**REQUEST FOR PROPOSAL**

**FOR AN**

**Advanced Metering Infrastructure (AMI)**

**and Meter Data Management System (MDMS)**

**RFP-70090474-JB**

**El Paso Electric Company**

**P.O. Box 982**

**El Paso, Texas 79960**



**Notice**

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# Introduction

El Paso Electric Company (“EPE” or the “Company”) is soliciting requests for proposals for the implementation and installation of an advanced metering infrastructure (AMI) system, including meter end point installation (EPI) services, and a meter data management system (MDMS) (collectively, the “Project”). EPE will consider all commercially available options for either an AMI/EPI only solution, an MDMS only solution, or a solution that includes both the AMI/EPI and MDMS.

## Purpose

EPE seeks responses to this Request for Proposal (“RFP”) to obtain information from prospective bidders for the design and implementation of an AMI and/or MDMS system. Information sought through bidder responses includes a detailed explanation of: (1) bidder capabilities and offerings for an AMI and/or MDMS system, (2) bidder experiences and past performance in implementing AMI and/or MDMS system(s), (3) bidder proposed services and designs for an AMI and/or MDMS solutions, or a holistic implementation and deployment for an AMI-MDMS system utilizing a secure, reliable, high bandwidth communication solution as well as including meter exchange and deployment services for approximately 467,000 meters (see note below), and 4) bidder estimated costs to design, build, test, implement, deploy and support the proposed AMI and/or MDMS system in order to deliver the benefits desired by EPE.

NOTE: Bidders should expect the following annual growth rate of the following for the expected meter populations to be exchanged:



While the actual quantities delivered may grow in accordance with these expected growth factors, Bidders are requested to provide pricing for the specific types, forms, and quantities indicated in the Appendix G Price Schedule Guide.

The successful bidder must perform several functions including but not limited to the following:

* The successful AMI bidder will be responsible for designing and integrating the AMI solution architecture, including data flows and interfaces, between the AMI and MDMS systems and any other to-be-determined back office systems.
* The successful AMI bidder will also be responsible for coordinating with EPE regarding end point installation services (and data) including data exchange to EPE’s Customer Information System (CIS), MDMS, and other to-be-determined back office systems. Bidder will be responsible for end-to-end meter exchange and installation services, including accurate data capture, meter configuration, and real time updates in EPE’s various technology platforms from the bidder’s work management system. Further, the bidder will be responsible for working with EPE to design the structure and format of the daily file as well as coordinating the delivery of daily meter file uploads.
* The successful MDMS bidder will be responsible for designing and integrating the MDMS solution architecture, including data flows and interfaces, between the MDMS and AMI system, the MDMS and EPE’s CIS (currently Oracle CC&B v 2.4 – expect to be version 2.6 or higher at the time of implementation) and any other to-be-determined back office systems. This will be performed in coordination and collaboration with the EPE to ensure integration of the full end-to-end AMI-MDMS-CIS solution.

### Bidder Eligibility

EPE is looking to procure an AMI and MDMS solution from a qualified and experienced company with a history of successful and proven AMI and MDMS solution implementations in North America of comparable size, scope, and complexity to EPE’s initiative. The bidder is expected to have sufficient experience to manage the installation and deployment of approximately 467,000 or more meters, and to provide technical expertise and services to design, develop, and deploy the AMI and MDMS solutions as well as supporting systems. As such, the bidder is expected to have these minimal levels of experience and expertise and it is expected that the technical solutions that are being proposed are sufficiently mature and have been successfully deployed previously by the bidder.

|  |  |
| --- | --- |
| **Experience** | **Description** |
| **Bidder Project Experience** | For those bidders submitting a bid for an AMI System, the bidder should provide demonstrated experience of having deployed an AMI system at three North American utilities, each of which having a minimum of 400,000 electric meters (end points). |
| For those bidders submitting a bid for an MDMS, the bidder should provide demonstrated experience of having deployed an MDMS at three North American utilities, each of which having a minimum of 400,000 electric meters (end points). |
| For those bidders submitting a bid for an AMI System, the bidder should have completed an exchange of drive-by AMR meters with fixed network AMI meters with at least 2 utilities that have a minimum of 250,000 electric meters (end points). |
| For those bidders submitting a bid for an MDMS, the bidder should have experience with integrating an MDMS with a North American utility utilizing Oracle CC&B as the billing system within the last 5 years. |
|  | To the extent that a bidder does not meet the experience requirements set forth above, the bidder shall include in its response to this RFP that they lack certain required experience and explain what other experience they do have that will allow them to successfully complete the services required to be performed hereunder within the expectations set forth herein. |
| **Product Commercially Available** | The bidder’s proposed solution (including meters, network devices, and version of the software proposed) must be commercially available as of the date of the proposal submission and installed for at least 2 previous customers. |
| The bidder’s proposed solution for AMI and/or MDMS must be commercially available via Cloud Services, SaaS, or on-premise Enterprise installation. |

Table 1.1 – Bidder Experience

The bidder will be expected to provide preliminary information about this experience in the Notice of Intent to Bid (Exhibit A) together with more detailed information about this experience in Appendix E as described in the following sections of this document.

