

 Submit Proposals To: City of Hollywood 2600 Hollywood Boulevard Hollywood, Florida 33020 Office of City Clerk, Room 221	CITY OF HOLLYWOOD, FLORIDA REQUEST FOR PROPOSALS PROPOSER ACKNOWLEDGMENT
RFP Title: Contracted Utility Customer Service and Related Field Services RFP No.: 4273-12-IS A Cone of Silence is in effect with respect to this RFP. The Cone of Silence prohibits certain communications between potential vendors and the City. For further information, please refer to Section 30.15(E) of the City's Code of Ordinances.	Proposals must be received prior to 3:00 P.M., February 10, 2012 and may not be withdrawn within 90 calendar days after such date and time. Proposals received by the date and time specified will be opened in Room 303. All Proposals received after the specified date and time will be returned unopened. Procurement Services Contact: Ian Superville or Linda Silvey, or Joel Wasserman or his designee Telephone No.: (954) 954-921-3552 or (954) 921-3200 or (954) 921-3290

PROPOSER ACKNOWLEDGMENT

THIS FORM MUST BE COMPLETED AND SUBMITTED ALONG WITH THE COMPLETE PROPOSAL PRIOR TO THE DATE AND THE TIME OF PROPOSAL OPENING. THE PROPOSAL SUMMARY SHEET PAGES ON WHICH THE PROPOSER ACTUALLY SUBMITS A PROPOSAL AND ANY PAGES UPON WHICH INFORMATION IS REQUIRED MUST BE COMPLETED AND ATTACHED WITH ALL PAGES OF THE PROPOSAL DOCUMENT.

Proposer's Name:	Fed. ID No. or SS Number
Complete Mailing Address:	Telephone No.: Fax No.:
Do You Have an Permanent Office Located in the City of Hollywood? Yes ☐ No ☐	E-Mail Address:
Indicate type of organization below: Corporation ☐ Partnership ☐ Individual ☐ Other ☐	Is the Proposer a City of Hollywood Qualified Local MBE or SBE? Yes ☐ No ☐ Certifying Agency:

ATTENTION: FAILURE TO SIGN (PREFERABLY IN BLUE INK) OR COMPLETE ALL RFP SUBMITTAL FORMS AND FAILURE TO SUBMIT ALL PAGES OF THE RFP DOCUMENT AND ANY ADDENDUMS ISSUED MAY RENDER YOUR RFP NON-RESPONSIVE.

CHECK BOX BELOW TO ACKNOWLEDGE THIS PROPOSAL.

The proposer certifies that this proposal is based upon all conditions as listed in the proposal documents and that he has made no changes in the proposal document as received. He further proposes and agrees, if his proposal is accepted, he will execute an appropriate agreement for the purpose of establishing a formal contractual relationship between him and the city of Hollywood, Florida, for the performance of all requirements to which this proposal pertains. Further, by checking the agree box listed below (if submitting RFP online) and by signing below in blue ink (if submitting RFP via mail) all RFP pages are acknowledged and accepted as well as any special instruction sheet(s) if applicable. I am authorized to bind performance of this RFP for the above proposer.

Agree ☐

Authorized Name (Type or Print)

Title

Date

Authorized Signature



CITY OF HOLLYWOOD, FLORIDA

RFP-4273-12-IS

BID/PROPOSAL NOTIFICATION

PROCUREMENT SERVICES DIVISION

Notice to Offerors: Log on to www.hollywoodfl.org and select the link to Vendor Registration & Bids to register as a supplier.

BID/PROPOSAL DOCUMENT INFORMATION

Bid/Proposal Number:	RFP-4273-12-IS
Bid/Proposal Name:	Contracted Utility Customer Service and Field Related Services
Procurement Contact Person:	Ian Superville
Email Address:	isuperville@hollywoodfl.org
Telephone Number:	954-921-3552
Bid/Proposal Opening Date:	February 10, 2012
Pre-Bid/Proposal Conference Date:	January 19, 2012
☐ Mandatory if Box is Checked	

To view or download this Bid or RFP and any addenda go to:

www.hollywoodfl.org/purchasing/bids_pdf.asp and click on the bid or proposal number referenced above on this document or the corresponding addendum.

A Cone of Silence is in effect with respect to all Formal Bids and Request for Proposals. The Cone of Silence prohibits certain communications between potential vendors and the City. For further information, please refer to Section 30.15 (E) of the City's Code of Ordinances.

Bid/Proposal Name: Contracted Utility Customer Service and Related Field Services

Bid/Proposal Number: RFP-4273-12-IS

Bid/Proposal Opening Date: February 10, 2012

Firm Name/Address: _____

Return to: _____

City of Hollywood, Florida
c/o: Office of City Clerk
2600 Hollywood Blvd., Rm#: 221
Hollywood, Florida 33020

NOTE: Always use the label to the left on all packages when returning your bid or proposal to the City.

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FORM 1: PROPOSER QUESTIONNAIRE – EXPERIENCE AND FEES

FORM 2: PROPOSER QUESTIONNAIRE – SCOPE OF SERVICES

The City's ordinances regarding utility services are found in Chapters 50, 51, 52, and 54. Proposers may view these Chapters on line at www.hollywoodfl.org . On the "Select a Service" menu on the left side, select "Code of Ordinances" and then select "Title V: Public Works" on the menu to the left.

For a copy of the current contract with the City's existing provider for utility customer service and related field services, please visit the City's website at www.hollywoodfl.org . On the "Select an Agency" menu on the right side, select "Procurement Services" and then "View Bid". Then scroll down until you locate RFP-4273-12-IS.



NOTICE TO ALL BIDDERS AND PROPOSERS

Cone of Silence

The City of Hollywood City Commission adopted Ordinance No. O-2007-05, which created Section 30.15(E) imposing a Cone of Silence for certain City purchases of goods and services.

The Cone of Silence refers to limits on communications held between vendors and vendor's representatives and City elected officials, management and staff during the period in which a Formal Solicitation is open.

The Ordinance does allow potential vendors or vendor's representatives to communicate with designated employees for the limited purpose of seeking clarification or additional information. The names and contact information of those employees that may be contacted for clarification or additional information are included in the solicitation.

The Cone of Silence does not prohibit a vendor or vendor's representative from communicating verbally, or in writing to the City Manager, the City Manager's designee, the City Attorney or the City Attorney's designee on those procurement items to be considered by the City Commission.

The Cone of Silence does not prohibit a vendor or vendor's representative from making public presentations at a duly noticed pre-bid conference or duly noticed evaluation committee meeting or from communicating with the City Commission during a duly noticed public meeting.

The Cone of Silence shall be imposed when a formal competitive solicitation has been issued and shall remain in effect until an award is made, a contract is approved, or the City Commission takes any other action which ends the solicitation.

To view the Cone of Silence, Ordinance No. O-2007-05, go to the City of Hollywood's Official website at <http://www.hollywoodfl.org/ConeOfSilence>

**REQUEST FOR PROPOSAL FORM
CITY OF HOLLYWOOD, FLORIDA**

“AN EQUAL OPPORTUNITY AND SERVICE PROVIDER AGENCY”

PART I: PURPOSE OF RFP AND OVERVIEW OF PROCESS

A. WORK OBJECTIVE

The City of Hollywood owns and operates a water and wastewater utility which presently services about 40,000 customers within Hollywood. Since 1996, the City has contracted out the customer service side of its utility. Field services (including but not limited to meter reading and service connection/disconnection) and utility customer services (including but not limited to account setup and maintenance, monthly account billing and delinquency processing, new service request and deposit processing, answering customer questions, and investigating customer complaints) are presently provided by a private contractor who operates from the City's main business location at 2600 Hollywood Boulevard. The current contract expires on September 30, 2012, and a competitive proposal process to engage a private contractor beginning October 1, 2012 must be conducted.

The City is soliciting proposals from qualified vendors to provide utility customer services (including but not limited to account setup and maintenance, monthly account billing and delinquency processing, new service request and deposit processing, answering customer questions, and investigating customer complaints) as well as field services (specifically service connection/disconnection, checking for leaks, delivery of customer notifications to the property, and other related services). As the City anticipates completing the installation of automated meter reading (AMR) devices on its 40,000 meters throughout Hollywood in 2012, this RFP does not include meter reading services as part of the scope of services; however, limited meter reading (estimated at 100 meters or less per month) may be necessary in certain cases where an AMR device fails to register a read and the meter cannot be estimated. Field staff would be requested to read this small number of meters by the creation of a work order.

It is the intent of the City to select the one vendor that demonstrates a proven record in providing utility customer services to government or public utility clients, and that best meets or exceeds the City's RFP requirements for the most cost-effective price. Upon ranking all proposals received and with the approval of the City Commission, the City shall attempt to negotiate a services contract with the number one ranked proposer. A copy of the City's existing contract for meter reading and utility customer services is available on the City's website www.hollywoodfl.org. From the right side menu "Select An Agency", select "Procurement Services", then "View Bid" and scroll down to RFP-4273-12-IS. Final City Commission approval of the negotiated services agreement is expected by May. The new contract will commence on October 1, 2012.

B. TERM OF CONTRACT

The contract term shall commence on October 1, 2012 and end on September 30, 2013. The contract will be renewed for an additional four-year period upon satisfactory performance by the contractor during its first one-year term, and with the approval of the City Commission. The second contract term, upon renewal, will continue and terminate September 30, 2017. For fee computation and budgeting purposes, the contract year shall be considered beginning October 1 and ending September 30 of each year.

The contract may be terminated by the contractor upon six (6) months prior written notice to the City in the event of substantial failure by the City to perform in accordance with the terms of this contract through no fault of the contractor. It may also be terminated by the City with or without cause forthwith upon giving 90 days written notice to the contractor. The City requires that the pricing terms and conditions of the contract entered into with the successful proposer remain firm throughout the five-year term of the contract unless modified or cancelled in accordance with the provisions of the contract. The contract may be extended an additional five years with the approval of the City Commission. In no event will the contract extend beyond September 30, 2022.

C. SCOPE OF SERVICES

The Scope of Services for this Request for Proposal is set forth in "Form 2: Proposer Questionnaire - - Scope of Services" which is to be completed by proposer and attached as part of proposer's response.

