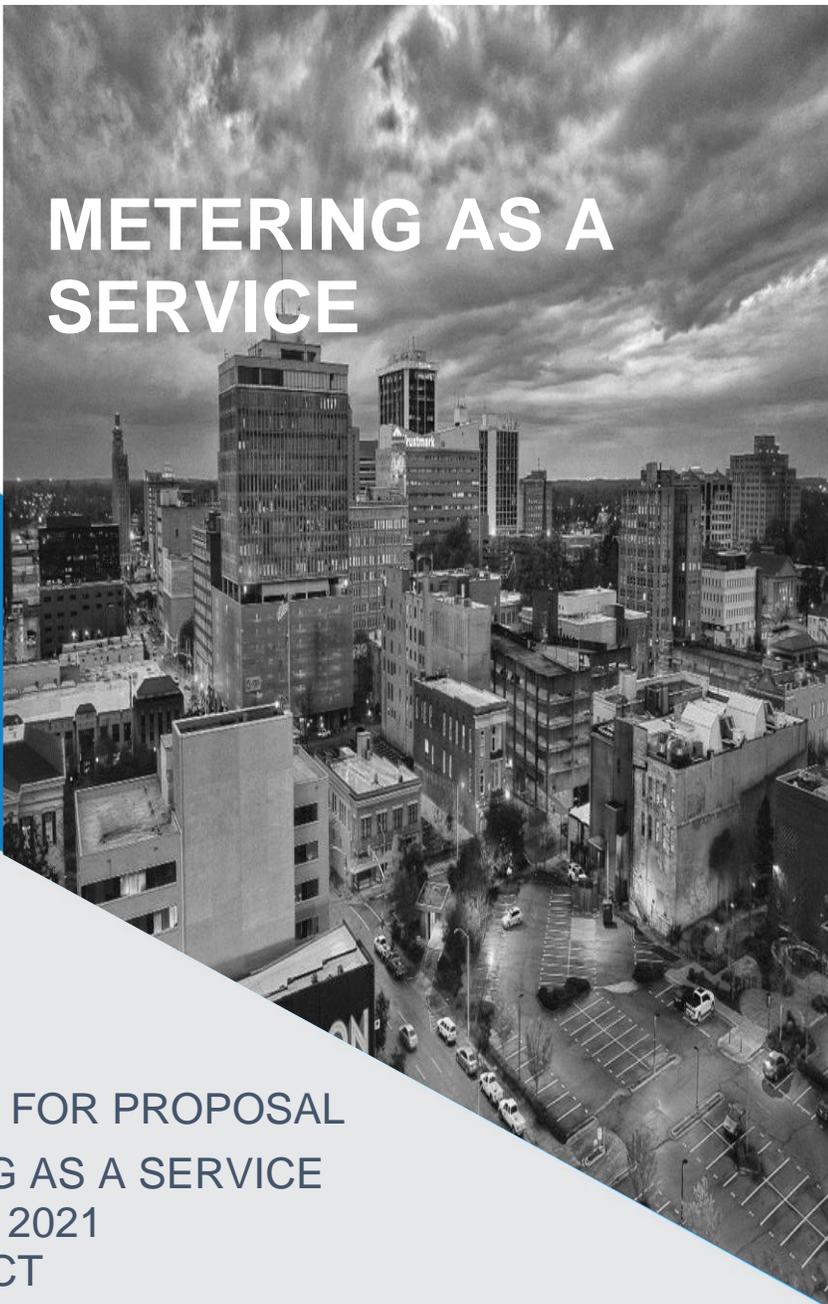


# METERING AS A SERVICE



REQUEST FOR PROPOSAL  
METERING AS A SERVICE  
MARCH 2, 2021  
3:30 P.M. CT



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**Submitted by:**

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# Table of Contents

- Introduction ..... 3**
  - Introduction Letter And Additional Information ..... 3
- 1. Company Background & Project Resources ..... 5**
  - About Ums ..... 5
  - Proposed Project Team..... 8
- 2. Project Understanding & Approach ..... 11**
  - Project Summary ..... 11
  - Approach To Initiating Your Metering As A Service Program ..... 12
  - Approach To Deploying Metering As A Service ..... 14
  - Project Plan(S)..... 21
  - Our Subcontractor / Ebo Policy ..... 22
  - Our Supplier Diversity Policy..... 22
  - Supplier Diversity Program ..... 23
- 3. References..... 24**
  - Related Industry Experience ..... 24
  - Ongoing Industry Experience..... 24
- Bid Sheet ..... 26**
  - Additional Unit Pricing ..... 27
- Appendix..... 31**
  - Appendices ..... 31

# INTRODUCTION

## Introduction Letter and Additional Information

Dear City of Jackson,

It is with great pleasure that Utility Metering Solutions (UMS) submits its response to Metering as a Services as described in the RFP.

Wholesale metering upgrades, establishing new data interfaces and learning new systems can be challenging. Selecting a service partner that provides a robust mix of pre-deployment, deployment and maintenance services will ensure your metering as a services solution is properly implemented, Jackson employees are properly trained and supported and that the solution operates as efficiently in year 10 as it did when it was initially deployed. Our experience in designing full scale meter change out programs, data integration, meter installation and long term services has led us to discoveries and implementation strategies that are changing the industry and have made UMS the premier utility services firm in the industry. This project aligns with our core business and we are committed to:

- Serving as an ambassador to the City during this upgrade to ensure project success.
- Executing the project, systems integration, and deployment of the new metering System in a manner which builds trust between the City and the citizens of Jackson, MS.
- Working directly with SP, the selected meter and AMI vendor and Oracle to maximize the benefits and capabilities of the upgraded metering as a service program.
- Meeting and exceeding the current EBO participation goals.

By properly deploying Advanced Metering with UMS certified services, the City will be able to automatically enter new meter information into Oracle, ensure all meters are properly provisioned onto the network, enable report automation to help make strategic water decisions, and produce reliable billings. UMS will deliver a system which is customized to:

- Integrate clean, new meter information into Oracle digitally and in a manner that will not require manual entries.
- Support the adoption of the upgraded service enhancements the City is providing.
- Complete the mass meter change out project expeditiously.

UMS is committed to investing in the communities where we work and will achieve the local EBO participation goals for the available services work for this project. Our equal opportunity, local bidding processes and preconstruction outreach meetings help establish fair pathways to pursue ADDITIONAL local supply and subcontracting opportunities prior to soliciting our national supply chain. Furthermore, we are proud of our M/WBE Mentoring Program that builds effective working relationships between leaders, established companies, and emerging minority and women owned businesses. We are proud that our M/WBE partner, **Metro Services, The Wet Work Group and 360 Water** are already enrolled in our mentorship program and equipped with the technical knowledge and experience to be successful on this project. UMS is dedicated to ensuring that minority and women owned businesses gain opportunities that can lead to a successful career in the metering industry and proud that many of our local partners end up being long term partners on future projects. A successful AMI deployment in Jackson will come from leveraging UMS' vast experience and hands-on approach to installing various meter vendors. Our proprietary tools and methodology, along with the team assembled to deliver this project will ensure a

successful project. Summarized below are qualifications and capabilities which demonstrate why the UMS team is most qualified to implement its Advanced Metering Infrastructure Solution for the City:

- Certified Installation Services Provider for all major manufacturers.
- Our knowledge on Oracle integration.
- UMS has implemented 1,000,000 meters in just the last three calendar years. We have the staff and resources to implement your metering as a service solution.
- 200+ AMR/AMI installations nationwide and over 3 million meters installed by UMS employees.
- A full-service, highly qualified professional services team with a deep understanding of advanced metering, utility billing, work order management and Smart City infrastructure/design initiatives.
- Project Management services team led by PMP®-certified Project Managers who have been actively involved in the management, billing integration, and successful implementation of more than 150 AMI conversion projects.
- Dedicated team that handles Advanced Metering system integration.
- Strong references, with current and past clients who continually recommend UMS to other utilities and municipalities.
- Financial ability to undertake the work and assume implementation risk.
- Leader in the industry at developing the best practices for communicating program benefits, project details, and COVID-19 safety information to utility customers.
- Proprietary work order management and data analytics software suite (Xchange), designed to help manage meter deployments efficiently and accurately.

Lastly, we understand that the City is working to upgrade and deliver services to your community in unprecedented times. The COVID-19 pandemic is one of the most serious challenges this world has faced in our lifetime with severe health and economic consequences. The pandemic has changed not only how we all are working and living but has created a great deal of uncertainty about revenues, budget and the financial health of the businesses that utilities choose to partner with. In this unparalleled time, our focus has been on the health, safety and well-being of our employees and the communities we serve. UMS is proud we have not had to lay off or furlough a single employee and that our continued ability to service and support our clients during this global pandemic remains strong.

We appreciate the opportunity to submit our proposal and look forward to the opportunity to partner with you on this initiative.

Sincerely,



Joey Mitchell, Vice President  
*Executive Sponsor*

**UMS**  
7200 Falls of Neuse Rd, Ste 100  
Raleigh, NC 27614



# 1. Company Background & Project Resources

## ABOUT UMS

Utility Metering Solutions (UMS) is the leading end-to-end solution provider that helps utilities accelerate advanced metering implementations and improve operational outcomes. UMS provides and installs meters and equipment, implements technology and integrates software with billing and control systems to help utilities better manage water resources for the communities they serve. UMS is driven each day by opportunities to serve its customers. Whether they have outdated infrastructures, fragmented systems or non-revenue water loss, UMS brings the expertise and experience to support utilities and municipalities.

Utility Metering Solutions, LLC, a privately-owned company, was established in 2009 as a field meter installation company based in Hammond, LA. Since then, it has evolved into a full-service firm specializing in the design, build, integration, and maintenance of innovative utility solutions: Advanced Metering, Billing Systems, Smart City Design and Integration, and Water Conservation. Not only are solutions designed, the installation and integration of AMI systems is managed with an aptitude not found in performance contractors, manufacturers, or traditional construction companies. To keep up with our exponential growth, a Professional Services office was opened in Raleigh, NC in 2017.

UMS is known for efficient planning, rapid deployments, the industry's highest standard of work, and an unmatched ability to coordinate with our clients and their communities. Through our innovation and superior quality of work, strong relationships have been established with the major manufacturers and distributors in the advanced metering field, lending our experience and industry expertise to clients.

Through extensive hands-on history with end-to-end advanced metering projects, a keen ability has been gained to develop processes and best practices that deliver successful, custom solutions to cities across the country. Having started as an installation company, a unique advantage is possessed over other firms in the industry.

### *A Qualified and Experienced Partner*

In the past three years, UMS has worked on over 140 projects and installed more than 3,000,000 meters and AMI endpoints. UMS has installed and overseen the implementation of all major meter brands, ranging from direct-read solutions, to automated meter reading (AMR), to advanced metering infrastructure (AMI). Today, we are the nation's leading provider of AMI solutions for water, electric, and gas utilities and on the cutting edge of Smart Cities implementation.

## UMS AT-A-GLANCE

- ✓ 10 years as an integrator for AMI programs
- ✓ More than 3,000,000 meter installations
- ✓ Works with all major AMI infrastructure providers
- ✓ Proven outcome-focused methodology
- ✓ Over 150 AMI conversion projects since 2016
- ✓ Over 250 Employees

Our qualifications are second-to-none: each of our field personnel (project managers, installers, etc.), information technology/programming specialists, data and business analysts, and Project Management Institute® (PMI®) certified project managers, have a profound understanding of advanced metering, utility billing, and Smart City infrastructure/design initiatives, which ensures a seamless and successful project.

