

**FORM A: PROPOSAL**  
(See B8)

1. Contract Title DESIGN, DEVELOP, IMPLEMENT, AND OPERATE A CUSTOMER SELF SERVICE WEB SITE FOR WATER BILLING

2. Bidder

\_\_\_\_\_  
Name of Bidder

\_\_\_\_\_  
Street

\_\_\_\_\_  
City

\_\_\_\_\_  
Province

\_\_\_\_\_  
Postal Code

\_\_\_\_\_  
Facsimile Number

(Mailing address if different)

\_\_\_\_\_  
Street or P.O. Box

\_\_\_\_\_  
City

\_\_\_\_\_  
Province

\_\_\_\_\_  
Postal Code

The Bidder is:

(Choose one)

a sole proprietor

a partnership

a corporation

carrying on business under the above name.

3. Contact Person

The Bidder hereby authorizes the following contact person to represent the Bidder for purposes of the Proposal.

\_\_\_\_\_  
Contact Person

\_\_\_\_\_  
Title

\_\_\_\_\_  
Telephone Number

\_\_\_\_\_  
Facsimile Number

4. Definitions

All capitalized terms used in the Contract shall have the meanings ascribed to them in the General Conditions.

5. Offer

The Bidder hereby offers to perform the Work in accordance with the Contract for the Price(s), in Canadian funds, set out on Form B: Prices, appended hereto.

6. Execution of Contract

The Bidder agrees to execute and return the Contract no later than seven (7) Calendar Days after receipt of the Contract, in the manner specified in C4.1.

7. Commencement of the Work The Bidder agrees that no Work shall commence until he is in receipt of a notice of award from the Award Authority authorizing the commencement of the Work.

8. Contract The Bidder agrees that the Request for Proposal in its entirety shall be deemed to be incorporated in and to form a part of this offer notwithstanding that not all parts thereof are necessarily attached to or accompany this Proposal.

9. Addenda The Bidder certifies that the following addenda have been received and agrees that they shall be deemed to form a part of the Contract:

No.	_____	Dated	_____
	_____		_____
	_____		_____

10. Time This offer shall be open for acceptance, binding and irrevocable for a period of forty-five (45) Calendar Days following the Submission Deadline.

11. Signatures The Bidder or the Bidder's authorized official or officials have signed this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_\_.

Signature of Bidder or Bidder's Authorized Official or Officials

\_\_\_\_\_

\_\_\_\_\_

(Print here name and official capacity of individual whose signature appears above)

\_\_\_\_\_

\_\_\_\_\_

(Print here name and official capacity of individual whose signature appears above)

**FORM B: PRICES**  
(See B9)

**DESIGN, DEVELOP, IMPLEMENT, AND OPERATE A CUSTOMER SELF SERVICE WEB SITE FOR WATER BILLING**

**UNIT PRICES**

ITEM NO.	DESCRIPTION	SPEC. REF.	UNIT	APPROX. QUANTITY	UNIT PRICE	AMOUNT
1.	Design, Develop, Implement, and Operate	E2 thru E4	Lump Sum	1		
2.	Annual Software/System Maintenance costs	Form N # 40	Year	1		
3.	Annual Hosting Service Costs	Form N # 54	Year	1		

TOTAL BID PRICE (GST and MRST extra) (in figures)\$ \_\_\_\_\_

(in words) \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_  
Name of Bidder

**FORM N – BIDDER RESPONSES**  
(See B11)

**DESIGN, DEVELOP, IMPLEMENT, AND OPERATE A CUSTOMER SELF SERVICE WEB SITE FOR WATER BILLING**

**WATER BILLING CUSTOMER REQUIREMENTS**

1.	Customers will be able to view a summary of their current and previous water billing information. (The design should take advantage of the medium and present information in an appealing manner). Discuss how this could be done.
<b>Bidder's Response</b>	
2.	After a year of production operation the department will provide customers with ability to view a graph of their water consumption history by address. Discuss how this could be done.
<b>Bidder's Response</b>	
3.	Customers will be able to view the website in either French or English. Discuss how this could be done.
<b>Bidder's Response</b>	
4.	Customers must be able to optionally select whether they want to receive a printed bill through the mail and indicate this preference on the website. This information will be accumulated and provided to Water and Waste in the form of a requested report.
5.	Customers will be able to print an image copy of their water bill(s).
6.	Customers with multiple accounts will be able to view all accounts and optionally select accounts to view or change.
7.	Customers will be able to provide information about a move from or to a new location. This would involve providing new premise information, dates and meter readings, etc., and would require the selective use of mandatory fields. Discuss how this could be done.
<b>Bidder's Response</b>	