## Communications

All communications from bidders to EPE, including questions regarding this RFP, must be submitted via email. Based upon the nature and frequency of the questions EPE receives, EPE may choose to respond to bidders either directly or address the question through a conference call. All questions and EPE’s responses will be provided to all prospective bidders.

All inquiries, and communications related to this RFP should be directed solely to Julie Bañuelos as the designated EPE point of contact to the following email address:

bids@epelectric.com

All communications between a bidder and EPE shall be conducted via email. Bidder shall refrain from any communications with any EPE personnel (both employees and independent contractors), other than the email listed above.

Please see Section 3.8 for instructions on submitting response documents to EPE regarding this RFP.

## Confidentiality

Included as Exhibit C to this RFP is a Confidentiality Agreement that must be executed by the bidder and returned to EPE (to the point of contact referenced in Section 1.2 above) as a condition precedent to its receipt of Appendices A-I that are necessary for its compilation of a thorough response to this RFP. Bidders must submit the (signed) Confidentiality Agreement document via email to the contact (email) shown in Section 1.2

## El Paso Bid Portal

Information about this RFP and doing business with EPE can be found at:

<https://www.epelectric.com/doing-business-with-epe>

## Company Overview

EPE is a public utility engaged in the generation, transmission and distribution of electricity in an area of approximately 10,000 square miles in the Rio Grande Valley in West Texas and south-central New Mexico as illustrated in Figure 1.5. EPE serves approximately 428,000 residential, commercial, industrial and wholesale customers through approximately 467,000 meters. EPE distributes electricity to retail customers, principally in El Paso, Texas and Las Cruces, New Mexico, utilizing remote and local generating stations.

https://www.epelectric.com/about-el-paso-electric/service-area

For a complete history of the Company and its services, please visit its web site at:

<https://www.epelectric.com/about-el-paso-electric/history>



Figure 1.5 – EPE Service Territory

# AMI and MDMS Project Vision and Scope

## Project Vision

EPE is pursuing this RFP for an AMI and MDMS for several reasons. EPE currently employs the use of automated meter reading (AMR) as well as Itron MV90x1 technologies for capturing the electric consumption of its residential and commercial customers. Several existing systems at EPE are reaching their end of life. Additionally, EPE presently employs multiple methods of meter data collection which adds complexity and costs to EPE’s operations. Further, EPE’s current metering and systems limit insight into real time energy demand and usage. EPE seeks to provide flexibility and control to customers regarding their individual energy consumption through new rate designs and offerings that are currently not provided. EPE is seeking opportunities enhance safety, reliability, and efficiency and increase situational awareness. EPE is also looking to provide a customer’s additional insight on their individual electric use, encourage efficiency/conservation, provide better outage communication and improve restoration activities.

AMI systems and metering will allow EPE to offer additional rate options for customers allowing them to select the most beneficial options for them. AMI is the foundation for smart grid technologies and smart city initiatives within the EPE service territory and will provide opportunities for EPE to execute different smart city initiatives including EPE’s electric vehicle charging, better integration of distributed energy resources, expanded demand response and other initiatives.

To that end, EPE is embarking upon implementation of an AMI and MDMS solution to transform the way that EPE does business today, but more importantly to provide EPE customers with additional tools, programs, and opportunities to manage and monitor their electric consumption while reducing the overall cost of services.

The AMI and MDMS solution is expected to address key EPE Utility needs including:

* Improved distribution system reliability;
* Enhanced employee productivity;
* Increased bill accuracy and advanced billing options;
* Enable easier implementation of rate options;
* Empower customers to control their bills through more frequent and timely usage information;
* Support demand side management initiatives;
* Improved accuracy of customer outage data thus enabling faster outage restoration; and
* Establish a foundation for future Smart Grid and Smart City technologies.

## Project Scope

EPE has identified a series of business opportunities envisioned to address the new opportunities expected from the implementation of smart grid and smart cities technologies. These phases form the basis of the program roadmap that was developed as part of the initial project phases.

The program roadmap includes 6 distinct phases with multiple business releases per each phase. At a high level, EPE expects to begin meter deployment in the first quarter of 2023 with a targeted completion of 2025. Per the bidding instructions that follow, once EPE receives an executed Confidentiality Agreement (Exhibit C) from a bidder as well as Exhibit A – Notice of Intent to Bid and confirms that the bidder meets the minimum eligibility requirements, EPE will provide the bidder additional information regarding the project roadmap and timeline for the RFP (Appendix H).