Not Part of the Scope of Services:

Cashiering and payment processing

- Maintenance, repair, installation and removal of water meters
- Meter reading except in specific, limited cases where the AMR device is not operational
- Water/wastewater plant operations

Prospective new services:

Proposers may address in Form 2 any prospective new services or ideas for operational efficiencies as part of their proposals.

D. MINIMUM QUALIFICATIONS

Proposer must have an office located in the State of Florida or an existing business presence with other water/sewer utilities in the State of Florida, and be able to demonstrate proven experience providing utility customer services and field services for a government or utility.

Proposer must have adequate organization, facilities, equipment and personnel to insure prompt and efficient services to the City. The City reserves the right before recommending any award to inspect the proposer's facilities, organization and financial condition or to take any other actions necessary to determine the proposer's ability to perform in accordance with the specifications, terms and conditions of this RFP. Severe or repeated breakdown of service due to the lack of sufficient personnel, organization, facilities or equipment will be cause for cancellation of the contract once entered into.

PART II: PROPOSAL SUBMISSION REQUIREMENTS

A. SUBMISSION REQUIREMENTS

All Proposals shall be received by the City Clerk, City of Hollywood, City Hall, 2600 Hollywood Boulevard, Room 221, Hollywood, Florida 33020, and plainly marked on the outside of the envelope.

PROPOSAL ENVELOPES SHALL BE SEALED AND IDENTIFIED AS SPECIFIED BELOW:

RFP NO. 4273-12-IS

**Contracted Utility Customer Service and
Related Field Services**

TO BE OPENED:

3:00 P.M., February 10, 2012

TO BE ADDRESSED TO:

**CITY OF HOLLYWOOD
OFFICE OF THE CITY CLERK
2600 HOLLYWOOD BLVD., ROOM 221
HOLLYWOOD, FLORIDA 33020**

ONE ORIGINAL, ONE CD AND FIFTEEN (15) COPIES OF YOUR PROPOSAL MUST BE SUBMITTED AT OR BEFORE TIME OF PROPOSAL OPENING. PROPOSER MUST INCLUDE A NOTARIZED STATEMENT THAT THE CD VERSION IS A TRUE COPY OF THE PRINTED VERSION.

It will be the sole responsibility of the Proposer to have his Proposal delivered to the Office of the City Clerk on or before the closing Time and date shown above for receipt of Proposals. If a Proposal is sent by mail, the Proposers shall be responsible for its delivery to the City Clerk's Office before the closing Time and date shown above for receipt of Proposals. Proposals thus delayed will not be considered and will be returned unopened after award.

SUBMISSION REQUIREMENTS (CONTINUED)

The Proposal shall be signed by a representative who is authorized to contractually bind the Proposer.

Each Proposal shall be prepared simply and economically, providing a straightforward, concise delineation of the Proposer's capabilities to satisfy the requirements of the RFP. The emphasis in each Proposal must be on completeness and clarity of content. In order to expedite the evaluation of Proposals, it is essential that Proposer follow the format and instructions contained herein. If the Proposer so wishes, the Proposal may be accompanied with brochures, promotional materials, or displays properly identified. This supplemental information should relate directly to the work to be performed as defined in this RFP's Scope of Services, and should be kept to a reasonable minimum. However, Proposal Submission Requirements as listed herein must be followed. All Proposals must be submitted as specified on the Proposal pages which follow. Any attachments must be clearly identified.

The Proposal shall be considered an offer on the part of the Proposer, which offer shall be deemed accepted upon approval of the City Commission of the City of Hollywood, and in case of default the City of Hollywood reserves the right to accept or reject any or all Proposals, to waive irregularities and technicalities, and request new Proposals. The City also reserves the right to award any resulting agreement as it deems will best serve the interests of the City.

Format of Proposer's RFP Response to the City

- 1) Official Title Page of RFP -4273-12-IS (Proposer Acknowledgement Form)**
- 2) RFP Checklist**
- 3) FORM 1: PROPOSER QUESTIONNAIRE – EXPERIENCE AND FEES**
 - Part A: Proposer Background and Understanding of the Work to be Performed
 - Part B: Client Experience and References
 - Part C: Proposed Organization and Staffing, Including Qualifications and Experience of Key Personnel
 - Part D: Proposer Fees
 - Part E: Statements and Declarations
 - Part F: Proposer Sign-Off
- 4) FORM 2: PROPOSER QUESTIONNAIRE – SCOPE OF SERVICES**
 - Part A: Field Services
 - Part B: Customer Service
 - Part C: Billing and Delinquency Processing Services
 - Part D: General Administration
 - Part E: City Qualifications and Disclaimers
 - Part F: New or Innovative Services or Procedures Proposed
 - Part G: Proposer Sign-Off
- 5) Copy of your company's most recently audited financial statements**
- 6) Any other information that your company believes is relevant to its proposal**

To help proposers respond completely to the RFP and to assist the City in evaluating RFP responses, FORMS 1 AND 2 are available in Microsoft Word form templates so that you do not need to type the forms. **Proposers are required to use the form templates in preparing their responses - - you need only tab through the sections and questions, and type your responses. These template forms are available on the City's website at www.hollywoodfl.org. Go to the right side menu "Select and Agency" and select "Procurement Services." Then select "View Bid" and scroll down to RFP-4273-12-IS.** Copies of the forms have been provided in the "Exhibits" area of this RFP document.

Scope of Services Required As Set Forth in Form 2: The Scope of Services herein provided, while comprehensive and inclusive of the major tasks and responsibilities of the contractor, does not include every task and responsibility of the contractor which are too numerous to detail. The contractor is responsible for performance of the primary functions set forth in the Scope of Services in accordance with the City's Code of Ordinances and related procedures. There may be other secondary tasks or responsibilities that are necessary in order to perform the primary functions and responsibilities, to fulfill the requirements of the related sections of City Code, or to perform related procedures as set forth by the City.

Volume of Work: Projected volumes of transactions are provided in Form 1 for purposes of determining staffing and pricing your proposal. The volumes stated are for information and tabulation purposes only. No guarantee is given or implied as to the exact volume of transactions.

B. INSURANCE REQUIREMENTS

Contractor shall maintain, at its sole expense, during the term of this agreement the following insurances:

- A. Commercial General Liability **Insurance naming the City as an additional insured** with not less than the following limits:

General Aggregate	\$2,000,000
Each Occurrence	\$1,000,000
Personal and Advertising Injury	\$1,000,000
Products & Completed Operations	\$1,000,000
Fire Damage	\$50,000

Coverage shall include contractual liability assumed under this agreement, products and completed operations, personal injury, broad form property damage, and premises-operations.

- B. Commercial Automobile Liability **Insurance naming the City as an additional insured** with not less than the following limits:

Combined Single Limit	\$1,000,000
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Coverage shall include contractual liability assumed under this agreement, owned, hired and non-owned vehicles.

Worker's Compensation:

- C. Worker's compensation insurance covering the contractor and the contractor's employees with not less than the following limits:

Each Accident	\$500,000
Disease, Each Employee	\$500,000
Disease, Policy Limit	\$500,000

Employee Dishonesty Fidelity Bond:

The minimum limits of liability shall be:

E. Per Occurrence	\$1,000,000
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Please Note: The Certificate shall contain a provision that coverage afforded under the policy will not be cancelled until at least thirty (30) days prior written notice has been given to the City. Certificates of insurance, reflecting evidence of the required insurance, shall be provided to the City's Risk Manager. In the event the Certificate of Insurance provided indicates that the insurance shall terminate and lapse during the period of this Agreement, the vendor shall furnish to the City's Risk Manager, at least thirty (30) days prior to the expiration of the date of such insurance, a renewed Certificate of Insurance as proof that equal and like coverage for the balance of the period of the Agreement or extension thereunder is in effect.

The insurance policy shall not contain any exceptions that would exclude coverage for risks that can be directly or reasonably related to the scope of goods or services in this bid/proposal. A violation of this requirement at any time during the term, or any extension thereof shall be grounds for the immediate termination of any contract entered in to pursuant to this bid/proposal. In order to show that this requirement has been met, along with an insurance declaration sheet demonstrating the existence of a valid policy of insurance meeting the requirements of this bid/proposal, the successful proposer must submit a signed statement from insurance agency of record that the full policy contains no such exception.

The City reserves the right to require additional insurance in order to meet the full value of the contract.

C. GENERAL INFORMATION AND SCHEDULE

For information concerning procedure for responding to this Request for Proposal (RFP), contact the Procurement Services Division, Ian Superville at (954) 921-3552 or Linda Silvey, Procurement Specialist at 954-921-3200 or Joel Wasserman, Director of Procurement Services at 954-921-3290 or his designee. Such contact is to be for clarification purposes only. Material changes, if any, to the scope of services, or Proposal procedures will only be transmitted by written addendum.

It is preferred that all questions be submitted in writing. Questions should be directed to the City of Hollywood, P.O. Box 229045, Hollywood, Florida 33022-9045, Attention: Ian Superville, Procurement Services Division, or to facilitate prompt receipt of questions, they may be sent via fax at (954) 921-3086, or via e-mail to isuperville@hollywoodfl.org and lsilvey@hollywoodfl.org. **Questions must be received no later than January 13, 2012 by 5:00 p.m..**

RFP Schedule

REQUEST FOR PROPOSALS ISSUED	DECEMBER 12, 2011
PRE-PROPOSAL CONFERENCE AT 2:00 P.M.	JANUARY 19, 2012
PROPOSAL DUE DATE-PRIOR TO 3:00P.M.	FEBRUARY 10, 2012

D. PRE-PROPOSAL CONFERENCE

A Pre-Proposal Conference for all firms interested in submitting Proposals will be held on Thursday, January 19, 2012 AT 2:00 P.M. IN ROOM 215, CITY HALL, CITY OF HOLLYWOOD, 2600 HOLLYWOOD BOULEVARD to answer questions about the engagement. Written addenda will be issued, if required, as soon as possible after that conference.

