City of Mount Dora
510 North Baker Street
Mount Dora, Florida 32757
352-735-7126

Mount Dora City Council

Mount Dora City Hall Board Room
510 North Baker Street, Mount Dora, Florida 32757
July 15, 2025, 6:00 PM

AGENDA

CALL TO ORDER

MOMENT OF SILENCE & PLEDGE OF ALLEGIANCE

ROLL CALL

PRESENTATIONS

PUBLIC COMMENT

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APPROVAL OF AGENDA

APPROVAL OF CONSENT AGENDA

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2. Councilmember Dennis Dawson
3. Councilmember Marc Crail
4. Councilmember Nate Walker
5. Councilmember Doug Bryant
6. Vice-mayor John Cataldo
7. Mayor James Homich

UPCOMING MEETING DATES

1. Monday, July 21, 2025, 6:00 p.m., Budget Workshop: Government Funds; Internal Services

2. Tuesday, August 5, 2025, 6:00 p.m., Regular Session

3. Tuesday, August 19, 2025, 6:00 p.m., Regular Session

4. Monday, August 25, 2025, 6:00 p.m., Final Budget Workshop; Overall Budget

ADJOURNMENT

PURSUANT TO SECTION 286.0105, FLORIDA STATUTES, IF ANY PERSON DECIDES TO APPEAL ANY DECISION MADE AT THIS MEETING WITH RESPECT TO ANY MATTER CONSIDERED AT ANY MEETING OR HEARING, SUCH PERSON MAY NEED A RECORD OF THESE PROCEEDINGS FOR SUCH PURPOSE, A PERSON MAY NEED TO ENSURE THAT A VERBATIM RECORD OF THE PROCEEDINGS IS MADE WHICH RECORD INCLUDES THE TESTIMONY AND EVIDENCE UPON WHICH THE APPEAL IS TO BE BASED. VERBATIM RECORD WILL NOT BE PROVIDED BY THE CITY OF MOUNT DORA.

NOTICE: IN ACCORDANCE WITH THE AMERICANS WITH DISABILITIES ACT OF 1990, PERSONS NEEDING A SPECIAL ACCOMMODATION TO PARTICIPATE IN THIS PROCEEDING SHOULD CONTACT THE CITY CLERK AT LEAST 48 HOURS PRIOR TO THE PROCEEDINGS. TELEPHONE (352) 735-7126 FOR ASSISTANCE. IF HEARING IMPAIRED, TELEPHONE THE FLORIDA RELAY SERVICE NUMBERS, (800) 955-8771 (TDD) OR (800) 955-8770 (VOICE) FOR ASSISTANCE.

510 N. Baker St.
Mount Dora, FL 32757
352-735-7126

DATE: **July 15, 2025**

TO: **Honorable Mayor and City Council Members**

FROM: **Vince Sandersfeld, City Manager**

SUBJECT: Request Approval of Fourth Amendment to Interlocal Agreement Between Lake County, Florida with the City of Mount Dora for Library Services

Introduction:
This is a request for the City Council to approve the Fourth Amendment to the Lake County Library System Interlocal Agreement.

Discussion:
The W.T. Bland Public Library is a member of the Lake County Library System, which is governed by the Interlocal Agreement between Lake County and the ten city-owned member libraries (ATTACHMENT #1), most recently signed in 2019. This agreement has been extended with one-year amendments since then. Lake County is again requesting an amendment to the existing agreement providing a one-year extension.

Included in the Interlocal Agreement is the appropriation formula that partially compensates city libraries for the non-resident use of their libraries and collections (expected to be $282,581 for the City of Mount Dora in 2025-26). This formula includes a base annual payment of $30,000 and then a proportionate share of the allocated County funds distributed based upon the libraries' circulation rates. The new amendment (ATTACHMENT #2) extends this agreement until September 30, 2026, and there are no other changes to the amendment or original agreement.

The Lake County Library System Interlocal Agreement has served the libraries and their communities well since 1992, when Mount Dora joined the cooperative. The Lake County Library System provides a coordinated and high-quality delivery of library services to all the residents of Lake County and the Interlocal Agreement is critical for maintaining that cohesion.

Budget Impact:
In addition to the annual appropriation, which is budgeted to be $282,581 in 2025-26 (GL #001-0000-338.00-09), the Interlocal Agreement results in significant cost savings for the City of Mount Dora. All networked public PCs and printers are supplied, maintained and managed by

the cooperative. The Library's Wi-Fi is provided by the cooperative, as are databases and access to volume discount contracts with publishers.

Strategic Impact:

Strategic Initiative #4 High Quality Services, Goal 12 - High-quality programs
Strategic Initiative #5 Fiscal Resources, Goal 13 - Alternative funding sources

Recommendation:

City Council to approve the Amendment to the Lake County Library System Interlocal Agreement.

Attachment(s):

1. ATTACHMENT #1 - Lake County City of Mount Dora_2019-2022 Interlocal Agreement
2. ATTACHMENT #2 - Interlocal Agreement 4th Amendment 2025-26
3. Fourth Amendment to Library System Interlocal Agreement

Prepared by:	Cathy Lunday, Library Director	
Reviewed by:	Cathy Lunday, Library Director	Approved - 6/27/2025
	Matthew Dodson, Budget Officer	Approved - 7/1/2025
	Steven Weber, Finance Director	Approved - 7/1/2025
	City Attorney, City Attorney	Approved - 7/9/2025
	Jeanann Hand, City Clerk	Approved - 7/9/2025
	Vince Sandersfeld, City Manager	Final Approval - 7/9/2025

ATTACHMENT #1

INTERLOCAL AGREEMENT BETWEEN LAKE COUNTY AND THE CITY OF MOUNT DORA RELATING TO PROVISION OF LIBRARY SERVICES

This is an Agreement between LAKE COUNTY, a political subdivision of the State of Florida, hereinafter referred to as "COUNTY", by and through its Board of County Commissioners, and the City of Mount Dora, a municipal corporation pursuant to the laws of Florida, located in Lake County, Florida, hereinafter referred to as "MUNICIPALITY" or "CITY".

WITNESSETH:

WHEREAS, the COUNTY and MUNICIPALITY believe it is mutually beneficial and in the public interest to enter into an agreement which provides equal access to public library services, without charge, for all residents of Lake County; and

WHEREAS, Chapter 163, Florida Statutes, Intergovernmental Programs, Part I, Miscellaneous Programs, Section 163.01, The Florida Interlocal Cooperation Act of 1969, provides that public agencies of the state of Florida may exercise jointly with any other public agency of the state of Florida any power, privilege, or authority which such agencies share in common, and which each might exercise separately, and that a joint exercise of power by such agencies may be made by contract in the form of an interlocal agreement; and

WHEREAS, both the COUNTY and the MUNICIPALITY are public agencies within the meaning of Chapter 163, Florida Statutes, Intergovernmental Programs, Part I, Section 163.01; and

WHEREAS, Chapter 166, Florida Statutes, subsection 166.021(1), authorizes the MUNICIPALITY to render municipal services, and exercise any power for municipal purposes, except when expressly prohibited by law; and

WHEREAS, Chapter 125, Florida Statutes, subsection 125.01(1)(f), authorizes the COUNTY to provide libraries and cultural facilities and programs; and

WHEREAS, the COUNTY is an eligible political subdivision under Chapter 257.17, Florida Statutes, that can participate in the State Aid to Libraries Program and is designated as the single library administrative unit; and

WHEREAS, the Lake County Board of County Commissioners is designated as the governing body that coordinates the library services and programs for the public library cooperative.

NOW, THEREFORE, in consideration of the mutual benefits, covenants and agreements set forth herein, the parties hereto agree as follows:

1. PURPOSE:

The COUNTY and the MUNICIPALITY enter into this Agreement for the purpose of providing unified library services without charge to residents of Lake County by participating in the cooperative operation of the Lake County Library System, a public library cooperative. In support of said purpose the COUNTY and the MUNICIPALITY endorse the overarching goal of the *State Aid to Libraries Program* which is to assist local governments in maintaining and developing vital library services, and specifically to:

A. Provide equal access to free public library services to all residents in the service areas of the participating governments.

B. Coordinate library service throughout the service areas.

C. Provide consistent plans, programs, policies, and procedures in the operation, maintenance, and development of library services throughout the service area.

2. DEFINITIONS:

A. "Annual plan of service", according to *State Aid to Libraries Guidelines,* means a document adopted or approved by the library system's governing body and submitted as part of the application for State Aid to Libraries grants that includes the goals, objectives, and activities that will be supported for the application year.

B. "Governing body" shall mean the Lake County Board of County Commissioners.

C. "Library Advisory Board" shall mean the Lake County Library Advisory Board.

D. "Lake County Library System" shall mean the entire program of free library services and resources provided for the residents of Lake County through the public library cooperative established through this Agreement and Lake County Code, Chapter 12, Article III.

E. "Local funds", according to *State Aid to Libraries Guidelines,* means funds, exclusive of any state and federal funds, that are expended centrally for the operation and maintenance of the Lake County Library System. Local funds may be COUNTY funds or municipality funds and shall be expended by the appropriate local entity. Funds which would otherwise be received by and expended by the municipality except for this agreement shall constitute the municipality's local funds.

F. "Participating Library's governing body" means the municipality that operates and supports a public library and participates in the Lake County Library System through an Interlocal agreement.

G. "Participating Library" or "Member Library" means a library which, through its governing body, has entered into an Interlocal Agreement with Lake County to provide library service, without charge, to the residents of Lake County.

H. "Public library cooperative" shall mean the Lake County Library System and, according to *State Aid to Libraries Guidelines*, means a program of public library services and resources operated or coordinated by a governing body designated by one or more participating local governments. The governing body administers or coordinates, through a single administrative head, the common services for libraries operated by those participating local governments that have agreed through interlocal or other agreements to provide library service across their combined legal service areas. The single administrative head must be employed full- time by either the cooperative's governing body or a local participating government. Interlocal or other agreements identify the authority of the governing body and the participating local governments and the libraries each supports. Residents of the combined legal service area have equal free access to all services provided by the libraries of all the participating local governments.

I. "Reciprocal Borrowing" for purposes of the State Aid to Libraries Grant Program means that all public libraries within a county that receive Operating Grants extend borrowing privileges without charge to residents of each other's service areas. Borrowing privileges must apply to all materials that are available to be borrowed by residents of the library service area receiving an Operating Grant. The reciprocal borrowing requirement only applies to a county and the independent municipal libraries within the same county that are applying for State Aid.

J. "Resident" shall mean any individual who either owns real property or resides in Lake County on a permanent or continual basis. Required evidence of residency is outlined in Lake County Policy number LCC-8, *Lake County Library System Circulation and Registration.*

K. "Service area" shall mean Lake County. Likewise, for each participating municipality, service area means the incorporated boundaries of that municipality; and in the case of the City of Leesburg, service area means the utility district.

L. "Single administrative head", according to *State Aid to Libraries Guidelines*, means the individual who is employed full-time by the Board of County Commissioners who is responsible for managing or coordinating the Lake County Library System.

M. "Single library administrative unit" means Lake County and, according to *State Aid to Libraries Guidelines*, means an eligible political subdivision under Section 257.17, *Florida*

Statutes, designated by a county to be responsible for managing or coordinating free library service to its residents.

N. "State Aid to Libraries Grants Program", according to *State Aid to Libraries Guidelines,* means a continuing state grant authorized by Chapter 257, *Florida Statutes*, for eligible library entities.

O. "*State Aid to Libraries Guidelines",* means the publication which specifies mandatory requirements for eligibility in the State Aid to Libraries Grants Program.

P. "Total Circulation" for the purposes of this Interlocal Agreement shall mean the sum of all items circulated by the MUNICIPALITY to library patrons and all items circulated by the MUNICIPALITY to another Lake County Library System library in a fiscal year, based on circulation reports generated by the library automation system.

3. TERM:

This Agreement shall be in effect for a period beginning October 1, 2019, and ending on September 30, 2022, unless terminated earlier in accordance with the provisions of the Agreement.

4. TERMINATION:

Either party may terminate the Agreement without cause by giving the other party sixty (60) days advance written notice.

5. ADDITION OF NEW MEMBERS:

A library may become a member of the Lake County Library System by meeting the criteria and following the guidelines outlined in Lake County Policy number LCC-7, *Lake County Library System Guidelines and Minimum Standards for Public Libraries Entering the County Library System* and by obtaining approval of the Board of County Commissioners.

6. LAKE COUNTY LIBRARY SYSTEM GOVERNING BODY:

The Board of County Commissioners is designated as the governing body of the Lake County Library System, a public library cooperative, to administer or coordinate the library services and programs of the Lake County Library System. According to *State Aid to Libraries Guidelines,* this involves policy-making, planning, budgeting, and employing the single administrative head of the library system and entering into contracts on behalf of the library system.

7. LIBRARY ADVISORY BOARD:

A. There shall be a Library Advisory Board, whose responsibilities shall be to:

(1) Study and make recommendations to the Board of County Commissioners regarding the coordination and development of the Lake County Library System. This shall include recommending countywide policies, long range plans and annual plans of service and shall be accomplished in cooperation with the participating library directors and the single administrative head; and

(2) Make recommendations regarding the COUNTY's budget for the countywide library system, the proportionate shares of all COUNTY funds to be allocated to the participating libraries, and the method of distribution of those funds.

B. The members of the Lake County Library Advisory Board shall be appointed by the Board of County Commissioners. Five (5) members shall be appointed with one (1) from each commission district. Such appointments shall be based on recommendations by the Lake County Library Advisory Board. However, the Lake County Board of Commissioners shall not be bound by such recommendations. In addition, the City shall have one (1) member on the Lake County Library Advisory Board who shall be designated by its City Council. Upon designation, the City member shall be appointed by the Board of County Commissioners. Each member shall be appointed for a term of four (4) years. The Board of County Commissioners may also appoint an alternate member who shall serve in the case of the appointed member's absence. The terms and manner of appointment of such alternate members shall be the same as that of the member whom he/she is representing as an alternate. Alternate members may attend Library Advisory Board meetings and shall have voting authority only if filling in as an alternate for an absent board member.