## Overview of RFP

The RFP is broken into several sections that are structured to allow EPE to conduct a thorough analysis of the bidder, the proposed technical and functional capabilities of the proposed systems, the estimated total cost of ownership of the proposed AMI, MDMS, and end point installer (EPI) solutions, and the experience of the bidder in installing and deploying AMI and MDMS solutions.

The RFP is structured around the following concepts:

* Functional and technical requirements (Appendix A) – the requirements are broken down into three main sections:
  + AMI Functional and technical requirements
    - Meters and meter specifications
    - AMI network and AMI head end system
    - Non-functional (disaster recovery, security, configuration, monitoring)
    - Testing and performance metrics
    - Support Services (Project management, installation, documentation)
    - Equipment Support
    - AMI Solutions
  + End point Installation (approach, methodology, safety, supply chain, call center, etc.)
  + Meter data management system
* Bidder Information (Appendix E)
  + Bidder background, financial standing, Project team, and experience
* Overall Estimated Price (Appendix G)

# Instructions to Bidders

## Bid Documents

In response to this RFP, a bidder must submit all the required information (items in **bold**) listed below by providing the completed documents to EPE on or before the bid submission due date. Failure to submit complete and timely responses in the format requested with all required information may, subject to EPE’s discretion, disqualify the bidder from further consideration.

|  |  |
| --- | --- |
| **Document Name** | **Format** |
| **Exhibit A – Notice of Intent to Bid** allows the bidder to indicate their previous experience as well as indicating that the bidder intends to submit a bid for this proposal. Exhibit A must be filled out and submitted to be reviewed by EPE to confirm that the bidder meets eligibility requirements prior to the Bidder receiving Appendices A-H (See below). | MS Word |
| **Exhibit B – No Bid Form** indicates that the bidder will not be bidding | MS Word |
| **Exhibit C – Confidentiality Agreement** – must be signed and delivered to receive additional Bid Documents – see below | MS Word |
| Please note that the documents listed below will NOT be provided by EPE until the bidder has filled out, signed, and returned Exhibit A – Notice of Intent to Bid, EPE has confirmed the bidder’s eligibility and signed and returned Exhibit C - Confidentiality Agreement. Please note that the Appendices are further described in the Appendices section of this document. | |
| **Appendix A – Requirements and Questions** | MS Excel |
| Appendix B / C – Electric Meter Population – Endpoints *(one file for both)* | MS Excel |
| Appendix D – Existing EPE Facilities | MS Excel and KMZ file |
| **Appendix E – Bidder Information** | MS Excel |
| Appendix F – IT Standards | MS Excel |
| **Appendix G – Price Schedule and Instructions** | MS Excel and MS Word |
| Appendix H – Project Roadmap and Proposed Timeline | MS Word |
| Appendix I – Rate Structures | PDF |

Table 3.1 – Bid Response Documents

In Table 3.1, the documents listed in **bold** are required to be provided as part of the bidder’s response. Please note that the instructions for these documents may be described in the following sections of this document and/or individually in the Appendix or Exhibit.

## Amendments During RFP Process

Any additional information required by a bidder, revisions in the requested scope of supply, discrepancies in the bidding documents, or clarifications will be in the form of addenda issued to all bidders. Any addenda issued to bidders shall be acknowledged by the bidders.

## Bidder's Responsibility

It is a bidder’s responsibility to gather and dispense to its subcontractors all information necessary for the completion of the bid documents.

EPE shall have no agreement with a bidder’s subcontractors, and bidder shall so inform its subcontractors.

Selected bidder(s) will be required to enforce the safety, security, and fitness-for-duty procedures while bidder, its employees, agents, representatives and/or subcontractors are on EPE customer and/or EPE premises.

## General Conditions

EPE may pursue contract negotiations with those bidders, if any, that EPE believes are best suited to meet its needs. Any expenses incurred in the preparation of responses to this RFP are the bidder’s sole responsibility. Bidder’s submitted proposal must remain valid for at least one (1) year.

## Right of Rejection

EPE reserves the right to reject any or all responses to this RFP or any portion thereof for any or no reason. Neither receipt of a response nor failure to reject a response shall impose any legal obligation on EPE or any of its affiliates. EPE may enter discussions and/or negotiations with one or more qualified bidders at the same time, should such action be in the best interest of EPE and its stakeholders.

## Notification of Intent to Bid

To participate in the RFP process, a bidder must complete Exhibit A – Notice of Intent to Bid Form by **5:00 PM Mountain Time (MT)** on November 1, 2019. Bidders may send this document via email to the contact (email) as shown in Section 1.2. If a Bidder does not intend to bid, please notify EPE via email.