**FORM N – BIDDER RESPONSES**  
(See B11)

**DESIGN, DEVELOP, IMPLEMENT, AND OPERATE A CUSTOMER SELF SERVICE WEB SITE FOR WATER BILLING**

**WATER BILLING CUSTOMER REQUIREMENTS (CONTINUED)**

8.	Customers will be able to optionally select whether they receive a hardcopy of their bill by regular mail. If customers opt for an electronic bill copy via the Web service they must be able to receive an email notification of their bill availability. Discuss how providing and controlling this option can be done.
<b>Bidder's Response</b>	
9.	Customers must be able to pay water bills online. Currently, this would be accomplished via linking to a customer's bank of choice. The design must not compromise the ability to include functionality to accept and manage payments from debit and credit cards in a PCI compliant manner at some future point.
10.	Customers will be able to change account-related information. For example, customers must be able to update their mailing address, contact phone numbers, email address, or provide account name changes. This information will be accumulated and provided to Water and Waste staff. Discuss how this can be done and how customers could get confirmation upon receipt of their changes.
<b>Bidder's Response</b>	
11.	Customers will be able to view current and previous bulletins normally associated with the mailing of printed bills.
12.	Customers will be able to establish and maintain their own passwords to access the system. Password generation will be authorized by verifying customer-entered information to unique information specific to the customer's water bill.
13.	Customers will require functionality to deal with forgotten password situations.
14.	Customers must be able to optionally provide water meter readings for each of the meters on their premises. This will be a separate feature of the system and not linked to bill review and payment. The information entered will be stored and extractable in batches by the Water and Waste department. The file format will be defined during the design process. Discuss how this can be done.
<b>Bidder's Response</b>	

**FORM N – BIDDER RESPONSES**  
(See B11)

**DESIGN, DEVELOP, IMPLEMENT, AND OPERATE A CUSTOMER SELF SERVICE WEB SITE FOR WATER BILLING**

**WATER BILLING CUSTOMER REQUIREMENTS (CONTINUED)**

15.	Customer meter reading entry must display existing account and meter number, with appropriate entry box for new meter readings
16.	Customers will require the ability to email Water and Waste department billing staff directly from the Website (“Contact Us” feature). Emails would have the required information fields (meter readings, addresses, etc.) available to assist with supplying correct information.
17.	The system must include a customer demonstration and tutorial section on usage and navigation. Describe how this can be accomplished and provide examples of other systems that have been done.

**ADMINISTRATIVE REQUIREMENTS**

18.	Delete from the website an entire batch of bills, range of bills, or specific bill and its related information.
19.	Purge web records older than a defined date.
20.	Delete or inactivate a particular customer’s account.
21.	Department staff must be able to manage (archive, purge and extract) batches of customer-entered meter readings.
22.	Change a customer’s password (reset a password).
23.	Undeliverable email messages (from requirement # 8) will be logged and provided to the department as a requested report.
24.	Provide a log of when customers have accessed their accounts on the website and provide this information to the department in the form of a report. Additionally, provide all relevant statistics on site usage like access counts by time of day, availability and transaction performance.
25.	The website must have the capability for administrative functions to manage the website. Use of these functions must be logged recording user id, date and time and made available in an administrative report.
26.	Provide a mechanism to manage (add and maintain) links to financial institutions. (Related to requirement # 9)
27.	Provide a mechanism to manage (review, announce, highlight, archive, purge) viewing of general customer notification and bulletin information uploaded to the Website (as defined in E2.1(d).

**Bidder’s Response:**

**FORM N – BIDDER RESPONSES**  
(See B11)

**DESIGN, DEVELOP, IMPLEMENT, AND OPERATE A CUSTOMER SELF SERVICE WEB SITE FOR WATER BILLING**

**GENERAL DESIGN REQUIREMENTS**

28. Bidders are required to provide a thorough description of the proposed design process outlining; elapsed time, number and nature of resources required, design methodologies and all other pertinent information to describe their proposed design process.