An appointment to fill any vacancy on the Library Advisory Board shall be for the remainder of the unexpired term of office. If the City appointment fails to attend three (3) consecutive regular meetings, the Library Advisory Board may recommend that the Board of County Commissioners or the Municipality declare the member's office vacant. The Board of County Commissioners or Municipality shall fill such vacancy as set forth herein.

The subsequent addition of participating libraries shall result in the addition of one seat per additional participating library on the Library Advisory Board and such seat shall be filled as set forth herein.

C. Terms of appointment and composition of the Library Advisory Board are further

described in *Lake County Code, Chapter 12, Article III.*

8. OWNERSHIP AND DISPOSITION OF PROPERTY, MATERIALS AND EQUIPMENT:

A. MUNICIPALITY shall own:

(1) Library materials, equipment, and other goods purchased by the COUNTY for and placed in the participating library using MUNICIPALITY, COUNTY or State Aid Operating grant funds, regardless of value, except for those described in Section 8. B.

(2) Library materials, equipment and other goods purchased from federal Library Services and Construction Act (LSCA) and Library Services and Technology Act (LSTA) grant funds administered by the COUNTY, if purchased for the MUNICIPALITY, with a value less than $1,000.00 at the time of purchase, except for those described in Section 8(B).

(3) All items purchased using the MUNICIPALITY's local funds.

(4) All items purchased by the MUNICIPALITY and reimbursed by Library Impact Fee funds, unless otherwise specified in a separate agreement.

B. COUNTY shall own:

(1) Items purchased by the COUNTY, using COUNTY, state, or federal funds, as a part of the COUNTY's networked library computer and telecommunications systems, regardless of item location or placement. Items shall include, but may not be limited to, hardware, software, and licenses.

(2) Equipment purchased from federal Library Services and Construction Act (LSCA) and Library Services and Technology Act (LSTA) grant funds administered by the COUNTY with a value in excess of $1,000.00 at the time of purchase.

(3) All items purchased for the single administrative unit using the COUNTY's local funds, or State Aid Operating and federal grant funds.

(4) All items purchased by the COUNTY using Library Impact Fee funds, unless otherwise specified in separate agreement.

C. The COUNTY, in consultation with the participating library director, may remove, relocate, or replace COUNTY owned equipment located at the MUNICIPALITY's participating library as deemed necessary or advantageous to the Lake County Library System.

9. LOCAL AUTHORITY:

The MUNICIPALITY and the COUNTY shall remain autonomous and each shall retain control of its facilities, operations, functions, and local funds. For example:

A. Each shall determine the level of library service for its community to be incorporated in the long-range plan of service.

B. All authority with respect to MUNICIPALITY funding of library programs and services or expenditures from the MUNICIPALITY revenues and sources shall lie solely with the MUNICIPALITY. All authority with respect to COUNTY funding of library programs and services or expenditures from the COUNTY revenues and sources shall lie solely with the COUNTY.

C. Trust funds, individual gifts or donations made to a library shall remain the property of the governmental entity to which they were given.

D. The MUNICIPALITY's library facility shall remain the property of the MUNICIPALITY, and the COUNTY's facilities shall remain the property of the COUNTY. Operations, maintenance and repairs shall be affected through operating budgets from appropriations allocated by the owning entity. Maintenance, modification, sale or lease of real property shall be the responsibility of the owning entity.

E. All paid staff, of the MUNICIPALITY's participating library, shall remain employees of the MUNICIPALITY, and all paid COUNTY library staff shall remain employees of the COUNTY. Each shall retain all rights, responsibilities and powers associated with employment of staff.

10. SINGLE ADMINISTRATIVE HEAD:

A. According to established COUNTY policies and procedures, the Board of County Commissioners is responsible for hiring the single administrative head, who shall be employed full-time, and shall be under the supervision of the County Manager or designee. The single administrative head shall be the head of the Lake County Library System, a public library cooperative, and according to *State Aid for Libraries Guidelines* shall have completed a library education program accredited by the American Library Association and shall have had at least two years of successful, full-time paid professional experience, after completing the library education program, in a public library that is open to the public at least forty (40) hours a week. The Board of County Commissioners may establish additional qualifications for the single administrative

head and shall set positions, salary structure and benefits.

B. According to *State Aid for Libraries Guidelines*, the single administrative head shall be responsible for the overall management or coordination of the library system within the framework established by this Interlocal or other agreements, plans, policies, and budgets. Responsibility for managing or coordinating the following activities may not be delegated through Interlocal or other agreements:

(1) Development of a single long-range plan for all library outlets;

(2) Development of a single annual plan of service;

(3) Development of a Lake County Library System budget;

(4) Implementation of the long-range plan, an annual plan of service and the budget;

(5) Preparing reports on behalf of the library system; and

(6) Expending all State Aid to Libraries grants.

11. LONG RANGE PLAN FOR LIBRARY SERVICE, ANNUAL PLAN OF SERVICE AND COMBINED BUDGET:

A. According to *State Aid to Libraries Guidelines*, in order to be eligible to receive a State Aid to Libraries Grant, the Lake County Library System shall have on file with the State Library a current copy of the following:

(1) A long-range plan adopted or approved by the library system's governing body outlining the library system's operation and development over a three to five-year period;

(2) A current annual plan of service adopted by the library system's governing body and submitted as part of the application for State Aid to Libraries grants that includes the goals, objectives, and activities that will be supported for the application year; and

(3) A combined budget for the current year adopted by the library system's governing body.

B. The single administrative head shall develop and implement a long-range plan for the operation and development of county-wide library service. The long-range plan shall be developed in cooperation with the Library Advisory Board, the governing bodies of the participating libraries, the directors of the participating libraries and the Board of County Commissioners. The single administrative head and the participating library directors shall serve

as support staff. The Board of County Commissioners shall adopt the long-range plan at a public hearing. Prior to adopting the long-range plan, the Library Advisory Board shall review and make recommendations to the Board of County Commissioners. The Board of County Commissioners shall consider these recommendations but shall not be bound thereby. The plan shall be reviewed and updated yearly through the development of an annual plan of service.

C. The annual plan of service will be based on the long-range plan of service and the combined budget; and will be developed by the single administrative head in cooperation with participating library directors, and the Library Advisory Board. In adopting the annual plan of service, the Board of County Commissioners shall consider the recommendations of the Library Advisory Board but shall not be bound thereby.

D. There shall be a combined budget for library service to the residents of Lake County. The budget shall be developed along a fiscal year ending on September 30 of each year. Upon adoption by the MUNICIPALITY, the MUNICIPALITY shall present its line item budget for library services to the single administrative head for inclusion in the combined budget. The combined budget shall include and take into account funds allocated by participating governing bodies, aid received from state and federal sources, and all other revenues received to provide library services. The combined budget shall be adopted by the Board of County Commissioners. The combined budget shall not include funds to be expended for the purchase or construction of a library building.

E. In accordance with *State Aid to Libraries Guidelines*, the COUNTY and the MUNICIPALITY agree to spend funds in accordance with the Lake County Library System's long-range plan, annual plan of service, and budget for those funds that the Lake County Library System will report on a State Aid application as having been expended centrally.

12. FISCAL RESPONSIBILITY:

The COUNTY shall procure an independent audit annually of all funds administered by the single administrative head. The audit shall be prepared and presented to the MUNICIPALITY and to the State Library of Florida within thirty (30) days following acceptance of the audit by the COUNTY.

The MUNICIPALITY shall provide a copy of its audit for each fiscal year to the COUNTY and the single administrative head within thirty (30) days following acceptance of the audit by the MUNICIPALITY. By August 1 of each year, the MUNICIPALITY shall submit to the COUNTY

a completed *Certification of Local Operating Expenditures* form, Attachment A, accompanied by a supporting general ledger that details line item expenditures for library operations for the preceding fiscal year, which shall be used to support the Lake County Library System's application for a State Aid Operating grant and the appropriation of COUNTY funds for the MUNICIPALITY.

13. APPROPRIATION OF COUNTY FUNDS FOR MUNICIPALITY:

A. The COUNTY shall allocate a base amount of fifteen thousand dollars ($15,000) per year to the MUNICIPALITY to assist with funding of programs and services at its participating library. In addition to the annual base amount, the COUNTY shall distribute to the MUNICIPALITY its share of the total amount to be appropriated to all member libraries that year, less the total of the base amounts to all of the member libraries, based on the MUNICIPALITY's total circulation for the fiscal year prior to the previous fiscal year. Therefore, the total amount to be appropriated to the MUNICIPALITY for provision of countywide library services shall be the base amount, plus the proportionate share of the net total appropriation. This distribution shall be calculated as follows:

- Total amount appropriated to the MUNICIPALITY
- Base amount
- The MUNICIPALITY's percentage share of all member libraries' total circulation for fiscal year prior to previous fiscal year
- Total Appropriation to all member libraries for current fiscal year
- Number of member libraries $a = b + c * [d - (b * e)]$

B. In consideration of these allocations the MUNICIPALITY:

(1) Shall provide library services to all residents of the COUNTY;

(2) Shall use COUNTY funds to enhance current library services provided by its participating library;

(3) Shall make its best effort to maintain or exceed the current level of its local operating funds for the library budget;

(4) Shall not use COUNTY funds annually allocated to the MUNICIPALITY for the purchase or construction of a library building.

(5) Shall enter and maintain accurate patron records on the Lake County patron database.

C. It is the intent of the parties that the distribution of COUNTY funds to the various

participating libraries be made on a fair and equitable basis. Accordingly, the formula for disbursing COUNTY funds to participating libraries set forth in Section 13(A) above may be changed only upon the approval of all of the participating libraries' governing bodies and the Board of County Commissioners.

D. The COUNTY shall make its best effort to maintain or exceed the current level of its total appropriation to all participating libraries; however, the COUNTY may propose an increase or decrease based on current financial circumstances or changes in library services. The COUNTY shall not decrease the total appropriation to all participating libraries unless it gives four (4) months advance notice to the participating libraries and their governing bodies of its intent to reduce said funding levels.

E. When a MUNICIPALITY requests to join the Lake County Library System, the municipality shall receive a graduated payment for year one and year two, with a full payment in year three, as follows:

- Year One: Base Amount of $15,000.
- Year Two: Base Amount of $15,000 plus an additional $15,000 for intra-library loans to other Lake County Libraries.
- Year Three: Funding formula as identified in Section 13(A) above.

14. CENTRALIZED SERVICES:

The COUNTY shall provide the following centralized services to the MUNICIPALITY's participating library:

A. Courier service to route materials and equipment among libraries;

B. Intra-library loan services;

C. Centralized cataloging of library materials, maintenance and oversight of the bibliographic database;

D. Purchasing from State Aid Operating grant funds and Library Services and Technology Act grant funds for the benefit of the Lake County Library System;

E. Networked telecommunications and computer systems services as described in Section 15;

F. Coordination and/or funding of other centralized services where feasible such as, but not limited to, subscriptions to digital resources and other formats;

G. Coordination of youth and adult programming and literacy services.

15. NETWORKED SYSTEMS:

A. The COUNTY shall provide and maintain networked library automation and telecommunications systems. The COUNTY shall be responsible for providing systems hardware, software, maintenance, technical support, monitoring, installation, and services. The COUNTY shall further enhance or add networked systems in accordance with the goals and objectives of the long-range plan and annual plan of service and based on availability of funds.

B. The COUNTY shall pay maintenance costs for all equipment attached to the COUNTY's networked systems and purchased with COUNTY, state or federal funds, and Library Impact Fees awarded to COUNTY, except as outlined in Section 15(D)(1).

C. The COUNTY shall provide staff to perform networked systems administration which shall include: technology planning, training, preventative maintenance, systems monitoring, trouble-shooting, running of required backups, resolution of systems problems, monitoring of system needs, running and creating statistical reports, insuring systems security, procurement of equipment, development and maintenance of Lake County Library System web pages, development of participating library web pages upon request, maintenance of staff e-mail accounts, acting as a liaison with network vendors, installation of peripheral equipment and devices, and technology grants application and administration. Assigned COUNTY staff shall be available to perform the above during library operating hours in a reasonable amount of time and shall have the authority to prioritize requests for assistance.

D. Networked library systems shall be provided by the COUNTY to the MUNICIPALITY at no cost to the MUNICIPALITY except as specified below:

(1) The MUNICIPALITY reserves the right to expand, at its own expense, the COUNTY's networked systems at its participating library to levels exceeding those provided by the COUNTY in consultation with the single administrative head and provided said expansion meets the COUNTY specifications. At the request of the participating library, such equipment may be paid for with State Aid funds, if available, at the discretion of the COUNTY. The MUNICIPALITY shall be responsible for associated costs including, but not limited to, maintenance, licenses, installation, and software of any non-COUNTY owned equipment. The COUNTY may provide technical support where feasible.

(2) The MUNICIPALITY shall, at its own expense, provide proper electrical

and data wiring of its participating library facility, according to specifications provided by the COUNTY, to insure proper operation of the networked systems. At the request of the participating library, necessary wiring expenses may be paid by the COUNTY with State Aid funds, if available, at the COUNTY's discretion.

(3) The MUNICIPALITY shall, at its own expense, make available at its participating library any telecommunications lines necessary to the operation and maintenance of any networked library computer systems. The MUNICIPALITY shall cover costs of associated installation, maintenance and monthly telecommunications charges.

(4) The MUNICIPALITY shall, at its own expense, provide supplies at its participating library that are pertinent to the operation of the networked systems such as printer paper, printer ink cartridges and drums, item barcodes, etc. Patron cards and patron registration forms shall be provided by the COUNTY to the MUNICIPALITY at no charge. The COUNTY may choose to provide other automation supply items to the MUNICIPALITY at no charge.

E. The MUNICIPALITY shall participate in the centralized cataloging program and adhere to County procedures to ensure the integrity of the combined bibliographic database.

F. Neither the MUNICIPALITY nor its participating library shall attach equipment or software to any COUNTY networked system without prior written approval from the single administrative head or designee; or remove equipment or software purchased by the COUNTY and placed at the participating library as part of any COUNTY networked system without prior written approval from the single administrative head or designee. Any physical attachment to or removal from a COUNTY networked system shall be performed by the COUNTY or a vendor authorized or recommended by the COUNTY.

