



REQUEST FOR PROPOSALS

ADVANCED METERING INFRASTRUCTURE (AMI) SYSTEM



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I. Overview

The East Orange County Water District (District) is inviting proposals to provide a turnkey solution of a fully integrated Advanced Metering Infrastructure System (AMI). This shall include all the required equipment, installation, customer portal, implementation, training and integration of data into the District's billing software, Continental Utility Solutions, Inc. (CUSI). The new system will be capable of remotely reading water meters, via fixed network or point cellular technology, and transmit the information to a portal which will allow customers to monitor their real time water usage. The District will evaluate and select the proposer that best meets the functional and business requirements, and offers the best value to EOCWD. Qualified individuals, firms, contractors, consultants or entities that meet the requirements set forth in this Request for Proposal (RFP) and can provide the services requested are encouraged to participate.

A. East Orange County Water District

The District was founded in 1961 under the principles of local community service and fiscal discipline, which it maintains to this day. The District encompasses an area of approximately 10,000 acres and functions as a wholesale water supplier, a retail water supplier, and a wastewater collections system operator.

The District is a County Water District and, as an independent special district, is governed by a Board of Directors elected to four-year terms by the voters within the District. The wholesale service area serves the City of Tustin, the City of Orange, IRWD, Golden State Water Company and the District's own Retail Zone.

In July of 1985, the District assumed operation of the County of Orange Waterworks District No. 8 (OWWD#8), which until that time had been one of the District's sub agencies (it should also be noted that OWWD#8 acquired the water system in 1951 from the El Modena Mutual Irrigation Company). Upon acquisition of this water system, it was named the District's "Retail Zone" to distinguish it from the wholesale operation. EOCWD's Retail Zone provides groundwater and imported water to approximately 1,210 connections in the Panorama Heights area of unincorporated Orange County (North Tustin). Groundwater supply is from by two wells located at the District's headquarters in Orange and the adjacent water treatment plant site.

In 2016, the District acquired Orange County Sanitation District Local Sewer Service Area 7 serving parts of Tustin and unincorporated areas north of Tustin.



B. Project Description

The objective of this project is to implement and install advanced metering infrastructure and equipment. This project will give EOCWD's approximately 1,210 retail water customers the ability to have full implementation of real-time monitoring of all retail water usage for purposes of improving water efficiency and reliability. This project will install new advanced water meters at every retail property in the service area and will enable the transmission of meter reading information to EOCWD's customer portal, track water use over time, compare use with the customer's water budget, provide continuous usage alarms and integrate the customer meter usage information into EOCWD's AWWA Water Loss Program – enabling accurate analysis of the total retail water loss in compliance with California's SB 555.

The District's meter stock utilizes a variety of manufacturers: Master, Neptune, Sensus, Hersey, and Rockwell are primarily installed. Meters range in size from 5/8" to 3". The water billing meter reads are currently on a bimonthly scale which varies from 58-62 days. The current meter reading is performed by staff. There are 6 routes in the system, which vary in the number of reads per route. EOCWD may consider moving to monthly billing after the AMI Project is complete.

C. Minimum Requirements

The proposer shall have 5 or more years of experience deploying AMI solutions with deployment to at least 5 or more water utilities throughout the company's history. The proposer must demonstrate its ability to provide a complete functional turnkey AMI system, including but not limited to: AMI compatible meters, endpoints, fixed radio networks of antenna, collectors, and repeaters (if necessary) or subscriptions to cellular service, software including a customer engagement portal, meter/endpoint programming devices, and meter box lids.



II. General Information

The District will not be held liable for any costs incurred by proposers in responding to this Request for Proposal (RFP). Each proposer shall submit a complete proposal with all information required. Proposer must be able to meet all requirements in the attached Standard Agreement. Terms and scope of the Agreement will be negotiated upon selection. If District and prospective proposer fail to reach an agreement, District may negotiate with other qualified proposers. The approved plans and all data gathered throughout the term of contract will be property of the District. Any questions regarding the RFP should be directed to Bobby Young, P.E., Engineering Manager, by email at byoung@eocwd.com.

Key Dates *(subject to change)*

Request for Proposal Issue Date:	April 29, 2025
Preproposal meeting:	May 8, 2025, 10:00am
Proposal Submission Deadline:	June 12, 2025, by 5:00pm
Expected Award:	July 2025



III. Scope of Work

The selected proposer will work closely with District staff to provide a complete functional turnkey AMI system, including but not limited to: AMI meters and endpoints, cellular service or fixed radio networks of antenna, collectors, and repeaters (as determined necessary by proposer), software including a customer engagement portal, meter/endpoint programming devices, and meter box lids. The work must comply with EPA's Community Grants requirements.

The proposer shall replace all non-AMI compatible water meters with AMI ready meters. This shall include any necessary programming. All meter box and vaults lids shall be modified or replaced to ensure that the endpoint signal can successfully transmit. An estimate of the cost to modify and/or replace vault lids should be included in the submitted proposal.

If cellular endpoints are provided, they shall be capable of providing coverage for the entire Retail Zone. They shall be capable of encoding, storing and transmitting data. The software shall include an advanced metering analytics software and customer engagement portal.