**Bidder's Response:**

29. Bidders should identify any additional customer or administrative requirements not already provided and provide optional costing for their inclusion.

**Bidder's Response:**

30. Bidders are required to provide the number of hours, resources and total costs for the design effort for the WEB service.

**Bidder's Response:**

**WEB DEVELOPMENT**

31. Long term sustainment of the system is an overall requirement. Bids will be evaluated based on the City's evaluation of the ongoing sustainability of the system. Bidders must provide a list of all software required to build and maintain the system and include for each an explanation of how this particular software contributes to the long-term sustainability of the system. Bidders are encouraged to include any other information that reflects ongoing sustainment/reliability of the system

**Bidder's Response:**

**FORM N – BIDDER RESPONSES**  
(See B11)

**DESIGN, DEVELOP, IMPLEMENT, AND OPERATE A CUSTOMER SELF SERVICE WEB SITE FOR WATER BILLING**

**WEB DEVELOPMENT (CONTINUED)**

32. It is preferable that Bidders provide all source code for the system and a list of all software licenses (including acquisition and annual maintenance costs) required for products needed to develop and operate the system. At a minimum, Bidders must provide all source code in escrow.

**Bidder's Response:**

33. Web development must conform to the standards and guidelines as defined E2.1(c).

**Bidder's Response:**

COMPLY YES/NO

34. Bidders must define their testing methodology and identify how Water and Waste departmental staff will be involved in the testing processes.

**Bidder's Response:**

35. User acceptance testing of the system will include a Vulnerability Assessment of the system. All major and critical errors identified in this assessment will need to be remedied by the Bidder. Bidders are encouraged to follow coding practices as defined by the Open Web Application Security Project (OWASP). This document is available to Bidders at their request.

**Bidder's Response:**

36. Bidders must define their training methodology for Water and Waste staff administration of the system.

**Bidder's Response:**



**FORM N – BIDDER RESPONSES**  
(See B11)

**DESIGN, DEVELOP, IMPLEMENT, AND OPERATE A CUSTOMER SELF SERVICE WEB SITE FOR WATER BILLING**

**WEB DEVELOPMENT (CONTINUED)**

37. Bidders must define and provide samples of what documentation (web development environment, operational, technical) is supplied with the system.

**Bidder's Response:**

38. Bidders are required to provide a secure methodology for implementing customer access to the system. Bidders must provide a description of the methodology, standards adopted and technology used to provide a secure method for customer access (account/password interchange and control) throughout a customer access session.

**Bidder's Response:**

39. Bidders must define what procedures they will use to implement the system and any costs associated with implementation

**Bidder's Response:**

40. Bidders must define the hardware, software and licensing requirements necessary to maintain a maintenance / test environment to support changes to the production system and what costs if any are associated with a maintenance / test environment.

**Bidder's Response:**

41. Bidders must provide the time effort, resources and total cost for each component of the development effort (development, testing, training, implementation and documentation).

**Bidder's Response:**

**FORM N – BIDDER RESPONSES**

(See B11)

**DESIGN, DEVELOP, IMPLEMENT, AND OPERATE A CUSTOMER SELF SERVICE WEB SITE FOR WATER BILLING**

**WEBSITE OPERATION**

42. Bidders must define how the data in the system is backed up, where backup data is stored and what recovery methods will be in place.

**Bidder's Response:**

43. Bidders must define how long an application and data recovery would take from a database or application failure incident.

**Bidder's Response:**

44. Bidders must define when and how long their pre-planned maintenance windows would be.

**Bidder's Response:**

45. Bidders must define what availability (see E4.2) the system will provide. Expressed as percentage of availability (total minutes available during the reporting period / total minutes in the reporting period \* 100)

**Bidder's Response:**

46. Bidders must define what performance (see E4.2) the system will be able to provide, how this will be monitored and when and what steps will be taken if the monitoring process indicates performance is below expectations.