UMS is deeply committed to the long-term success of the City, and believe that a holistic, customer-centric approach is critical to achieve the success you deserve. *Partnership is what sets UMS apart from the competition.* By partnering with our clients to develop actionable designs that meet the needs and long-term goals of your utilities, UMS does not just merely perform tasks.

Advanced Metering programs are complex in nature, and require a capable, knowledgeable partner to ensure minimal disruption to your utility and the community you serve. Our experienced, qualified delivery team works in tandem with our PMP®-certified project managers to accomplish rapid and efficient implementations, without sacrificing quality.

The list below summarizes several of the key reasons why UMS is the most qualified partner for this project:

**Past Performance** - Engaged in the development, management, and implementation of over 250 AMI installations.

**Metering Technologies** - Extensive experience with all major metering manufacturer technologies.

**Proprietary Software** – Xchange, our proprietary work order management and data analytics software suite, ensures accurate data.

**Legal Standing** - Never been involved in any AMI installation-related litigation, contract non-compliance, or contract non-performance.

**Client Satisfaction** - Current and past clients continually recommend UMS to other utilities and municipalities.

**Project Team Experience** - We bring highly qualified, experienced project managers, information technology/programming specialists, data and business analysts, and field personnel.

**Data Driven** - Because accurate data is one of the key aspects of an AMI implementation, a dedicated team is employed to handle billing system, GIS, and other third-party integrations.

**Customer Outreach** - Fully-staffed call center in Hammond, LA expertly handles all customer questions, concerns and scheduling appointments. Additionally, an online portal will be available for the City's customers to schedule their own appointments for inside meter installations.

**Project Management Certifications** - Employ full-time, dedicated PMP®-certified staff members in our Professional Services division to ensure projects are delivered on time and within budget.

**Best Practices** - UMS has developed industry best practices for installation and integration, communicating program benefits, project details, and safety information to utility customers.

## ***Industry Knowledge***

End-to-end projects are self-installed, resulting in expert experience with all top metering manufacturers. Not only is the current advanced metering technological landscape understood, but strong relationships have been built with key players in the industry.

Our track record should provide peace of mind that the City will have a partner who truly understands its needs and goals and is able to incorporate the desired technology solution efficiently and effectively.



## *Integration Knowledge*

Accurate data is one of the most important aspects of any mass meter change out or technology upgrade. The value of a billing system lies not only in the data integrity it provides, but also in its accessibility for the billing department. UMS takes a data-driven approach to metering integrations. In every installation, our dedicated systems integration team follows a 3-step process to guarantee data integrity: analyze, normalize, and validate.

UMS has successfully managed the implementation of hundreds of solutions for utilities nationwide. We are a product- and vendor-independent firm, which ensures we understand the intricacies around each manufacturer's technology. Our experienced and highly-specialized integration team provides full, end-to-end programs, in addition to standalone services that assist utilities with implementing third-party software.

## *Technical Expertise*

**AMI Technology Experience** - Experience deploying every major metering technology in the industry, including Badger, Sensus, Itron, Neptune, Mueller, Master Meter, GE, Aclara, and Honeywell/Elster.

**Technology Deployment** - Leadership team brings over 120 combined years of Advanced Metering deployment experience to our clients, ensuring the delivery of projects that are on time, on budget, and to plan.

**Software Integration** - Software integration team ensures delivery of the highest quality scrubbed, analyzed, and validated data for the City. This data acts as a baseline of high-quality data from which the City can begin to develop a Smart City program.

**Water Meter Testing** - We operate a state-of-the-art water meter testing facility according to AWWA standards and best practices.

## PROPOSED PROJECT TEAM

Each member of our team has been handpicked for their experience and expertise in designing, planning, managing, implementing, and maintaining full-scale Advanced Metering programs.

The following UMS staff members will be assigned to this project:

### Executive Sponsor



#### **Joey Mitchell | Vice President**

Joey has more than 15 years of technical and real-world experience assessing, defining, and deploying Advanced Metering networks for water, gas, and electric utilities. He has held executive leadership positions developing multi-million-dollar sales channels and has been responsible for building software integration and professional services teams.

### Project Advisors



#### **Joe Badera, PMP® | Program Management**

Joe is a solution-oriented project manager with more than 25 years of experience and a successful record of leading integration projects for over 100 AMI networks. His unique blend of technical skills, business acumen, and project management expertise enables him to translate customer needs into specific business requirements so that large-scale technology projects are delivered on time, within budget, and to plan.

### Project Management Office



#### **Zachary Lemay | Project Manager**

Mr. Lemay is a customer-centric project manager with over 5 years of project management experience, successfully driving to completion numerous large-scale projects with smart meters. Mr. Lemay has capitalized on his seasoned expertise as a strong negotiator and collaborator through his experience in sales and project execution, managing scope and budget with a focus on quality and customer satisfaction. Mr. Lemay is also invested in Energy Conversation and Low Environmental Impact Energy projects

### Data Management



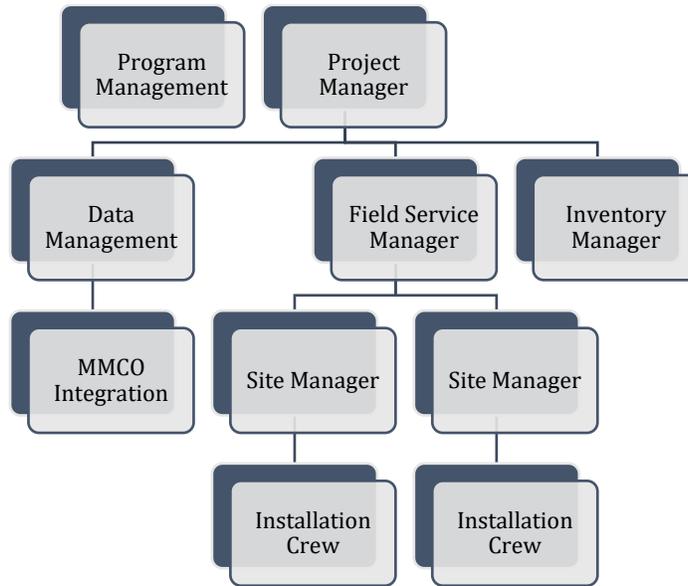
#### **Stephen Zozula | Data Management**

Stephen has nearly 10 years of experience in the advanced metering industry. He specializes in AMI/AMR support, training, and use of software and computer-based solutions. Stephen manages all data-related activities, including data quality assurance and control, reporting, mass meter change out reports, and information-based troubleshooting.



### Organizational Chart

Below is UMS' Organizational chart for the AMI implementation with the City. Final resources will be assigned during the planning stages of this project.



### Roles and Responsibilities of Key Personnel

#### UMS Project Management Staff and Responsibilities

##### Project Management Office (PMO)

- Develop and manage the Project Execution Plan, including communications, performance tracking, scope/issue/risk management
- Develop and manage the Public Outreach Plan, including PSA, social media, door hangers, and news releases
- Manage purchasing, invoicing, and inventory tracking
- Provide status of milestones, deliverables and scheduled activities, open action items, and next steps
- Provide technology training
- Manage stakeholder expectations and oversee sub-consultant and vendor agreements
- Oversee project scope changes and ensure appropriate measures are taken to reassess and amend the scope of work, budget, and schedule

- Organize meetings, including kickoffs, status updates, close-out, and lessons learned
- Manage project close-out activities: documentation, acceptance, and account sign-off

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### UMS Field Services Staff and Responsibilities

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<b>Field Services Manager</b>	<ul style="list-style-type: none"> <li>• Oversee daily operations onsite</li> <li>• Determine and schedule work orders</li> <li>• Ensure quality assurance</li> <li>• Lead daily “Toolbox” Safety Meeting</li> <li>• Oversee installation technicians</li> <li>• Control inventory and supplies</li> <li>• Oversee dispatch of machinery</li> <li>• Ensure accountability of leadership, field team, and quality control</li> <li>• Provide daily verification and exception reporting</li> <li>• Troubleshoot hardware and software issues</li> <li>• Verify installation data</li> </ul>
<b>Data Management Team</b>	<ul style="list-style-type: none"> <li>• Liaison between meter manufacturer and utility during commissioning and set-up</li> <li>• Scrub installation data and perform gap analysis</li> <li>• Validate and troubleshoot with manufacturer</li> <li>• Create work orders for field team</li> <li>• Create, test, and deliver Mass Meter Change Out (MMCO) file</li> <li>• Integrate Advanced Metering system with client billing system</li> <li>• Provide interim read file to assist with monthly billing</li> </ul>
<b>Installation Technician Team</b>	<ul style="list-style-type: none"> <li>• Confirm meter allotment and location assignments</li> <li>• Inform customer of the installation and get approval</li> <li>• Install meter and collect all data</li> <li>• Clear installation area before moving to the next installation</li> <li>• Program meters and collect change out data</li> </ul>

### **Resumes**

Resumes of key personnel have been included in **Appendix 1: Team Resumes**.



## 2. PROJECT UNDERSTANDING & APPROACH

### PROJECT SUMMARY

The City of Jackson is seeking professional services to support the installation and implementation of an upgraded Advanced Metering Infrastructure (AMI) Systems to support its water distribution services across the service territory serving 65,000 water customers. The requested services support residential and commercial customers and includes full-service installation, configuration, and deployment of new AMI Solution in which it the city is advertising for under a separate solicitation. The project will begin by establishing the new AMI network and upgrading nearly ~1,200 commercial meters and properly integrating the solution into the Oracle billing system.

Critical to realizing the full potential and far-reaching benefits of its planned AMI upgrade, Jackson understands the important role proper planning, communication and implementation plays in deploying successful AMI systems. To that end, the City of Jackson requires deep expertise across:

- **Planning** – To uncover operational hurdles and legacy system/software issues ...as well as the development of a Project Execution Plan (PEP) to govern who is responsible for what, how the project will be executed, and when the various objectives outlined during the design phase will be achieved.
- **Data Integration** – Establish automated interfaces for billing reads and develop a plan to manage and leverage the large amounts of AMI data you'll receive.
- **AMI Technology** – The right partner will have proven knowledge and experience necessary to anticipate operational and deployment issues across any of the potential technologies they may choose to deploy under the metering as a service program.
- **Field Services** – Replacing existing meters with AMI-ready meters involves more than just removing and installing the physical meters – field crews require strong data integration skills.
- **Communication** – The right partner understands how to build and execute a comprehensive community outreach plan to build awareness and support for your new AMI systems.
- **Program Management** – These services ensure projects get done according to the Project Execution Plan, on time, and within budget.
- **Long Term Maintenance Services** – The right partner will be able to provide services that work alongside City staff to troubleshoot potential problems, ensure successful staff adoption and new business processes are established.

Today, the City uses the Mueller Mi-Net AMI network and hosted software system to read all residential and commercial meters. UMS will develop and deploy a Transitional Meter Reading Plan to ease the challenges of the technology transition between the old and the new systems and ensure customer billing is accurate and delivered on time. UMS will also help Jackson prepare for the impacts and changes to utility processes required with the new advanced metering infrastructure.

The AMI Systems inclusive of the AMI network devices, AMI software, water meters, and associated hardware will be procured and purchased by the City of Jackson under a separate solicitation. The selected Service Provider will deliver holistic Professional Services, tools, and labor to deploy the end-to-end water AMI solution.