G. Should the COUNTY cancel this Agreement for any reason other than the MUNICIPALITY's failure to comply with the terms of this Agreement, the COUNTY, at its own expense and at the request of the MUNICIPALITY, shall make provision for the continuation of the COUNTY's library automation network as installed at the MUNICIPALITY's participating library at the operational level existing at the time of the termination of the Agreement for a period not to exceed two (2) years. Should the MUNICIPALITY not request continuation of the COUNTY's networked systems, the COUNTY shall be responsible for all costs associated with

removal of the COUNTY's networked systems from the MUNICIPALITY's library, including obtaining a copy of the MUNICIPALITY's library patron and bibliographic databases from the library automation vendor. Upon separate mutual written agreement between the MUNICIPALITY and the COUNTY, the COUNTY may continue to operate and maintain networked systems for the MUNICIPALITY's participating library beyond the two (2) year period.

H. Should the MUNICIPALITY cancel this Agreement for any reason other than the COUNTY's failure to comply with the terms of this Agreement, the MUNICIPALITY shall be responsible for all costs associated with removal of the COUNTY's networked systems from the MUNICIPALITY's library. The MUNICIPALITY shall also be responsible for all costs associated with obtaining a copy of the MUNICIPALITY's library patron and bibliographic databases from the library automation vendor. The COUNTY shall be obligated, at the MUNICIPALITY's request, to continue operation and maintenance of the COUNTY's networked systems for a period of up to one (1) year and the MUNICIPALITY shall be obligated to pay associated operating and maintenance costs to the COUNTY. Upon mutual written agreement between the MUNICIPALITY and the COUNTY, the COUNTY may continue to operate and maintain networked systems for the MUNICIPALITY's participating library beyond the one (1) year period.

I. Should this Agreement terminate through expiration, the COUNTY, if requested by the MUNICIPALITY, shall make provision for the continuation of the COUNTY's library automation network as installed at the MUNICIPALITY's participating library at the operational level existing at the time of the expiration of the Agreement for a period not to exceed one (1) year during which the MUNICIPALITY will pay associated operating and maintenance costs for the one (1) year period. Should the MUNICIPALITY not request continuation of the COUNTY's networked systems, the MUNICIPALITY shall be responsible for all costs associated with removal of the COUNTY's networked systems from the MUNICIPALITY's library, including the costs of obtaining a copy of the MUNICIPALITY's library patron and bibliographic databases from the library automation vendor. In the event that negotiations are ongoing prior to the expiration of the Agreement, the MUNICIPALITY shall be exempt from obligated costs during a negotiation period not to exceed one hundred twenty (120) days after expiration.

16. REPORTING:

The MUNICIPALITY and its participating library shall submit, by deadlines established through an agreement, policy or procedure, all reports, documentation, and information required for inclusion in any reports, or documents required to maintain State Aid eligibility. The COUNTY shall file, by deadlines established in *State Aid to Libraries Guidelines*, all reports and documents required to maintain State Aid eligibility.

17. SYSTEM WIDE POLICIES:

A. The single administrative head, in consultation with the directors of the participating libraries, shall develop and recommend system wide policies that will provide consistency for library patrons and staff. The policies shall be developed in cooperation with the Library Advisory Board, the governing bodies of the participating libraries, and the Board of County Commissioners.

B. The Library Advisory Board shall recommend system wide library policies to the Board of County Commissioners upon a two thirds majority vote of its members. The MUNICIPALITY's representative shall represent the MUNICIPALITY's direction in recommendation of policies. In adopting policies, the Board of County Commissioners shall consider the recommendations of the Library Advisory Board but shall not be bound thereby. System wide policies shall be transmitted to all member library governing bodies for consideration and/or action at least thirty (30) days before consideration by the Board of County Commissioners.

C. The COUNTY and MUNICIPALITY shall abide by system wide policies to the extent they do not conflict with County and City Ordinances, policies or procedures.

18. RECIPROCAL BORROWING:

The COUNTY has previously existing agreements authorizing reciprocal borrowing with Seminole, Volusia, and Marion counties, and with Lake-Sumter State College. Additional reciprocal borrowing agreements may be entered into by the COUNTY on behalf of the Lake County Library System upon the written approval of the Board of County Commissioners and all participating library governing bodies.

19. ADDITIONAL RESPONSIBILITIES OF COUNTY AND MEMBER LIBRARY GOVERNING BODIES:

A. The COUNTY and the MUNICIPALITY shall abide by all State and Federal laws, and specifically those relating to the provision of library services.

B. The COUNTY shall refrain from using State Aid Operating grant funds, except in

the case of a severe funding shortage and only upon the consent of the COUNTY and all participating MUNICIPALITIES, as a means to replace COUNTY allocations for library services.

20. INDEMNIFICATION:

Subject to the provisions of Section 768.28, *Florida Statutes*, the MUNICIPALITY agrees to indemnify and hold the COUNTY harmless to the extent allowed for by Florida law, and the COUNTY agrees to indemnify and hold the MUNICIPALITY harmless to the extent allowed for by Florida law, from and against any actions at law to recover damages in tort for money damages for injury or loss of property, personal injury, or death arising out of this Agreement and caused by the negligent or wrongful act or omission of any employee under circumstances in which the MUNICIPALITY and the COUNTY, if a private person, would be liable to the claimant, in accordance with the general laws of the state of Florida.

This indemnification shall continue in full force and effect subsequent to and notwithstanding the expiration or termination of this Agreement to the extent allowed for by Florida law. Nothing contained herein shall be construed as an admission of liability on the part of either party.

The full execution of this Agreement shall obligate the COUNTY and the MUNICIPALITY to comply with this indemnification. This indemnification shall not act or be interpreted as a waiver of either party's sovereign immunity pursuant to Section 768.28, Florida Statutes.

21. INSURANCE:

The COUNTY shall provide, pay for, and maintain in force at all times during this Agreement, insurance to cover the COUNTY's buildings, contents, vehicles, networked systems, workers' compensation, general liability, and any other insurance required by law.

The MUNICIPALITY shall provide, pay for, and maintain in force at all times during this Agreement, insurance to cover the MUNICIPALITY's participating library including buildings, contents, equipment owned by the MUNICIPALITY, vehicles, workers' compensation, general liability, and any other insurance required by law.

22. MEDIATION/LEGAL FEES /JURY TRIAL WAIVER:

In the event that any dispute arises between the MUNICIPALITY and the COUNTY with respect to the rights or responsibilities of the MUNICIPALITY or the COUNTY under the Agreement, that dispute shall be mediated by a library professional chosen by the State Librarian

from the State Library consultant staff. The mediation shall not be binding, and if agreement cannot be reached, the aggrieved party(s) may pursue legal recourse as allowed by law.

Should litigation arise under this Interlocal Agreement, each party agrees to waive any right to trial by jury.

23. MODIFICATION:

No modification, amendment or alteration of the terms or conditions contained herein shall be effective unless contained in a written document executed by the parties hereto, with the same formality, and of equal dignity herewith.

24. NOTICES:

A. All notices, demands, or other writings required to be given or made or sent in this Agreement, or which may be given or made or sent, by either party to the other, shall be deemed to have been fully given or made or sent when in writing and addressed as follows:

COUNTY	MUNICIPALITY
County Manager	City Manager
Lake County Administration Building 315 West Main Street, Suite 308	510 N. Baker Street
P.O. Box 7800	Mount Dora, FL 32757
Tavares, FL 32778-7800	

cc: Director of the Office of Library Services
P.O. Box 7800
Tavares, FL 32778-7800

B. All Notices required, or which may be given hereunder, shall be considered properly given if (1) personally delivered, (2) sent by certified United States Mail, return receipt requested, (3) sent by Federal Express or other equivalent overnight letter delivery company.

C. The effective date of such notices shall be the date personally delivered; or if sent by mail, the date of the postmark; or if sent by overnight letter delivery company, the date the notice was picked up by the overnight letter delivery company.

D. Parties may designate other parties or addresses to which notices shall be sent by notifying, in writing, the other party in a manner designated for the filing of notice hereunder.

25. ENTIRE AGREEMENT:

This Agreement embodies the entire agreement between the parties. It may not be modified

IN WITNESS WHEREOF, the parties hereto have made and executed this Agreement on the respective dates under each signature: COUNTY, through its Board of County Commissioners, signing by and through its Chair, and MUNICIPALITY, by its duly authorized representative.

COUNTY

ATTEST:

LAKE COUNTY, through its
BOARD OF COUNTY
COMMISSIONERS

Gary J. Cooney, Clerk of the
Board of County Commissioners of Lake
County, Florida

Leslie Campione, Chairman

This 10th day of September, 2019.

Approved as to form and legality:

Melanie Marsh
County Attorney

MUNICIPALITY

ATTEST:

Gwen Johns, City Clerk

Nick Girone, as Mayor
City of Mount Dora

This 18th day of July, 2019.

Approved as to form and legality:

Sherry Sutphen, City Attorney

ATTACHMENT A

CERTIFICATION OF LOCAL OPERATING EXPENDITURES
FISCAL YEAR _____

The _____,
(name of library governing body)

governing body for the_____,
(name of Lake County Library System Member Library)

hereby certifies that the following total funds from local sources were expended centrally during the fiscal year beginning October 1, _____, and ending September 30, _____ for the operation and maintenance of a library under the conditions outlined in Chapter 257, Florida Statutes, Lake County Library System's Long Range Plan and Annual Plan of Service and Budget, and the Interlocal Agreement Relating to Provision of Library Services.

We further certify that the amount listed below does not include any of the following:

- Funds received from the federal government
- Funds received from the state government
- Funds used for purchase or construction of a library building or library quarters

Such funds are not eligible to be used as local match for State Aid applications under Chapter 257, Florida Statutes, and guidelines for the State Aid to Libraries Grant program.

We further certify that the amount listed below:
(check one)
___ does include funds received from the Lake County Board of County Commissioners.
___ does not include funds received from the Lake County Board of County Commissioners.

(check one)
___ has been audited by an external auditor.
___ has been reviewed by an independent auditor.
___ has been compiled into financial statement format by an independent auditor.

Also, a copy of the report of the independent auditor:
(check one)
___ has been provided to the Lake County Board of County Commissioners.
___ is enclosed.

A copy of the supporting general ledger with detail line item expenditures for library operations is required to be submitted to the Lake County Board of County Commissioners for all libraries.

Total local funds expended centrally by the library for the operation and maintenance of a library between October 1, _____ and September 30, _____.

$_____

Signature

_____ _____
Chief Financial Officer Date

Please type name and official title here:

_____

This certification is to be completed and mailed by **August 1,**_____ to: Library Services Director, Lake County Library System, P.O. Box 7800, Tavares, FL 34778-7800.

ATTACHMENT #2

FOURTH AMENDMENT TO
INTERLOCAL AGREEMENT BETWEEN
LAKE COUNTY, FLORIDA, AND THE CITY OF MOUNT DORA
RELATING TO THE PROVISION OF LIBRARY SERVICES

This is the Fourth Amendment to the Interlocal Agreement between Lake County, Florida, a political subdivision of the State of Florida, hereinafter referred to as "County", by and through its Board of County Commissioners, and the City of Mount Dora, a municipal corporation pursuant to the Laws of Florida, hereinafter referred to as "Municipality," by and through its City Council.

WITNESSETH:

WHEREAS, on September 10, 2019, County entered into an Interlocal Agreement with Municipality for the purpose of providing unified library services to the residents of Lake County through participation in the Lake County Library System public library cooperative (the "Agreement"); and

WHEREAS, on September 13, 2022, County and Municipality entered into an extension of the Agreement for an additional 12-month period expiring on September 30, 2023 (First Amendment); and

WHEREAS, on September 12, 2023, County and Municipality entered into a second extension of the Agreement for an additional 12-month period expiring on September 30, 2024 (Second Amendment); and

WHEREAS, on September 24, 2024, County and Municipality entered into a third extension of the Agreement for an additional 12-month period expiring on September 30, 2025 (Third Amendment); and

WHEREAS, the parties now want to extend the Agreement for a fourth, additional 12-month period expiring on September 30, 2026 (Fourth Amendment); and

WHEREAS, executing this Fourth Amendment is in the best interests of the parties and the residents of Lake County.

NOW, THEREFORE, the parties agree as follows:

1. **Legal Findings of Fact.** The foregoing recitals are hereby adopted as legislative findings of the Board of County Commissioners and are ratified and confirmed as being true and correct and are hereby made a specific part of this Fourth Amendment upon adoption hereof.

2. **Amendment.** The Agreement, as previously amended, is hereby amended as follows:

A. **Section 3, *Term***, is hereby amended to allow for an additional 12-month period and terminating on September 30, 2026, and is hereby amended as follows:

> This Agreement shall be in effect for a period beginning October 1, 2019, and ending on September 30, 2026, unless terminated earlier in accordance with the provisions of the Agreement.

B. Section 13, Paragraph (E), ***Appropriation of County Funds for Municipality***, is hereby amended to provide funding for the additional "Year Seven" created by the 12-month extension of the Term under this Fourth Amendment and is hereby amended to add:

> Year Seven: The COUNTY shall allocate a base amount of thirty thousand dollars ($30,000) to assist with funding of programs and services at its participating library.

3. Effect of Amendment. All other provisions of the Agreement will remain in full force and effect unless otherwise formally amended by the parties. To the extent this Fourth Amendment conflicts with the Agreement, this Fourth Amendment will govern.

IN WITNESS WHEREOF, the parties have signed this Fourth Amendment through their authorized representatives on the dates under each signature.

COUNTY

LAKE COUNTY, FLORIDA, through its
BOARD OF COUNTY COMMISSIONERS

ATTEST:

_____
Gary J. Cooney, Clerk
Board of County Commissioners
of Lake County, Florida

_____
Leslie Campione, Chairman

This _____ day of _____, 2025.

Approved as to form and legality:

_____
Melanie Marsh, County Attorney

MUNICIPALITY

CITY OF MOUNT DORA

ATTEST:

_____ _____

Jeanann Hand, City Clerk James L. Homich, Mayor

This _____ day of _____, 2025.

Approved as to form and legality:

_____

Patrick Brackins, City Attorney

FOURTH AMENDMENT TO
INTERLOCAL AGREEMENT BETWEEN
LAKE COUNTY, FLORIDA, AND THE CITY OF MOUNT DORA
RELATING TO THE PROVISION OF LIBRARY SERVICES

This is the Fourth Amendment to the Interlocal Agreement between Lake County, Florida, a political subdivision of the State of Florida, hereinafter referred to as "County", by and through its Board of County Commissioners, and the City of Mount Dora, a municipal corporation pursuant to the Laws of Florida, hereinafter referred to as "Municipality," by and through its City Council.