**Bidder's Response:**

**FORM N – BIDDER RESPONSES**

(See B11)

**DESIGN, DEVELOP, IMPLEMENT, AND OPERATE A CUSTOMER SELF SERVICE WEB SITE FOR WATER BILLING**

**WEBSITE OPERATION (CONTINUED)**

47. Bidders must define how the system will present to Water Billing customers when accessed during pre-planned maintenance periods or when accessed during emergency maintenance periods.

**Bidder's Response:**

48. Bidders must provide monthly availability logs showing percentage of availability for customer access for each day in the reporting period (see E4.2).

**Bidder's Response:**

49. Bidders must define how they protect their systems from malware, "hacker" attacks and unauthorized access.

**Bidder's Response:**

50. Bidders must define the architecture of the hardware and software identifying each component and providing a high level schematic of the system and the interconnection and function.

**Bidder's Response:**

51. Bidders must define the extent to which they comply with E4.1, E4.2 and E4.3.

**Bidder's Response:**

52. Bidders must provide a Bidder's Profile (see # 59- 69) for the data center(s) that will host the servers for this system. All hosting sites must be Canadian-based.

**Bidder's Response:**

**FORM N – BIDDER RESPONSES**  
(See B11)

**DESIGN, DEVELOP, IMPLEMENT, AND OPERATE A CUSTOMER SELF SERVICE WEB SITE FOR WATER BILLING**

**WEBSITE OPERATION (CONTINUED)**

53. Bidders must define what process the City will need to follow to request functional changes to the system after it goes into operation and the costs (hourly rate if applicable) that will be charged to make changes. If Bidder's have an existing maintenance contract include a copy with the Bidder's response.

**Bidder's Response:**

54. Bidders must define how the City will report errors in the operational system, and what process the Bidder will follow to correct those errors and whether correction of errors in the system after the warranty period will be chargeable service and, if chargeable, at what rate.

**Bidder's Response:**

55. Bidders must provide all costs associated with operations of the website. Acquisition of equipment if required and all ongoing service related charges.

**Bidder's Response:**

56. If Bidders have a copy of an operations/maintenance agreement provide it with the bid.

**Bidder's Response:**

**FORM N – BIDDER RESPONSES**  
(See B11)

**DESIGN, DEVELOP, IMPLEMENT, AND OPERATE A CUSTOMER SELF SERVICE WEB SITE FOR WATER BILLING**

**WEBSITE OPERATION (CONTINUED)**

57.

The preferred technical environment will consist of:

- Able to be virtualized with VMware 4.x
- OS: Windows 2008 R2
- Database: Oracle 10g R2 Standard Edition or SQL Server 2008 Standard Edition
- Storage: Enterprise SAN with SAN boot
- Backup: IBM TSM 6.x
- Systems Management: MS System Center Operations Manager 2007 R2
- Identity Management: MS Active Directory 2003
- Application source: MS.net

Bidders are required to define the technical environment of their offered solution(s)

**Bidder's Response:**

**WORKPLAN**

58.

The Bidder is required to provide a work plan for all phases of the project showing duration and resources for each of the phases listed (project planning, design, development, system testing, acceptance testing, and implementation including key milestones for project deliverables like (documentation, training, operations, etc.)

**Bidder's Response:**

**FORM N – BIDDER RESPONSES**  
(See B11)

**DESIGN, DEVELOP, IMPLEMENT, AND OPERATE A CUSTOMER SELF SERVICE WEB SITE FOR WATER BILLING**

**BIDDER'S PROFILE**

**Bidder Profile**

The Bidder will provide a profile of its organization and all other companies who will be providing products or services either through a subcontracting arrangement with the Bidder or through a separate contract to be negotiated with the City.

Answer each question in the space provided to the right of the item. If the solution has one or more Vendor partners, duplicate the table as appropriate.

59.	Year established	
60.	Parent company and the Subsidiary offering the product, if any	
61.	Office locations	
62.	Serving office for this project And project team for this project	
63.	Products available	
64.	Total number of employees	
65.	Description of your strategic plan and industry outlook for your firm	
66.	Latest available gross sales and net income	
67.	Number of employees focused on the product offering	
68.	Number of client installations, and number using current release	
69.	Number of signed client contracts of proposed solution in process (clients in contract negotiations or projects being implemented)	

**The Bidder may attach any additional literature and product brochures.**

**FORM N – BIDDER RESPONSES**  
(See B11)

**DESIGN, DEVELOP, IMPLEMENT, AND OPERATE A CUSTOMER SELF SERVICE WEB SITE FOR WATER BILLING**

**BIDDER FINANCIALS**

**Company Financials**

Please furnish the following information required from appropriate entities as listed below. The City reserves the right to request such financial information from any member of the Respondent’s team, if such a request is determined to be in the best interest of the City.