To provide the City of Hollywood sufficient time to adequately prepare responses to vendor inquiries at the pre-Proposal conference, it is desirable that all questions be submitted in writing to the City of Hollywood Procurement Services, PO Box 229045 Hollywood, Florida 33022-9045 (or by fax at (954) 921-3086 or via email to isuperville@hollywoodfl.org and lsilvey@hollywoodfl.org) **no later than January 13, 2012 by 5:00 p.m.** Written responses to all questions will be provided to each participant and discussed at the pre-Proposal conference. Written addendum will be issued, if required, as soon as possible after that conference.

Due to the importance of the proposers having a clear understanding of the specifications/scope of work and requirements for this solicitation, **attendance at this conference is highly recommended.**

E. OTHER CONSIDERATIONS

1. The City reserves the right to approve substitutions for assigned personnel proposed for this engagement. Substitutions may be allowed for staff turnover, sickness or other emergency situations.
2. All contact for information regarding the Proposal must be addressed to the City of Hollywood's Procurement Services Division. Over the course of this RFP process, related contact with City Staff by a respondent or their agent, other than as part of the evaluation process or for clarification purposes, will be grounds for automatic disqualification of that vendor.

Each Proposer shall examine all Proposal Documents and judge for themselves all matters relating to the adequacy and accuracy of the documents. If the Proposer is of the opinion that any part(s) of the Proposal Document is incorrect or obscure, or that additional information is needed, he should request such information or clarification from the Procurement Services Division in order that appropriate addenda may be issued, if necessary, to all prospective Proposers.

3. No oral change or interpretation of the provisions contained in this Request for Proposal 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. The issuance of a written addendum is the only official method whereby interpretation, clarification or additional information can be given.
4. All materials submitted in response to the RFP become the property of the City of Hollywood and will be returned only at the option of the City. The City has the right to use any or all ideas presented in any response to the RFP whether amended or not and selection or rejection of the Proposal does not affect this right, provided however, that any Proposal that has been submitted to the City Clerk's Office may be withdrawn prior to Proposal opening time stated herein, upon proper identification and signature releasing Proposal Documents back to Proposer.
5. After initial review of the Proposals, the City may invite one or more of the proposers for an interview to discuss the Proposal and meet its representatives, particularly key personnel who would be assigned to the project. It is understood that the City shall incur no costs as a result of this interview, nor bear any obligation in further consideration of the Proposal.
6. Copies of Proposals submitted may not be viewed until thirty (30) days after RFP opening date.
7. The City reserves the right to determine, at its sole discretion, whether any aspect of a Proposal satisfies the criteria established in this Request for Proposals. The City further reserves the right to negotiate with any person or firm submitting Proposals and reserves the right to reject any or all Proposals with or without cause. The City also reserves the right to waive minor technical defects in a Proposal. In the event that this Request for Proposals is withdrawn by the City for any reason, the City shall have no liability to any applicant for any costs or

expenses incurred in connection with this Request for Proposals or otherwise. All such expenses incurred in the preparation of a Proposal shall be borne by the Proposer.

Failure or refusal of the successful Proposer to execute a contract within thirty (30) days after award shall constitute a default. Any such Proposer shall not assign, transfer, convey or otherwise dispose of any or all of its rights, title or interest therein, or its power to execute such contract to any person or firm without prior written consent of the City.

F. EVALUATION CRITERIA

Proposals will be evaluated using the criteria listed below to ascertain which Proposal best meets the requirements of the City. The items to be considered during the evaluation and the associated point values are as follows:

- | | | |
|----|---|-------------|
| 1. | Proposer Understanding and Ability
To Perform the Required Work Under
The Scope of Services | 0-25 points |
| 2. | Proposed Organization and Staffing, and
Technical Qualifications of the Persons
Assigned to the Project | 0-25 points |
| 3. | References and successfully
Completed Similar Projects (proven experience) | 0-15 points |
| 4. | Cost of Services | 0-35 points |

MAXIMUM TECHNICAL POINTS	100
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G. SELECTION PROCESS

Evaluation of the proposals will be performed by a committee selected by the City. The committee will evaluate the firms according to their proposals. The initial scores will be tallied and a short list will be developed consisting of the firms receiving the highest point ratings. The committee may conduct discussions with proposers on the short list for the purpose of clarification to assure full understanding of, and responsiveness to, the solicitation requirements. In conducting discussions, there shall be no disclosure of any information derived from proposals submitted by competing proposers. These firms may be invited to an oral interview before the committee. A short list of finalists will be determined and presented to either the City Manager or his designee or to the City Commission, in accordance with the applicable City of Hollywood Code of Ordinances, and the final ranking will be made for the purposes of negotiating a contract with the top ranked firm. **The City reserves the right to award any resulting agreement as it deems will best serve the interests of the City.**

H. EQUAL EMPLOYMENT OPPORTUNITY

Proposer shall provide a written statement that it does not and will not discriminate against any person, employee, or applicant for employment, because of race, creed, color, religion, sex, national origin, ancestry, age or disability.

I. PROMPT PAYMENT: LATE PAYMENTS BY CONTRACTOR TO SUBCONTRACTOR AND MATERIAL SUPPLIERS; PENALTY:

When a contractor receives from the City of Hollywood any payment for contractual services, commodities, materials, supplies, or construction contracts, the contractor shall pay such moneys received to each Subcontractor and Material Supplier in proportion to the percentage of work completed by each Subcontractor and Material Supplier at the time of receipt. If the contractor receives less than full payment, then the contractor shall be required to disburse only the funds received on a pro rata basis with the Subcontractors and Material Suppliers, each receiving a prorated portion based on the amount due on the payment. If the contractor without reasonable cause fails to make payments required by this section to Subcontractors and Material Suppliers within fifteen (15) working days after the receipt by the contractor of full or partial payment, the contractor shall pay to the Subcontractors and Material Suppliers a penalty in the amount of one percent (1%) of the amount due, per month, from the expiration of the period allowed herein for payment. Such penalty shall be in addition to actual payments owed. Retainage is also subject to the prompt payment requirement and must be returned to the Subcontractor or Material Supplier whose work has been completed, even if the prime contract has not been completed. The Contractor shall include the above obligation in each subcontract it signs with a Subcontractor or Material Supplier.

J. ADA COMPLIANCE

Persons with disabilities who require reasonable accommodation to participate in City programs and/or services may call the Equal Opportunity Manager, Office of Human Resources and Risk Management at (954) 921-3218 (voice). If an individual is hearing or speech impaired, please call Florida Relay Service 1-800-955-8771.

K. PUBLIC ENTITY CRIMES

"A person or affiliate who has been placed on the convicted vendor list following a conviction for public entity crime may not submit a bid on a contract to provide any goods or services to a public entity, may not submit a bid on a contract with a public entity for the construction or repair of a public building or public work, may not submit bids on leases of real property to public entity, may not be awarded or perform work as a contractor, supplier, subcontractor, or consultant under a contract with any public entity, and may not transact business with any public entity in excess of the threshold amount provided in Section 287.017, for CATEGORY TWO for a period of 36 months from the date of being placed on the convicted vendor list."

HOLD HARMLESS AND INDEMNITY CLAUSE:

(Company Name and Authorized Signature, Print Name),

the contractor shall indemnify, defend and hold harmless the City of Hollywood, its elected and appointed officials, employees and agents for any and all suits, actions, legal or administrative proceedings, claims, damage, liabilities, interest, attorney's fees, costs of any kind whether arising prior to the start of activities or following the completion or acceptance and in any manner directly or indirectly caused, occasioned or contributed to in whole or in part by reason of any act, error or omission, fault or negligence whether active or passive by the contractor, or anyone acting under its direction, control, or on its behalf in connection with or incident to its performance of the contract.

(Company Name and Authorized Signature, Print Name),

further certifies that it will meet all insurance requirements of the City of Hollywood and agrees to produce valid, timely certificates of coverage.

The City reserves the right to require any other insurance coverage it deems necessary depending upon the exposures.

L. DECLARATION

The aforementioned, as Proposer (herein used in the masculine singular, irrespective of actual gender and number) declares, under oath that no other person has any interest in this Proposal or in any resulting agreement to which this Proposal pertains, that this Proposal is not made with connection or arrangement with any other persons and without collusion or fraud.

The Proposer further declares that he has complied in every respect with all the instructions to Proposers, that he has read all addenda, if any, issued prior to the opening of Proposals, and that he has satisfied himself fully relative to all matters and conditions with respect to the general conditions of the agreement and all relevant information to which this proposal pertains.

M. DISCLOSURE OF CONFLICT OF INTEREST

Vendor shall disclose below, to the best of his or her knowledge, any City of Hollywood officer or employee, or any relative of any such officer or employee as defined in Section 112.3135, Florida Statutes, who is an officer, partner, director or proprietor of, or has a material interest in the vendor's business or its parent company, any subsidiary, or affiliated company, whether such City official or employee is in a position to influence this procurement or not.

Failure of a vendor to disclose any relationship described herein shall be reason for debarment in accordance with the provisions of the City of Hollywood Purchasing Ordinance.

Name	Relationship
_____	_____
_____	_____

In the event the vendor does not indicate any name, the City shall interpret this to mean that no such relationship exists.

RFP CHECKLIST

Please check each line item after the completion of the appropriate item.

- _____ I verify that the signature on the official title page of RFP-4273-12-IS ("Proposer Acknowledgement Form") and on Forms 1 and 2, as herein submitted, is the signature of the person authorized to legally bind the proposer. (Preferably in blue ink)
- _____ I, the Proposer, acknowledge reading information relative to the City's ***"Local Minority Business Enterprise (MBE) and Local Small Business Enterprise (SBE) Program"*** as contained in this document and providing for such information. (if applicable to this proposal)
- _____ I acknowledge reading and signing the Hold Harmless Statement as contained in Form 1.
- _____ I have included all information, certificates, licenses and additional documentation, as required by the City, in my/our RFP response.
- _____ I have checked for any addendums to this RFP, and will continue to check for any addendums up to the deadline for submission of this RFP response.
- _____ I have submitted one (1) original, 1 electronic submission on CD and fifteen (15) copies of the entire proposal with addendums. **Proposers must include a notarized statement that the CD version is a true copy of the printed version, and should use the "Required Notarization" found in Part F in Form 1.**
- _____ I have verified that the outside address label of my RFP package is clearly marked to include my company's name, address, RFP number and date of RFP opening.
- _____ I have read and completed (if applicable) the "Disclosure of Conflict of Interest" as contained in Part II M and found on Form 2.
- _____ I, the Proposer, am aware that a Notice of Intent to award this bid shall be posted on the City's website at www.hollywoodfl.org and on the Procurement Services bulletin board in room 303 at City Hall, and that it is my responsibility to check for this posting. Also, I have provided my email address, as the City, at its discretion, may provide me information by such means regarding this procurement process.
- _____ I, the Proposer, have submitted all supporting documentation for local preference eligibility, which must be received with the bid package prior to the bid opening date and time (if applicable).