WITNESSETH:

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WHEREAS, on September 12, 2023, County and Municipality entered into a second extension of the Agreement for an additional 12-month period expiring on September 30, 2024 (Second Amendment); and

WHEREAS, on September 24, 2024, County and Municipality entered into a third extension of the Agreement for an additional 12-month period expiring on September 30, 2025 (Third Amendment); and

WHEREAS, the parties now want to extend the Agreement for a fourth, additional 12-month period expiring on September 30, 2026 (Fourth Amendment); and

WHEREAS, executing this Fourth Amendment is in the best interests of the parties and the residents of Lake County.

NOW, THEREFORE, the parties agree as follows:

1. **Legal Findings of Fact.** The foregoing recitals are hereby adopted as legislative findings of the Board of County Commissioners and are ratified and confirmed as being true and correct and are hereby made a specific part of this Fourth Amendment upon adoption hereof.

2. **Amendment.** The Agreement, as previously amended, is hereby amended as follows:

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> This Agreement shall be in effect for a period beginning October 1, 2019, and ending on September 30, 2026, unless terminated earlier in accordance with the provisions of the Agreement.

B. Section 13, Paragraph (E), ***Appropriation of County Funds for Municipality***, is hereby amended to provide funding for the additional "Year Seven" created by the 12-month extension of the Term under this Fourth Amendment and is hereby amended to add:

> Year Seven: The COUNTY shall allocate a base amount of thirty thousand dollars ($30,000) to assist with funding of programs and services at its participating library.

3. Effect of Amendment. All other provisions of the Agreement will remain in full force and effect unless otherwise formally amended by the parties. To the extent this Fourth Amendment conflicts with the Agreement, this Fourth Amendment will govern.

IN WITNESS WHEREOF, the parties have signed this Fourth Amendment through their authorized representatives on the dates under each signature.

COUNTY

LAKE COUNTY, FLORIDA, through its
BOARD OF COUNTY COMMISSIONERS

ATTEST:

_____
Gary J. Cooney, Clerk
Board of County Commissioners
of Lake County, Florida

_____
Leslie Campione, Chairman

This _____ day of _____, 2025.

Approved as to form and legality:

_____
Melanie Marsh, County Attorney

MUNICIPALITY

CITY OF MOUNT DORA

ATTEST:

_____ _____

Jeanann Hand, City Clerk James L. Homich, Mayor

This _____ day of _____, 2025.

Approved as to form and legality:

_____

Patrick Brackins, City Attorney

510 N. Baker St.
Mount Dora, FL 32757
352-735-7126

DATE: **July 15, 2025**

TO: **Honorable Mayor and City Council Members**

FROM: **Vince Sandersfeld, City Manager**

SUBJECT: Request Approval of Contract with Core and Main LP Providing an Advanced Metering Infrastructure

Introduction:
This is a request for the Council's approval of the contract for Advanced Metering Infrastructure with Core and Main LP.

Discussion:
The City of Mount Dora currently uses a vehicle-based drive-by read system known as Automatic Meter Reading (AMR) introduced in the late 90s and implemented by Mount Dora in 2009. The system reads both electric and water meters' consumption from a vehicle-mounted drive-by reader once each billing period. This technology has continued to develop, enabling expanded communications, increasing flexibility and providing additional choices for consumers to manage energy usage and energy efficiency.

The Electric department drafted a Request for Proposal (RFP) to upgrade the drive-by system to an Advanced Metering Infrastructure (AMI). The RFP scope included installation of communications infrastructure and head-end applications for both City Electric and Water Utility billing meters. The AMI deployment will exchange approximately 6700 electric meters, along with a water meter pilot to provide an AMI systems "proof of concept". The exchange of water meters can then be conducted as budget allows.

AMI transforms the overall utility by enabling real-time data collection, improving operational efficiency, and improving customer service. AMI transforms utility operations by eliminating manual meter reading and providing near-real-time metering data, alerts, and indications that help the utility manage day-to-day operations and improve customer service.

AMI systems comprise advanced meters equipped with network communicating devices, a secure and reliable wireless communication network, and head-end applications which allow utility staff to receive information from the meters as well as issue commands when needed. AMI meters provide analytics to create higher value and analysis, as well as better manage

indications from meters, improving response times and operations in general.

The Sensus AMI system is committed to being fully integrated with the City's existing billing and GIS systems. This system will also provide a customer portal providing near-real-time data for customer service staff to reference in support of any customer call or questions. The customer portal will allow users to access their information via a mobile application or the City's online web page. Customers will have the ability to pay their bills, monitor their usage, set up alerts, obtain outage and restoration indications, and better manage their utility usage and bill. The system collects, stores, analyzes, and presents energy usage data, providing customers with the ability to monitor electricity and water usage in real time, enabling power interruption reporting and water leak detection.

There are several key benefits of AMI, but some of the most notable include:

- Overall improvement in utility operations and efficiency by incorporating automated reads that eliminate monthly visits to customer sites, reducing truck rolls and potential safety incidents
- Improved outage and restoration reporting for both utility staff and customers, improving recovery efforts and service reliability
- Ability to perform remote connect/disconnect operations, reducing truck rolls for change of service or non-pay scenarios
- Near-real-time alerts and indications improving the utility's insights into operations.
- Improved customer experience with the introduction of the customer portal, allowing for detailed usage analysis, billing estimations, ease of bill pay, and use of active alerts and notifications

The City of Mount Dora issued RFP #24-EL-014, Advanced Metering Infrastructure, on August 18, 2024. Nine (9) responses were received and assessed by the evaluation committee. This committee met on October 29, 2024, to discuss and score all nine proposals as received under this RFP. The discussion was detailed, and the scoring was consistent. Based on the Committee scores, the proposals were ranked from highest to lowest. The Evaluation Committee elected to hold individual Presentation/Question & Answer sessions with the top three ranked firms.

The Question & Answer sessions were held on November 6, 2024. Scoring and ranking of the three shortlisted firms resulted in a final ranking as follows:

1. Core & Main
2. Landis + Gyr
3. RTS Water Solutions

The City Council approved at the December 3, 2024, meeting for the Electric Department to negotiate a contract with the #1 ranked firm, Core and Main. City staff retained Quanta Technologies through a contract with Florida Municipal Power Agency. Quanta Technologies has implemented numerous AMI projects for FMPA members, providing municipalities and other public power entities with over 120 AMI deployments worldwide. Quanta and City staff negotiated detailed terms and conditions, along with a reduction of $303,874 in project costs, while providing a water pilot valued at $29,036 at no cost to the City.

Budget Impact:
The initial project costs are $2,246,755.61 included in the FY2024-25 and FY 2025-26 budgets, along with a total of $1,122,215.45 in annual maintenance fees for the next ten years that will be budgeted in future years.

The cost of the water pilot will be $19,632.44, which is included in the FY 2025-26 budget.

Also, Core and Main will provide various water meters at no cost for a savings of $29,036.

Strategic Impact:
Strategic Initiative 4:Provide High-Quality Services
Goal 10: Ensure safe and reliable electric [...]
Objective10.1: Install Advanced Metering Infrastructure system to enhance reliability and provide real-time data to the electric and water customer.

Recommendation:
City Council approve the proposed contract with Core and Main LP providing an Advanced Metering Infrastructure.

Attachment(s):
1. Attachment 1_Notice of Intent To Award- RFP 24-EL-014
2. City of Mount Dora-Master Project Agreement-AMI-Core Main-Complete

Prepared by:	Kimberly LaFlamme, Deputy City Clerk	
Reviewed by:	Wayne Zimmerman, Deputy Electric Utility Director	Approved - 6/23/2025
	Steve Langley, Assistant City Manager-Electric Utility Director	Approved - 7/1/2025
	Matthew Dodson, Budget Officer	Approved - 7/1/2025
	Steven Weber, Finance Director	Approved - 7/1/2025
	City Attorney, City Attorney	Approved - 7/9/2025
	Jeanann Hand, City Clerk	Approved - 7/9/2025
	Vince Sandersfeld, City Manager	Final Approval - 7/9/2025

ATTACHMENT 1

CITY OF MOUNT DORA

Purchasing Division

Whitney Donovan
Purchasing Coordinator
510 N. Baker Street
Mount Dora, FL 32757
Voice: 352-735-7176 ext. 1211
E-mail: donovanw@mountdora.gov

Date: November 13, 2024

To: All Submitting Vendors

Re: **INTENT TO AWARD: RFP # 24-EL-014– Advanced Metering Infrastructure (AMI) REBID**

This letter serves as notification that the Evaluation Committee will present a final ranking of firms; and a recommendation to City Council to approve the final ranking and staff entering into negotiations with the top ranked firm under this RFP.

On August 18, 2024, RFP #24-EL-014 was issued and resulted in nine timely proposals being received by the opening date of October 21, 2024 at 12:00 p.m. The Evaluation Committee met on October 29, 2024 to discuss and score all nine proposals as received under this RFP. The discussion was detailed and the scoring was consistent. Based on the Committee scores the proposals were ranked from highest to lowest. The Evaluation Committee elected to hold individual Presentation/Question & Answer sessions with the top three ranked firms.

The Question & Answer sessions were held on November 6, 2024. The scoring and ranking of the three shortlisted firms resulted in a final ranking as follows:

#1 –Core & Main; **#2** –Landis + Gyr; **#3** –RTS Water Solutions;

The Evaluation Committee will recommend approval of the final ranking as established above to the City Council and recommend entering into negotiations with the top ranked firm. If negotiations are unsuccessful with the #1 ranked firm the City will cease negotiations with that firm and begin negotiations with the #2 ranked firm. This process will continue until a successful negotiation is reached. For additional information reference the final scoring and ranking as attached.

If you have any questions regarding the procurement procedures, please contact me at 352.735.7176, or via e-mail at donovanw@mountdora.gov.

We appreciate your interest in doing business with The City of Mount Dora and we look forward to working with you on future projects.

Regards,
Whitney M. Donovan
Purchasing Coordinator

Firm Name	Jose Bravo	ITEM WEIGHT		Jason Marlor	ITEM WEIGHT		Wayne Zimmerman	ITEM WEIGHT		TOTAL	WEIGHTED TOTAL
		2.5			**2.5**			**2.5**			
Core & Main	4	2.5	10.00	4	2.5	10.00	4	2.5	10.00	12.00	30.00
Landis + Gyr	3.9	2.5	9.75	2	2.5	5.00	4	2.5	10.00	9.90	24.75
RTS Water Solutions	3.5	2.5	8.75	3	2.5	7.50	2.5	2.5	6.25	9.00	22.50

AMI Contract Between Core & Main LP and City of Mount Dora, Florida

Confidential

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Confidential

AMI Contract

This AMI Contract ("Contract") dated as of June 20, 2025 (the "Effective Date") between the City of Mount Dora, Florida ("City"), 510 Baker Street, Mount Dora. FL 32757 and Core & Main LP, a Florida limited partnership ("Contractor"), where Core & Main and the City may be referred to herein individually as a "Party," and jointly as the "Parties."

SECTION 1. PURPOSE AND SCOPE

A. Delivery and Installation Project: The Parties have entered into this Contract for the purpose of the Contractor to provide services, equipment and hardware, to fully implement an Automated Meter Infrastructure System for the electric utilities in Mount Dora, FL, in a manner consistent with industry standards and applicable laws, codes, and customs according to the terms, conditions, plans, specifications, and other requirements set forth herein (hereinafter referred to as the "Delivery and Installation Project" or the "Project"). To demonstrate proof of concept, Contractor has agreed to implement a "Water Pilot" to validate an AMI system for Electric and Water meters in the Mount Dora Service Territories, as defined in RFP #24-EL-014 Section 1.3. The Water Pilot shall be included in the Project to confirm compatibility the City's BS&A billing system during and subsequent to deployment of Electric AMI meters. Contractor shall furnish all the materials, supplies, tools, equipment, labor, and other services necessary for the completion of the Project as specified in Core & Main RFP Response #24-EL-014 (Appendix B) and this document herein.

B. NaaS/SaaS Managed Services: These services will be provided to the City pursuant to the Software as a Service and Spectrum Lease Agreement (the "NaaS/SaaS Agreement") entered into between the City of Mount Dora and Sensus USA, Inc. ("Sensus"), the manufacturer of the AMI system, and attached hereto as APPENDIX E. The NAAS and SAAS services (hereinafter referred to as the "Managed Services") are identified as part of APPENDIX D – Advanced Metering Infrastructure (AMI) System Pricing Sheet as Managed Services, and Contractor, as the Value Added Reseller for Sensus, shall invoice the City for Managed Services, and shall provide the City and Sensus ongoing technical support and troubleshooting for the system including the base stations installed in the AMI System as needed during regular business hours (between 8am and 5pm, Monday-Friday).

It is the responsibility of Contractor or its subcontractors to support all software integrations to the same levels noted in Appendix E throughout the multiple year term of that agreement. Any integration that ceases to function or has degraded performance resulting from a Sensus head end system or other contractor software upgrade or patch is the responsibility of the Contractor to resolve.

Contractor has primary responsibility for provisions of services defined in APPENDIX E – Network as a Service, Software as a Service and Spectrum Lease Agreement through Sensus. While the primary provider involved in these services is Sensus, Contractor Responsibilities include:

i. First response labor to troubleshoot FlexNet Base Stations or other field network equipment such as repeaters, if any.
ii. First response to address City issues and escalation of NaaS and SaaS issues to Sensus when next level support is needed.

C. The City agrees to undertake all of its obligations that are identified and to pay the Contractor in the manner contemplated by this Contract.

SECTION 2. CONTRACTOR QUALIFIED

Contractor represents and warrants that it is fully qualified to perform the services called for hereunder and possesses all State and local licenses necessary to perform the services called for hereunder. Prior to the execution of this Contract, Contractor has visited and inspected the Project site and the local conditions under which the Project is to be designed, constructed, and operated, and Contractor has performed such tests, if any, as are necessary to determine the conditions under which the work will be performed, and Contractor accepts the conditions of the work site and has taken those conditions into account in entering into this Contract.