## APPROACH TO INITIATING YOUR METERING AS A SERVICE PROGRAM

UMS has found that planning and implementing an Advanced Metering Program can be one of the most complex endeavors undertaken by any utility. Because these programs include implementing new technologies, integrations into legacy systems, and business process transformations, we have developed a structured methodology for AMI implementations and integrations. The foundation of this methodology is developing a comprehensive Project Execution Plan (PEP) during the readiness phase of project. The PEP defines WHO is responsible for WHAT, HOW the project will be executed, and WHEN the various objectives outlined will be achieved. Some of the key sections for Jackson includes:

- **Meter Configuration Specifications** – UMS will guide the City of Jackson and the respective vendors through the development of the meter configuration specifications for all procured meter types. Once approved by the City, each respective configuration will be communicated to the vendors for inclusion in the meter/device factory orders. Part numbers will be assigned for future reference.
- **Network Implementation Plan** – This task will leverage the chosen AMI vendor’s propagation study to establish and communicate network coverage expectations. The plan will also determine the work required for each network site. This work may include permit requirements, a data collector, an antenna, as well as cabling placement, equipment requirements and specifications, and electric and data backhaul services. The actual implementation of this plan will occur during the deployment phase.
- **AMI System Integration Plan** – UMS will facilitate a workshop with City personnel and the selected vendors to outline the systems integration plan required to support the AMI deployment. The plan will include support for integration of meter exchange data with the CIS/utility billing system as well as the headend and CIS/utility billing systems and the timeline for development and testing. The actual implementation of this plan will occur during the deployment phase.
- **Integration Services** – UMS will work with your CIS/Utility Billing software provider to complete the setup and test of a mass meter change out (MMCO) integration interface for completed work orders mass meter deployment. This process will eliminate the need for manually entering new meter information into the billing software.
- **AMI Network and Software Testing Plan** – We’ll develop testing plans for each component of the solution that will ensure City objectives are met. These plans will include specific instructions for AMI network end-to-end data flow testing, Functional Testing, Integration Testing, and User Acceptance Testing.
- **A Transitional Meter Reading Plan** – UMS will coordinate with the City of Jackson to prepare for the impacts to City processes that need to be understood and managed throughout the automated metering program deployment. The following topics will be addressed in preparation for the deployment phase:
  - Obtaining and processing billing reads across current system, new system, and change-over of routes from one read mechanism to another
  - Providing communications/awareness to the City customer service staff regarding the planned AMI installation plans
  - Utilizing Xchange tools to assist in resolving billing exceptions related to the changeout of the old meter



- **Meter Deployment & Installation Plan** – UMS will perform water meter and transmitter installations per UMS best practices and standard operating procedures. Field replacement of meter equipment and endpoints will occur during the deployment phase. UMS will coordinate with the City of Jackson and drive the development of the meter equipment and endpoint change-out plan. The plan will consider the current state of systems integration and will develop the process for updating the Customer Information System (CIS) with new meter and meter device specifications, out reads, GPS determinants, and other device-specific data and information.
- **Installation Data QA/QC** – UMS will perform multiple levels of audits on installation data collected in the field to ensure errors are identified and corrected prior to the completed work order data being transferred to the CIS/utility billing system.
- **Project Timeline.** The timeline lays the responsibilities for daily operations and activities for each phase of the project as well as summarizes the order in which technology is deployed.
- **Organizational Structure.** This section defines the project team, including primary roles, resources, and responsibilities. It also establishes the executive committee, project team leaders, and other program members.
- **Project Communication.** This section discusses how program-level information will be distributed among team members and how decision making will progress. Establishing a clear project communication process is key to ensuring work proceeds in an organized, thoughtful, and cost-effective manner. An additional element of this section details how the program will be communicated internally to non-project team members and how the project's benefits will be promoted to your customers.
- **Project Issue Management.** This section outlines the assumptions, constraints, and risks the program faces as well as how to manage and quickly resolve any issues in the field.
- **Program Policies and Procedures.** This section establishes the rules and procedures that span across departments and throughout the project's duration, including reporting, tracking, invoicing, inventory management, project closeout, etc.
- **Program Initiatives.** This section examines program-level operations rather than those that occur inside a particular aspect of the project. Such items largely pertain to organizational management and policy changes that will be required.

UMS will begin this project by building consensus with internal and external project stakeholders. Our first undertaking will be to establish the necessary interfaces required to bill during the transition period and electronically input new meter information without the need for manual data entry. This work will be completed while UMS is overseeing the implementation of the new AMI network. Prior to deploying the new water meters UMS will systematically employ its testing and validations procedures outlined below. We have provided a project plan which will complete network setup and have all water meter upgrades completed in 24 months. The first six (6) months will be dedicated establishing the network, testing and deploying our customer outreach program. Over the next 18 months UMS along with our local partners will provide a field service manager to oversee the water meter deployments along with (18) Water Installation Technicians and three (3) Electric Installation Technicians.

## APPROACH TO DEPLOYING METERING AS A SERVICE

Technology upgrades are multifaceted and complex. To maximize benefits and reduce risk, they must be accompanied by a robust program management plan. UMS Program Management services ensure projects get done according to plan, on time, and within budget. Our PMP®-certified Project Managers establish and maintain regular project communication and ensure performance is visible, measurable, and tracked. Our vetted processes and methodologies are the cornerstone of our services, and deliver successful, one-of-a-kind solutions—every time.

Program management will include the controls and oversight of the AMI implementation and network maintenance. The primary focus of this activity will be the routine monthly meetings. There will be a minimum of one formal progress report/meeting monthly. Our monthly report will include budget and schedule status, work performed in the last month, work planned for the next month, issues encountered, and decisions made for each task. For day-to-day data collection and collaboration with the City staff, coordination will be a continuous effort until the work is complete.

The UMS team's project management plan will focus on communication as a key element, so that work can proceed in a stepwise, cost-effective manner. We will keep in constant contact with the City's Project Manager and other key Department staff. Our depth of local staff makes it very easy to meet in person with Department personnel and other agencies, as necessary. Also, regularly scheduled progress meetings will be held to track the progress and quality of work under this contract.

Close and effective communication will include monthly progress reports submitted with each invoice, monthly meetings with the City staff followed by formalized meeting minutes distributed to the City/UMS team, and weekly informal communications via telephone and email.

Effective scheduling and completion of tasks are project management essentials. UMS' policy requires task managers to develop detailed job schedules for their technical efforts. Project management teams then prepare a master schedule that integrates the various components for the total project including key milestones, task interrelationships, and staffing requirements if appropriate. The master schedule is followed by the team throughout the project.

### Project Management Tools

UMS utilizes a leading project management application to keep project implementations on track. This tool allows the team to:

- Organize complex projects into manageable units with milestones, tasks, and subtasks.
- Log billable and non-billable hours.
- View project progress with easy-to-decipher charts and graphs.
- Stay in-the-loop by providing document storage.
- Log issues and track them as they get fixed and tested.
- Go mobile with your project by utilizing robust Apple and Android apps.

### Project Management Methodology

**EVALUATE & UNDERSTAND**

**PROJECT EXECUTION & CONTROL**



- Collaborate to fully understand unique wants, needs, challenges
- Evaluate current processes/roles
- Identify customer pain points
- Recommend best practices

#### **PLAN & SCHEDULE**

- Confirm project scope, deliverables, roles and responsibilities
- Develop project plan/initial schedule
- Review plan with stakeholders

#### **COMMUNICATIONS MANAGEMENT**

- Develop project communications plan answering what/who/when/how
- Devise public relations strategy
- Manage and coordinate communication between all parties
- Update customer via on-site and web-based meetings, as well as emails when appropriate

- Utilize cloud-based project management tool
- Manage critical path tasks
- Monitor progress and dependencies
- Manage deliverables, risks, issues, and change

#### **RISK MANAGEMENT**

- Identify and review risks
- Quantitatively assess risk
- Determine response strategy
- Monitor and control risks

#### **ISSUE/ACTION MANAGEMENT**

- Identify and report open actions
- Manage through resolution

#### **SCOPE/CHANGE MANAGEMENT**

- Identify and manage project scope changes
- Manage assessment and stakeholder reviews

### ***Performance Metrics***

UMS will provide bi-weekly updates to the City which will address the project plan, progress and problems. This will provide an overview of production and schedule related items while also providing quality or other project challenges.

### ***Project Approach***

UMS is a company that listens well to its customers and can craft a unique deployment plan to address the needs of the City. UMS has been a part of many projects that involved owners' representatives, consultants and unique project teams. The most successful projects are those that foster open communication, value each team member's unique skill sets and operate with a singular focus and mission.

### **Public Outreach: Platinum**

You know your customers better than anyone, so we'll work with you closely to build and customize the communication materials to fit your specific needs. The materials outlined below are examples of the base material we can develop for City of Jackson.

- UMS will develop a Public Outreach Campaign to inform customers on the Advanced Metering program plans and benefits. Content to include:
  - Public Service Announcement Video
  - 90-120 second video
    - Footage of local iconic locations (up to five locations)

- Interview with up to two client representatives
- Project-specific information (plans and value)
- Social Media Campaign
- Graphics and suggested verbiage to use at various times during the installation project
  - Project Information/Announcement
  - Informational/Did You Know
- Installations Starting
- Progress Updates
- Print-ready customer toolkit material:
  - Project Information Letter / News Release
  - Post-installation Door Hanger
  - Meter Installer Authorization Letter
  - AMI FAQ
  - Staff & Department Memo
  - Billing Insert
  - Installation Project Poster

## Approach to System Integration

Accurate data is one of the most important aspects of any mass meter change out or technology upgrade. The value of a billing system lies not only in the data integrity it provides, but also in its accessibility for the billing department. UMS takes a data-driven approach to metering integrations. In every installation, our dedicated systems integration team follows a 3-step process to guarantee data integrity.



### Analyze

During pre-deployment, a thorough “data scrub” is conducted to ensure we have all the information we need to fully and accurately integrate installation data into the billing system. We work closely with your billing department and your vendors to define a mass meter changeout interface, used to send validated changeout data back into the billing system—eliminating the need for manual entry.

### Normalize

Once the integrity of the data has been validated and mapped, we define the route-by-route scope of work plan. The routes are optimized to allow for minimal disruptions to existing billing and meter reading processes. Then, account data is uploaded into the handheld devices utilized by our installation field crews. Installation teams proceed in route sequence order, verifying current data, collecting old meter data, and recording data for the new meter and transmitter.

### Validate

New meter and transmitter data will not be uploaded into your utility billing system until it goes through a thorough multi-step data validation procedure. Twice a week, installations are evaluated by our data analysts to ensure that they were all performed correctly and are working properly.

### Third-Party Software Implementation

Robust billing and customer information solutions are critical for utilities to collect, store, and process customer data, such as property location, service history, consumption, payment records, and other



information relevant to the City. UMS has successfully managed the implementation of hundreds of solutions for utilities nationwide. We are a product- and vendor-independent firm, which allows us to focus on finding the best solution for individual needs. Our experienced and highly-specialized integration team provides full, end-to-end programs, in addition to standalone services that assist utilities with implementing third-party software.

### Approach to Configuration and Testing

UMS will work with vendors to develop thorough testing plans, including pertinent use cases and test scripts as well as a formal method for recording, compiling, and reporting the test results, as well as tracking through issue resolution. Based on the user acceptance criteria outlined in each Vendor contract and the requirements set forth by the City, UMS will work with the Vendors to supplement those plans as required.