The proposer shall program all the water meters and endpoints to provide a successful transmission of the water meter reads with the meter reading portal. The proposer shall ensure the meter read data is properly migrated into the District's billing software. Upon successful installation of the hardware and implementation of the software, the proposer shall provide assistance in troubleshooting and resolving any issues that arise, including formatting of the customer engagement portal.

The proposal shall include the following and be detailed in the proposal:

- Project management and quality assurance/quality control (QA/QC) plan for the implementation of the turnkey AMI project.
- Perform a site survey of all meter locations to identify the number of lids that will need to be replaced.
- Procure and replace all concrete/steel meter box lids with composite lids, traffic rated, where necessary.
- Recommend data collection means and methods and transport of the meter reading data and other information from the endpoints to a metering management system.
- Procure, store, install and program all meters with an AMI metering system, including endpoints, antenna (if necessary), software and programming that will enable it to provide timely and accurate consumption readings.



- Provide an advanced metering analytics software that will provide communication from the endpoints into a portal to allow for the District to utilize for billing purposes and for customer engagement.
- Provide a data interface between the AMI system and District's utility billing system, CUSI.
- Document GIS locations for each meter and program details into the AMI system.
- Achieve a minimum transmission rate of 99.5% of readings.
- Training of the District's employees in endpoint installation, maintenance, troubleshooting including all software use, operation and maintenance.
- Provide customer portal support when AMI is in service.
- Detailed cost breakdown which shall include all the costs for the AMI system including but not limited to meters, endpoints, vault lids (modified or replacement), meter box lids, labor, fixed network infrastructure or monthly cellular service, and any other annual service fees, maintenance fees, or license fees that may be necessary for networking purposes



IV. Proposal Content

Submitted proposal must contain the following information:

- Cover letter
- Table of Contents
- Proposer Experience
- Scope of Work / Approach
- Project Schedule
- Resumes of Key Staff (include AMI deployment and installation experience and any changes to staff must be approved in writing by District Engineering Manager)
- Detailed cost proposal following Scope of Work format. This will be a time and material not to exceed contract.
- Three (3) references for similar services including:
 - Name of Organization/Agency:
 - Point of Contact Name:
 - E-mail:
 - Phone Number:
 - Term of Contract:
 - Services Provided:



V. Submission Instructions

Submittal Deadline: Thursday, June 12th, 2025, 5:00 PM PST
Late submissions will not be accepted. Electronic submission will be accepted. It is the proposer's responsibility to confirm receipt of submissions by the District.

Submittal Address: East Orange County Water District
185 N. McPherson Rd.
Orange, CA 92869
714 538-5815
Attn: Bobby Young, P.E.

OR

Electronic: byoung@eocwd.com

Submissions must be clearly marked:
East Orange County Water District AMI Proposal

Quantities: (1) electronically submitted PDF file of the proposal

OR

(1) Hard copy of the proposal



VI. Selection Process

The District will review all submittals received by the due date and time and completed as per this RFP. The District's representatives will select the proposer that meets the minimum requirements and demonstrates the best understanding of the scope. Price shall be considered but will not be the determining factor.

The District reserves the right to discontinue utilizing any selected proposer that does not perform to the District's expectation. This request does not commit the District to retain any proposers, to pay costs incurred in the preparation of proposals. Additionally, should it be in the best interest of the District, the District reserves the right to select different proposers to complete the different tasks.

Submitted proposals will become the property of the District. Proposals will be held in confidence to the extent permitted by law. After award of a contract or after rejection of all proposals, the proposals will be public records subject to disclosure under the California Public Records Act.

Evaluation will be based on the following criteria:

Criteria	Percentage
<u>Experience/Team:</u> Based on relevant experience of key personnel based on resumes showing experience. Evaluation will also be based on previous projects of comparable complexity, scale and nature; training and proven expertise in the area of work required; experience in projects completed for public entities. Familiarity with and capability to professionally perform all aspects of the work. This includes project management, budgetary control, project planning, responsiveness, adherence to schedules, quality control and communications.	20%
<u>Work Plan / Approach:</u> Based on the planned approach and scope of the proposed work. This will include the manner and clarity in which both are presented in the proposal to complete all elements of the work.	20%
<u>Schedule / Timeline:</u> Evaluation will consider time allotted for procurement and installation and could be based on the proposer's ability to perform the work within a reasonable time frame. Efficiency and timeliness in completion of full turnkey project, including customer portal set up and functionality. This will also include the ability to commence work immediately after execution of the contract.	20%
<u>References:</u> Based on proposer's work for similar engagements. Please submit references from public entities of similar size and scope.	10%
<u>Cost of Services:</u> The overall cost proposal for the project should reflect all services proposed to be provided, including procurement of materials, installation services, software, training, and any annual or on-going associated costs. Costs should be broken out to cover components where feasible.	30%



VII. Appendices

1. Additional Contract Clauses
2. Davis-Bacon Wage Determination
3. Sample Agreement w/ Appendices
4. Byrd Anti-Lobbying Form