SECTION 3. CONTRACT TERM

A. Delivery and Installation Project. The term of the Delivery and Installation Project shall begin fifteen (15) calendar days after the date of the Notice to Proceed and will be substantially complete within twenty-four (24) months thereafter, or as such term may be extended as set forth herein (the "Delivery and Installation Term"). Upon completion and acceptance of the Delivery and Installation Project, Contractor's obligations under the Delivery and Installation Project portion of the Contract will terminate.

B. Managed Services. The term of the Managed Services shall begin after the system has successfully completed Functional System Acceptance Testing (FSAT) (as hereinafter defined) and shall continue for a period of ten (10) years (the "Initial NaaS/SaaS Term"), unless earlier terminated in the manner contemplated by this Contract. After the expiration of the Initial NaaS/SaaS Term, the Managed Services portion of the Contract shall automatically renew for an additional term of 10 years ("NaaS/SaaS Renewal Term"), unless the City provides Contractor with one hundred twenty (120) days' prior written notice of its desire to not renew the Managed Services portion of the Contract.

SECTION 4. CONTRACT PRICE

Contractor agrees to perform all of the work described in this Contract for the satisfactory completion of the Project for the total sum of $2,264,514.87, said amount being the total of the One-Time Pricing Summary project prices for Electric AMI Deployment and Water AMI Pilot ("Contract Price"). The Contract Price will be adjusted to reflect actual quantities of work ordered by the City and performed by Contractor based on the unit prices herein. Contractor shall invoice the City for ongoing NaaS and SaaS services for the Initial NaaS Term of ten (10) years, for the total sum of $1,122,215.45 ("Recurring Pricing"). Managed Services under the Initial NaaS/SaaS Term and any NaaS/SaaS Renewal Term shall be paid in advance in annual installments, which are subject to and conditioned upon annual budgeting and appropriation by the City. Except as otherwise specified herein, the Contract Price shall not be increased in the total amount stated herein without a written change order executed by the City, nor shall the Contractor be entitled to any additional time or payment for time required for the submission and consideration of any such change order request. This section shall not apply to work or services provided when required to alleviate an emergency condition not caused by the Contractor's actions or omissions.

The Contract Price is firm for contract quantities for the duration of the Delivery and Installation Project, and Contractor's pricing will expire upon final completion of the Delivery and Installation Project. Contractor's prices for Water Meters & Modules (Pilot) are valid only for the pilot project in the quantities specified. Any full deployment project for water meters will be priced separately. The City agrees to issue a purchase order to Contractor for the entire quantity of materials required for the project within 90 (ninety) days of contract execution. Materials will be delivered during the Delivery and Installation Term. Notwithstanding the foregoing or anything contained herein to the contrary, Contractor reserves the right to increase the Contract Price at any time in the event of a manufacturer price increase caused by tariffs. Contractor will provide evidence of the actual tariff

amount from Sensus and will invoice the City only the actual tariff amount without markup. Contractor will provide City with written assurance of the following:

a. Contractor shall require Sensus to utilize a blended rate for tariff surcharge calculations.
b. Tariff amount calculations exclude items such as profit, freight, and administrative costs
c. Tariff amounts will be clearly identified on all invoices on a per line item basis. The blended rate for tariff surcharges will be uniform across all meter forms, thus this line item shall be a cumulative total of all surcharge amounts.
d. Contractor shall require Sensus to provide written notification (and a request for acknowledgment) for any new tariff surcharge, or subsequent increase or decrease to the amount of an existing tariff surcharge, in advance of any shipment of goods on which a tariff surcharge will be imposed.
e. Contractor shall require Sensus to provide documentation indicating the general range of Sensus' tariff share across all applicable products.

Owner reserves the right to challenge Contractor's increase in Contract Price, prior to filing any legal claim or cause of action. Notwithstanding the foregoing, in no event will Contractor be required to provide materials if the parties are unable to agree on a price increase due to tariffs. The Recurring Pricing for the Managed Services is firm for the Initial NaaS/SaaS Term. Prices for Managed Services for any NaaS/SaaS Renewal Term will be established prior to the start of the NaaS/SaaS Renewal Term.

SECTION 5. NO GENERAL OBLIGATION

In no event shall any obligation of the City under this Contract be or constitute a pledge of the ad valorem taxing power of the City within the meaning of the Constitution of the State of Florida or any other applicable laws. Neither the Contractor nor any other party shall ever have the right to compel the exercise of the ad valorem taxing power of the City in any form on any real or personal property to pay the City's obligations or undertakings hereunder.

SECTION 6. PAYMENT

Periodic Payments will be made by the City from invoices submitted to the City of Mount Dora, a Florida municipality, 510 North Baker Street, Mount Dora, FL 32757, as provided in APPENDIX D - Advanced Metering Infrastructure (AMI) System Pricing Sheet. Retainage of five percent (5%) will be withheld from all labor progress payments, in accordance with Section 255.078, Florida Statutes. When the Project is substantially complete, Contractor shall so notify the City's designated representative in writing. As used herein "Substantial Completion" means that all requirements of this Contract are complete and are ready for use, as more particularly defined in Article I - Definitions. The City will then make a final inspection of the work within ten (10) days after receipt of the notice and develop a list of items required to render the Project complete, satisfactory, and acceptable. The list shall be delivered to Contractor within five (5) days after the inspection has been completed. Contractor shall correct the items on the list within thirty (30) days after delivery of the list and notify the City when the corrections have been completed. The City, upon confirming that all items have been corrected, will then issue final payment for the Delivery and Installation Project, in accordance with Article VII – Payments to the Contractor and APPENDIX D - Advanced Metering Infrastructure (AMI) System Pricing Sheet. As a condition precedent to Final Payment by the City, Contractor must provide the City the Consent of Surety to final payment, an affidavit by Contractor identifying all subcontractors, laborers, or equipment or material suppliers who provided goods or services in connection with the Project and provision of separate releases of lien or lien waivers in form acceptable to the City from each

subcontractor, and copies of product warranties, operating manuals and instruction manuals if not previously provided.

SECTION 7. PAYMENT NOT A WAIVER OR ACCEPTANCE

No payment to Contractor, nor any use or occupancy of the Project by the City, shall be interpreted or construed to constitute acceptance of any work not in strict compliance with the Contract, and Contractor expressly accepts the risk that defective work may not be detected (1) during any inspection by the City, (2) prior to making of any payment to Contractor, or (3) before the City's final payment.

SECTION 8. COMPLIANCE WITH LABOR LAWS

Contractor shall assume all labor responsibility for all personnel assigned to or contracted for the performance of the work and agrees to strictly comply with all its obligations as employer with respect to said personnel under all applicable labor laws of the State of Florida and the United States of America.

SECTION 9. CLAIMS OF SUBCONTRACTORS

All work performed hereunder shall be accomplished in a manner that will result in no liens, claims or encumbrances being imposed on the City's property or suits for payment brought against the City. Contractor shall ensure prompt payment of all subcontractors and materialmen utilized by Contractor on the Project. In the event any materialman or subcontractor of Contractor should file any lien on the property of the City or otherwise file a claim for payment against the City, Contractor shall obtain the release and satisfaction of the lien or claim within ten (10) days of its filing to the extent Contractor has been paid for its Work giving rise to the claim.

SECTION 10. CONTRACT DOCUMENTS

This Contract, including the Contract Documents as defined below, contains all of the understandings and agreements of the parties hereto in respect of the subject matter hereof as of the Effective Date of the Contract. Any and all prior understandings and agreements, expressed or implied, between the parties hereto in respect of the subject matter hereof shall be superseded hereby. Parol or extrinsic evidence will not be used to vary or contradict the express terms of this Contract.

The term "Contract Documents" means and includes the following, which are hereby incorporated by reference and made a binding part of this Contract:

a) The Contract and all Sections thereunder
    - Sections 1 - 41

b) Articles of this Contract
    - Article I - Definitions
    - Article II – Statement of Work & Schedule
    - Article III – Deliverables
    - Article IV – System Acceptance & Performance
    - Article V – Contractor Responsibilities

- Article VI – City's Representative (Owner's Engineer) During Construction
- Article VII – Payments to the Contractor
- Article VIII – Changes in the Work
- Article IX - Change of Contract Price; Change of Contract Times
- Article X – Suspension of Work and Termination
- Article XI - Miscellaneous

c) Appendices in this Contract:

- Appendix A – City RFP
- Appendix B – Contractor Proposal
- Appendix C – Initial Project Schedule
- Appendix D – Advanced Metering Infrastructure (AMI) System Pricing Sheet
- Appendix E –Network as a Service, Software as a Service and Spectrum Lease Agreement
- Appendix F – Warranties
- Appendix G – RMA Process
- Appendix H – Human Trafficking Affidavit

d) In the event of inconsistency or ambiguity among any of the Contract Documents, the Contract (Sections 1-41) shall control first, and the remaining documents shall control the others in the above order of priority except Appendix B shall supersede and control over Appendix A.

SECTION 11. COMPLETE AGREEMENT

This Contract, together with the Contractor's and Surety's performance and payment bonds for the Delivery and Installation Project, if any, constitute the entire and exclusive agreements between the City and Contractor with reference to the Project. This Contract supersedes any and all prior documents, discussions, communications, representations, understandings, negotiations, or agreements by and between the parties.

SECTION 12. ASSIGNMENT

This Contract may not be assigned except at the prior written consent of the City, and if so assigned, shall be binding upon the successors and permitted assigns of Contractor.

SECTION 13. STATUTORY DISCLOSURES

Solicitation of Contract: Contractor warrants that it has not employed or retained any company or person, other than a bona fide employee working solely for Contractor, to solicit or secure this Contract and that it has not paid or agreed to pay any person, company, corporation, individual or firm, other than a bona fide employee working solely for Contractor, any fee, commission, percentage, gift, or other compensation contingent upon or resulting from the award or making of this Contract.

Public Entity Crime: As provided by Florida Statute 287.133(2)(a), a person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a bid on a contract to provide any goods or services to a public entity, may not submit a bid on a contract with a public entity for the construction or repair of a public building or a public work, may not submit bids on leases of real property to a public entity, may not be awarded or perform work as a contractor, supplier, subcontractor, or consultant under a contract with any public entity, and may not transact business with any public entity in excess of the threshold amount provided in Florida Statute 287.017 for Category Two for a period of 36 months from the date of being placed on the convicted vendor list. Any person must notify the City within 30 days after a conviction of a public entity crime applicable to that person or to an affiliate of that person. By its execution hereof, Contractor certifies that neither it nor an affiliate is on the convicted vendor list.

Scrutinized Companies List/Countries of Concern/Interests of Foreign Countries: Contractor hereby certifies that it: (a) has not been placed on the Scrutinized Companies that Boycott Israel List, nor is engaged in a boycott of Israel; (b) has not been placed on the Scrutinized Companies with Activities in Sudan List nor the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List; and (c) has not been engaged in business operations in Cuba or Syria. This Contract may be terminated at the option of the City if the Contractor is found to have submitted a false certification as provided under Florida Statute 287.135(5), been placed on the Scrutinized Companies that Boycott Israel List, or is engaged in a boycott of Israel, been placed on the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, or been engaged in business operations in Cuba or Syria.

Anti-Trust Vendor Violator: The Contractor has a continuous duty, throughout the entire Contract Term identified in Section 3, and any renewal, to disclose to the City if the Contractor or any of its affiliates, as defined by section 287.137(1), Fla. Stat., are placed on the Antitrust Violator Vendor List. Pursuant to section 287.137, Fla. Stat., "A person or an affiliate who has been placed on the antitrust violator vendor list following a conviction or being held civilly liable for an antitrust violation may not submit a bid, proposal, or reply for any new contract to provide any goods or services to a public entity; may not submit a bid, proposal, or reply for a new contract with a public entity for the construction or repair of a public building or public work; may not submit a bid, proposal, or reply on new leases of real property to a public entity; may not be awarded or perform work as a contractor, supplier, subcontractor, or consultant under a new contract with a public entity; and may not transact new business with a public entity."

SECTION 14. ADMINISTRATION OF CONTRACT

The City Manager, or their designated representative, shall administer this Contract for the City. No change in the Contract scope or payment shall be valid without prior written approval by the City Manager and, if necessary, approval by the City Council.

SECTION 15. NOTICE OF DEFAULT

In the event Contractor fails or refuses to materially perform the work in accordance with the Contract or is otherwise in material breach of this Contract, the City will provide written notice of default to Contractor. Thereafter, Contractor will substantially commence efforts to correct such failure to perform within thirty (30) days of notice from the City, and thereafter diligently pursue correction. Should Contractor fail to substantially commence efforts to cure within thirty (30) days, or fail to diligently pursue correction thereafter, the City may terminate the contract as provided herein and pursue all remedies available hereunder or at law.

SECTION 16. DEFAULT OF THE CONTRACTOR

The following events shall be considered events of default on the part of the Contractor: (a) the failure of the Contractor to deliver its Work free and clear of any lien or encumbrance by any subcontractor, laborer, materialman, or other creditor of the Contractor; (b) the Contractor becomes insolvent, or makes an assignment for the benefit of creditors, or should a voluntary or involuntary petition in bankruptcy or a reorganization or any adjudication of the Contractor as insolvent or bankrupt be filed; (c) any representation or warranty (excluding a warranty as contemplated by Section 19 and Appendix F of this Contract) provided by the Contractor that proves to be materially false or misleading when made, (d) any failure of the Contractor to comply with or perform according to the terms of this Contract or to commence efforts to correct such failure to perform within thirty (30) days of notice from the City, and thereafter diligently pursue correction. In the event of default by the Contractor, the City will have the right to cancel this Contract and to terminate immediately all Work hereunder without further obligation except the City will be obligated to pay for Work performed through the date of termination.

SECTION 17. FORCE MAJEURE

Neither the Contractor nor the City shall be responsible to each other for damage or delay that arise from Force Majeure, including but not limited to conditions beyond the reasonable control, and not the result of the fault of the impacted Party, including, without limitation acts of God, storms, extraordinary weather, epidemic or pandemic, acts of government units, strikes or labor disputes, fire, explosions, thefts, vandalism, riots, acts of war or terrorism, non-price related unavailability of materials required for the Project, and unavailability of fuel.