The approach for validating all interfaces prior to installing meters and endpoints in the Initial Deployment Area will include three phases as follows:

1. Functional Testing (FT)
2. Systems Integration Testing (SIT)
3. User Acceptance Testing (UAT)

**Functional Testing (FT)** (aka application testing): During Functional Testing, UMS will ensure that vendors have performed individual interface requirements specification testing. UMS will develop test cases and test the functionality of the following:

1. **UMS Work Order Management System (WOMS/Xchange)**
  - a. CIS meter and account “work order” data loading to the Xchange Web Interface
  - b. Generation of the MMCO file to CIS specifications
2. **CIS/Billing**
  - c. Processing of the MMCO data
  - d. Generation of meter and account “work order” data for WOMS/Xchange
  - e. Generation of AMI meter and account data for synchronization to the BEACON AMA platform
  - f. Processing of the AMI reads
3. **Meter Vendor**
  - g. Processing the CIS AMI meter and account (‘sync’) data
  - h. Generation of AMI read data for the CIS system

**System Integration Testing (SIT):** The main objective of System Integration Testing is to validate connectivity of field devices through the communications network, as well as end-to-end integration from meter change out, to meter reading, through utility billing. UMS will document test cases for each system integration interface scenario and manage the end-to-end integration testing of all solution interfaces.

**User Acceptance Testing (UAT):** Use cases and test cases will be co-developed by the City and UMS to cover all potential AMI and CIS change-out scenarios. The Department will lead, with UMS’ guidance, “real world” testing that validates whether the system can support daily business operational and user

requirements. Thorough UAT potential inconsistencies will be captured, and resolution will be facilitated. New and redesigned business processes may also be tested during UAT.

The following table highlights UMS and the City’s responsibilities during each testing phase described above.

TEST PHASE	UMS RESPONSIBILITIES	DEPARTMENT RESPONSIBILITIES
<b>Functional Testing (FT)</b>	Develop interface requirements & specifications Review and analyze requested field data for CIS storage Work with the City on data setup Perform CIS data gap analysis Develop test cases Execute test cases & validate results	Review requirements & specifications Define desired field data to be collected and stored in CIS Provide production level CIS meter and account data Work with UMS on data setup & questions
<b>Systems Integration Testing (SIT)</b>	Work with the City on data setup Develop test cases Execute test cases & validate results	Provide CIS test environment & support Work with UMS on data setup
<b>User Acceptance Testing (UAT)</b>	Co-develop test cases & acceptance criteria Assist with test data setup Support test case execution & results validation	Provide CIS test environment & support Co-develop test cases & acceptance criteria Setup test environment data to support test cases Execute test cases Validate results

## Technical Approach to Meter and Endpoint Installation

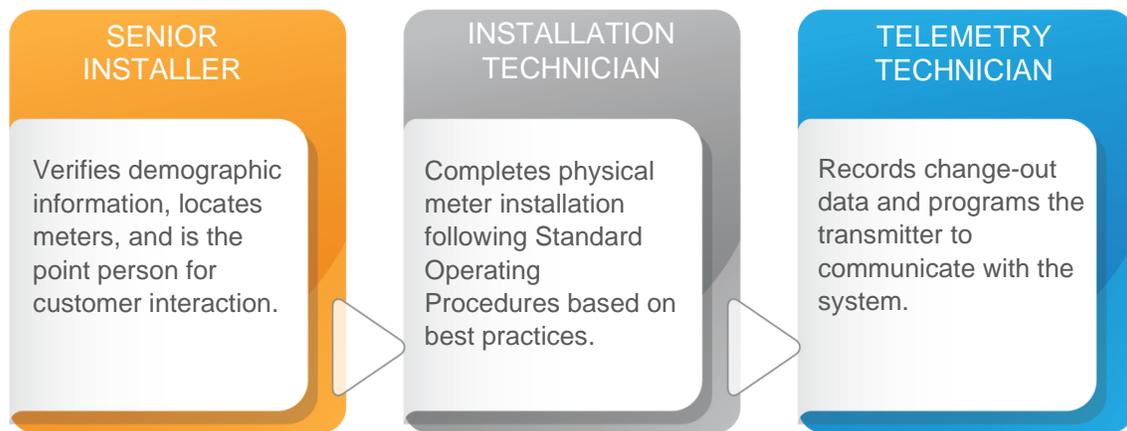
### Advanced Metering Installation

Advanced Metering systems rely on many components to operate effectively. Therefore, it’s important that your new AMI meters are properly installed and integrated to ensure the City is receiving all the benefits of your new meters. AMI implementations can also impact many departments and agencies across the City, therefore providing detailed communication, planning, budgeting and project management is critical to the overall success of the AMI deployment.

To achieve maximum efficiency in the field, we utilize blended crews to provide quality control, troubleshooting, and situational analyses. Each crew is led by a Senior Installer and all UMS installers have 5-10 years’ experience with meter installation. This depth of knowledge allows for nearly all scenarios to be handled in the moment. From locating hard-to-reach meters, to evaluating the age and condition of the hardware inside the meter box, to operating in challenging meter site conditions, the UMS Field Services Team brings a level of expertise not found with other utility partners.



A typical crew is made up of a Senior Installer (lead), three Installation Technicians, and a Telemetry Technician.



### *The Installation Process – Complete Meter Changeout*

At the start of each installation, the UMS Field Services Team will turn off water to your customer, evaluate the condition of the existing meter connections, take beforehand pictures, remove the old meter from the water line, install the new Badger meter, turn the water back on, and check for any leaks.

To ensure accurate billing, the UMS Field Services Team will also record key information, including outgoing and incoming meter serial numbers, characteristics, and reads. Our team will record, capture, and upload the information in our proprietary Xchange database.

- Prior to installing the meter and activating the Badger Meter ORION endpoint, the UMS Field Services Team will check the meter read, serial number, and key characteristics about the meter to ensure they are at the correct location.
- After the new Badger Meter is installed, the new meter endpoint will be activated to allow the meter to connect to the BEACON network.
- Once the endpoint is activated and programmed, the technician will record key information about the endpoint in order to ensure accurate billing.
- Once active, the Badger Orion endpoint will transmit the cellular meter reading data to the Badger BEACON software.
- All pictures, old meter register data, and new pictures will be uploaded and saved to the UMS Xchange Work Order Management software and held for record keeping for the City.

### *The Installation Process – Retrofit Changeout*

For the retrofit only installations for this project, the UMS Field Services Team will evaluate the condition of the existing meter connections, take beforehand pictures, remove the old meter register, and install the new encoder register ORION endpoint.

- To ensure accurate billing, the UMS Field Services Team will also record key information, including outgoing and incoming meter serial numbers, characteristics, and reads. Our team will record, capture, and upload the information in our proprietary Xchange database.
- Prior to installation the UMS Field Services Team will check the old meter read, serial number, and key characteristics about the meter to ensure they are at the correct location.

- Once the compatible retro-fit register is installed a new ORION endpoint will be activated to allow the meter to connect to the BEACON network.
- As with installing the meter, the UMS Field Services Team will record key information about the endpoint in order to ensure accurate billing. With a retrofit, this will happen without the installation of a new meter.
- Once connected, the Badger Orion endpoint will transmit the cellular meter reading data to the Badger BEACON software. All pictures, old meter register data, and new pictures will be uploaded and saved to the UMS Xchange Work Order Management software and held for record keeping for the City.

### *Work Order Management & Data Analytics*

Developed, engineered, and maintained by our in-house programmers, Xchange is a robust work order management and data analytics software suite designed to help you manage meter deployments efficiently, accurately, and with fewer resources. In addition to streamlining work, Xchange also features extensive reporting and data analysis capabilities, providing the insight needed to make smart, data-driven decisions.



Reports and modules available on-demand through Xchange, include:

- **Field Work Order Management:** Captures old meter final reading; new meter serial/transmitter/ID numbers; GPS coordinates, installation site pictures; unique site conditions; transmitter signal strength; customer interactions; and any additional work completed.
- **Utility Dashboard:** Project overview, scope of work, percent complete.
- **Substantial Completion:** Scope of work by route/percent complete.
- **Field Production Report:** Daily installation details by account and date.
- **Assist Report:** Accounts that cannot/have not been changed and reason.
- **Punch List:** Accounts not complete by route.
- **Online Account Inquiry:** Account details, including pictures of pit sets and final read.
- **Mass Meter Export:** Used to update CIS/billing system.

### *Measuring Implementation Success*

UMS is committed to the highest performance standards in the industry. We leave no stone unturned to ensure your new AMI meters support your billing process, are installed on-time and on-budget. Additionally, UMS will:

- Develop a detailed Deployment Plan to guide the AMI Implementation.
- Improve the speed and accuracy of implementation through project management.
- Ensure your new meters enable you to invoice your customers accurately and timely.

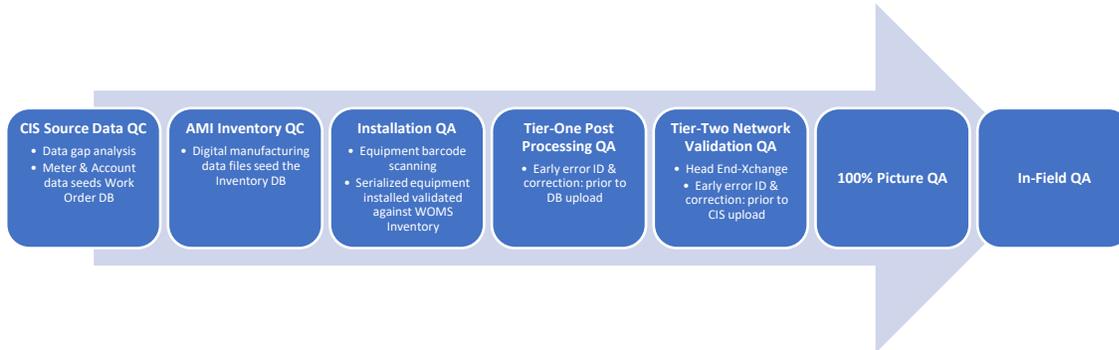
### **Approach to Quality Assurance and Control**

The project will utilize UMS' standard Quality Management Plan to ensure a high-quality delivery of your AMI solution. Quality control is utilized across all aspects of the project including installation processes, auditing, data checking, training, and automated systems.

Quality Assurance/Quality Control (QA/QC) is no longer simply a matter of correctly installing a physical asset. AMI has introduced various new layers of complexity, and data quality is a critical success factor to



a successful implementation. That’s why UMS uses a multi-faceted, seven-step QA/QC approach, as demonstrated below:



### Approach to Safety

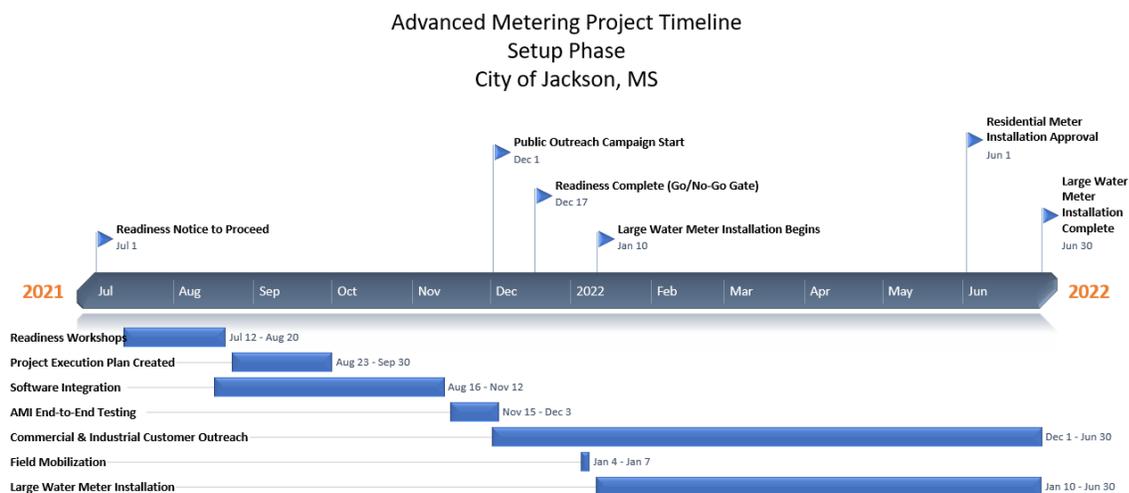
UMS is committed to providing the highest level of health and safety possible for our staff, clients, and our clients’ customers. All field staff are required to sign and abide by a 19-point Safety Checklist. This list covers topics such as welding, personal protective equipment (PPE), housekeeping, ergonomics, and more. Additionally, a daily “Toolbox” Safety Training meeting is held prior to crews being dispatched.

