practices.
- V. PROPOSAL SUBMISSION PROCEDURE - An unbound one-sided, 8 1/2 x 11" original and three (3) copies (a total of 4) of the complete proposal response must be received by Friday, _____, 2022 at 1:00 PM. Note: The Price Proposal envelope will remain sealed during the Technical Proposal review process.
- A. Proposals will be opened at the City of _____ Purchasing Department by the Purchasing Manager in conjunction with the City Manager or his representative.
 - B. The original and all copies must be submitted in a sealed envelope or container stating on the outside; proposer's name, address, telephone number, due date, due time, the RFP title (*Analysis of Unbilled Water and Wastewater Usage*) and the identifying RFP number. The sealed package containing the Technical Proposal and the separately sealed Price Proposal shall be submitted to:
City of _____
Purchasing Department

_____, _____
 - C. Hand-carried proposals may be delivered **ONLY** between the hours of 8:00 AM and 4:30 PM, Monday through Friday, excluding holidays observed by the City.
 - D. Proposers are responsible for informing any commercial delivery service, if used, of all delivery requirements and for insuring that the required address information appears on the outer container used by such service
 - E. The Technical Proposal and the Price Proposal must be signed by an officer of the company, who is legally authorized to enter into a contractual relationship in the name of the proposer, and proposer must affix their company's corporate seal to both the Technical and Price Proposal. In the absence of a corporate seal, the Proposal forms must be notarized by a Notary Public.
 - F. The submission of a proposal by a proposer will be considered by the City as constituting an offer by the Proposer to perform the required services at the stated fees.
 - G. Any Proposal received after the RFP closing date will be considered non-responsive and will be returned unopened to the respondent.
- VI. SELECTION PROCEDURE - All proposals will be subject to the following:
- A. Each Technical Proposal will be reviewed to determine if it is responsive to the submission requirements outlined in the RFP. A responsive Technical Proposal is one which follows the requirements of the RFP, includes all required documentation, is submitted in the form outlined in the RFP, is of timely submission, and has the appropriate signatures required. Failure to comply with these requirements may deem your proposal non-responsive.

- B. The City Manager will appoint an Evaluation Committee who will be responsible for reviewing and evaluating the Technical Proposals received to determine that each proposer has met the qualifications of this RFP.
- C. Upon completion of the Technical Proposal evaluation, the Committee may choose to conduct oral presentation(s), from any proposer warranting further consideration. Upon completion of any oral presentation, the Committee may re-evaluate the Technical Proposal based upon the written combined with the oral input.
- D. The Evaluation Committee will forward their recommendation to the City Manager for review.
- E. Those Technical Proposals that are not qualified will be returned to the proposer with the sealed Price Proposal envelope unopened.
- F. Upon completion of the Evaluation Committee and City Manager's review, the sealed Price Proposal envelope of each qualified proposer will be opened by the Manager in the presence of the City's Contact person and other City representatives. Proposers who wish to attend such opening may do so by communicating with the City's Contact person for date, time and location.
- G. AWARD OF CONTRACT - The City shall award a contract to the Proposer who offers the best overall plan for the City, factoring in technical ability and the most favorable plan for the City to share increase revenue.

VII. ADDITIONAL REQUIREMENTS

- A. CONTACT PERSON - The contact person for this RFP is (**name, address, telephone, and fax number**). Any requests for additional information or clarification regarding this RFP should be addressed to the contact person in writing. Furthermore, proposers are advised that from the date of the release of this RFP until award of the contract, NO contact with City personnel related to this RFP is permitted, except as authorized by the contact person. Any such unauthorized contact shall not be used as a basis for responding to this RFP and also may result in the disqualification of the proposer's submittal.
- B. PRE-PROPOSAL CONFERENCE - A mandatory pre-proposal conference has been scheduled for (**date, time, location**). Proposers are requested to inform the contact person of the number of persons expected to attend the conference, no later than 24 hours prior to the scheduled conference. Proposers are encouraged to submit written questions to the contact person in advance.
- C. INSURANCE - The successful proposer shall be required to provide by the date of the City's Notice to Proceed ... (**insert standard City requirement for Worker's Compensation, General Liability, Auto, etc. naming the City as additional insured, etc .**)
- D. CONTRACT INCORPORATION - Respondent should be aware that the contents of the successful Proposal will become a part of the subsequent contractual documents. Failure of the respondent to accept this obligation may result in the cancellation of any award.
- E. FAILURE TO COMPLY - Failure to comply with the Proposal Response Format detailed in this RFP may result in the respondent's proposal being rejected as non-responsive.

- F. PROPOSAL ACCEPTANCE PERIOD - All Proposals must include a statement that they are valid for a minimum period of ninety (90) days subsequent to the RFP closing date.
- G. RELEASE OF INFORMATION - Submission of information received by the City from respondents relative to this RFP shall not be released by the City during the Proposal evaluation process or prior to contract award.
- H. PROPRIETARY INFORMATION - If information in the Technical Proposal is to be considered proprietary, the respondent is required to identify such information accordingly. By submission to this RFP, proposer agrees that information not labeled proprietary shall be made available upon public request, after a contract has been awarded.
- I. COST INCURRED IN RESPONDING - All costs directly or indirectly related to the response by a proposer to this RFP shall be the sole responsibility of and shall be borne by the respondent. This includes any cost associated with any oral presentation required by the City during the qualification process, prior to the opening of the sealed Price Proposal.

**REVIEW OF UNBILLED OR MISBILLED UTILITY SERVICES
FOR THE CITY OF _____**

PRICE PROPOSAL

For any work performed by the proposer which results in increased revenue for the City of _____ in accordance with the provisions of the RFP, the proposer shall be paid _____ percent of all increase revenue for a term of _____ months thereafter.

For the purpose of this RFP, increased revenue shall mean the difference between the amount of monthly income received by the City on an account subsequent to and prior to corrective action being taken on all unbilled or misbilled water and wastewater services provided by the City, including retroactive collections made as a result of work by the proposer.

The proposer is responsible for all direct and indirect costs associated with the performance of the work necessitated under this RFP, except for service and meter installations, replacements, and repairs, which shall be performed by the City.

WITNESSETH:

(signature)

(signature)

(print name)

(print name)

ATTEST:

(firm name)

(signature)

(date)

(print name)

NOTE: Proposer shall enclose this Price Proposal in a separate sealed envelope identified with the Proposer's name, address, telephone number, due date, due time, the RFP title (REVIEW OF UNBILLED OR MISBILLED UTILITY SERVICES) and the identifying RFP number.