NAME OF COMPANY: _____

PROPOSER'S NAME: _____

PROPOSER'S AUTHORIZED SIGNATURE: _____

DATE: _____

CITY OF HOLLYWOOD, FLORIDA
RFP-4273-12-IS CONTRACTED UTILITY CUSTOMER/FIELD SERVICES
FORM 1: PROPOSER QUESTIONNAIRE – EXPERIENCE AND FEES

QUESTIONS ABOUT THIS FORM? Please email the City at
 lsilvey@hollywoodfl.org or isuperville@hollywoodfl.org for assistance.

PART A: PROPOSER BACKGROUND

Date:	
Name of Proposer:	
Main Contact for questions regarding your proposal response:	Name: Title: Phone Number(s): Email Address:
Secondary Contact for proposal response:	Name: Title: Phone Number(s): Email Address:
Contract manager assigned if your company is awarded the contract:	Name: Title: Phone Number(s): Email Address: Qualifications (or attach resume):
Business Organization	☐ National ☐ State ☐ Local
Address Information	Corporate Headquarters: Closest Office Location to Hollywood:
Brief description of the services/products offered by your company	

Briefly state your firm's understanding of the work to be done and provide a positive commitment to perform the work:

CITY OF HOLLYWOOD, FLORIDA
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PART B: EXPERIENCE AND REFERENCES

Please list government clients in Florida and elsewhere in the United States that you have provided similar utility customer services and related field services to within the past three years, along with a contact name and telephone number for each listed:

Please provide three government client references, including contact names and phone numbers, who the City of Hollywood may contact:

- 1)
- 2)
- 3)

Please tell us about your company's greatest accomplishments at other client sites - - what successes are you most proud of? (please limit your response to one page)

PART C: PROPOSED ORGANIZATION AND STAFFING, INCLUDING QUALIFICATIONS AND EXPERIENCE OF KEY PERSONNEL

Describe your approach to performing the scope of work of this contract:
(please limit your response to one page)

Organizational Chart

Please provide an organizational chart (import the chart or attach a hard copy) and plan for staffing both office and field in order to meet the requirements of the scope of services for this RFP (see Form 2 for scope of services). Distinguish managerial and supervisory personnel on the chart, and indicate the number and titles of positions assigned to each of the following main functions:

Billing (daily bill file creating, meter read processing, billing file processing and review, and printing)

Customer Service/Account Maintenance (customer trouble-shooting/higher level problem resolution; general customer service – counter; general customer service – phone; updating and maintaining customer account records)

Account Adjustments/Credit Processing/Deposit Refunds (preparation, review and approval)

Receivables Monitoring and Delinquency Processing (for service disconnection)

Management and Quality Assurance

Field Service (service disconnections/reconnections and other work order completion)

Meter Reading (non-routine reading as needed)

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Experience of Key Personnel Assigned

Please copy in or attached resumes or tell us about the experience of the key personnel that would be assigned to the City of Hollywood, including managers, office and field supervisory personnel, and the billing officer.

Systems Experience

The City utilizes Sungard/HTE utility billing software which runs on an AS/400 computer. Please describe the experience of the key personnel assigned in working with large-scale automated billing and work order systems. Does assigned staff have any specific experience working with Sungard HTE software?

The City utilizes Aclara's STAR system for automated meter reading. This system consists of an MTU (Meter Transmission Unit) attached to the meter lid which sends consumption data to a DCU (Data Collection Unit). The DCU stores this information and transmits it to a file server located in the City's Data Center. There is a billing update file that is created and uploaded to the City's utility billing system. What is the experience of assigned office staff in understanding and utilizing automated meter reading (AMR) data and systems in the areas of billing and responsive customer service?

Meter Reading Experience

What is the experience of assigned field staff in using handheld meter reading devices, specifically the Nomad?

If you are the successful proposer and assuming a contract is signed and in place by June 30, 2012, please describe the preparatory work and steps you would perform to be ready for operation by the October 1, 2012 start-up date:

Other Information/Comments

Please provide any other relevant information (limit response to one page).

PART D: PROPOSER FEES

Please determine your total projected contract costs and expected profit margin, and allocate this below by service function.

Costs to be Included: All personnel costs, uniforms, vehicle costs; telephone system and related hardware and software, telephone handsets and headsets; telephone line for faxing capability; toner and paper for all printers (except for the bill printers) and the copy machine; chairs, file cabinets; all routine office supplies; kitchenette appliances; all other costs not specifically excluded below.

Costs to be Excluded: Costs to be paid by the City that should NOT be included or factored into in the Proposer's fee quote: rent for office space including modular furniture desks; all postage and mail processing costs; all associated costs of bill printing, including forms, envelopes and related supplies; and all hardware/software and related support and maintenance including personal computers, office printers, bill printers including toner for bill printers, copy machine with fax capability, City's email system and internet service; intercom connection for supervisory personnel; meter locks and boots; handheld meter reading device.

CITY OF HOLLYWOOD, FLORIDA
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FORM 1: PROPOSER QUESTIONNAIRE – EXPERIENCE AND FEES

Contracted Service Function	Estimated Monthly Volume	Item	ENTER HERE Per Item Fixed Rate, Then Hit Tab	Total Monthly Amount	Projected Annual Payment
Billing	40,000	Accounts @	\$0.00	\$0.00	\$0.00
Customer Service/Account Maintenance	40,000	Accounts @	\$0.00	\$0.00	\$0.00
Account Adjustments/ Credit Processing/ Deposit Refunds	40,000	Accounts @	\$0.00	\$0.00	\$0.00
Receivables Monitoring/ Delinquency Processing	40,000	Accounts @	\$0.00	\$0.00	\$0.00
Management and Quality Assurance	40,000	Accounts @	\$0.00	\$0.00	\$0.00
Field Service	3,000	Work Orders @	\$0.00	\$0.00	\$0.00
Meter Reading – Non-Routine As Needed	100	Work Orders @	\$0.00	\$0.00	\$0.00
TOTAL				\$0.00	\$0.00

Rate Adjustments: Each per item fixed rate in each category shall be adjusted annually on October 1 subject to the satisfactory performance of the contractor, and based on the percentage change in the consumer price index (CPI) for all urban consumers in the Miami-Fort Lauderdale area as published by the U.S. Bureau of Labor Statistics. For purposes of determining the percentage change in the CPI, the CPI for August of the previous year shall be subtracted from the CPI for August in the current year, and then that difference divided by the CPI for August of the previous year.

The annual adjustment in each category will be tied to contractor performance. If the City determines that performance in any of the categories listed above was unsatisfactory based on predetermined criteria, the annual adjustment will not be granted for the specific category or categories. Performance will be re-evaluated in six months, and a pro-rata share of the annual adjustment will be granted if performance has improved.

Volume Adjustments: No guarantee is given or implied as to the exact volume of transactions. Where the fee above is based on the total number of utility accounts, the City shall adjust the monthly volume of accounts on an annual basis based on the actual number of active meters at 9/30 of each year pursuant to the report titled "HTE Meter Status Listing". The number of meters read for assigned routes (routine meter reading) will also be adjusted this way.

The City shall pay the contractor for actual work orders performed on a monthly basis. The City shall subtract from the monthly volume of work orders, any work orders performed to obtain actual reads due to repeated estimation on an account that can be read, and any work orders performed to verify questionable or doubtful performance by the contractor.

Other Information/Comments: (please limit response to one page)

CITY OF HOLLYWOOD, FLORIDA
RFP-4273-12-IS CONTRACTED UTILITY CUSTOMER/FIELD SERVICES
FORM 1: PROPOSER QUESTIONNAIRE – EXPERIENCE AND FEES

PART E: STATEMENTS AND DECLARATIONS

LITIGATION OR PROCEEDINGS: Describe any litigation or proceeding within the past three (3) years whereby a court or any administrative agency has ruled against your company in any manner related to its professional activities or performance. Describe any current or pending litigation or proceeding of any kind involving your company and its professional activities or performance. State the nature of the litigation or proceeding, a brief description of the case, the outcome or projected outcome, and the monetary amounts involved if any. Failure to provide this information will result in the rejection of your proposal. ☐ Nothing to report ☐ We report the following:

HOLD HARMLESS AND INDEMNITY CLAUSE: In signing and submitting this proposal, the proposer if awarded the contract shall indemnify, defend and hold harmless the City of Hollywood, its elected and appointed officials, employees and agents for any and all suits, actions, legal or administrative proceedings, claims, damage, liabilities, interest, attorney's fees, costs of any kind whether arising prior to the start of activities or following the completion or acceptance and in any manner directly or indirectly caused, occasioned or contributed to in whole or in part by reason of any act, error or omission, fault or negligence whether active or passive by the contractor, or anyone acting under its direction, control, or on its behalf in connection with or incident to its performance of the contract. ☐ We understand and agree

STATEMENT OF INSURANCE COMPLIANCE: In signing and submitting this proposal, the proposer declares that the proposer has read the insurance requirements of the City of Hollywood as set forth in the Request for Proposal and certifies that the proposer, if awarded the contract, will meet all insurance requirements of the City of Hollywood and agrees to provide valid, timely certificates of coverage to the City. The City reserves the right to require any other insurance coverage it deems necessary depending on its exposures. ☐ We understand and agree

EQUAL EMPLOYMENT OPPORTUNITY STATEMENT: In signing and submitting this proposal, the proposer states that the proposer does not and will not discriminate against any person, employee, or applicant for employment because of race, creed, color, religion, sex, national origin, ancestry, age or disability. ☐ We understand and agree

DECLARATION: In signing and submitting this proposal, the proposer declares under oath that no other person has any interest in this proposal or in any resulting agreement to which this Proposal pertains, and that this proposal is not made with connection or arrangement with any other persons and without collusion or fraud. The proposer further declares that it has complied in every respect with all the instructions to proposers, that the proposer has read all addenda, if any, issued prior to the opening of the proposals, and that the proposer has satisfied itself fully relative to all matters and conditions with respect to the general conditions of entering into an agreement with the City of Hollywood and all relevant information to which this proposal pertains. ☐ We understand and agree

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FORM 1: PROPOSER QUESTIONNAIRE – EXPERIENCE AND FEES

DISCLOSURE OF CONFLICT OF INTEREST: Pursuant to Part II, Section M of the RFP, the proposer is required to disclose below, to the best of its knowledge, any City of Hollywood officer or employee, or any relative of any such officer or employee, as defined in Section 112.3135, Florida Statutes, who is an officer, partner, director or proprietor of, or has a material interest in the vendor's business or its parent company, any subsidiary, or affiliated company, whether such City official or employee is in a position to influence this procurement or not. Failure of a vendor to disclose any relationship described herein shall be reason for debarment in accordance with the provisions of the City of Hollywood Purchasing Ordinance. In the event vendor does not indicate any name, the City shall interpret this to mean that no such relationship exists.