UMS complies with all applicable Occupational Safety and Health Association (OSHA) standards. Each Project Manager is CPR and first-aid certified, and 90% hold OSHA 10 safety certifications.

Additionally, as a member of the ISNetworld® Contractors Group, UMS has an “A” grade from our customers.

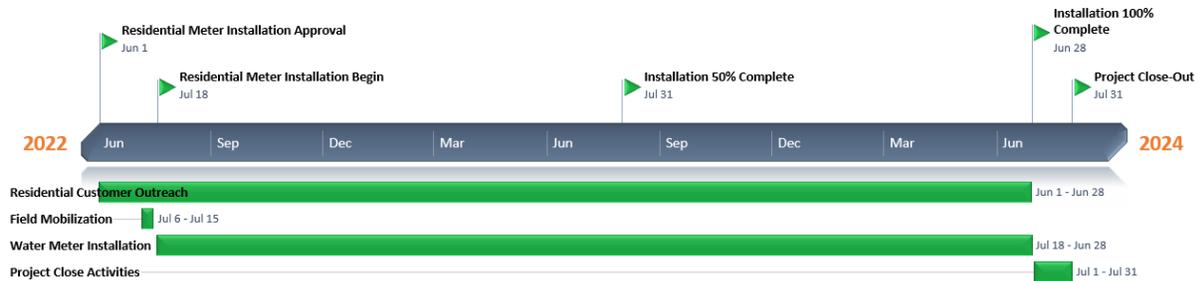
### PROJECT PLAN(S)

The timeline illustrated below shows the expected milestones and key activities from project initiation to the completion of the large meter installations.



## Mass Meter Deployment

Based on a 24-month overall schedule, the high-level timeline illustrated below shows the expected milestones and key activities from project initiation to the completion of the large meter installations.



## OUR SUBCONTRACTOR / EBO POLICY

UMS is committed to investing in the communities where we work. Our growth and development is rooted in the neighborhood environment. We are dedicated to giving back to our communities to enhance the future for others.

Our projects provide employment and training for the community during the lifetime of each project and open the door of opportunity within trades and construction management fields. We are dedicated to ensuring that minority and women owned businesses gain opportunities that can lead to a successful career in the metering industry. We are proud that many of our local partners end up being long term partners on future projects.

Our equal opportunity bidding processes and preconstruction outreach meetings bring together local vendors, subcontractors, and trades people. We reach out to the community to understand the needs so that we can best formulate a project specific resident hiring plan. We are proud of our M/WBE Mentoring Program that builds effective working relationships between leaders, established companies, and emerging minority and women owned businesses. These relationships benefit M/WBEs by equipping them with the knowledge and experience established firms provide, and identify the needs, actions, and results required to be a contractor, consultant, and/or supplier.

## OUR SUPPLIER DIVERSITY POLICY

It is the policy of UMS that diverse suppliers will have an equal opportunity to be included in our strategic sourcing and procurement process. Companies that seek to do business with UMS must demonstrate the ability to add value and provide high-quality goods and services that are competitively priced, reliable, and aligned with our superior level of service.

Our objectives include:

- Actively seeking out certified diverse suppliers that can provide competitive, high-quality goods and services whose business models are aligned with our own business strategy.
- Ensuring the inclusion of diverse suppliers as a part of our strategic sourcing and procurement process.
- Communicating the value of supplier diversity both internally and externally to all stakeholders.
- Leveraging our supplier diversity results to meet our clients' supplier diversity requirements.

We will measure our success based upon our ability to attain and surpass these objectives.



## SUPPLIER DIVERSITY PROGRAM

Our supplier diversity mission is to proactively identify, build relationships with, and purchase goods and services from certified small businesses, as well as enterprises owned by minorities, women, veterans, members of the LGBTQ community, and disabled persons that can help add valuable local support to our programs.

### *Program Commitment*

UMS encourages Small Business Enterprise (SBE), Minority Business Enterprise (MBE), and Woman-owned Business Enterprise (WBE) participation on all our projects – regardless of funding requirements. Our goal is to maximize local business involvement without sacrificing quality, time, or cost. We make this team effort happen by working closely with each owner to establish local inclusion goals within each program.

Our program focuses on:

- **Objective Measurements** – establishing and meeting company and departmental goals and objectives.
- **Tracking and Reporting** – monitoring and reporting our progress toward achieving our supplier diversity goals and objectives with a strong emphasis on continuous improvement.
- **Training and Education** – ensuring that associates in decision-making positions throughout our organization understand our commitment to our supplier diversity principles.
- **External Outreach Activities** – seeking diverse suppliers through active involvement with small business and minority development organizations, and participation in various trade shows and procurement events.
- **Communications** – educating employees, management, diverse suppliers, and the community-at-large on our supplier diversity program, policies, and achievements.
- **Purchasing Policies** – Upon identification of needs during the project implementation, W/MBE vendors will be sought by following our standard Good Faith Efforts (GFE). If a W/MBE cannot be identified to fill the project requirement, then local small non-diverse businesses will be explored. If a small non-diverse business cannot be located, then a local, corporate business will be utilized. Only when all local efforts have been exhausted, will we look outside of the local area to fill the project need.



**Sara Bardwell, CPSM, CPSD®**

UMS Purchasing, Specializing in Supplier Diversity

Phone: 985-507-6671

Email: [Sara.Bardwell@umswater.com](mailto:Sara.Bardwell@umswater.com)

### 3. REFERENCES

#### RELATED INDUSTRY EXPERIENCE

UTILITY NAME	PROJECT SIZE	CONTACT INFORMATION
Loudoun, VA	61,000	<b>Contact:</b> Andy Krapf <b>Phone:</b> (571) 291-7700 <b>Email:</b> akrapf@loudounwater.org
Lima, OH	29,000	<b>Contact:</b> Michael Caprella <b>Phone:</b> (419) 221-5294 <b>Email:</b> mike.caprella@cityhall.lima.oh.us
Columbia, SC	150,000	<b>Contact:</b> Sandra A. Wright <b>Phone:</b> (803) 545-3470 <b>Email:</b> sawright@columbiasc.net
Westminster, CO	33,000	<b>Contact:</b> Brad Bettale <b>Phone:</b> (303) 658-2594 <b>Email:</b> bbettale@cityofwestminster.us
Salisbury-Rowan Utilities District	22,500	<b>Contact:</b> Jason Wilson <b>Phone:</b> (704) 216-7553 <b>Email:</b> jawils@salisburync.gov

#### ONGOING INDUSTRY EXPERIENCE

In the past three years, UMS has worked on over 140 projects and installed more than 1,000,000 meters. UMS has installed and overseen the implementation of all major meter brands, ranging from direct-read solutions, to automated meter reading (AMR), to advanced metering infrastructure (AMI). Today, we are the nation's leading provider of AMI solutions for water, electric, and gas utilities and on the cutting edge of Smart Cities implementation. The tables below include projects currently in progress, as well as completed projects.

PROJECTS	UTILITY TYPE	PROJECT SIGN DATE
LITTLE THOMPSON	Water	1/15/2021
BERTHOUD, CO	Water	12/15/2020
PINE PRAIRIE, LA	Water	10/15/2020
NOVI, MI	Water	9/2/2020
BAYOU TECH, LA	Water	07/21/2020
BEEVILLE, TX	Water	04/15/2020
NOVI, MI	Water	03/31/2020
ROBESON COUNTY, NC	Water	03/17/2020
KNOX COUNTY, OH	Water	02/28/2020
FERNDALE, MI	Water	11/05/2019
ROBESON COUNTY, NC	Water	09/30/2019
BRADENTON, FL	Water	08/22/2019
WESTMINSTER, CO	Water	07/24/2019
LOS ALAMOS, NM	Combination W/G/E	06/13/2019
ANN ARBOR, MI	Water	06/07/2019



PROJECTS	UTILITY TYPE	PROJECT SIGN DATE
CITY OF COLUMBIA, SC	Water	02/25/2019
AGUA, TX	Water	12/19/2019
EDGEWATER, CO	Water	11/19/2019
OCALA, FL	Water	11/12/2019
SILSBEE, TX		11/05/2019
NORTHVILLE, MI	Water	11/05/2019
DC WATER	Water	10/11/2019
NEWBURGH, IN:	Water	08/28/2019
WHEAT RIDGE WATER DISTRICT, CO	Water	08/20/2019
DERIDDER, LA	Water	08/01/2019
DELCAMBRE, LA	Water	04/30/2019
JENNINGS, LA	Water	04/10/2019
KALAMAZOO, MI	Water	04/10/2019
NEWNAN, GA	Combination W/E	03/29/2019
LAFAYETTE, CO	Water	03/07/2019
ROBESON COUNTY, NC	Water	12/06/2018
VENICE, FL	Water	12/06/2018
SHELBY TOWNSHIP, MI	Water	11/20/2018
DAVIE, FL: METER INSTALL	Water	11/16/2018
IBERVILLE PARISH, LA	Water	10/26/2018
PWSD, CO	Water	09/28/2018
ROCK ENERGY, CO	Combination	06/22/2018
VENICE, FL	Water	06/21/2018
MUSKEGON HEIGHTS, MI	Water	05/23/2018
LOUNDON, TN	Combination W/G/E	03/31/2018
LIMA, OH	Water	03/31/2018
SUNSET, LA	WATER	12/31/2017
CASTLE PINES, CO	Water	12/31/2017
OAKLAND PARK, FL	WATER	12/29/2017
GEORGETOWN/JEFFERSONVILLE, IN	Water	10/13/2017
DANVILLE, KY	WATER	10/01/2017
RAYMONDVILLE, TX	Water	07/20/2017
LITTLE ROCK, AR	Water	07/15/2017
CITY OF MADISON HEIGHTS, MI	Water	07/01/2017
PERU, IN	COMBINATION	06/30/2017
CITY OF DUSON, LA	WATER	06/01/2017
RAYMONDVILLE, TX	Water	06/01/2017
UNION COUNT	WATER	05/16/2017

# BID SHEET

## Meter Installation and Commissioning, Infrastructure Installation:

5/8" Meter	\$ <u>69.75</u> per meter
1" Meter	\$ <u>69.75</u> per meter
1.5" Meter	\$ <u>355.00</u> per meter
2" Meter	\$ <u>355.00</u> per meter
3" Meter	\$ <u>595.00</u> per meter
4" Meter	\$ <u>895.00</u> per meter
6" Meter	\$ <u>1,900.00</u> per meter
8" Meter	\$ <u>2,100.00</u> per meter
Shipping and Handling Fee per meter for return process	\$9.50 _____ per meter

Year One Ongoing Maintenance and Support

\$ .18 per meter per month (Per FTE)

Annual Ongoing Maintenance and Support for Years 2 through  
5

\$ .18 per meter per month (Per FTE)

Annual Cost Indexing for Years 3 through 5

3.5 %



## ADDITIONAL UNIT PRICING

A metering as a service program requires a comprehensive and wide angle view of all the necessary pre-deployment, deployment and long-term maintenance services to ensure program accuracy and integrity. Below is a list of necessary services, rooted in best practices, that the City of Jackson will need to ensure the metering as a services is implemented properly in the field and inside the building.