## Clarifying Inquiries

Any clarifying inquiries requested by bidders must be submitted via the instructions shown in Section 1.2 of this RFP. EPE will not be bound by erroneous information or clarifications obtained through any other means. Clarifying Inquiries submitted after the deadline will not be addressed.

## Submission Requirements

Bid Response documents (see Table 3.1) must be received at EPE’s offices to the attention of:

Julie Bañuelos, Contract Negotiator,

100 North Stanton Street, Location #121,

El Paso, Texas 79901

by **5:00 pm Mountain Time (MT)** on the Proposals Due date indicated in Table 3.10. Any proposal received after the due date will be excluded from consideration. The bid response should include the documents indicated in Table 3.1 and be as complete as possible.

Two hard copies of the bid response (proposal) must be submitted. In addition, a soft copy of the proposal must be submitted on a USB Flash Drive. Facsimile and emails submittals shall be excluded from consideration.

Bidder is solely responsible for ensuring the proposal is received by EPE in accordance with the RFP instructions prior to the date and time specified, and at the place specified. EPE shall not be responsible for any delays in mail, or by common carriers, by transmitting errors, delays or mislabeling.

## Bid Process

EPE plans to conduct the RFP according to the following process. Information about deadlines and due dates is contained in Table 3.10 – RFP Important Dates.

* **RFP Issued:** EPE will release the RFP to bidders via [*https://www.epelectric.com/company/request-for-proposals*](https://www.epelectric.com/company/request-for-proposals)*.* Please note that several Appendices that contain confidential EPE information will not be released to the bidder until the Confidentiality Statement has been received from the bidder.
* **Notification of Intent to Bid:** Bidders must submit the appropriate “Notice of Intent to Bid” form.
* **Confidentiality Statement:** Bidders must submit the Confidentiality Agreement and return it to EPE (see Communication Section) prior to receiving any confidential information about EPE. Bidders may send the (signed) Confidentiality Agreement document via email to the contact (email) shown in Section 1.2
* **Deadline for Questions:** All questions from bidders must be submitted to EPE via email address shown in Section 1.2. Only inquiries from those bidders who have submitted an “RFP Intent to Bid” form will be accepted. Clarifying Inquiries submitted after the deadline will not be addressed.
* **Deadline for EPE to Respond to Questions:** EPE will respond/provide a response to all questions submitted by bidders by the deadline date for review by all bidders who have submitted a Notice of Intent to Bid (Exhibit A) and the Confidentiality Agreement (Exhibit C).
* **Proposals Due:** Each bidder must submit its complete response to EPE to remain in consideration for the RFP.
* **Shortlist of Bidders:** Bidders may go through a down-selection process where select bidders will be short-listed to continue in the evaluation process. All decisions to shortlist or not to shortlist bidders will be made at the sole discretion of EPE.
* **Oral Presentations:** Each bidder who has been shortlisted may be requested to provide an in-person presentation at EPE’s headquarters in El Paso, Texas regarding its proposed solutions. This will provide EPE a forum to ask questions about the proposed solutions.
* **Bidder Selection and Negotiations:** EPE may select one or multiple bidders with whom to enter into negotiations for contracting.

The above process may be modified at EPE’s discretion.

## RFP Schedule

Bidder shall recognize and comply with the following schedule: \*

|  |  |
| --- | --- |
| **RFP Process Step** | **Date** |
| Request for Proposal Issued | 7 1, 2019 |
| Notification of Intent to Bid Due | November 1, 2019, 5:00 PM MT |
| Executed Confidentiality Agreement Returned to EPE | November 1, 2019, 5:00 PM MT |
| Informational Webinar | October 16, 2019 |
| Final Submission of Questions Due | December 2, 2019, 5:00 PM MT |
| EPE Responds to Questions Submitted | December 16, 2019 |
| Proposals Due | January 6, 2020, 5:00 PM MT |
| Shortlisted Bidders Notification | February 6, 2020 |
| Oral Presentations in El Paso, Texas | February 27, 2020 |
| Bidder Selection | April 1, 2020 |

Table 3.10 – RFP Important Dates

\*The above dates may be modified at EPE’s discretion. Any changes to dates will be provided to all bidders via the El Paso Bid Portal and/or provided to those who have submitted a Notice of Intent to Bid.

# Expectations for Bidder Response

## General Guidance

To facilitate the review of all responses in a manner that is fair to all bidders and allows for comparability across responses, EPE is providing guidance to all bidders regarding the expectations for response to this RFP. It is EPE’s expectation that bidders shall adhere to this guidance to ensure that EPE is able to clearly understand each bidder’s response to all aspects of the RFP.