- a) The Bidder(s) should include Annual Audited financial reports for the most recent year,
- b) Or the most recent form 10-K and Form 10-Q filed with the Securities and Exchange Commission ("SEC"),
- c) Or, if the respondent is not regulated by the SEC, then the most recent quarterly financial report prepared internally approved and signed by an officer of the company.
- d) Any additional information of the Respondent that is believed to be appropriate in fully reflecting the financial strength of the company. Examples include prospectus and credit reports, etc.

Answer each question in the space provided to the right of the item. If the solution has one or more Vendor partners, duplicate the table as appropriate.

70.	Describe any material historical or anticipated changes in financial position of the Respondent including mergers, acquisitions, takeovers, and or divestitures.	
71.	List and briefly describe any threatened, pending or past legal proceeding and judgment or any contingent liabilities in which the Respondent is a party.	
72.	Has the Respondent failed to complete any contract or has any contract been terminated. If so, provide explanation.	
73.	Does Respondent have one customer that accounts for more than 50% of gross sales	

**Bidder Financials will be evaluated on a PASS/FAIL basis, and proposals may be rejected if they fail the City’s review of the Bidder’s financials.**

**FORM N – BIDDER RESPONSES**  
(See B11)

**DESIGN, DEVELOP, IMPLEMENT, AND OPERATE A CUSTOMER SELF SERVICE WEB SITE FOR WATER BILLING**

**RELEVANT CLIENT LIST**

**Bidder Credentials**

The Bidder (and any vendor partners) must demonstrate a proven track record in providing reliable product solutions across a series of successful project installation efforts.

The Bidder's record should reflect experience in work of a similar nature and magnitude to that being proposed (access by 200,000+ customers). Relevant experience must be associated with projects completed not more than three (5) years prior to the date of this RFP.

The Bidder and each vendor partner will provide a listing of its current clients that demonstrate the experience for which the City is seeking. The list should include: customer name, site location, customer base, implementation date and description of the engagement.

Please complete the client listing below. Add rows to the table as appropriate.

<b>Organization name</b>	
Location of installation	
Customer base	
Implementation date	
Description of engagement	
<b>Organization name</b>	
Location of installation	
Customer base	
Implementation date	
Description of engagement	
<b>Organization name</b>	
Location of installation	
Customer base	
Implementation date	
Description of engagement	
<b>Organization name</b>	
Location of installation	
Customer base	
Implementation date	
Description of engagement	



**FORM N – BIDDER RESPONSES**  
(See B11)

**DESIGN, DEVELOP, IMPLEMENT, AND OPERATE A CUSTOMER SELF SERVICE WEB SITE FOR WATER BILLING**

**REFERENCES**

In addition to this complete list, the Bidder must provide a minimum of three (3) references which are most similar to the proposed solution.

Please complete the reference table below.

**REFERENCE 1**

Organization name	
Location of installation	
Contact name	
Contact title	
Contact telephone number	
Contact email address	
Customer base	
Services provided	
Implementation date	
Brief description of the engagement	

**REFERENCE 2**

Organization name	
Location of installation	
Contact name	
Contact title	
Contact telephone number	
Contact email address	
Customer base	
Services provided	
Implementation date	
Brief description of the engagement	

**FORM N – BIDDER RESPONSES**

(See B11)

**DESIGN, DEVELOP, IMPLEMENT, AND OPERATE A CUSTOMER SELF SERVICE WEB SITE FOR WATER BILLING**

**REFERENCES (CONTINUED)**

**REFERENCE 3**

Organization name	
Location of installation	
Contact name	
Contact title	
Contact telephone number	
Contact email address	
Customer base	
Services provided	
Implementation date	
Brief description of the engagement	
_____ Name of Bidder	