SECTION 18. TAXES, PERMITS, AND FEES

Core & Main shall be responsible for obtaining all permits and related permit fees associated with the Project. The City is exempt from Federal Excise and State of Florida Sales Tax. Only in strict accordance with the terms and conditions of Section 4 above, the City shall pay any tariffs relating to the materials to be provided hereunder. The City is not waiving any right to the terms and conditions of Section 4 in this Section and any ambiguity between the two shall be resolved by strict application of Section 4. The City shall be responsible for securing at its sole expense any other necessary approvals, easements, assessments, or required zoning changes. Core & Main shall be responsible for all taxes measured by Core & Main's income.

SECTION 19. WARRANTY

The extent of the warranty to be provided by Core & Main is set forth in APPENDIX F –WARRANTIES

SECTION 20. AMENDMENTS

No amendment or variation from the terms or conditions of this Contract shall be valid unless in writing and signed by the parties.

SECTION 21. INDEMNITY

To the maximum extent permitted by Florida law, the Contractor shall indemnify and hold harmless the City of Mount Dora, its officers and employees from any and all liabilities, damages, losses and costs, including, but not limited to, reasonable attorneys' fees and paralegals' fees, to the extent caused by the negligence, recklessness, or intentionally wrongful conduct of the Contractor or anyone employed or utilized by the Contractor in the performance of this Contract. This indemnification obligation shall not be construed to negate, abridge or reduce any other rights or remedies which otherwise may be available to an indemnified party or person described in this paragraph. This clause shall survive the term of this Contract.

SECTION 22. CONTRACTOR TO REPAIR PROPERTY DAMAGE CAUSED BY THE CONTRACTOR

Contractor agrees to promptly repair and/or replace, or cause to have repaired and/or replaced, at its sole cost and expense and in a manner acceptable to and approved by the City, any property damage arising out of, or caused by, the willful or negligent acts of the Contractor, or of its subcontractors. The Contractor's obligation under this section does not apply to property damage caused by any other Contractor engaged directly by the City. The City reserves the right, should the Contractor fail to make such repairs and/or replacement within a reasonable period of time, to cause such repairs and/or replacement to be made by others and for all costs and expenses associated with having such repairs and/or replacement done to be paid for by the Contractor, or by the Contractor reimbursing the City for all such costs and expenses.

SECTION 23. TITLE AND RISK OF LOSS

Risk of loss and title to the materials shall pass to the City upon delivery to a location specified by the City, excluding the meters and endpoints delivered for the Project which will be installed by Contractor. Risk of loss and title of project meters and endpoints to be installed by Contractor shall remain with the Contractor until successfully installed and initially readable from the head-end system, at which time title, risk of loss and obligations for maintenance will then immediately transfer to the City. Contractor agrees to protect equipment or materials in the custody or control of Contractor or its Subcontractor and to be responsible for any damage or loss occasioned by its failure to do so.

SECTION 24. INSURANCE

(a) During the Term of this Contract the Contractor will procure and maintain at its own expense the following insurance coverage:

(1)	General Liability	$2,000,000/occurrence
(2)	Automobile Liability	$500,000/occurrence
(3)	Worker's Compensation, including Employer's Liability	As required by law
(4)	Umbrella Liability	$5,000,000

(b) The Contractor will add the City as an additional insured on the above policies except Workers' Compensation. The Contractor shall provide a certificate of insurance evidencing the above coverage. Notice of cancellation will be provided 30 days in advance. Limits may be met by a combination of General Liability and Excess or Umbrella coverage.

(c) The Contractor will require its Subcontractors to provide a certificate of insurance evidencing the same coverage as the Contractor and to include the City and the Contractor as additional insureds.

SECTION 25. SAFETY

The Contractor shall have the primary responsibility for all safety precautions and programs necessary to complete its Work associated with the Project. The Contractor agrees to comply with all applicable regulations, ordinances, and laws relating to safety.

SECTION 26. HAZARDOUS MATERIALS

The Project and the Work expressly excludes any Work of any nature associated or connected with the identification, abatement, cleanup, control, removal, or disposal of hazardous materials or substances. The City warrants and represents that, to the best of the City's knowledge, there is no asbestos or other hazardous materials in the Project premises in areas that the Contractor shall be required to perform work that in any way will affect The Contractor's ability to complete the Project. If the Contractor is made aware or suspects the presence of hazardous materials, the Contractor reserves the right to stop work in the affected area and shall immediately notify the City. It shall remain the City's responsibility to correct the condition to comply with local and federal standards and regulations. The City shall remain responsible for any Claims that result from the presence of the hazardous materials. The City is responsible for proper disposal of all hazardous materials, including but not limited to lithium batteries.

SECTION 27. DELAYS AND ACCESS

In the event of any delay, including but not limited to Force Majeure or delays caused by the City, the Contractor will notify the City in writing of the existence and nature of the delay. The City and the Contractor will then mutually agree upon any new completion dates, and pricing or payment terms for the Work contemplated by this Contract. Nothing in the foregoing sentence shall be deemed to relieve the City from its obligation to provide the Contractor and its subcontractor's reasonable and safe access to facilities that are necessary for the Contractor to complete the Work.

SECTION 28. COMPLIANCE

The Contractor and the City will comply with all applicable laws, statutes, rules, regulations, ordinances, codes, and orders of any governmental bodies, agencies, authorities, and courts having jurisdiction. Except where otherwise expressly required by applicable laws and regulations, neither the City nor Owner's Engineer shall be responsible for monitoring Contractor's compliance with any laws or regulations.

SECTION 29. DISPUTE RESOLUTION

(a) The Parties will attempt in good faith to resolve through negotiation any dispute, claim or controversy arising out of or relating to this Contract. Either Party may initiate negotiations by providing written notice to the

other Party, setting forth the subject of the dispute and the relief requested. The recipient of such notice will respond in writing within three business days from receipt with a statement of its position on, and recommended solution to, the dispute. Thereafter the Parties will attempt to resolve the dispute through negotiations conducted in good faith. If the dispute is not resolved by these negotiations within 15 business days following the date of the initial written notice, the matter will be resolved in accordance with Section 30(b) below.

(b) The Parties agree that in the event any dispute between them relating to this Contract is not resolved under Section 29(a) above, exclusive jurisdiction shall be in the state or federal trial courts having jurisdiction in Lake County, Florida. The Parties expressly waive any objection and consent to the personal jurisdiction of such courts. **BOTH THE CITY AND THE CONTRACTOR HEREBY IRREVOCABLY AND VOLUNTARILY WAIVE ALL RIGHT TO TRIAL BY JURY IN ANY ACTION, PROCEEDING OR COUNTERCLAIM (WHETHER BASED UPON CONTRACT, TORT OR OTHERWISE) ARISING OUT OF OR RELATING TO THIS AGREEMENT OR THE ACTIONS OF THE PARTIES IN THE NEGOTIATIONS, ADMINISTRATION, PERFORMANCE OR ENFORCEMENT THEREOF**.

(c) All disputes arising out of this Contract shall be governed by, and construed in accordance with, the laws of the State of Florida without giving effect to any choice of law or conflict of law rules or provisions (whether of the State or any other jurisdiction) that would cause the application hereto of the laws of any jurisdiction other than the laws of the State.

SECTION 30. ATTORNEYS' FEES

In the event of any litigation between Parties hereto arising from or with respect to this Contract, the Parties will each bear their own attorneys' fees and costs of the action.

SECTION 31. ASSIGNABILITY

Absent express written consent of the non-assigning party, this Contract nor any rights or obligations hereunder may be assigned, delegated or transferred.

SECTION 32. NOTICE

The parties hereto agree and understand that written notice, mailed, emailed or delivered to the last known mailing address, shall constitute sufficient notice to the City and the Contractor. All notices required and/or made pursuant to this Contract to be given to the CITY and the Contractor shall be in writing and given by way of the United States Postal Service, first class mail, postage prepaid, addressed to the following addresses of record with copy by electronic mail: All notices and communications related to this Contract shall be made in following address:

CITY: City of Mount Dora
Attn: City Manager
510 N. Baker Street
Mount Dora, Florida 32757

sandersfeldv@mountdora.gov

Copy to: Shepard, Smith, Hand & Brackins, P.A.
Attn: Patrick Brackins, City Attorney
2300 Maitland Center PKWY, STE 100
Maitland, FL 32751
pbrackins@shepardfirm.com
ahand@shepardfirm.com
service@shepardfirm.com

CORE & MAIN: Core & Main LP
Attn: District Manager
590 Ferguson Drive
Orlando, FL 32805

Copy to: Legal Department
Core & Main LP
1830 Craig Park Court
St. Louis, MO 63146
Ph: (314) 432-4700
cm-legal@coreandmain.com

SECTION 33. BINDING EFFECT

The City and the Contractor each represent and warrant to the other that this Contract has been duly authorized, executed and delivered by such Party and constitutes a legal, valid and binding agreement enforceable against such Party in accordance with its terms.

SECTION 34. MODIFICATIONS

This Contract shall not be modified in any respect except by a written document signed and agreed to by both the Contractor and the City.

SECTION 35. PUBLIC RECORDS

(a) Pursuant to Florida Statutes, Section 119.0701:

IF YOU HAVE QUESTIONS REGARDING THE APPLICATION OF FLORIDA STATUTES, CHAPTER 119, TO YOUR DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS CONTRACT, CONTACT THE CITY'S CUSTODIAN OF PUBLIC RECORDS:

CITY CLERK: JEANANN HAND
510 NORTH BAKER STREET
MOUNT DORA, FL 32757
(352) 735-7126

jeanann.hand@mountdora.gov

(b) The Contractor agrees to comply with public records laws, specifically to:

1. Keep and maintain public records required by the CITY for the term of this Contract.

2. Upon request from the CITY's custodian of public records, provide the City with a copy of the requested records or allow the records to be inspected or copied within a reasonable time at a cost that does not exceed the cost allowed by law.

3. Ensure that any public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed, except as authorized by law, for the duration of the contract term and following completion of the contract if the CONTRACTOR does not transfer the records to the City.

4. Upon completion of this contract, transfer, at no cost, to the City all public records in the the Contractor's possession or keep and maintain the public records as required by the City. If the CONTRACTOR transfers all public records to the CITY upon completion of this contract, the CONTRACTOR shall destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. If the CONTRACTOR keeps and maintains public records upon completion of the contract, the CONTRACTOR shall meet all applicable requirements for retaining public records. All records stored electronically must be provided to the CITY, upon request, in a format that is compatible with the information technology systems of the CITY.

SECTION 36. E-VERIFY

The City will not intentionally award contracts to any contractor who knowingly employs unauthorized alien workers, constituting a violation of the employment provisions contained in 8 U.S.C. Section 1324 a(e), Section 274A(e) of the Immigration and Nationality Act ("INA"). The Contractor must comply with Florida Statutes 448.095(2), and shall comply with the requirements to use the E-Verify System to verify the employment eligibility of all new employees hired by the Contractor during the term of the Contract as more specifically set forth in Article V, paragraph 17.

SECTION 37. TRADE SECRETS AND PROPRIETARY CONFIDENTIAL BUSINESS INFORMATION

(a) Documents submitted by Contractor which it contends constitute trade secrets as defined in Sections 812.081 and 688.002, Florida Statutes, or confidential and propriety business information when held by the CITY as a utility owner, consistent with Section 119.0713(5), Florida Statutes, or information related to cybersecurity that is exempt and confidential under Section 119.0725, Florida Statutes, and which are clearly marked or stamped as confidential by the Contractor at the time of submission to the CITY, will not be subject to public access. Except as may be required under applicable law, court order, or regulation, or to the extent required to perform and enforce this Contract, both parties shall (and shall cause their employees and contractors to) keep all Confidential Information strictly confidential and shall not disclose it to any third party. The Confidential Information may be transmitted orally, in writing, electronically or otherwise observed by either party. However, should a requestor of public records challenge Contractor's claim of trade secret or confidential and proprietary business information, within five (5) calendar days of such challenge, Contractor must provide a separate written affidavit and a separate indemnification and release guarantee, as approved by the CITY's Attorney or

designee, to the CITY to support its claim that the alleged trade secrets or proprietary and confidential business information actually constitutes same as defined by law. Contractor must demonstrate the need for confidentiality of the documentation by showing a business advantage or opportunity to obtain an advantage would be gained if the documentation were released. Otherwise, Contractor is required to timely seek a protective order in the Circuit Court of Hardee County to prevent the CITY's release of the requested records.

(b) "Confidential Information" means all non-public information of either party, including the terms of this agreement, all technical information about either party's products or services, pricing information, marketing and marketing plans, Customer's End Users' data, AMI System performance, AMI System architecture and design, AMI System software, other business and financial information of either party and all trade secrets of either party. Notwithstanding the foregoing, "Confidential Information" shall not include (i) any information that is in the public domain other than due to Recipient's breach of this Contract; (ii) any information in the possession of the Recipient without restriction prior to disclosure by the Discloser; or (iii) any information independently developed by the Recipient without reliance on the information disclosed hereunder by the Discloser. "Discloser" means either party that discloses Confidential Information, and "Recipient" means either party that receives it.

(c) To the extent Contractor regards certain terms and provisions of this Contract to contain data or information that is covered by one or more of the following: (1) cybersecurity insurance coverage limits and deductible self-insurance amounts, (2) information related to critical infrastructure, and (3) network schematics, hardware and software configurations, or encryption information or information that identifies detection, investigation, or response practices for suspected or confirmed cybersecurity incidents, Contractor must clearly mark such provisions as confidential and exempt. To the extent such terms and provisions are clearly marked as confidential and exempt from public record law requirements, the parties agree to the treat the terms and conditions in accordance with the provisions of Section 37, Paragraph a) above.

SECTION 38. NO OBLIGATION TO THIRD PARTIES

No party to this Contract shall have any responsibility whatsoever with respect to services provided or contractual obligations assumed by the other party to third parties, and nothing in this Contract shall be deemed to contemplate either party as a partner, agent, or representative of the other party. The parties specifically intend that no third party have any rights hereunder.

SECTION 39. SEVERABILITY

Any term or provision found to be prohibited by law or unenforceable shall be ineffective to the extent of such prohibition or unenforceability without, to the extent reasonably possible, invalidating the remainder of this Contract.