Detailed guidance for documentation and information to be submitted can be found below. In addition to that guidance, EPE would like to emphasize the following:

### Scope of Response

EPE expects responses to this RFP will be confined to the scope of the components sought in this RFP and will not focus on components outside of this RFP, except for how they directly relate to the components of this RFP (e.g., compatibility requirements).

It is bidder’s responsibility to ensure that any information submitted is provided in response to the RFP based on the guidance provided by EPE and to seek clarification by the deadline should it be needed.

### Clarity

EPE expects bidders will make their best efforts to be clear in their responses to information sought through the RFP. This includes approaching responses with enough detail to provide a complete and thorough answer to the questions asked. Further, while technical information submitted will clearly require using detailed technical language to appropriately respond, where possible, bidders should seek to use non-technical language to convey their responses, such that appropriate EPE personnel across the organization will be able to understand and evaluate the information provided.

### Brevity

The AMI and/or MDMS solution being sought is a complicated system, and responses to this RFP will need to appropriately address that complexity. However, EPE encourages bidders to be concise in their submissions. Marketing type information should not be included in responses but can be provided as attachments to the response.

### Formatting

All functional, technical, service, pricing and experiential information submitted in response to this RFP should follow the format in the templates (Appendices or Exhibits) provided by EPE.

## Bidder Information

### Detailed Project Experience and References

To help EPE understand a bidder’s experience in AMI and/or MDMS implementations, the bidder must complete **Appendix E – Bidder Information**. In the response, a bidder should provide at least three (3) examples of AMI and/or MDMS deployments in North America where the bidder provided the same or similar services as solicited in this RFP. If the bidder has not performed services for at least three implementations of size, the bidder should provide examples of their next largest electric AMI and/or MDMS installations.

Specific examples of types of information EPE is seeking to evaluate, and bidders should emphasize, include, but are not limited to:

* Scope of project, including pilot vs. full deployment and number of electric meter end-points, broken out by customer type, for which the bidder installed the system;
* The bidder’s role and responsibilities as they relate to the services solicited in this RFP;
* Specific techniques, tools and methods employed to successfully deliver services across all three packages;
* Best practices and lessons learned from experiences in deployment or challenges incurred, and how those will be applied to future projects in this solicitation;
* Timeline of project, including the time to complete specific components or phases, and the time to fully provide all services provided;
* Other vendors the bidder worked with in developing the overall AMI and/or MDMS solution, those with which bidder coordinated (not subcontractors);
* The bidder’s use of subcontractors, and experience with each regarding the specific roles and responsibilities subcontracted; and
* Utility client contact information, so EPE may make inquiries as desired.

### Company Background Financial Information

Additionally, in Appendix E the bidder should supply the requested company background and financial information. Information that will be supplied as a separate document should be clearly indicated in Appendix E. Bidders should also indicate the name of the document in the Comments / Notes column. Please make sure to review the instructions in Appendix E as well.

A bidder should provide any additional supporting documentation or information that is not directly solicited in Appendix E through attachments. Please follow the instructions in Appendix E for supplemental information to be included as part of Appendix E. Please do not provide marketing information in this section but limit the information to specifics about the company background, financial, and previous experience.

#### Financial Standing

A bidder shall demonstrate that it is in good financial standing by submitting its most recent three (3) years audited financial statements, or if audited financial statements are unavailable, unaudited financial statements shall be submitted and certified as true, correct, and accurate by the chief financial officer or treasurer of the bidder’s company. There is no template or appendix for submitting financial statements. A bidder should include its financial statements as clearly instructed in Appendix E Bidder Information Instructions for including supplemental information.

EPE will evaluate and make its own determination of the sufficiency of a bidder’s financial resources and its ability to provide the service. Factors to be reviewed include, but are not limited to:

* + - Balance sheets
    - Net working capital
    - Current asset ratio
    - Liquidity ratio
    - Auditor(s) notes
    - Any notes to the financial statements
    - Any outstanding legal issues or lawsuits

EPE may also request a statement from the president, owner, or financial officer on company letterhead certifying that the bidder is in good financial standing and current in payment of all taxes and fees.

### Project Team

The bidder must submit, by phase, information regarding the key personnel for the proposed Project team required for successful deployment of the AMI and MDMS systems. Information sought by EPE for each key member of the proposed Project team includes:

* Basic information (name, title, tenure, etc.);
* Experience at bidder and other companies related to similar projects, including exact roles and responsibilities on those projects as they relate to this RFP;
* Expected role on the Project team, including responsibilities, estimated hours, and specific phases of support;
* Ability to commit for the life of EPE’s initiative, through full meter deployment in 2025; and
* Expected time commitment for the Project (e.g., full-time, 50% part-time, 25% part-time, etc.).

