

CITY OF GREELEY**PRE-BID MEETING**

F23-07-062 CIS & Implementation Services

July 24, 2023, 2:00PM MT via Microsoft Teams

NAME OF PERSON ATTENDING PRE-BID MEETING (PLEASE PRINT)	COMPANY NAME (PLEASE PRINT)	PHONE/EMAIL
Pav Sekhon	Advanced Utility Systems	PH 1-613-519-8814
		EMAIL: Psekhon@advancedutility.com
Troy Schake	Universus Energy & Water	PH 1-904-705-4147
		EMAIL: tschake@universus.com
Rachelle Clowers	Cayenta	PH 1-716-402-2400
		EMAIL: RClowers@cayenta.com
Bill Weber	Utility Solutions Partners, LLC	PH 1-484-356-3420
		EMAIL: bill.weber@utilityolutionsllc.com
Laurie Watts	Origin Utility	PH 1-214-709-0002
		EMAIL: lwatts@originutility.com
Dana Drysdale	Aptumo North America	PH 1-408-316-7585
		EMAIL: danadrysdale@aptumo.com
Ryan LaFave	City of Greeley	PH
		EMAIL:
Tina Wert	City of Greeley	PH
		EMAIL:

Corey Labor	Origin Utility	PH 1-802-233-2970
		EMAIL: clabor@originutility.com
Mark Fletcher	Utility Solutions Partners, LLC	PH
		EMAIL: mark.fletcher@utilityolutionsllc.com
Stephen Burrowes	Cayenta	PH 1-716-402-2359
		EMAIL: Sburrows@cayenta.com
Wendy Bethel	City of Greeley	PH
		EMAIL:
Virgil Pierce	City of Greeley	PH
		EMAIL:
Krystal Dilka	City of Greeley	PH
		EMAIL:
Nick Hoyle	City of Greeley	PH
		EMAIL:
Alex Adame	City of Greeley	PH 1-970-350-9325
		EMAIL: purchasing@greeleygov.com

City of Greeley, CO
Customer Information System (CIS) and Implementation Services
Vendor Pre-Proposal Meeting Agenda
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Agenda CIS RFP Pre-Proposal 7/24/2023

1) PMO Team Introductions (Krystal)

- a) Welcome and Logistics (recording and note taking)
- b) Ask each PMO member to introduce themselves and area they represent

2) Vendor Introductions (Krystal)

- a) Ask each attendee to introduce Vendor Name and Contact

3) Project Summary & Vision (Krystal)

a) Background

- The City of Greeley has determined that the Utilities' Customer Information System (CIS) must be replaced. The City currently utilizes several systems to bill approximately 28,000 customer accounts for water, sewer, and stormwater. The City's existing systems were acquired in the early 1990's and no longer adequately support existing business processes at the City, while also preventing these processes from adapting to changing needs. These limitations have restricted the City's ability to fulfill their business needs.
- The City would like to have a new CIS system live by the end of 2024 at the latest. The City is committed to purchasing and implementing a standard, off the shelf product, but needs a system that is highly configurable to accommodate the City's complex water billing rate structure
- We previously worked on an RFP for our CIS preplacement but paused due to Covid. Now we are prepared and staffed to go forward with this implementation.
- Plante Moran is assisting in an advisory role with us.
- Many staff have participated in the requirements gathering process to ensure it meets each department's unique needs

b) Business Drivers

- The capabilities of the current system do not adequately support existing or changing business processes at the City.
- Opportunities to streamline and maximize efficiency are limited with the current software.
- The current systems may not be able to meet minimum state/federal requirements in future.
- Systems are not producing the information in a way to ensure the City makes the best decisions.
- Changing business processes at the City.

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- Significant staffing requirements on previous technology projects.

c) Vision

- The City of Greeley requires a robust solution that will allow the City to continue to leverage this investment well into the future as the needs of the City grow and evolve.

d) Project objectives

- Provide staffing requirements for a CIS implementation so the City is adequately prepared.
- Understand current City technology strategy and changes to the existing environment.
- Ensure procurement-related documents (e.g., request for proposals document, requirements, demonstration scripts) are updated based on City business processes.
- Implement a new CIS system to fit the needs for the City of Greeley

e) Project Scope

- The City is requiring that responding proposers complete CIS solution, including software, hardware specifications, project management, and other technology services for the entire scope of the project that may or may not include components owned by the proposer. Please look over section 1.5 of the RFP carefully.

4) Pre-Proposal Meeting Introduction (Alex)

a) Overview of Pre-Proposal Meeting Format and Agenda

b) Overview of Purchasing Process and Submission Requirements (e.g. submission via email, file formats, etc.)

- i) In order to confirm and maintain a complete attendance list, please send an email to purchasing@greeleygov.com. Include, company name, attendee name(s), phone and email address.
- ii) All proposals received by the City are subject to public viewing per CORA after contract award. Vendors have the option to provide an additional proposal labeled "For Public Viewing". If the City receives a records request, the public viewing copy will be the one shared.
- iii) Do not attempt to correspond with anyone outside the purchasing department during the solicitation process. Only responses from purchasing@greeleygov.com will be considered binding.

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- c) Discussion questions/answers are not official until summarized and issued in an addendum. All questions answered here in the Pre-Proposal meeting will be summarized and issued also in the addendum. Submit all questions in writing. **-VENDOR RESPONSIBILITY**
- d) No communication with City staff other than Purchasing.
- e) RFP Posted to bidnetdirect.com and City site and reiterate *the official* source for RFP/addendum
- f) Reminder of key dates
 - i) Deadline for additional questions is **August 1 at 4:00pm** MST
 - ii) Questions & Answers issued in Addendum by **August 14.**
 - iii) Proposals due **August 21 at 2:00pm** local time
- g) Evaluation Criteria
 - i) The minimum evaluation criteria are as follows:

Minimum Criteria

Minimum Client Software Installations

Must have provided software for at least three previous public utilities of similar size and complexity within the past 5 years.

RFP Response Timeliness

RFP response is submitted by the due date and time.

Response Authorization

The RFP response is signed by an authorized company officer.

Response Completeness

Vendor complied with all instructions in the RFP and provided a response to all items requested with sufficient detail, which provides for the proposal to be properly evaluated. Any deficiencies in this regard will be determined by the City's Purchasing staff to be either a defect that will be waived or that the proposal can be sufficiently modified to meet the requirements of the RFP.

PCI Compliance

Where applicable, the Vendor shall certify in its Proposal that it meets Payment Card Industry (PCI) Data Security Standards (DSS), and if recommended for award, shall illustrate compliance.

Note that the detailed Evaluation Process and Criteria is in Section 1.7 of RFP

- h) Overview of Proposal Format
 - i) Proposal Response Format in Section 3
 - ii) Required Forms
 - (1) RFP F23-07-062 CIS System Selection - Specifications.xlsx
 - (2) RFP F23-07-062 CIS System Selection - Pricing Forms.xlsx
 - (3) RFP F23-07-062 CIS System Selection - Vendor Forms.docx

📄 **Vendor Question & Answer (Alex)**

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- a) Facilitate questions from vendors with the assistance of Plante Moran and PMO Team
- b) Krystal will take notes on Q&A

☐ **Pre-Proposal Meeting Wrap-up (Alex)**

- a) Reminder to submit questions via email to Purchasing not on BidNet
- b) Thank you