Name and Relationship:

Name and Relationship:

PART F: PROPOSER SIGN-OFF

ADDITIONAL INFORMATION/COMMENTS: (please limit response to one page)

PROPOSER SIGNATURE

I am/we are authorized to sign this proposal form on behalf of the proposer, and bind the proposer to the responses provided. I/we have read and understand all the Statements and Declarations in Part E above.

Authorized Signature:

Printed Name:

Title:

Date:

Authorized Signature:

Printed Name:

Title:

Date:

**REQUIRED
NOTARIZATION**

I/we have submitted one (1) original, 1 electronic submission on CD and fifteen (15) copies of our entire proposal with any addendums and supplemental information.

We have submitted our proposal in its entirety, including any addendums and supplemental information, in electronic form on the CD herein included as part of our proposal submission, and attest that our complete proposal, as found on the CD, is a true copy of the printed version.

Signed: _____ Title: _____

SWORN TO AND SUBSCRIBED before me this _____ day of _____, 2012.

Signature of Notary Public

Print, type or stamp name of Notary Public:

☐ Personally known to me, or

☐ Produced identification: _____

CITY OF HOLLYWOOD, FLORIDA

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RFP-4273-12-IS CONTRACTED UTILITY CUSTOMER/FIELD SERVICES FORM 2: PROPOSER QUESTIONNAIRE - SCOPE OF SERVICES

(Please limit your comments or answer to any one question below to no more than one page)

QUESTIONS ABOUT THIS FORM? Please email the City at lsilvey@hollywoodfl.org or isuperville@hollywoodfl.org for assistance.

PURPOSE OF FORM 2

The purpose of Form 2 is to take the proposer through each of the City's service requirements one at a time, and enable the proposer to note any exceptions or comments to providing each of the City's required services. This is necessary given the volume, depth and complexities of the various services to be provided. This format provides an easy way for proposers to respond systematically to the details of the services to be provided, and for the City to evaluate proposer responses. **We thank you for assisting the City in its evaluation by limiting your comments or answer to any one question below to no more than one page.** For purposes of Form 2, "Manager" as referenced throughout this document is herein defined as "the successful proposer".

PART A. FIELD SERVICES

BACKGROUND: The City provides utility service to about 40,000 metered locations. The contractor will be expected to perform a range of field services in conjunction with these metered locations. A list of the typical field services performed is presented below. All field work is tracked through the creation of work orders in the Sungard/HTE utility billing system that indicate the type of work performed at an address, the results and any comments. Approximately 3,000 work orders are generated each month.

Until recently, the City read its meters monthly with handheld devices. Over the past three years, the City has been slowly retrofitting its meters with automated meter reading (AMR) devices enabling the meters to be read remotely to obtain consumption information for billing purposes. The project implementation is expected to be completed by April 2012. Once the project is completed, it is expected that all meters will be remotely read. It is expected that a small percentage of AMR units (an estimated 100 per month) will not be remotely read each month due to tampering, damage to the unit or other reasons for failure, and will have to be read in the field. The City will provide the contractor with access to a handheld reader for reading these meters.

Whether read remotely or in the field, all of the City's meters need to be read monthly within 28 to 33 days from the previous month's read.

Scope of Services:

- 1) Manager shall provide the necessary trained personnel to perform the following field services:

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FORM 2: PROPOSER QUESTIONNAIRE - SCOPE OF SERVICES**

(Please limit your comments or answer to any one question below to no more than one page)

- a. Turn on or turn off service at the meter in response to customer-requested account changes, delinquent accounts, and emergencies.
- b. "Night service" which is defined as turning on or turning off (in the case of emergencies) service at the meter between the hours of 4:00 p.m. to 11 p.m. Monday through Friday.
- c. Billing unit verification. Verify the number of units in commercial and residential buildings, where identified from exception reports, for billing purposes.
- d. Meter size verification upon the City's request.
- e. Rechecks of meter reads, whether field-obtained or AMR-generated
- f. Service investigations. Meet with the customer at the property to discuss customer complaints or disputes, and report the meeting results to the customer service office.
- g. Customer education. Meet with customers at their request to provide information and education, such as how to read the meter, and ways to conserve water.
- h. Provide additional 24-hour notification of pending service disconnection (for nonpayment) to commercial and multifamily residential buildings with 10 or more units by leaving physical notice at the premises. Provide additional notice at the premises to the occupants of multifamily residential buildings where payment is not forthcoming from the property owner, or owner's agent such as a management company, after the initial 24-hour notice provided.
- i. Using remote meter reading technology and the STAR system, verify that the customer has not reconnected service upon being disconnected for nonpayment. Generate work orders to lock or boot the meter for those locations where unlawful consumption and use of service is detected. If further tampering is detected, initiate a work order to the City's Underground Utilities division to plug or pull the meter. Plugging or pulling the meter is performed by the City.
- j. Request access to a customer's meter where access is impeded, by posting a courtesy notice at the premises. If there is no response from the customer, initiate coordination with the City to obtain access in accordance with City ordinance provisions.
- k. Verify meter numbers and billing addresses where determined to be necessary by the Manager or where requested by the City.
- l. Check for stuck meters that Manager identifies from consumption reports or from customer complaints, and issue a work order to Underground Utilities to replace the meter when there is no registered consumption for 2 or more months.
- m. Respond to customer requests to check for leaks at the customer's location and initiate a work order to Underground Utilities if it appears the leak is on the City's side.
- n. Investigate what conditions at the meter box may be causing billing to go to "off cycle" the first time the system generates an estimate read and generate a work order to Underground Utilities to repair the problem if necessary.
- o. While addressing work orders in the field, identify and report other important observed information (such as necessary meter repairs, conditions impeding access to the meter box, public safety concerns, etc.), and follow up with a work order to the meter shop.

**RFP-4273-12-IS CONTRACTED UTILITY CUSTOMER/FIELD SERVICES
FORM 2: PROPOSER QUESTIONNAIRE - SCOPE OF SERVICES**

(Please limit your comments or answer to any one question below to no more than one page)

- p. Read the meters where AMR units cannot be remotely read each month due to tampering, damage to the unit, or other reasons for failure. A work order is to be generated to track any meters needing reads. Ensure that a work order has been generated to Underground Utilities, as necessary, to repair or replace the AMR device.

- ☐ All services above can be provided as stated.
☐ Services can be provided with the following exceptions and/or comments:

- 2) Manager shall requisition and track all field services provided under the contract through the City's work order system for monitoring and billing purposes. A work order is defined as any one visit to a service address to perform a field service.

- ☐ Service can be provided as stated.
☐ Service can be provided with the following exceptions and/or comments:

- 3) Manager shall perform service disconnections for nonpayment on Monday through Thursday each week between the hours of 8 a.m. and 4 p.m.. Service disconnections shall not be performed on Fridays, weekends, holidays and at any other time designated by the City.

- ☐ Service can be provided as stated.
☐ Service can be provided with the following exceptions and/or comments:

- 4) Field personnel shall perform their routine daily duties (excluding night service duties) no earlier than 7 a.m. and no later than 6 p.m. unless approved by the City. Field personnel shall perform their duties on Monday through Friday, or on weekends on rare occasions when necessary. Field personnel shall perform their duties in all weather conditions except those endangering the safety or life of the employee.

- ☐ Service can be provided as stated.
☐ Service can be provided with the following exceptions and/or comments:

- 5) Field service personnel shall wear a uniform and identification badge at all times while in the field. The uniforms and badges are subject to the City's approval. Uniformed employees shall present a clean and wholesome appearance, and be readily identifiable to the public as the Manager's employees.

- ☐ Service can be provided as stated.
☐ Service can be provided with the following exceptions and/or comments:

CITY OF HOLLYWOOD, FLORIDA

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**RFP-4273-12-IS CONTRACTED UTILITY CUSTOMER/FIELD SERVICES
FORM 2: PROPOSER QUESTIONNAIRE - SCOPE OF SERVICES**

(Please limit your comments or answer to any one question below to no more than one page)

- 6) All field personnel are required to have a valid Florida driver's license and driver's insurance. Manager shall check their employees' licenses and insurance every six months to ensure they are valid, current and in effect.

- ☐ Service can be provided as stated.
☐ Service can be provided with the following exceptions and/or comments:

- 7) Manager shall provide all transportation needed to complete the work required under the contract. Manager shall maintain its vehicles and ensure that the vehicles are clean and mechanically sound. Manager's vehicles shall be clearly identified as those of a City contractor's with signage agreed to by the City.

- ☐ Service can be provided as stated.
☐ Service can be provided with the following exceptions and/or comments:

- 8) It is required that the Manager will provide its own staffing for field services, and will not subcontract any aspect.

- ☐ Service can be provided as stated.
☐ Service can be provided with the following exceptions and/or comments:

- 9) While in the field addressing work orders, field personnel shall identify and report important observed negative conditions (such as necessary meter repairs, conditions impeding access to the meter box or obtaining an AMR read such as a vehicle parked over a meter box, conditions that explain high usage, suspected leaks, conditions that explain low or no usage such as "stuck" meters, and observed public safety concerns) by manually generating a work order to Underground Utilities when they return to the office.