<b>JACKSON, MS</b>				
<b>METERING AS A SERVICE ESTIMATE</b>				
<b>BREAKDOWN</b>				
	<b>PRE-DEPLOYMENT SERVICES</b>	<b>Units</b>	<b>Services Unit Cost</b>	<b>Comments</b>
SETUP_1	Project Initiation & Setup	0	\$ 95,000.00	One Time Fee
SETUP_2	Public Outreach Program & Custom PR Video	0	\$ 89,000.00	One Time Fee
SETUP_3	AMI Network User Acceptance Testing	0	\$ 45,000.00	One Time Fee
SETUP_4	Oracle Interface Setup and Testing: AMI Change Out	0	\$ 150,345.00	One Time Fee
SETUP_5	Readiness & Change Management	0	\$ 436,000.00	One Time Fee
	<b>DEPLOYMENT SERVICES</b>	<b>Units</b>	<b>Services Unit Cost</b>	<b>Comments</b>
PM_1	Project Management: Logistics and Vendor Coordination	0	\$ 22,000.00	Monthly Fee
TRAIN_1	Custom Training (ILT, OJT, WBT) & Documentation	0	\$ 351,270.00	One Time Fee
DEPLOY_1	Mobilization: Field Crew	0	\$ 35,000.00	One Time Fee
DEPLOY_2	5/8"x 3/4" Meter Exchange	0	\$ 69.75	Per Unit Fee
DEPLOY_3	1" Meter Exchange	0	\$ 69.75	Per Unit Fee
DEPLOY_4	1.5" Meter Exchange	0	\$ 355.00	Per Unit Fee
DEPLOY_5	2" Meter Exchange	0	\$ 355.00	Per Unit Fee
DEPLOY_6	3" Meter Exchange	0	\$ 595.00	Per Unit Fee
DEPLOY_7	4" Meter Exchange	0	\$ 895.00	Per Unit Fee
DEPLOY_8	6" Meter Exchange	0	\$ 1,900.00	Per Unit Fee
DEPLOY_9	8" Meter Exchange	0	\$ 2,100.00	Per Unit Fee
DEPLOY_10	Transmitter Activation & Configuration	0	\$ 6.00	Per Unit Fee
DEPLOY_11	AMI Endpoint Validation, QA/QC, User Acceptance	0	\$ 1.75	Per Unit Fee
	<b>MONTHLY MAINTENACE SERVICES</b>	<b>Units</b>	<b>Services Unit Cost</b>	<b>Comments</b>
MAINT_1	TAC (Technical Assistance Center), Annual Meter Testing (3"+)	0	\$ 0.66	Per meter per month Fee (Full Deployment)
MAINT_2	Full Time FTE: Maintenance and Troubleshooting	0	\$ 0.18	Per meter per month Fee (Full Deployment)

	<b>OPTIONAL REHABILITATION SERVICE ADD ONS</b>	<b>Units</b>	<b>Services Unit Cost</b>	<b>Comments</b>
BOND_1	Bonding		2.50%	Total Cost of Contract
OPT_1	Field Labor Rate (Hourly)		\$ 112.00	Hourly Fee
OPT_2	Material Warehousing and Inventory Management		\$ 6,000.00	Monthly Fee
OPT_3	Endpoint and Meter Recycling		\$ 2.88	Unit Fee
OPT_4	Return to Utility		\$ 10.00	Unit Fee
REHAB_1	Cut and Install New Meter Lid		\$ 12.00	Unit Fee
REHAB_2	Meter Box Replacement for 1" and under		\$ 57.00	Unit Fee
REHAB_3	Meter Box Reset for 1" and under		\$ 57.00	Unit Fee
REHAB_4	Install New Meter Box (up to 1.5-2")		\$ 75.00	Unit Fee
REHAB_5	Installation of Residential Backflow Device		\$ 75.00	Unit Fee
REHAB_6	Install New Curb Stop (up to 1")		\$ 75.00	Unit Fee
REHAB_7	Install New Gate Valve (up to 1")		\$ 75.00	Unit Fee
REHAB_8	Install New Dual Check Valve (up to 1")		\$ 75.00	Unit Fee
REHAB_9	Install Pipe Riser (up to 1")		\$ 75.00	Unit Fee
REHAB_10	Replace Existing Gate Valve (up to 1")		\$ 75.00	Unit Fee
REHAB_11	Replace Existing Direct Connect Meter (up to 1")		\$ 75.00	Unit Fee
REHAB_12	Confined Space Adder		\$ 155.00	Unit Fee
REHAB_13	Sub Meter GPS		\$ 7.95	Unit Fee

### ***Payment Term Assumptions***

- Net 30 day payment terms. UMS reserves the right to impose a 1.5% late payment fee if payments are not received on-time.
- Any material purchased will be invoiced cost plus 15%.

### ***General Installation Assumptions***

- UMS assumes the City will provide all materials required for installation (meters, endpoints, lids, ancillary parts, etc.). Furthermore, UMS assumes the City will have a minimum of a six-week supply of meter inventory which is based on planned installation schedule.
- UMS assumes all work will be completed in a single visit. Any subsequent visits will be subject to the applicable hourly rate outlined in the contract.
- Any extra work will be performed per the standard hourly rates or remediation services unit pricing set forth in the pricing proposal. Hourly pricing and remediation services unit pricing is applicable for the initial customer visit only.



- UMS assumes no work stoppages once project starts. Any work stoppages/material inventory shortage beyond UMS's control will be subject to the hourly rate outlined in the contract for each person. Any additional warehousing, housing or material costs will be invoiced separately.
- If UMS must demobilize from project prior to project completion, remobilization and pricing is subject to change.
- UMS assumes that all residential meters will be released in route read order. UMS further assumes that the City will provide a meter-reading/black out schedule prior to the project start date.
- UMS assumes all customer notification letters and mailings and will be delivered by the City.
- UMS assumes police escorts will be provided by the city in unsafe installation areas.
- UMS will not be responsible for sorting, palatalizing, labeling, or packaging of old meters and endpoints. All meters and materials removed from service will be recycled and disposed of by UMS.
- All meters located in confined space as defined by OSHA will require additional time and personnel in order to complete the change out. Confined space pricing provided in pricing proposal.
- UMS assumes the City will provide assistance with unsafe meter installations or other special circumstances.
- UMS will only be responsible for the repair of damages caused directly by UMS services.
- All meters are readily accessible by field tech with standard work vehicle. Pricing does not include meters requiring access by boat, ATV, or any other means other than automobile.
- The City agrees to complete assistance requests within five (5) working days of notification so that UMS can complete the meter installation. When the City cannot resolve within that time, UMS may return the meter to utility (RTU) and removed from UMS' scope, or at the client's discretion and prior to UMS demobilization, UMS can complete the installation at the standard miscellaneous hourly rate.
- All UMS activated endpoints will be monitored via the AMI network for three (3) days to ensure billable reads are received each day. UMS will troubleshoot all endpoints that do not meet the three (3) day AMI network validation. Once an endpoint reaches the three (3) day validation the installation will achieve account acceptance and be added to the weekly account acceptance list. After acceptance, UMS will troubleshoot these endpoints at the hourly rates outlined in the pricing proposal.
- When GPS satellites are unavailable, UMS will geocode endpoint to the service address.

### ***Residential Water Meter Installation Assumptions***

- UMS assumes meter exchanges are like for like, same lay and length, and no major plumbing is required. UMS assumes all isolation devices will be in good working condition, easily accessible and free of debris or obstructions.
- UMS assumes all ancillary parts will be provided at time of installation by the City.
- UMS assumes water meter installation will involve either complete exchange of existing meter with new meter, encoder register, and endpoint or retrofit of the existing meter register with new endpoint.

- UMS will not be responsible for the repair of pre-existing conditions such as excessive corrosion, plumbing irregularities, and breaks associated with degradation of supply lines.
- UMS will return to the City meters set in hazardous conditions or obvious code violations.
- Water meters are on setters or equipped with standard meter connections that can be reused during installation activities.
- UMS assumes meter exchange does not include provision of or replacement of expansion connectors, meter couplings, setters, or flanges. Pricing for such services is available upon request.
- UMS assumes all meters are able to be accessed by one employee and are no more than 18" in depth. All labor and groundwork required to access meters including but not limited to excessive digging and the cutting, removal, and replacement of asphalt or concrete will be charged separately.
- Pricing does not include testing of new or removed meters. Pricing for such services is available upon request.

### ***Data Collection and Network Assumptions***

- UMS assumes the City is to provide CIS/utility billing system meter and account data electronically (csv or Excel format preferred), for all active and inactive meters.
- UMS assumes all CIS, MMCO and billing read integrations completed before planned installation start.
- UMS assumes advanced metering network fully operational before planned installation start.
- The City is to provide authorization to the CIS/utility billing software vendor to enable UMS to work on behalf of the City for the purpose of establishing a mass meter change out interface.
- The City is to pay for all CIS/utility billing software vendor fees that may be charged to establish and test interfaces.
- Data collection for installs to include: photo of meter in pit before removal, data collection of old meter serial number and old meter final read, photo of meter final read, scanned new meter serial number, photo of new meter installed showing flow direction and position of valve, GPS coordinates (+/- 4m), and any additional comments on handheld if needed.
- The City is to participate in final testing and acceptance of the mass meter change out interface.

### ***Maintenance Assumptions***

- Ongoing maintenance assumes 1 FTE
- Annual Cost for ongoing maintenance assumes 3.5% increase after year 3



## APPENDIX

### APPENDICES

***Appendix 1: Addenda Acknowledgement***

***Appendix 2: EBO Paperwork***

***Appendix 3: Team Resumes***

# ADDENDA ACKNOWLEDGMENTS



## CITY OF JACKSON, MISSISSIPPI

February 19, 2021

### ADDENDUM 1 REQUEST FOR PROPOSALS

#### METERING AS A SERVICE

The following revisions shall be incorporated in and take precedence over any conflicting part of the original Request for Proposals:

1. On the RFP Cover, next to "Pre-Proposal Meeting:," delete "February 16, 2021" and **replace with** "February 23, 2021."
2. Under **Introduction, A. PURPOSE:**  
At the end of the third paragraph:  
**REPLACE:**  
The City anticipates that this continue support would be provided for five (5).  
**WITH:**  
The City anticipates that this continuing support would be provided for five (5) years.
3. Under **Introduction, A. PURPOSE:**  
At the end of this subsection:  
**ADD:**  
The City has entered into a Master Utility Service Agreement with Sustainability Partners to provide AMI water meters as a service and has elected to issue this RFP for Sustainability Partners' procurement of the installation and maintenance of AMI meters and infrastructure.
4. Under **Proposal Submission & Selection, A. Preproposal Meeting:**  
**REPLACE:**  
The City will hold a preproposal meeting on **February 16, 2021 at 10 am.**  
**WITH:**  
The City will hold a preproposal meeting on **February 23, 2021 at 10 am.**
5. Under **Proposal Submission & Selection, C. Questions and Addenda:**  
**REPLACE:**  
All questions regarding the RFP must be emailed to Carla Dazet at [cgamill@jacksonms.gov](mailto:cgamill@jacksonms.gov) no later than 1:00 pm CT, February 22, 2021. Questions and their appropriate responses will be distributed via email to all firms requesting the RFP through Central Bidding. Any addenda to the RFP will be provided to all firms no later than 5:00 pm CT, February 24, 2021.  
**WITH:**  
All questions regarding the RFP must be emailed to Carla Dazet at [cgamill@jacksonms.gov](mailto:cgamill@jacksonms.gov) no later than **5:00 pm CT, February 23, 2021.** Questions and their appropriate responses will be distributed via email to all firms **visiting the RFP through Central Bidding or requesting the RFP through**





**Carla Dazet.** Any addenda to the RFP will be provided to all firms no later than 5:00 pm CT, February 24, 2021.

6. Under **Proposal Submission & Selection, C. Questions and Addenda:**

**ADD:**

After the second and last paragraph: "Contact with employees of COJ other than the contact person designated in the RFP, by any prospective Proposer, after publication of the RFP and prior to the execution of a contract with the successful Proposer(s) could result in disqualification of your proposal."