Beyond individual bidder team member information, the bidder should provide information regarding its proposed team structure and work plans:

* Proposed streams of work (AMI, EPI, MDMS) and alignment to services solicited and proposed in the response;
* Bidder staffing, and team structures required for each stream of work;
* Anticipated deployment of individuals identified as part of the overall Project team;
* Specific roles of key members within the stream of work;
* Good-faith estimate of the time expected for completion of the services in the design phase; and
* Good-faith estimate of the time expected for completion of the services in the build test deploy phase.

EPE also recognizes the Project will require staffing and support from EPE personnel to ensure efficient operations and execution by the bidder. Hence, a bidder should provide, by phase, the following information based on its experiences in providing the same or similar services at other utilities:

* Proposed full-time and part-time staffing commitment from EPE to support the bidder’s services;
* Experience and tenure of EPE personnel best-suited to supporting the bidder;
* Proposed organizational structure for EPE personnel to effectively support the bidder;
* Roles and responsibilities of EPE personnel in supporting the bidder’s services, broken down by stream of work (AMI, EPI, MDMS) and/or the bidder Project team as described above;
* Frequency and forms of interaction and reporting between the bidder and EPE personnel for efficient operations and execution of the bidder’s services; and
* Length of commitment and continuity required from EPE personnel by phase (e.g., design and build, test, deploy).

### Description of Proposed Subcontractors

If a bidder plans to use subcontractors to perform any or all the work being proposed as part of the submission, the bidder must specify so in its response in “**Appendix A – Section 8.0**.” Please see the following information regarding subcontractor information being requested:

* **Role:** Define the specific role(s) of the subcontractor in terms of delivering the proposed solution, including the functions the subcontractor will serve and where it fits into the overall set of roles required to deliver the solution.
* **Responsibilities:** Define the responsibilities for which the subcontractor will have control and accountability to the bidder. Confirm that the bidder will ultimately be responsible to EPE.
* **Rationale:** For each subcontractor, explain why the use of a subcontractor to fill the role and take responsibility for the defined aspects of the solution is an optimal choice to meet EPE needs. Please also explain how and why each specific subcontractor was chosen to fill the specified roles and responsibilities.
* **Relationship:** Explain any existing relationship between the subcontractor and the bidder, including business relationships and strategic agreements or partnerships.

## Licensing and Permitting

Bidder, its subcontractors, agents, and each of their respective employees shall (I) possess all licenses required by applicable law, rule, or regulation to perform the project work, and (II) obtain and maintain all permits and authorizations required by applicable law, rule, or regulation for performance of the project work.

## Pricing

The bidder shall provide detailed pricing information for the solicited services as described in **Appendix G – Price Schedule***.* The bidder should not provide any pricing information in other response documents. All pricing information submitted should be submitted in the pricing template.

EPE expects the bidder to accurately represent all costs associated with the bidder’s proposal. Failure to disclose all true costs or inaccurate representation of any portion of bidder’s AMI and/or MDMS solution and its associated costs may result in disqualification of response from evaluation.

A bidder is expected to thoroughly review all relevant information provided in this RFP to provide EPE with the most accurate price quotes possible. As such, it is a bidder’s responsibility to fully understand the scope of the AMI and/or MDMS solution as laid out in this RFP and ask clarifying questions prior to submission of its response.

**4.4.1 Tax and Invoicing**

**Bidder shall provide separate invoices for Services provided in Texas and Services provided in New Mexico.**

**Taxes and Invoicing for Services provided in Texas:**

**Invoicing** – Bidder shall separately state the solicited services based on Price Schedule on Appendix G Tab 1, and Tab 2, Tab 3, Tab 4, Tab 5, Tab 7, Tab 8, and Tab 10.

**Taxes** - Bidder shall invoice EPE for and EPE agrees to pay, state sales, use, or similar taxes, if applicable, to the Services or the Contractor Materials or, in lieu thereof, EPE shall provide to the Bidder a valid tax exemption certificate exempting EPE from the payment of such taxes or a valid direct pay certificate allowing EPE to pay such taxes directly to the state taxing authority.

**Taxes and Invoicing for Services provided in New Mexico:**

**Invoicing -** Bidder shall separately state the solicited services based on Price Schedule on Appendix G Tab 1, and Tab 2, Tab 3, Tab 4, Tab 5, Tab 7, Tab 8, and Tab 10. The invoice shall separately state the amount of New Mexico Gross Receipts Tax due on the invoice.

**Taxes -** Bidder shall invoice EPE for and EPE agrees to pay, state gross receipts, or similar taxes, if applicable. The invoice shall separately state the amount of Gross Receipts Tax due on the invoice.