- ☐ Service can be provided as stated.
☐ Service can be provided with the following exceptions and/or comments:

- 10) Field personnel shall identify actual or suspected illegal service hookups and the Manager shall report these incidences immediately to the appropriate City departments in accordance with established City procedures.

- ☐ Service can be provided as stated.
☐ Service can be provided with the following exceptions and/or comments:

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(Please limit your comments or answer to any one question below to no more than one page)

- 11) Field personnel shall exercise care and caution when opening meter boxes to check meter conditions or to read a City meter. Damage to City property will not be tolerated, and Manager will be liable for any damage due to negligence or carelessness. Manager shall provide the City with a plan for monitoring and rechecking field personnel performance including the handling of City property.

- ☐ Service can be provided as stated.
☐ Service can be provided with the following exceptions and/or comments:

PART B. CUSTOMER SERVICE

Scope of Services:

- 1) Manager shall provide courteous, responsive and timely customer service over the phone and over the counter, as well as in the field, to the City's utility customers in response to their questions regarding billed services and specific billings. Manager shall adequately meet the communications needs of the City's diverse, multilingual customer base and have on-site at least one Spanish-speaking employee.

- ☐ Service can be provided as stated.
☐ Service can be provided with the following exceptions and/or comments:

- 2) Customer service personnel shall be scheduled to cover the work hours of 7:30 a.m. until 5:00 p.m. weekdays. Additionally, Manager shall provide extended customer service by phone from 5:00 p.m. to 5:30 p.m..

- ☐ Service can be provided as stated.
☐ Service can be provided with the following exceptions and/or comments:

- 3) Manager shall provide its own phone system including all telephone hardware and employee headsets at no cost to the City, and shall acquire its own telecommunications service provider and pay for on-going service. Manager shall maintain its phone system at its own expense. Manager's phone system must have enough lines to accommodate the City's call volume, and have features that allow for queuing calls in the order received, assigning calls to the next available agent, reporting on actual and average wait times, and allowing for the auditing and playback of calls for quality assurance. Customer wait time should be limited to an average of one minute, and the system should allow for public service messages or music while the customer is on hold. The greeting message that customers hear when calling for customer service must be approved by the City.

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FORM 2: PROPOSER QUESTIONNAIRE - SCOPE OF SERVICES**

(Please limit your comments or answer to any one question below to no more than one page)

- ☐ Service can be provided as stated.
☐ Service can be provided with the following exceptions and/or comments:

- 4) Manager shall provide the appropriate number of qualified personnel to provide customer service over the phone and at the counter to meet the City's customer volume. Approximately 200 calls are received on average daily, and approximately 100 customers on average are served at the counter daily. Manager shall provide its customer service personnel with on-going training in the art of customer service excellence focusing on achieving customer satisfaction to the greatest extent possible, and on handling customers, particularly difficult customers, with diplomacy and tact. Manager will train its customer service personnel in when and how to elevate a customer call to a supervisor. Most customers call or walk in to ask questions regarding usage, account balance, how a bill was calculated, the date and amount of last payment, account history, bill due date, customer mailing and service address, alternative methods to pay their bills, how to open or close their accounts, and how to update customer information on their accounts.

- ☐ Service can be provided as stated.
☐ Service can be provided with the following exceptions and/or comments:

- 5) The City shall provide initial training on the utility billing and related systems, such as the STAR system which maintains the AMR read histories, upon execution of the contract, if needed, and then Manager shall be responsible for all subsequent on-going training of its employees on the City's systems.

- ☐ Service can be provided as stated.
☐ Service can be provided with the following exceptions and/or comments:

- 6) Customer service personnel shall diplomatically and tactfully address account delinquency issues with the customer, including service termination and reinstatement. Customer service personnel will be trained in offering payment plan options to eligible customers, finalizing the payment plan agreement, and setting up the payment plan terms on the utility billing system. Manager will coordinate office and field personnel to ensure that service is not discontinued where customer dispute resolution or payment plans are in progress but not yet finalized.

- ☐ Service can be provided as stated.
☐ Service can be provided with the following exceptions and/or comments:

- 7) Manager shall ensure that its customer service personnel can adequately address customer questions related to the various payment methods offered by the City, including payment by internet, credit card, and direct debit; and the correct address for payments by mail.

CITY OF HOLLYWOOD, FLORIDA

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**RFP-4273-12-IS CONTRACTED UTILITY CUSTOMER/FIELD SERVICES
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(Please limit your comments or answer to any one question below to no more than one page)

Customer service personnel shall answer customer questions related to date and amount of payments, as well as provide the validated receipt number for payments if requested.

- ☐ Service can be provided as stated.
- ☐ Service can be provided with the following exceptions and/or comments:

- 8) Customer service personnel shall be trained in assisting customers with how to register for on-line access to their utility account information; how to establish a "PIN" for security purposes; how to retrieve the PIN if forgotten; how to make a payment over the internet, how to check to make sure a payment was properly processed over the internet, and if directed by the City how to reset a PIN.

- ☐ Service can be provided as stated.
- ☐ Service can be provided with the following exceptions and/or comments:

- 9) Manager shall designate personnel to enter bank account information into the utility billing system for utility customers who have enrolled in the City's direct debit payment program. This program enables customers, if they choose, to have their bank accounts automatically debited each month for the amount of their bills.

- ☐ Service can be provided as stated.
- ☐ Service can be provided with the following exceptions and/or comments:

- 10) Manager shall be responsible for processing new account applications, including setting up the new account properly on the utility billing system along with the correct services to be billed, and determining the deposit on new service requests. Manager shall verify that the customer has paid the deposit prior to entering the work order to connect service. Manager shall also ensure that a customer applying for new service at a location has no other outstanding balances at other locations within Hollywood which must be paid prior to opening a new account. Manager shall bill the new service application fee so that it appears on the customer's first bill. Manager shall monitor and verify new account set ups for quality assurance. Manager is also responsible for the on-going maintenance of customer account information, and shall update customer information at the customer's request promptly and correctly.

- ☐ Service can be provided as stated.
- ☐ Service can be provided with the following exceptions and/or comments:

- 11) Manager shall properly note in the Miscellaneous Customer Information Comments section of the customer record, any special needs or unusual circumstances of a customer (such as

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(Please limit your comments or answer to any one question below to no more than one page)

a serious medical condition where service disconnection can be life-threatening) which might require temporary exemption from service shutoff.

- ☐ Service can be provided as stated.
- ☐ Service can be provided with the following exceptions and/or comments:

12) Manager shall apprise customers with special needs or financial hardship of various human service and governmental agencies that may be able to assist customers with making payments.

- ☐ Service can be provided as stated.
- ☐ Service can be provided with the following exceptions and/or comments:

13) Manager shall be responsible for maintaining third party notification of customer bills and delinquency. In the case of all rental properties, Manager shall enter the property owner's name and address into the third party notification field so that the property owner receives a duplicate bill and any delinquency notices.

- ☐ Service can be provided as stated.
- ☐ Service can be provided with the following exceptions and/or comments:

14) Manager shall process new account applications for temporary meters, including setting up the new account properly on the utility billing system, and determining the deposit which must be paid prior to the customer receiving the temporary meter from the meter shop. Manager shall ensure that both the applicant and the property owner have signed the temporary meter application. Manager shall generate a work order quarterly to have the temporary meter read so it can be billed quarterly.

- ☐ Service can be provided as stated.
- ☐ Service can be provided with the following exceptions and/or comments:

15) Manager shall coordinate with the Underground Utilities Division to obtain the correct charges for tapping and connection to be assessed customers for new service installations or meter size changes. Manager shall ensure that these fees and any assessed water or sewer capacity charges have been paid prior to sending a work order to the Underground Utilities Division to perform the work. Manager shall verify that the work order has been completed, and shall ensure that service is turned on at the time requested by the customer.

- ☐ Service can be provided as stated.
- ☐ Service can be provided with the following exceptions and/or comments:

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16) Manager shall not close a customer account until all charges are posted to the account and proper documentation proving vacancy of the premises is provided. If there is no immediate new customer at the premises, the account will be placed in the property owner's name on an interim basis. Manager shall open a new account at the same location upon being provided proper documentation proving occupancy of the premises by a new customer. New occupants who do not timely apply for service with the City will be notified by field personnel to contact the office or service will be terminated. Any interim usage on the account is to be billed to the former customer (or property owner) and the new customer based on the property sale closing date or lease date of the new customer.

- ☐ Service can be provided as stated.
☐ Service can be provided with the following exceptions and/or comments:

17) Manager is responsible for identifying, correctly computing and completing all account adjustments. Manager personnel shall prepare all supporting documentation for account adjustments, and all account adjustments must be reviewed and approved by the office manager or supervisor prior to the adjustment being made by designated Manager personnel. Reasons for account adjustments include but are not limited to high water use adjustments, sewer credits for pool refills and for water leaks; incorrect charges for services such as those resulting from overreads or underreads; and removal of penalties. The City shall audit all adjustments made by the Manager for propriety and quality assurance. Manager shall not reduce or waive any disputed customer account charges without the prior written approval of the City in accordance with City policies and procedures. All disputes or special requests for credits must be properly documented and presented to the City for review and approval. The lien settlement and write-off procedures are administered by the City.

- ☐ Service can be provided as stated.
☐ Service can be provided with the following exceptions and/or comments:

18) Customer service personnel shall follow City procedures, which are consistent with Florida Statutes, related to addressing public records requests with regard to providing customer account information (such as usage, customer comments, payment history, etc.) to someone other than the accountholder.

- ☐ Service can be provided as stated.
☐ Service can be provided with the following exceptions and/or comments:

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- 19) Customer service personnel shall follow City procedures with regard to responding to customer requests for final balances owed on their accounts. Specifically, customer service representatives will be trained in identifying accounts requiring further collection activity by the City, supplying the customer with a printout of that customer's account activity, and directing the customer to the Collections and Liens personnel in the Treasury Services Division for further assistance on the amounts owed.