7. Under **Proposal Submission & Selection, E. Equal Business Opportunity Program**

**ADD:**

After the first paragraph: "The Equal Business Opportunity Program goals for this Request for Proposals are those under the Procurement Category of 'Construction,' which are as follows: Asian (ABE) 0.00; African-American (AABE) 12.41; Hispanic (HBE) 0.37; Native American (NABE) 0.00; Female (FBE) 4.89."

8. The preproposal meeting will be held virtually using the following link:

Join the meeting: <https://call.lifesizecloud.com/7182064>

Click to call from Mobile (audio only)

United States: +1 (312) 584-2401,, 7182064#

Call in by Phone (audio only)

United States: +1 (312) 584-2401

Meeting extension: 7182064#

9. All proposers must include this Addendum and the following executed acknowledgement of receipt of this Addendum 1 with their proposal:

I, Chad Davis, hereby acknowledge receipt of  
(Print)

**Addendum No. 1, dated February 19, 2021** to the request for proposals for **METERING AS A SERVICE**, this the 26 day of February, 2021.

  
\_\_\_\_\_  
Signature

Utility Metering Solutions LLC  
\_\_\_\_\_  
Company Name



CITY OF JACKSON, MISSISSIPPI

February 25, 2021

ADDENDUM 2

REQUEST FOR PROPOSALS

METERING AS A SERVICE

The following revisions shall be incorporated in and take precedence over any conflicting part of the original Request for Proposals:

1. Under **Proposal Submission & Selection, C. Questions and Addenda:**

**REPLACE THE SUBSTITUTED LANGUAGE FROM ADDENDA 1:**

All questions regarding the RFP must be emailed to Carla Dazet at [cgamill@jacksonms.gov](mailto:cgamill@jacksonms.gov) no later than **5:00 pm CT, February 23, 2021**. Questions and their appropriate responses will be distributed via email to all firms **visiting** the RFP through Central Bidding **or requesting the RFP through Carla Dazet**. Any addenda to the RFP will be provided to all firms no later than 5:00 pm CT, February 24, 2021.

**WITH:**

All questions regarding the RFP must be emailed to Carla Dazet at [cgamill@jacksonms.gov](mailto:cgamill@jacksonms.gov) no later than **5:00 pm CT, February 23, 2021**. Questions and their appropriate responses will be distributed via email to all firms **visiting** the RFP through Central Bidding **or requesting the RFP through Carla Dazet**. Any addenda to the RFP will be provided to all firms no later than 3:30 pm CT, February 25, 2021.

2. The following questions have been posed by interested vendors:

Question 1: There is no mention of Collectors in the RFP. Will the installation contractor be responsible for the installation of the collectors? Will there be an addendum to add this to the RFP?

Answer 1: The successful Metering as a Service RFP proposer will be responsible for the installation of meters and all AMI components, including, but not limited to collectors, necessary for a functional system. The successful proposer on the separate AMI Water Meter RFP will be responsible for providing all AMI/Hardware to the successful Metering as a Service RFP proposer for installation. The Metering as a Service RFP proposer should include the cost of installation in their per meter cost on the pricing proposal, as indicated.

Question 2: When will the propagation study information for be provided to properly respond to the pricing of the "AMI" commercial meter pilot?

Answer 2: Information is being provided with this Addendum 2.

Question 3: Will office space be made available for the ongoing maintenance team?

Answer 3: There is space available on a limited basis as needed for ongoing maintenance support following completion of installation.

Question 4: Will warehouse space be made available?

Answer 4: Installer will be responsible for the inventory until installed.

Question 5: Will a dumpster be made available?

Answer 5: No. Meters removed from service will be returned to a location specified by the City.



Metering as a Service RFP, Addendum 2  
February 25, 2021  
Page 3

5. All proposers must include this Addendum and the following executed acknowledgement of receipt of this Addendum 2 with their proposal:

I, Chad Davis  
(Print), hereby acknowledge receipt of  
**Addendum No. 2, dated February 25, 2021** to the request for proposals for **METERING AS A SERVICE**, this the 26 day of February, 2021.

  
Signature

Utility Metering Solutions LLC  
Company Name

CITY OF JACKSON, MISSISSIPPI  
EQUAL BUSINESS OPPORTUNITY PLAN  
APPLICATION

I. Company Name: Utility Metering Solutions, LLC  
Address: 211 East Thomas St.  
City: Hammond State: LA ZIP Code: 70401  
Telephone: ( 800 ) 504-2568  
E-mail: info@umswater.com

II. Bid Name and Number: Request for Proposals for Metering as a Service-City of Jackson

III. PROPOSED MINORITY AND/OR FEMALE SUBCONTRACTORS: *(SEE ATTACHMENTS)*  
*If a prime contractor utilizes one or more suppliers to satisfy its EBO commitment, all MBE or FBE supplier participation will be credited in accordance to Section VI(C)(1) of the EBO Executive Order No.2014-3*

IV. Total Bid Amount: \$ TBD- only unit pricing requested at this time



V. WAIVER REQUESTED *(If you fail to meet either or all of the EBO Participation Goals check this box and follow the directions below to provide the required •WAIVER STATEMENT. The "Waiver Statement" should be submitted on company letterhead to the EBO Officer.)*

\* *The bidder/offeror shall provide the following as evidence of its good faith efforts and will*

*be evaluated on the same:*

- (a) Copies of written notification to MBEs and FBEs soliciting their participation as a subcontractor.
- (b) Evidence of efforts made to divide the work into economically feasible units in order to increase the likelihood of meeting the EBO participation goals.
- (c) Evidence of efforts made to negotiate with MBEs and/or FBEs, including, at a minimum:
  - 1. The names, addresses, and telephone numbers of the MBE and FBEs who were contacted.
  - 2. A description of the information provided to MBEs and FBEs regarding the plans and specifications for portions of the work to be performed.

3. A statement of reasons why additional agreements with MBEs and FBEs, if needed to meet the stated goals, were not reached.
4. Evidence of efforts made to assist the MBEs and FBEs contacted who need assistance in obtaining bonding and insurance which the bidder or offeror requires.
5. For each MBE and FBE contacted which the bidder or offeror considered to be not qualified, include a written statement of the reasons for the bidder's or offeror's conclusion.
6. Written quotes solicited from all MBEs and FBEs seeking subcontract work with Prime Contractors at the time of the bidding.
7. A statement with supporting documentation and affidavits indicating whether the offeror has used MBEs and/or FBEs as joint venture partners or subcontractors in past or present private sector contracts in Jackson.

*\*If you are unable to locate an MBF/FBE, please contact tire Business Development Division at (601) 960-1055.*

VI. Minority and Female Business Enterprise Actual Participation for this Bid/Offer/Proposal:

*(\*Please list your MBE and FBE Project Participation percentages (%) in the Table below.)*

PROCUREMENT CATEGORY	Asian (ABE)	African-American (AABE}	Hispanic (HBE)	Native American (NABE)	Female (FBE)
A/E & Professional Services					
Construction		12.41%	.37%		4.89%
Goods & Non-Professional Services					

VII. REPLACEMENT OF MBE/FBE

If an MBE or FBE is not performing satisfactorily, it is the responsibility of the Prime Contractor to notify the EBO Office immediately both in writing and by phone. All MBFJFBE replacements must be approved by the Equal Business Opportunity Review Committee (EBORC). If these steps are not taken this will result in penalties as outlined in Section XI of the EBO Executive Order No. 2014-3

VIII. CERTIFICATION

I certify, under penalties of perjury, that the information contained in this Equal Business Opportunity Plan Application is true and accurate to the best of my knowledge, and that my company fully intends to utilize all MBEs and FBEs listed if awarded the proposed project and/or service and abide by all EBO guidelines.

  
\_\_\_\_\_  
*Authorized Signature and Title* President

March 2, 2021  
*Date*

PRINT "AUTHORIZED" NAME HERE: Chad Davis, President

**EQUAL BUSINESS OPPORTUNITY PLAN APPLICATION -- ATTACHMENT**  
**Proposed Minority/Female Business Enterprise Firms**  
(This Sheet is to be duplicated and used for each firm)

---

---

Company Name: Metro Service Group Inc. Type Trade/Business: Field Services

Address: 9641 Old Gentility Rd.

City, State, ZIP: New Orleans, LA 70127

Contact Person: Jimmie Woods

Telephone Number: 504-520-8331

Type Minority Business (MBE/FBE):

- Female (FBE)
- African-American (AABE)
- Asian (ABE)
- Hispanic (HBE)
- Native American (NABE)

Type Minority Business (MBE/FBE) Involvement:

Subcontractor                       Supplier  
 Joint Venture                               Mentor-Protégé

Type Work or Service to be Performed: Field Services

Scope of Work to be Performed: Telemetry/ Meter Installation

Dollar Value of the Work to Be Performed by the Minority Business (MBE and/or FBE): \$ TBD

Percentage of MBE and/or FBE Participation: 6.41% %

**EQUAL BUSINESS OPPORTUNITY PLAN APPLICATION -- ATTACHMENT**  
**Proposed Minority/Female Business Enterprise Firms**  
(This Sheet is to be duplicated and used for each firm)

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Company Name: The Wet Work Group LLC Type Trade/Business: field services

Address: 1500 North 19th St.