# Evaluation

EPE will use both quantitative and qualitative criteria to evaluate the proposal as shown in the following tables:

For the AMI and EPI evaluation, the quantitative and qualitative criteria and weighting is broken down as shown in Table 5.1.

|  |  |
| --- | --- |
| AMI / EPI Categories | Weight |
| Commercial Evaluation | 25% |
| Technical Evaluation | 35% |
| Future Proofing and Obsolescence Evaluation | 15% |
| Financial Strength and Evaluation | 25% |
| Total | 100 |

Table 5.1

For the Meter Data Management System evaluation, the quantitative and qualitative criteria and weighting is broken down as shown in Table 5.2.

|  |  |
| --- | --- |
| MDMS Categories | Weight |
| Commercial Evaluation | 30% |
| Technical Evaluation | 40% |
| Future Proofing and Obsolescence Evaluation | 10% |
| Financial Strength and Evaluation | 20% |
| Total | 100 |

Table 5.2

## Evaluation Process

A list of the documents required to be submitted as part of the bidder’s response is shown in **Section 3.1 – Table 3.1**. Failure by a bidder to submit any of these documents may disqualify bidder from continuing in the RFP process. EPE will consider all information provided by the bidder in the listed documents as well as any supplemental documents that the bidder may/will submit in response to any of the required appendices listed in Table 1.1.

## Evaluation Criteria

The Company will conduct due diligence as part of the overall bid evaluation process, including, but not limited to, consideration of the following proposal characteristics:

### Overall Quality of Response

It is of the utmost importance to EPE that a bidder provides a high quality a response to this RFP. All information provided should be both aligned to the scope of this RFP and relevant to the content solicited within this RFP. In addition, responses should be sufficiently detailed to ensure EPE has a solid understanding of the bidder’s services and offerings; how the bidder’s services and offerings will deliver the solution; the specific services the bidder proposes to provide, and mechanisms by which they will be provided; how the bidder proposes to price its proposed services; the bidder’s body of experience in providing similar solutions to other North American utility companies; and how the bidder’s response has been specifically tailored based on EPE needs. For EPE to develop this level of understanding requires not only detail in the bidder’s response, but also completeness and clarity in the information submitted.

### Support of Proposed Solutions

In evaluating how a bidder’s proposed solution supports the solutions identified in the RFP, EPE will evaluate a bidder’s response based on how well the bidder’s solution enables the full AMI and/or MDMS solution and the quality and depth of support described. EPE will evaluate the degree to which the bidder can demonstrate its company has been able to deliver the same or similar solutions elsewhere using the same or similar services.

### Proposed Technical and Functional Solution

The bidder’s description of its proposed technical and functional solution and architecture is an important source of information that will provide detail and insight into how the proposed solution will work, and how it will deliver a comprehensive solution for the end-to-end AMI and/or MDMS solution sought in this RFP, how data will be integrated and managed across all systems, how the bidder plans to minimize complexity of the end-to-end solution, how it will meet the security requirements defined in this RFP, and the bidder’s overall philosophy in approaching the IT architecture and future development.

### Proposed Service Offerings

The overall AMI and/or MDMS solution sought is complex, requiring bidders to provide a detailed set of services. The bidder’s ability to provide the appropriate services as described in this RFP will be important to ensuring EPE is able to make full use of the AMI and/or MDMS technology components.

EPE plans to evaluate bidder responses based on a bidder’s ability to provide the specific services considered to be within the scope of this RFP. To the extent those services can be tailored to meet EPE needs, EPE will view a bidder’s service offerings favorably. Moreover, if a bidder can demonstrate a proven track record of providing similar services as part of other North American utility deployments of AMI and/or MDMS, EPE will also consider this a positive attribute with respect to the bidder’s service offerings.

The EPE AMI and/or MDMS implementation process will be a long and involved process that requires commitment of numerous resources and coordination with many parties. Therefore, EPE is seeking more than just a transactional relationship with a bidder. To the extent a bidder can demonstrate its ability to provide a team with a track record of success in providing the services sought in this RFP, that will be viewed favorably. This includes at both the level of the bidder’s overall organization and the individuals identified as part of the proposed team. Furthermore, a history of close working relationships with customers, utilities, stakeholders and other potential bidders that EPE may utilize in relation to the AMI solution will also be viewed favorably in the evaluation.

Additionally, EPE desires to understand the scope of work that is required to develop and deliver the AMI and MDMS system(s). Please refer to Appendix A - Section 8.1 where EPE desires for the bidder to provide a sample Statement of Work (SOW).

### Pricing

EPE expects bidders to provide fixed pricing information regarding the AMI and/or MDMS solution offering sought as part of this RFP for all phases as identified in Appendix H – Project Roadmap and Proposed Timeline. EPE will evaluate bidder price estimates based on several key criteria. Foremost, overall price to deliver the proposed solution in a cost-effective manner will be critical. However, other elements of price will be evaluated, including but not limited to, cost of meters and meter installation, network communication, head end system software, implementation services, MDMS software and services, and reasonableness of estimate.