- ☐ Service can be provided as stated.
☐ Service can be provided with the following exceptions and/or comments:

PART C. BILLING AND DELINQUENCY PROCESSING SERVICES

BACKGROUND: The City utilizes Aclara's STAR system for automated meter reading. This system consists of an MTU (Meter Transmission Unit) attached to the meter lid which sends consumption data to a DCU (Data Collection Unit). The DCU stores this information and transmits it to a file server located in the City's Data Center. There is a billing update file that is created and uploaded to the City's utility billing system. The City utilizes Sungard/HTE utility billing software which runs on an AS/400 computer.

The appropriate Manager personnel must run the billing update file and understand how the STAR system and HTE system integrate. The person performing the daily billing function must be technically proficient in utilizing computers and various software programs, such as STAR and the Sungard/HTE utility billing and work order systems, to perform the daily billing programs correctly, detect errors and problems, and operate the City's two Lexmark printers.

Scope of Services:

- 1) Manager shall use the City's utility billing system, both hardware and software, to maintain the master records of the City's utility customers, and to prepare timely bills to customers. Decisions regarding the design and format of the bill, and the billing and envelope stock to be utilized reside exclusively with the City.

- ☐ Service can be provided as stated.
☐ Service can be provided with the following exceptions and/or comments:

- 2) No message will appear on the utility bill or mail inserts included with the utility bills without the prior approval of the Treasury Services Division. The City shall provide the Manager with an opportunity to review any mail inserts containing information involving or impacting the Manager's responsibilities or operations with the City.

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- ☐ Service can be provided as stated.

☐ Service can be provided with the following exceptions and/or comments:

- 3) Manager shall run the billing update file to bring in the daily AMR reads from the STAR system, and shall upload any field-obtained meter readings from the handheld unit on a same-day basis. Manager shall bill all accounts that do not fail the Manager's audit process within two working days of the meter reading. Accounts are to be billed daily on Monday through Friday and on weekends where necessary (seldom). Bills shall be prepared and available for mail pickup within three days of obtaining the meter reads, whether by AMR or handheld unit. Manager shall notify the Treasury Services Division of any delays by Manager in preparing the bills for daily pickup for mailing, or of any delays by the City's mailing services provider in the actual pickup of the daily bills to be mailed.

- ☐ Service can be provided as stated.

☐ Service can be provided with the following exceptions and/or comments:

- 4) Manager will designate a primary billing officer who will learn all billing functions and be responsible for daily bill processing, and a backup billing officer to perform these duties in the primary billing officer's absence.

- ☐ Service can be provided as stated.

☐ Service can be provided with the following exceptions and/or comments:

- 5) Manager shall perform billing updates daily, and review every billing in edit mode prior to the final updating so as to identify any anomalies or errors in advance of the bills being printed and mailed.

- ☐ Service can be provided as stated.

☐ Service can be provided with the following exceptions and/or comments:

Additional: Please tell us how your company would go about reviewing the billing - - please describe your review process in detail:

- 6) Manager shall print the bills and prepare them for pickup by the City's mail processor by 11 a.m. daily. Manager shall "spot check" the bills daily to ensure quality appearance prior to pick up by the mail processor. Manager shall ensure that any bill inserts are provided to the mail processor for pickup and insertion.

- ☐ Service can be provided as stated.

☐ Service can be provided with the following exceptions and/or comments:

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- 7) Manager shall open all returned mail (bills) and make every effort to determine whether the address is incorrect or the customer has moved without closing his account, and to identify a correct or forwarding address in order to resend the bill. Additionally, if billed consumption is attributable to a new customer who has not yet applied for service with the City, Manager shall notify the customer (by a generated field work order to tag the property) to apply for service to avoid service disconnection. In the case of tenant accounts, Manager shall revert the account to the name of the owner for continued billing of base charges and consumption.

- ☐ Service can be provided as stated.
☐ Service can be provided with the following exceptions and/or comments:

- 8) Manager shall perform off cycle billing and ensure that all off-cycle bills are investigated, corrected and reissued within five work days. Off-cycle bills shall be kept to a minimum (less than 200 at any given time).

- ☐ Service can be provided as stated.
☐ Service can be provided with the following exceptions and/or comments:

- 9) Manager shall perform final bill processing on a weekly basis. Manager must obtain the final meter reading and enter any remaining charges on an account that is closed prior to performing the final billing. An account will be final billed upon service termination, and any deposit on file refunded if due, no later than 4 weeks following service termination. Manager shall review eligible accounts to ensure that all final charges have been added prior to performing final bill processing, and ensure that any final adjustments and amounts associated with returned, or "NSF", checks have been entered on the accounts. The billing system will apply any existing customer deposits toward outstanding account balances during the final bill processing. Manager shall ensure that the correct forwarding address has been entered into the customer record prior to performing final bill processing. Manager shall review all appropriate reports and verify the accuracy of deposit refund data prior to initiating the deposit refunds in accordance with established City procedures through the City's Accounts Payable process.

- ☐ Service can be provided as stated.
☐ Service can be provided with the following exceptions and/or comments:

- 10) Manager shall be responsible for all delinquency processing, and shall designate a primary employee to learn all delinquency processing functions and be responsible for daily delinquency processing, and a backup employee to perform these duties in the primary person's absence.

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- ☐ Service can be provided as stated.
- ☐ Service can be provided with the following exceptions and/or comments:

11) Manager's designated personnel shall generate daily the list of accounts where service is to be disconnected for nonpayment. The designated personnel shall carefully review this list and verify that no payments have been made before issuing the daily work orders to terminate service. The designated personnel shall also check for special notations on the account that would exempt the customer from service disconnection that day, such as customer disputes or pending credits. Manager shall comply with Section 51.142 of the City's Code of Ordinances and any related City policies and procedures regarding service termination.

- ☐ Service can be provided as stated.
- ☐ Service can be provided with the following exceptions and/or comments:

12) The delinquency processing personnel shall also generate the work orders for 24-hour advance notice of service disconnection for commercial and multifamily (10 units and greater) buildings, and any work orders for occupant advance notification in the case of multifamily buildings where the property owner has not responded to the initial 24-hour notice.

- ☐ Service can be provided as stated.
- ☐ Service can be provided with the following exceptions and/or comments:

13) Manager shall prepare and print system-generated delinquency notices to related third parties for active and finaled (closed) accounts that are in arrears. Manager shall ensure owner notification of any active tenant delinquency.

- ☐ Service can be provided as stated.
- ☐ Service can be provided with the following exceptions and/or comments:

PART D. GENERAL ADMINISTRATION**Scope of Services:**

1) Manager shall be located at and operate from City Hall, 2600 Hollywood Boulevard.

- ☐ Service can be provided as stated.
- ☐ Service can be provided with the following exceptions and/or comments:

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- 2) Manager shall provide adequate full-time supervision of all office and field personnel to the satisfaction of the City. Manager shall provide the City with the monthly work schedules of the manager and assistant manager including any scheduled vacation leaves. Manager shall promptly notify the Treasury Services Division of any unscheduled absence of either the manager or assistant manager arising on a daily basis. Manager shall meet with the City prior to any scheduled vacation leave of the manager or assistant manager to review outstanding items to ensure continuity of management. Either the manager or assistant manager shall be in the office at all times during working hours. Managers and supervisors shall possess the qualifications and experience necessary to supervise the functions under their control. Responsibilities include, but are not limited to, the scheduling and assignment of work, monitoring employee performance quality and regularly reviewing employee performance with personnel, disciplining and hiring employees as needed, customer service delivery focusing on satisfying the customer with diplomacy and tact, and customer dispute resolution.

- ☐ Service can be provided as stated.
☐ Service can be provided with the following exceptions and/or comments:

- 3) Manager shall ensure that all customers and their properties are treated with respect and consideration, and that proper customer relations are maintained.

- ☐ Service can be provided as stated.
☐ Service can be provided with the following exceptions and/or comments:

- 4) Manager shall establish an internal chain of command for customer dispute resolution designating a senior officer as the final authority prior to any City involvement in the resolution process. Manager will permanently document the dispute and actions taken to resolve the dispute in the customer comments section of the customer record. Manager shall promptly request City assistance in resolving disputes that Manager is unable to resolve. To request City assistance, Manager shall complete a request form prescribed by the City to describe the issues and the Manager's recommendation, and will attach all necessary documentation to detail all actions taken by the Manager and the present status of the dispute.

- ☐ Service can be provided as stated.
☐ Service can be provided with the following exceptions and/or comments:

- 5) Manager shall follow up on and resolve customer complaints within two days of receiving the complaint or immediately where requested by the City, and shall permanently record the

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complaint, actions taken and ultimate resolution in the utility billing system in the comments area of the customer record.

- ☐ Service can be provided as stated.
☐ Service can be provided with the following exceptions and/or comments:

- 6) Manager shall develop and implement quality assurance procedures in the office and in the field to achieve a high standard of performance in conducting all work assigned.

- ☐ Service can be provided as stated.
☐ Service can be provided with the following exceptions and/or comments:
Additional: Please provide examples of quality assurance procedures you would implement:

- 7) Manager shall monitor overall productivity and performance of the work required herein. Manager shall provide monthly progress reports or copies of various management reports if requested by the City. Manager shall provide a monthly report of meters read, either by AMR or manually, by cycle/route, and a monthly report listing the number of meters billed by cycle/route.

- ☐ Service can be provided as stated.
☐ Service can be provided with the following exceptions and/or comments:

- 8) Manager shall pay particular attention to customer consumption by reviewing various exception and management reports, including leak detection reports, and promptly following up on detected overusage (leaks) or underusage (slow meters or failed meters) on customer accounts. Manager shall initiate all necessary work orders, and contact the customers as appropriate.

- ☐ Service can be provided as stated.
☐ Service can be provided with the following exceptions and/or comments:

- 9) Manager shall run the "Consecutive Estimated Reads Listing" report on a monthly basis to identify and limit estimated readings to no more than two consecutive months. Manager shall follow up on existing work orders, or generate new work orders, to the Underground Utilities division to address the reasons for the estimating and stop it.

- ☐ Service can be provided as stated.
☐ Service can be provided with the following exceptions and/or comments:

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- 10) Manager shall constantly monitor work orders by analyzing appropriate reports to ensure that they are being completed timely and to detect problem areas that are resulting in repeated work orders. Manager shall timely close work orders in the system upon completion of the requested work. Manager shall make every effort to minimize the number of work orders where practicable.