Type Minority Business (MBE/FBE):

City, State, ZIP: Monroe, LA 71201

- Female (FBE)
- African-American (AABE)
- Asian (ABE)
- Hispanic (HBE)
- Native American (NABE)

Contact Person: Sean L. Benton

Telephone Number: 318-805-6291

Type Minority Business (MBE/FBE) Involvement:

<input checked="" type="checkbox"/> Subcontractor	<input type="checkbox"/> Supplier
<input type="checkbox"/> Joint Venture	<input type="checkbox"/> Mentor-Protégé

Type Work or Service to be Performed: field services

Scope of Work to be Performed: meter installation and warehousing /inventory management

Dollar Value of the Work to Be Performed by the Minority Business (MBE and/or FBE): \$ TBD

Percentage of MBE and/or FBE Participation: 6%

# CITY OF JACKSON

## *AFRICAN AMERICAN BUSINESS ENTERPRISE*



Grants Certification to

**THE NETWORK GROUP**

*Vic Sexton*

Vic Sexton, Small Business Outreach Coordinator  
Office of Economic Development  
Business Development Division

*March 2, 2021*

Date

Certificate Number: 03-02-2021-01

Expires: March 2, 2023

EQUAL BUSINESS OPPORTUNITY PLAN APPLICATION -- ATTACHMENT  
Proposed Minority/Female Business Enterprise Firms  
(This Sheet is to be duplicated and used for each firm)

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Company Name: 360 Water, Inc Type Trade/Business: training

Address: 965 W Third Ave

Type Minority Business (MBE/FBE):

City, State, ZIP: Columbus OH 43212

- Female (FBE)
- African-American (AABE)
- Asian (ABE)
- Hispanic (HBE)
- Native American (NABE)

Contact Person: Laura Tegethoff

Telephone Number: 614-294-3600

Type Minority Business (MBE/FBE) Involvement:

<input checked="" type="checkbox"/> Subcontractor	<input type="checkbox"/> Supplier
<input type="checkbox"/> Joint Venture	<input type="checkbox"/> Mentor-Protégé

Type Work or Service to be Performed: training, documentation, PR

Scope of Work to be Performed: web based training and public outreach

Dollar Value of the Work to Be Performed by the Minority Business (MBE and/or FBE): \$ TBD

Percentage of MBE and/or FBE Participation: 4.89% %

# CITY OF JACKSON

## *FEMALE BUSINESS ENTERPRISE*



Grants Certification to

**360 WATER, INC.**

*Vic Sexton*

Vic Sexton, Small Business Outreach Coordinator  
Office of Economic Development  
Business Development Division

*February 25, 2021*

Date

Certificate Number: 02-25-2021-01

Expires: February 25, 2023

**EQUAL BUSINESS OPPORTUNITY PLAN APPLICATION -- ATTACHMENT**  
**Proposed Minority/Female Business Enterprise Firms**  
(This Sheet is to be duplicated and used for each firm)

Company Name: Escudero Construction Type Trade/Business: concrete

Address: 223 S Hargon st.

Type Minority Business (MBE/FBE):

City, State, ZIP: Canton, MS 39046

Female (FBE)

African-American (AABE)

Asian (ABE)

Contact Person: Salvador Escudero-Lara

Hispanic (HBE)

Native American (NABE)

Telephone Number: 601-832-2834

Type Minority Business (MBE/FBE) Involvement:

Subcontractor

Supplier

Joint Venture

Mentor-Protégé

Type Work or Service to be Performed: concrete

Scope of Work to be Performed: concrete

Dollar Value of the Work to Be Performed by the Minority Business (MBE and/or FBE): \$ TBD

Percentage of MBE and/or FBE Participation: .37%

Search

### Certified Profile

CLOSE WINDOW 

[Print](#)

#### Business & Contact Information

BUSINESS NAME	<b>Escudero Construction</b>
OWNER	Salvador Escudero-Lara
ADDRESS	223 S Hargon St Canton, MS 39046 <a href="#">Map This Address</a>
PHONE	601-832-2834
FAX	601-832-2834
EMAIL	<a href="mailto:escudero@gmail.com">escudero@gmail.com</a>
ETHNICITY	Hispanic

#### Certification Information

CERTIFYING AGENCY	City of Jackson
CERTIFICATION TYPE	MBE - Minority Business Enterprise
CERTIFIED BUSINESS DESCRIPTION	Concrete finishing; carpentry; roofing; dry wall; paint

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# JOEY MITCHELL

Executive Sponsor

## PROFILE

Joey has more than 12 years of technical and real-world experience both deploying and defining future advanced utility networks for water, gas, and electric utilities. He has held executive leadership positions developing multi-million dollar sales channels and has been responsible for software integration and professional services teams. Joey holds a B.S. in Adult Education from the University of Southern Illinois and will serve as the Executive Sponsor on the project.

## AREAS OF FOCUS

- Vendor and Resource Management
  - Contract Negotiation
  - Business Development
  - RFP Development
  - Financial Planning
- Business Process Reengineering
- Standard Operating Procedures
- Work Order Management
- Implementation
- Smart Grid / Smart Water Networks
- Systems and Program Requirements
  - AMI / MDM Vendor Selection
  - Program Management
  - Business Case Development
  - Training / Education

## EDUCATION & CERTIFICATIONS

B.S., Adult Education, Southern Illinois University (2007)

## RELEVANT EXPERIENCE

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### *BUSINESS PLAN DEVELOPMENT*

Joey has developed a proven methodology for developing business plans that enable his clients to determine the true economic and operational impacts of a proposed technology. Using detailed modeling approaches, the development of a robust and detailed business plan allows for the ability to ensure that decision making is validated through vigorous fact-based analysis.

### *AMI VENDOR SELECTION/NEGOTIATION*

Joey has extensive knowledge and experience in managing the vendor selection process. He is familiar with all the technology manufactures and has a keen ability to translating customer needs into complex technology requirement documents.



# JOE BADERA, PMP

DIRECTOR OF PROGRAM MANAGEMENT

## PROFILE

Over twenty years' experience in successfully completing a multitude of projects while effectively balancing the triple constraints of project scope, time, and budget. Ten years' experience in planning and delivering advanced water, electric, and gas metering solutions for municipalities, independently owned utilities, and cooperatives nationally.

## AREAS OF FOCUS

- Interface Development & Testing
  - AMI Network Implementation
  - Data Integrity
  - User Acceptance Testing
- Software Project Management
  - Technology Migration
- Business Process Reengineering
  - Gap Analysis
- Customer Service Policies & Procedures
- Change Management
- Vendor & Resource Management
  - Budget Management
- Coaching & Team Development
  - People Management
  - Meter-to-Cash

## EDUCATION & CERTIFICATIONS

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B.S., Computer Science – Birmingham University

PMI® Certified Project Management Professional ®

## RELEVANT EXPERIENCE

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### *UMS – (PROGRAM & PROJECT MANAGEMENT)*

Mr. Badera has overseen the completion over 60 Advanced Metering Programs for UMS through effective technology migration project management. This includes AMI network implementation, user acceptance testing, business process reengineering, change management, software project management, budget management, and vendor and resource management. Some projects involve utility billing enhancement, community engagement, meter data management and analytics, systems and data integration, meter surveys, and web portal implementation. He has collaborated with multiple UMS clients and has ensured program objectives and goals are met with minimal client impacts and a high degree of client satisfaction. Mr. Badera provides business, technical, and domain expertise to project resources to deliver projects within the defined scope, schedule, and budget.

### *UMS – (PROJECT MANAGEMENT OFFICE)*

Mr. Badera uses Project Management Institute methods and standards as the foundation to ensure the successful completion of projects for clients. His unique blend of technical skills, business acumen, and project management expertise has informed UMS' best practices, policies, procedures, execution, monitoring/control, and closure of Advanced Metering Programs. This includes coaching and team development, business process reengineering, gap analysis, and people management.

### *AMI VENDOR – (PROGRAM MANAGEMENT & ARCHITECTURE)*

Mr. Badera conducted business process reengineering efforts and technology migration for a one million electric meter deployment project. He managed interface development and testing, AMI network implementation, software project management, and user acceptance testing for more than 100 AMI/AMR client project.



# ZACHARY LEMAY

PROJECT MANAGER - PMO

## PROFILE

Mr. Lemay is a customer-centric project manager with over 7 years of project management experience, successfully driving to completion numerous large-scale projects with smart electric meters. Mr. Lemay has capitalized on his seasoned expertise as a strong negotiator and collaborator through his experience in sales and project execution, managing scope and budget with a focus on quality and customer satisfaction. Mr. Lemay is also invested in Energy Conversation and Low Environmental Impact Energy projects

## AREAS OF FOCUS

- Construction Management
- Installation Troubleshooting
- Electric Meter Installation
- Business Development
- Coaching and Team development
- Regulatory Support
- Energy Finance and Valuation
- People Management
- Client Management - Training and Education

## EDUCATION & CERTIFICATIONS

Bachelor of Arts in Business Technology and Management -Vermont Technical College  
Project Management Professional Certification - University of Vermont  
OSHA 10 and 30  
PMI® Certified Project Management

## RELEVANT EXPERIENCE

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### *AQUA SPECIAL UTILITY DISTRICT*

UMS was awarded the contract to partner with the Agua Special Utility's District in the installation of smart meter technology for over 1100 3" and 4" meters. Mr. Lemay has effectively managed communications by establishing a successful working relationship with a third-party consultant to effectively accomplish this task. Mr. Lemay's ability to display a high level of initiative and attention to detail has provided expert client management, by clearly setting both external and internal expectations, driving proactive risk management, project timelines, status updates, and budgets. Mr. Lemay has worked closely with the System Engineers to ensure successful network integration.

### *ROBESON COUNTY, NC*

UMS was contracted to work with Robeson County for a multiphase project spanning several years. UMS was tasked with installing smart meters throughout the project area in a route sequence provided by the county. Mr. Lemay was instrumental in maintaining accurate data to ensure the scope and budget were met within each phase. Mr. Lemay's ability to coordinate with local representatives to establish areas for current and future work was instrumental in providing the most efficient installation possible. Mr. Lemay was able to complete this project, by closely following the contract to ensure the project was completed as specified within the agreed-upon terms. Based on these terms, the county is now able to read meters over the network benefitting the county's overall goal of increasing accuracy and efficiency in supplying the end-user with relevant information.



# STEPHEN ZOZULA

DIRECTOR, SYSTEMS INTEGRATION

## PROFILE

Eleven years' experience in both on-site and remote customer support. Six years in experience in delivering multi-million-dollar implementation projects through multiple utility commodities. Steve has also delivered training sessions on highly-technical subject matter at various high-profile conferences and trade shows. He has also developed an online-based meter installation training program to certify all new field employees in the proper techniques and procedures needed while installing water, electric, and gas meters.

## AREAS OF FOCUS

- Inventory & Quality Management
- Construction Management
- Installation Troubleshooting
- Interface Development & Testing
- IT Development & Support
- Network Management
- AMI Network Implementation
- Data Integrity
- User Acceptance Testing
- Software Project Management
- Relational Database Management
- Technology Migration
- Gap Analysis
- Data Modeling & Analysis
- Smart Grid Deployment, Design, & Mgmt.
- Meter to Reading
- Advances Metering Infrastructure
- Client Management - Training

## EDUCATION & CERTIFICATIONS

B.S., Management Information Systems, University of Pittsburgh

AMI Technical Certification

## RELEVANT EXPERIENCE

### *SYSTEMS & NETWORK INTEGRATION*

Mr. Zozula has led UMS efforts of establishing, integrating, validating, and maintaining advanced metering networks for projects across the country for over five years.

He leads an integration and network management team that facilitates technology migration upgrades to AMR/AMI systems and customer information billing systems. He leads software project management, network management, interface development and testing, and training.

Stephen has provided leadership for numerous advanced metering programs, including:

- ❖ Lima, OH
- ❖ Parker, CO
- ❖ Columbia, SC
- ❖ Pittsburgh, PA
- ❖ Bradenton, FL
- ❖ LaPorte, IN
- ❖ Rock Energy, WI
- ❖ Newton, NC
- ❖ Archdale, NC
- ❖ Lima, NC
- ❖ Minden, LA
- ❖ El Dorado, AR
- ❖ Bossier, LA
- ❖ St Cloud, FL
- ❖ Athens, GA