### General Corporate Information

In addition to the specific functional, technical, service, pricing and experiential information sought with respect to the AMI and/or MDMS solution, EPE will review the general corporate information provided by the bidder. This additional information will be used to validate the bidder’s overall financial stability, hiring practices, team capabilities, proposed Project timeline, and other information deemed critical to selection, but which may not be immediately identified in review of the AMI and/or MDMS solution per the dimensions noted above.

# Appendices

Please note that Appendices A-I will be provided after (1) bidder delivers the signed Confidentiality Agreement (Exhibit C) to EPE, and (2) bidder provides (and EPE validates) information demonstrating bidder satisfaction of the project experience requirements included in this RFP by its completion and delivery of Exhibit A.

## Appendix A – Requirements and Questions

“*Appendix A – Requirements and Questions*”is a spreadsheet containing the AMI-EPI and/or MDMS requirements and questions. Instructions for filling out this document are provided in the spreadsheet. Please note that several of the requirements will require that a supplemental word document must be created and developed by the bidder and returned with the response. Instructions to complete the supplemental document are included in the instructions.

## Appendix B – C – Electric Meter Population - Endpoints

“*Appendix B – C Electric Meter Population - Endpoints*”provides a listing of existing meter manufacturers and models for EPE that the bidder should expect to exchange/replace as part of the meter change out. It also contains a list of service point addresses for EPE. When the bidder is developing its preliminary network design, these addresses can/should be taken into consideration as the service point addresses that will have their meter exchanged for an AMI meter, and which will need to be included in the network coverage area planning. Please note that EPE does not have all existing service point meters geo-located in its GIS system and the information that is contained in this Appendix can be used to geocode approximate locations of the meter service end points.

## Appendix D – Existing EPE Facilities

*"Appendix D – Existing EPE Facilities"* contains information regarding the location of existing EPE facilities that may be used (subject to the bidder AMI Network Design) for locating towers, collectors, repeaters, and other network equipment for the AMI system.

* Existing facilities that are in place today.
* Locations of existing EPE buildings, substations, etc. are available via the KMZ file provided.

EPE is providing this information to bidders to assist them in designing the AMI network. The bidder should understand that EPE expects that the network design (reference the requirements in Appendix A) is a preliminary design and is subject to change, however EPE also expects that the bidder will use the information as input in developing the Pricing Schedule (see Appendix G) for the necessary equipment to collect and provide information and data to/from the meter end points.

## Appendix E – Bidder Information

“*Appendix E – Bidder Information*” contains requirements and questions about the bidder company and previous experience in implementing, deploying, and installing an AMI and/or MDMS solution. IMPORTANT: Information provided by the bidder in Appendix E may be used to qualify the bidder for subsequent review and scoring by EPE. The bidder should pay attention to Section E.6 (of Appendix E) and understand that EPE expects and anticipates that this information will be provided for at least 3 separate projects performed by the bidder.

## Appendix F – IT Standards

“*Appendix F – IT Standards*” indicates the information technology standards (for servers, VMware, network, authentication and authorization) amongst other standards at EPE. As indicated in the requirements in Appendix A, EPE expects the bidder to provide its platform (hosted, SaaS, or on premises) options as part of the response. Regardless of the platform proposed, EPE expects that the bidder will support all EPE IT standards and expressly communicate in writing in its response to the RFP any standards or guidelines that it does or will not support. In the body of Appendix A, the bidder shall indicate when identifying the platforms supported by the bidder any issues, exceptions or objections to the IT standards in the body of your response.

## Appendix G – Price Schedule

“*Appendix G – Price Schedule*”is a template provided by EPE for the bidder to fill in its price for the proposed solution. The information should be presented in such a way that it is clear to which product or service the line items in the price schedule pertain. For example, the bidder should clearly indicate, and EPE should be able to clearly understand, if a price shown is for:

* The AMI Head End System / End point Installer Solution;
* The AMI Field Collection Network; and
* The MDMS Solution.

Please refer to the accompanying instructions for guidance in filling out Appendix G.

## Appendix H – Appendix H – Project Roadmap and Proposed Timeline

This provides additional information on the project roadmap and proposed timeline.

## Appendix I – Rate Structures

This describes the El Paso Electric rate structures.

# Exhibits

## Exhibit A – Notice of Intent to Bid:

The bidder should complete this form and return it to EPE if it intends to bid on this RFP. Please note the due date listed in Table 3.10

## Exhibit B – No Bid Form:

The bidder should complete this form and submit it to EPE to indicate that the bidder will not be bidding.

## Exhibit C – Confidentiality Agreement:

The bidder must sign and return the confidentiality agreement to EPE to receive additional Appendices from EPE that contain confidential and sensitive information. Please note the due date listed in Table 3.10