SECTION 40. SUSPENDED OR DEBARRED VENDORS

The City does not award contracts to or consent to subcontracts with suspended or debarred vendors, unless the City Administrator has determined that an emergency exists justifying such action and obtained approval from the Board. Such vendors are also excluded from conducting business with the City as agents, representatives,

subcontractors, or partners of other vendors. Furthermore, subsequent suspension or debarment may constitute grounds for termination of this Contract.

SECTION 41. ELECTRONIC SIGNATURE

This Contract may be executed in multiple counterparts, each one of which shall be deemed an original, but all of which together shall constitute the same Contract. Electronic signatures shall be valid and sufficient to bind any party to this Contract. Signatures to this Contract transmitted by facsimile, email or other electronic transmission (for example, through the use of a Portable Document Format or "pdf" file) shall be valid and effective to bind the party so signing. All such signatures will be deemed to be original signatures for all purposes.

(Signatures on next page)

IN WITNESS WHEREOF, the Parties hereto, by their duly authorized representatives have executed this Contract as of this 20th day of June, 2025.

CITY OF MOUNT DORA

JAMES HOMICH
MAYOR of the City of Mount Dora, Florida

ATTEST:

JEANANN HAND
CITY CLERK

For the use and reliance of City of Mount Dora only
Approved as to form and legal sufficiency

Patrick Brackins
City Attorney

CORE & MAIN LP

By: _____

Printed Name: Joseph Holsten

Printed Title: Manager, Branch Operations

STATE OF FLORIDA
COUNTY OF ORANGE

The foregoing instrument was acknowledged before me by means of [ ] physical presence or [ ] online notarization of Joseph Holsten, as Manager, Branch Operations, of Core & Main LP, who personally swore or affirmed that he/she is authorized to execute this Contract and thereby bind the Contractor, and who is personally known to me or who produced _____ _____ as identification, and who did/did not take an oath this 20th day of June, 2025.

(stamp)

BRENDA F. ECKROSE
Commission # HH 215403
Expires February 27, 2026

_____

ARTICLE I - DEFINITIONS

The following definitions shall apply:

AMI – Means Advanced Metering Infrastructure and is comprised of the SmartPoint Modules, meters, RF Field Equipment, Hosted Software, Spectrum Lease, and other equipment provided to Customer hereunder. The AMI System only includes the foregoing, as provided by Sensus.

Change Order – A written order issued by the City after execution of the Contract to the Contractor, as may be recommended by the Engineer, signed by the City and authorizing an addition, deletion, or revision of the Work, or an adjustment in the Contract Price or the Contract Time. An executed Change Order resolves all issues related to price and time for the work included in the Change Order.

CIS – The City's existing Customer Information System.

City – The City of Mount Dora (City), Florida.

Continued Deployment – Ongoing deployment of meters and AMI devices after the completion of the project.

Contract Documents – All documents set forth in the executed agreement.

Customer – when capitalized, refers to the City of Mount Dora (City), Florida (Contractor's customer). When used with a lower case "c" it generally refers to the City's customer.

End User – any end user of electricity or water where the City provides for the consumption of electricity or water.

Engineer – The individual assigned by the City (either an employee or a third party), who is a licensed professional engineer in the State of Florida, to provide engineering, design review, and/or construction management including, but not limited to, overseeing and resolving engineering/design issues with the Engineer for the Work, and conveying the City's instructions to the Contractor.

The Engineer's authority includes interpreting the technical portion of the Contract Documents, deciding on matters relating to the execution and progress of the Work and evaluating the Contractor's performance. The Engineer may stop the Work when deemed necessary by the City. The Engineer will receive and adjudicate any claim of ambiguity or error in the technical portion of the Contract Documents and shall reduce any determination to writing and shall make a recommendation to the City. The Engineer is not a party to the Contract. The Engineer has no authority to approve changes to the Contract Price or Contract Time, or to commit the Owner to any expenditure of money except as expressly designated in writing by the Contract Administrator.

Field Devices – the SmartPoint Modules and meters equipped with SmartPoint Modules.

Final Acceptance -- The City's written notice to the Contractor that all Work as specified in the Contract has been completed to the City's satisfaction. Approval or recognition of the Contractor meeting a milestone or interim step does not constitute Final Acceptance of the Work. Final Acceptance is only applicable to the entirety of Work as specified in the Contract. Final Acceptance does not in any way limit the City's rights under the Contract or applicable laws, rules and regulations.

Final Completion -- The point in time after which the City has accepted the Work, in accordance with the Contract Documents, and the Contractor has fulfilled all requirements of the Contract Documents including successful System Acceptance Test results approved by the City.

FlexNet Base Station – identifies the Sensus manufactured device consisting of one transceiver, to be located on a tower that receives readings from the SmartPoint Modules (either directly or via an R100 unit) by radio frequency and passes those readings to the RNI by TCP/IP backhaul communication. For clarity, FlexNet Base Stations include Metro Base Stations.

Force Majeure – an event beyond a party's reasonable control, including, without limitation, acts of God, hurricane, flood, volcano, tsunami, tornado, storm, tempest, mudslide, vandalism, illegal or unauthorized radio frequency interference, strikes, lockouts, or other industrial disturbances, unavailability of component parts of any goods provided hereunder, acts of public enemies, wars, blockades, insurrections, riots, epidemics, pandemics (including Covid19), earthquakes, fires, restraints or prohibitions by any court, board, department, commission or agency of the United States or any States, any arrests and restraints, civil disturbances and explosion.

Functional Verification – Work performed as part of the System Acceptance Test to verify that the system is functioning as specified.

Hosted Software – means those items listed as an application in **APPENDIX E – Network as a Service, Software as a Service and Spectrum Lease Agreement.**

In/Out Costs – means any costs and expenses incurred by the City in transporting goods between its warehouse and its End User's premises and any costs and expenses incurred by the City in installing, uninstalling and removing goods at End User's premises.

Intellectual Property – means patents and patent applications, inventions (whether patentable or not), trademarks, service marks, trade dress, copyrights, trade secrets, know-how, data rights, specifications, drawings, designs, maskwork rights, moral rights, author's rights, and other intellectual property rights, including any derivations and/or derivative works, as may exist now or hereafter come into existence, and all renewals and extensions thereof, regardless of whether any of such rights arise under the laws of the United States or of any other state, country or jurisdiction, any registrations or applications thereof, and all goodwill pertinent thereto.

Meter Availability – Available Meter and Unavailable Meter are defined as follows:

a) **Available Meter** – Means an installed Sensus FlexNet meter (with a SmartPoint Module installed) or a Sensus SmartPoint Module which has been installed on a third party meter, and which, in either case, is not an Unavailable Meter (or on an Unavailable Meter in the case of SmartPoint Modules on third party meters) and which satisfies all of the following criteria: (i) it functions properly, is powered and is not a damaged or failed meter; (ii) it is in a deployment area of meters for Customer such that a sufficient number of two-way meters are in range of each other; (iii) it is serviced by RF Field Equipment that has not been subjected to a power failure greater than eight (8) total hours; (iv) neither it nor the RF Field Equipment that serves that meter has been affected by a Force Majeure event; (v) jamming of the radio spectrum is not preventing or interfering with radio communication to or from the meter; (vi) it is installed in the Service Territory; (vii) it has not been reported to Customer under Contractor' or Customer's preventative maintenance; (viii) its functioning or performance has not been adversely affected by a failure of Customer to perform its obligations or tasks for which it is responsible under this Contract, including, but not limited to, testing and

confirming that the socket to which the meter will be/is connected is in safe operating condition, is fully functional, is not corroded, does not contain improperly installed jaws or other deficiencies, complies with ANSI standards, and is not hot, damaged, or otherwise in need of maintenance or repair; (ix) its functioning or performance has not been adversely affected by a failure or insufficiency of the back haul telecommunications network of Customer for communications among the components of the Sensus FlexNet System; and (x) it has been installed in compliance with the procedures and specifications approved by Customer and Contractor.

b) **Unavailable Meter** – Includes meters with sockets with power cut at the pole, meters that are booted on the line side, sockets that are not provided power due to a power delivery system failure, meters with tamper, theft or other human induced failures that render the meter or SmartPoint Module incapable of providing a read, a Force Majeure event induced failures of the power delivery system, socket or meter, and/or any system or meter maintenance issue that precludes the meter from transmitting its message to the network. Examples of Unavailable Meters include: (i) Cut At Pole: a meter for which power has been turned off to the socket by Customer; (ii) Booted on Line Side: nominally a meter for which power has been turned off by placing boots in the socket from which the power to the meter has effectively been turned off; (iii) Failed or flawed power delivery to the meter socket: Customer power generation, distribution or delivery system failure that has effectively turned off power to the socket and/or meter; (iv) Tampered Meters: sockets, meters or distribution assets that have been modified by unauthorized personnel rendering the meter incapable of providing accurate usage readings from that meter;(v) Broken TouchCoupler unit: the TouchCoupler unit is damaged by intentional or unintentional acts; (vi) Broken Clip: the clip that holds the TouchCoupler unit into the radio package housing is broken and the unit cannot complete the inductive electrical connection; (vii) Improper installation of the TouchCoupler unit: the TouchCoupler unit is not pushed all the way into the housing clip causing the unit to not be able to complete the inductive electrical connection; (viii) Unit not installed through the pit lid: the unit is not installed with the antenna positioned through the pit lid and properly secured with the retaining nut. The radio unit must also be securely attached to the antenna section; (ix) Radio unit not securely attached to the Antenna unit: The water-proof SmartPoint Module housing is not properly installed and secured to the antenna unit; (x) Damaged antenna: the unit's antenna is damaged by intentional or unintentional acts; (xi) Damaged radio package: the unit's water-proof radio package is damaged by intentional or unintentional acts; (xii) Data Base errors: the unit is removed from the system but not updated in the database. Still shown as in the system when in fact has been removed; (xiii) Phantom Units: the unit is removed from the system but is still transmitting and being heard by the system; and (xiv) Other Installation Defect: the unit is otherwise installed improperly so that it does not communicate with the FlexNet Base Station.

NaaS – Network as a Service. Refers to services provided by Sensus to own and manage the RF Field Equipment.

Notice to Proceed -- The written notice duly authorized and delivered by the City that authorizes the Contractor to begin Project Work. When indicated by the City, a PO may also serve as a Notice to Proceed.

Owner's Engineer – A consultant engaged to represent the City on technical matters during the project.

Parties – The companies that are party to this agreement, the City and Contractor.

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Permitted Use – means only for reading and analyzing data from the City's Field Devices in the Service Territory. The Permitted Use does not include reading third party devices not provided by Contractor or reading Field Devices outside the Service Territory.

Project Deployment – Refers to the time in which the systems and devices described in this agreement are being actively deployed, prior to final acceptance of the system.

Project Manager – The primary contact for each company during Project Deployment. The City and Contractor will each designate a Project Manager.

Project Services – The services that Contractor is obligated to provide to the City under this agreement during the Project Deployment.

Return to Utility (RTU) – The process used when the installer discovers an anomaly at the site and needs advice or assistance from the City before the installation work can be completed.

Purchase Order (PO) --- A Work authorization document issued by the City with the words "Purchase Order" clearly marked across the top, a PO number used for reference shown on the front, a description of the Work or a listing of the applicable Contract Documents, an authorized City signature and stating the amount of lawfully authorized funds.

RF Field Equipment – Collectively, FlexNet Base Stations, R100 units (if any) and remote transceivers (if any)

RMA – Return material authorization. Refers to the process that the City uses when they wish to return defective products as further described in APPENDIX G – RMA Process**.**

SaaS – Software as a Service. Refers to services provided by Sensus to own and manage head end software and its associated hardware on an ongoing basis as further described in **APPENDIX E – Network as a Service, Software as a Service and Spectrum Lease Agreement.**

Sensus – identifies the Contractor's AMI technology manufacturer/sub-supplier.

Service Territory – identifies the geographic area where the City utilizes Sensus equipment to provide services to End Users as of the Effective Date. This area will be described on the propagation study in the parties' Spectrum Lease filing with the FCC.

SmartPoint™ Modules – identifies the Sensus transmission devices installed on devices such as meters located at the City's End Users' premises that communicate with the relevant devices and transmit those communications by radio frequency to the relevant piece of RF Field Equipment.

Software – all the Sensus proprietary software provided pursuant to this Contract, and any patches, updates, and upgrades that are provided to the City pursuant to the terms of this Contract. The Software does not include any third-party software provided by manufacturers other than Sensus.

SOW – Statement of Work. See Article II - STATEMENT OF WORK & SCHEDULE.

SpryPoint – Customer portal software manufacturer / provider and sub-supplier.

Standard Operating Procedures (SOPs) – Procedures applied by Contractor to work performed in the field.

Substantial Completion - The time when the Owner determines that the Work (or a specified part thereof) is sufficiently complete to be utilized for the purposes for which it is intended or ready for the City or other contractors to perform subsequent portions of the Work as stated in the Contract Documents. Recognition of the Work as Substantially Complete, as evidenced by issuance of a Certificate of Substantial Completion, does not represent the City's Final Acceptance of the Work.

System Administrator – the City employee responsible for managing access to the AMI system software.

WOMS – Work order management system.

WOM System – See WOMS.

ARTICLE II – STATEMENT OF WORK & SCHEDULE

The Statement of Work ("SOW") for the Project contemplated hereunder is to be completed by the Contractor (and its subcontractors) as set forth in this Contract for the successful implementation of a Sensus FlexNet Advanced Metering Infrastructure system. The SOW encompasses the installation, setup, and deployment of the AMI System which includes all Project materials and equipment as listed in Article 3, RFP 24 UT-001. 1 and herein.

1. Project Organization

a) City Responsibilities

Prior to the start of the project, the City will designate a person (Quanta Technology serving as the City's Project Manager) to whom all communications from the Contractor will be addressed, and who will have the responsibility to act on City's behalf in all matters regarding this SOW. The City shall be responsible for cooperating with the Contractor, providing accurate information in a timely manner, and making payment in a timely manner for Work performed. The City shall designate a representative who will be fully acquainted with the Work and will be reasonably accessible to the Contractor and its subcontractors and will have the authority to make decisions on behalf of the City. The City shall provide to the Contractor and its subcontractors utility locations and other information reasonably pertinent to this Contract and the Project. The City shall be required to give prompt notice should it become aware of any fault or defect in the Project.