- ☐ Service can be provided as stated.
☐ Service can be provided with the following exceptions and/or comments:

- 11) Manager shall regularly review active accounts with past due balances by running the appropriate report, and shall daily monitor accounts with balances of \$500 and more to determine the appropriate actions to take to collect any monies past due, with the ultimate goal of minimizing accounts receivable aging balances.

- ☐ Service can be provided as stated.
☐ Service can be provided with the following exceptions and/or comments:

- 12) Manager shall also determine whether customers need to reestablish their account deposits or increase their account deposits in response to repeated delinquencies or increased usage, by periodic review of available reports and shall promptly bill the deposit or deposit increase on the monthly customer bill.

- ☐ Service can be provided as stated.
☐ Service can be provided with the following exceptions and/or comments:

- 13) Manager is responsible for the correct set up and billing of customer accounts to ensure the integrity of the City's revenue base, and will generate routine reports for daily or monthly review of account data to enable timely corrective action.

- ☐ Service can be provided as stated.
☐ Service can be provided with the following exceptions and/or comments:

- 14) Manager shall administer the City's payment plan program utilizing the City's utility billing system in accordance with the City's Code requirements, and shall ensure that payment plan options are extended to eligible utility customers for the terms specified. Manager shall ensure that payment plans are properly executed and correctly set up on the billing system, and that the payment plans of customers who do not comply with the terms of their plans are promptly canceled. Manager shall promptly schedule delinquent customers for service termination in accordance with City Code Section 51.142 and any related City policies and procedures regarding service termination.

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- ☐ Service can be provided as stated.

☐ Service can be provided with the following exceptions and/or comments:

15) Manager shall utilize the copy machine provided by the City and its faxing capability, however Manager will be responsible for providing the phone line for faxing, as well as all office supplies necessary for both office and field personnel to perform their designated duties and assignments.

- ☐ Service can be provided as stated.

☐ Service can be provided with the following exceptions and/or comments:

16) Manager shall promptly provide the City with an invoice (in a format prescribed by the City) for services on a monthly basis. The invoice shall be easy to read and clearly show the period for which services are being billed. The charges listed shall be consistent with the compensation and terms of payment specified in the contract, and Manager shall include any supporting reports verifying monthly activity with the invoice. The City shall deduct from the payment to the Manager, any penalties incurred by Manager arising out of non-compliance with the terms and conditions of the contract. Penalties shall be deducted upon assessment and at any time during the contract period. As part of the penalty assessment, the City shall also deduct from the payment to the Manager, the charge for any work orders where the work performed was necessary due to Manager or subcontractor errors (for example, erroneous meter readings and incorrect comment codes entered).

- ☐ Service can be provided as stated.

☐ Service can be provided with the following exceptions and/or comments:

17) Manager shall familiarize itself with the City's code of ordinances as it relates to the utility services provided, and will agree to comply with all local, State and Federal laws. Manager will participate in the development of proposed changes to the City Code upon the City's request.

- ☐ Service can be provided as stated.

☐ Service can be provided with the following exceptions and/or comments:

18) Manager's letterhead and standard communications to the public must be reviewed and approved in advance by the City. Manager and the City shall agree on the terminology to be used to identify the Manager and its employees and offices, as contracted service providers of the City.

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- ☐ Service can be provided as stated.
- ☐ Service can be provided with the following exceptions and/or comments:

19) Manager shall furnish and ensure the necessary and appropriate on-going training of all field and office personnel to complete the work and assignments required under the contract. Manager shall attend the City's employee orientation classes as required by the City, and the City's customer service training classes on a routine basis to continually refresh employee skills.

- ☐ Service can be provided as stated.
- ☐ Service can be provided with the following exceptions and/or comments:

20) Manager shall participate at no additional charge during normal business hours in the testing of upgrades or modifications to the utility billing system and related software as directed by the City to ensure proper operation prior to implementing the final upgrades or modifications. Such notification shall include changes to utility rates or other billing procedures. The City shall notify the Manager in advance of any proposed upgrades or other modifications to the utility billing software upon the City becoming aware of the proposed upgrades or other modifications.

- ☐ Service can be provided as stated.
- ☐ Service can be provided with the following exceptions and/or comments:

21) Manager shall participate in developing and implementing all necessary steps to assist the City in closing year-end activity for the City's fiscal year-end which ends 9/30. Manager shall estimate reads for year-end purposes if the City so directs the Manager. All year-end meter readings are expected to be completed by September 25 for August/September consumption and by October 25 for September/October consumption, and all corresponding billings completed by September 27 for August/September and by October 27 for September/October billings. Any changes to these dates must be approved in advance by the City.

- ☐ Service can be provided as stated.
- ☐ Service can be provided with the following exceptions and/or comments:

22) Manager shall ensure the proper attire and dress etiquette of its employees, and comply with the City's dress code requirements.

- ☐ Service can be provided as stated.
- ☐ Service can be provided with the following exceptions and/or comments:

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23) Manager shall be in compliance with established City guidelines for a smoke-free, drug-free workplace.

- ☐ Service can be provided as stated.
☐ Service can be provided with the following exceptions and/or comments:

24) Manager shall be strictly liable for the safety and any medical treatment required of all its personnel and any subcontracted personnel, and shall carry all required workers compensation insurance coverage.

- ☐ Service can be provided as stated.
☐ Service can be provided with the following exceptions and/or comments:

25) Manager shall take all necessary steps to comply with the City's records retention requirements regarding customer information both in the utility billing system and in hard-copy form. Manager shall retain indefinitely all comments regarding significant customer issues in the Miscellaneous Customer Information record in the utility billing system.

- ☐ Service can be provided as stated.
☐ Service can be provided with the following exceptions and/or comments:

26) Manager shall perform all necessary processing and run all related reports to perform the functions and services required under the contract.

- ☐ Service can be provided as stated.
☐ Service can be provided with the following exceptions and/or comments:

PART E. CITY QUALIFICATIONS AND DISCLAIMERS

1) Damage to City meters or any other City property by the Manager, regardless of whether the City property is owned or leased, will not be tolerated and the Manager will be required to pay for the repair or replacement of the City property damaged. Repeated trends of damage to City meters or equipment will be "de facto" evidence of the Manager's liability, and the Manager shall be fined by the City pursuant to the contract, and be required to pay for the repair or replacement of the damaged meters or equipment.

- ☐ Proposer exceptions/comments:

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- 2) The City may change or modify its ordinances, policies or procedures from time to time, and the Manager shall implement these changes promptly. The City shall provide advance notice to the Manager of proposed changes that may impact Manager's required work responsibilities and duties. Manager shall participate in the development of changes or modifications to the City's ordinances, policies or procedures at the City's request.

☐ Proposer exceptions/comments:

- 3) The City shall review the performance of Manager annually, focusing on the quality and quantity of the services provided in accordance with the contract. However, the City can bring to the Manager's attention performance issues at any time during the year.

☐ Proposer exceptions/comments:

- 4) The City shall provide the following facilities, equipment, supplies and services to the Manager in order to accomplish the scope of services herein required:

- a. Office space at 2600 Hollywood Boulevard including desks, and telephone jacks.
- b. All necessary computer hardware and software and related support and maintenance for the Manager to perform the work required under the contract including personal computers, office printers, bill printers, toner for City-provided bill printers, access to the City's email system and internet service, and intercom connection for supervisory personnel.
- c. Mail fulfillment services (including folding, inserting, sealing and mailing bills) and postage related to bills and official correspondence.
- d. All billing forms and related envelopes.
- e. Copy machine and related maintenance
- f. Meter locks and boots.

The City shall **not** provide the following to the Manager in order to accomplish the scope of services herein required:

- a. File cabinets, chairs, and kitchenette appliances, accommodations or supplies.
- b. Telecommunications equipment or service, including telephone handsets or headsets.
- c. Office supplies, such as copy paper for the copy machine, tablets, pens, etc., for all field and office employees.
- d. Toner for the office printers (excluding the bill printers) and for the copy machine.
- e. A phone line to utilize the faxing capability of the copy machine.
- f. Vehicles or transportation accommodations.

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- g. Personnel to perform the services required under the contract including uniforms for personnel.
- h. Sales tax is not payable on the value of the space and computer hardware and software utilized by the Manager under the contract.

Note: Sales tax is not payable on the value of the leased space and computer hardware and software utilized by the Manager under the contract.

☐ Proposer exceptions/comments:

- 5) The City shall provide Manager with the most current version of and all updates to the City's emergency preparedness procedures, and Manager shall follow these procedures in the event of a hurricane or other declared emergency.

☐ Proposer exceptions/comments:

- 6) The City retains the right to read certain meters, such as those measuring flow for contractual reclaimed water and bulk water/sewer purchases from the City. The City is solely responsible for the reading and billing of these accounts.

☐ Proposer exceptions/comments:

- 7) The Scope of Services herein provided, while comprehensive and inclusive of the major tasks and responsibilities of the Manager, does not include every task and responsibility of the Manager which are too numerous to detail. The Manager is responsible for performance of the primary functions set forth in the Scope of Services in accordance with the City's Code of Ordinances and related procedures, and there may be other secondary tasks or responsibilities that are necessary in order to perform the primary functions and responsibilities, to fulfill the requirements of the related sections of City Code, or to perform related procedures as set forth by the City. Any overtime incurred by Manager that is necessary to complete the Manager's responsibilities herein set forth is the financial responsibility of the Manager unless pre-approved by the City.

☐ Proposer exceptions/comments:

PART F. NEW OR INNOVATIVE SERVICES OR PROCEDURES

Please set forth and describe any additional, new or innovative services or procedures that your company is proposing to offer and would like the City to consider:

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PART G: PROPOSER SIGN-OFF**ADDITIONAL INFORMATION/COMMENTS:****PROPOSER SIGNATURE**

I am/we are authorized to sign this proposal form on behalf of the proposer, and bind the proposer to the responses provided.

AUTHORIZED SIGNATURE:	
PRINTED NAME:	
TITLE:	
DATE:	
AUTHORIZED SIGNATURE:	
PRINTED NAME:	
TITLE:	
DATE:	