- Owner-Furnished Data. The City shall provide the Contractor all technical data and information in the City's possession, including previous reports, maps, and surveys necessary for the Contractor to perform the Work, as outlined within RFP 24-EL-014. The City shall support the Contractor in a timely manner should assistance be needed to find a meter location.

- Access to Facilities and Property: Contractor shall request permission to access City facilities within the scope of this agreement and any access granted shall occur during standard operating times unless agreed to previously by the City.

- Customer Notification: The City will provide notification in its billing to its customers that the Contractor is performing the designated work and that possible service interruption may result.

- Timely Review: The City shall examine all invoices and inspect all completed work and supporting documentation issued by the Contractor in a timely manner. In the event that the City fails to make timely payment to the Contractor as a result of the City's delay in inspecting the Work or processing the Contractor's invoice, the Contractor reserves the right to suspend further work without penalty until such time as payment is made. The project completion date will be extended for the same duration of any such delay and suspension of Work.

The City's Project Manager will:

- Serve as the interface between Contractor' project team and all of the City's departments and other City contractors participating in the AMI project;

- Attend status meetings;

- Obtain and provide applicable information, data, consents, decisions and approvals as required by Contractor to complete their responsibilities, within a reasonable time frame;

- Help resolve project issues, and escalate issues within the City's organization, as necessary;

- Work with Contractor sales to complete meter and configuration forms in timely manner to facilitate the hardware ordering process; and

- Support the project change order procedure in a timely manner.

In addition, the City will provide access to the following personnel as needed during the project:

- Field Point(s) of Contact: Generally, a foreman or superintendent who can answer or approve general day-to-day inquiries that may arise as work progresses. This may be a person from the Electric department and a person from the Water department.

- Finance / Billing Manager: Generally, the person who oversees monthly utility billing efforts and serves as a contact to BS&A for the billing software. This person should be available to answer integration questions and verify read data. The Contractor Project Manager will coordinate with this person prior to mass deployment to implement the cut-over plan and ensure that billing operations are not adversely impacted.

- IT Staff: Involvement may be required depending on backhaul configuration and end user's computer configuration (browser). Involvement and participation in integration efforts is recommended and may be required in some cases.

  Customer has primary responsibility for field endpoint maintenance. If Customer follows all field investigative measures to diagnose the issue and they are unsuccessful in their repair attempt Core & Main will assist the Customer in diagnosing issues with its field staff subject to the following conditions:

  1) After the initial on-site training Contractor will provide one refresher training to the City instate or online for no charge to the City. Should the City desire on-site training or customized training after the onsite project training, Contractor will provide this customized training for a fee.

  2) If the City requests that Contractor travel to its location specifically to diagnose a meter issue and it is determined that the City is not following the field protocol for which it has been trained and the issue is resolved by merely following repair protocols and retraining the City's personnel, Contractor reserves the right to charge the City a trip fee.

  3) Contractor will provide follow up spot training for field maintenance when Contractor's technician is in the area, and on a mutually acceptable schedule at no-charge to the City.

2. Contractor Responsibilities

Prior to the start of the project, Contractor will designate a person ("Contractor Project Manager") to whom all communications from the City will be addressed, and who will have the authority to act on Contractor's behalf in all matters regarding this SOW. The Contractor Project Manager shall be a person who is employed full-time by Contractor as a project manager.

Contractor Project Manager will:

- Serve as the interface between Contractor' project team (including their subcontractors) and the City's Project Manager;

- Review the SOW, and any associated documents, with the City's Project Manager;

- Facilitate the project kickoff and planning meeting;

- Establish and maintain communications through the City's Project Manager, as defined in the section entitled "Project Procedures" below;

- Review and administer the Project Change Order Procedure with the City's Project Manager, as defined in the section "Project Procedures" below;

- Coordinate and manage the project activities of Contractor' assigned personnel;

- Create and maintain the project schedule ensuring weekly progress updates are reflected throughout the project implementation period.

- Maintain an action items list on an ongoing basis throughout the duration of the project and insure timely completion of action items;

- Maintain a central repository for project documents and provide appropriate access to this repository for all project stakeholders; and

- Provide status reports and facilitate status meetings as agreed including prompt issuance of status meeting notes/minutes.

3. Travel

Project work is to be performed both on-site and remotely as necessary. Contractor personnel will be on-site for the project planning/kickoff meeting, for system training, as needed to support the functional verification testing (FSAT), and as mutually agreed to with the City.

4. Project Deployment

Contractor will provide active management of the project by a Contractor Project Manager. The Project Manager and project team are required to be highly skilled and involved in day-to-day coordinating efforts for task completion and approved in advance by the City.

5. Subcontractors

Contractor is responsible for the work of all subcontractors that it employs. Contractor will use the following subcontractors:

- Bermex – electric meter installation.

- L&S - Network equipment installer

The foregoing subcontractors are hereby approved by the City. Any other subcontractors must be approved in writing in advance by the City. The meter installation subcontractor shall use a single Work Order Management System (WOMS) for capturing and transferring meter exchange data to the City's billing system. A single Call Center shall be established and utilized during the installation.

2. Project Procedures

Project procedures describe communications, interface requirements, and means to control the activities between the City and the Contractor project team. Contractor will use best practices for project deployment which will be agreed upon by the City prior to deployment.

1. Project Review Meetings

The City and Contractor are required to participate in project review meetings that cover:

- status and schedule reviews,
- coordination of the City's and Contractor's scope activities,
- exchange of technical information, and
- design reviews of future work to be performed by the project team.

These meetings will include the City and Contractor personnel as required to address the key issues. To the extent possible, meetings will be conducted via conference calls or video conferencing. The Contractor and the City project managers will mutually agree upon the frequency of these project meetings. The Contractor and the City project managers will also mutually agree to the timing, frequency, and location of any face-to-face meetings.

2. Transmittal Reviews

The City and Contractor each will review and respond promptly to all questions and correspondence to each other and when practicable within five (5) business days of submittal.

3. Demobilization

Following successful completion of meter installations and acceptance, any leftover material purchased by the City will be returned to the City for shelf stock. Any rented storage or restroom facilities will be returned. Any City facilities utilized by installation staff will be left in a tidy presentable state.

3. Project Schedule

Contractor, City, and Owner's Engineer will develop a mutually agreeable project schedule within 2 weeks post the project kickoff. A sample schedule is provided in APPENDIX C – INITIAL PROJECT SCHEDULE.

ARTICLE III – DELIVERABLES

1. All materials purchased by the City are shipped to the City and shall be stored in City-supplied secure, covered storage area with access locks for storage and disposal of inventory located in the City's secured fenced location. City shall receive and inspect inventory, noting any shortages or damages on a signed Bill of Lading. All received inventory will be loaded into WOMS by way of an inventory file or by way of bar-code scanners. The City reserves the right to sample test any lot shipment received.

2. Customer Engagement Program

a. "AMI Day"

a. Should the City elect to host an "AMI Day" community event, Contractor and Sensus will attend and staff a booth displaying product at the event with local residents.

b. City Council Meeting

a. Contractor and Sensus will participate in City Council meetings, as requested by the City.

c. Customer Engagement & Communication Materials

Contractor will host a customer engagement and communications-focused workshop to discuss customer engagement strategies and communication and will produce a Communications & Strategy plan as an output of the workshop.

Contractor will develop, with input from the City, advance notification customer communication materials, such as billing inserts, postcards and door hangers. The design and content of these mailers will be developed in conjunction with the City with the City having final approval authority over all materials. The City will manage the timing and mailing of these materials to provide at least 28-day notice to customers prior to installation. Contractor will provide recommendations for any additional marketing material based on their experiences, including reasonable documentation to address RF safety concerns should they arise.

Contractor will print door hangers to leave at premises where the AMI meter installer has visited a location. The door hanger will indicate either the meter change out was successful or explain why the meter change out could not be completed.

3. AMI Electricity Meters

The City shall purchase the meter quantities at the prices specified in APPENDIX D - Advanced Metering Infrastructure (AMI) System Pricing Sheet of this Contract. The Contractor will deliver FlexNet-enabled Sensus Stratus IQ+ and Aclara kV2c meters according to a mutually agreed schedule. Once agreed upon, Contractor will use commercially reasonable efforts to request that the manufacturer's scheduled delivery dates for meters are not adjusted within twelve (12) weeks of the scheduled delivery date.

Contractor shall be responsible for all meter and communication module programming as part of the approved scope of work with approval of all programs being a responsibility of the City.

Prior to manufacture of full order of FlexNet electric meters and/or modules, Contractor shall require Sensus and its meter sub-suppliers to manufacture and deliver four (4) samples, or other City-designated quantity not to exceed twelve (12), (the "First Articles") of each electric meter and/or module ordered to the City to ensure that the meter and/or module meets the City's Requirements Documentation. Contractor shall require Sensus to commence manufacture of the applicable meters and/or modules according to the agreed upon schedule after the City's

acceptance of the First Articles. As used herein, "Requirements Documentation" means the meter order packet, nameplate definition and approval, manufacturing data file, specific metrology configuration, specific FlexNet configuration, meter numbering convention, and labeling information. All electricity meters shall be UL Listed for compliance with the UL 2735 specification.

All electric meters including the communications module shall be tested at the factory and shipped with the test report. When an electric meter shipment leaves the factory, the Contractor will be responsible for ensuring that manufacturing files areproduced for the project– one for inventory processing purposes for the City's CIS system and a second for importing into the FlexNet head-end software. The file includes all relevant meter data and test results in the agreed format which will be determined jointly during system integration working sessions. In addition, manufacturing files will be sent to the Contractor's installation subcontractor for inventory management during the project. The Contractor will import factory files to the FlexNet Head End System during the project and train the City employees in this process.

All electric meters are non-cancelable, non-returnable once shipped.

a. Alternate Meter Supplier

The City is not expecting to order FlexNet-enabled Aclara single-phase I-210+c meters for the initial deployment. However, upon reasonable notice the Contractor will ensure that Aclara is ready to accept orders for these meters for the City if needed and if available at the time of order placement. Price to be set at the time of order for any single phase Aclara meters added to order.

4. Water Meters & Water Communication Modules

The City shall purchase the meter quantities for a water pilot at the prices specified in APPENDIX D - ADVANCED METERING INFRASTRUCTURE (AMI) SYSTEM PRICING SHEET of this Contract. The Contractor will deliver Sensus iPERL+ (polymer and metal), OMNI+ C2, Cordonel, and ally® water meters all equipped with FlexNet SmartPoint modules. Additionally, the Contractor will deliver FlexNet SmartPoint retrofit modules to validate meter retrofits for a select quantity of the City's existing large meters. All products will be delivered according to a mutually agreed schedule. Once agreed upon, , Contractor will use commercially reasonable efforts to request that the manufacturer's scheduled delivery dates for meters are not adjusted within twelve (12) weeks of the scheduled delivery date. No first-article order is required for water meters or communication modules.

All meters shall be tested at the factory and shipped with the test report. When a meter shipment leaves the factory, the Contractor will be responsible for ensuring that a manufacturing file is sent to the City's CIS system for inventory processing purposes.. The file includes all relevant meter data and test results in the agreed format which will be determined jointly during system integration working sessions. In addition, should the Contractor perform the installation of the water pilot or the pilot is expanded to broader quantities, manufacturing files will be sent to the Contractor's installation subcontractor for inventory management during the project.
SmartPoint modules will also provide a back-up mobile read capability and this capability shall be tested as part of the delivered solution.

5. Base Station & Network Infrastructure Devices (RF Field Equipment)

Prior to the installation of any meters, Contractor shall install and test the RF Field Equipment on the following sites:

Base Station Location Name	Latitude	Longitude
City Water Tower	28.807467	-81.643065
Property 3 Tower	28.793893	-81.624471

- The City shall provide Contractor with access to these sites and with adequate space for the RF Field Equipment. If one of these sites cannot be used, Contractor will work with the City to determine alternatives necessary to maintain necessary system performance Contractor shall provide cellular backhaul for the RF Field Equipment unless the City elects to provide fiber to these locations.

Contractor has recommended two (2) Base Stations and agrees to supply any additional base stations above that number, if needed, to achieve agreed upon coverage from the approved RF design. All RF Field Equipment shall comply with all applicable FCC Regulations. Any outdoor enclosures shall meet NEMA 4 and be lockable. Door open contacts shall be included that will cause an alarm at the head-end system.

All network equipment shall meet applicable radiation exposure standards, within acceptable human exposure limits. Contractor will provide written instructions for City workers, stating acceptable limitations for working on or around network devices.

Contractor shall provide RF Field Equipment on a Network as a Service (NaaS) basis. The manufacturer will retain ownership of all RF Field Equipment and will be fully responsible for its ongoing maintenance and performance. Contractor will also be responsible for all firmware upgrades including upgrades to endpoint firmware. The City shall be given the opportunity to inspect and approve the functioning system prior to the installation of any meters on customer sites.

6. Communications Network

Contractor shall design the communications network with 100% RF coverage and 100% redundancy for electric, and 99.9% RF coverage and 99.9% redundancy for water, for electric, and 100% RF coverage and 99.9% redundancy for water, utilizing overlapping base station coverage resulting in reliable two-way communications to all Available Meters and proposed non-metering devices located within the City's service territory as indicated on the Sensus propagation study attached in Contractor's proposal as APPENDIX B (for all electric and water accounts located within the City's service territory). The Contractor has performed an RF propagation study to confirm adequate network coverage and will supply any needed communication equipment at no cost to achieve the contractual KPIs. Applicable terms and agreements are listed in APPENDIX E – Network as a Service, Software as a Service and Spectrum Lease Agreement.

1. Encryption

All FlexNet network communications from the base stations to the head-end application shall be encrypted using AES-256 encryption.

7. Handheld Field Tools

Contractor shall provide City with all necessary RF field devices and handheld tools required to install, activate, and maintain the supplied meters. The field devices and tools supplied by Contractor will be able to collect meter data from endpoints in the field should the network go down.

8. Non-Metering Devices

Contractor shall supply Smart Gateway.

Head-end applications

Contractor shall provide the Sensus FlexNet Head End software suite (cloud-based Software as a Service (SaaS)) accessed securely through a standard internet browser. The FlexNet head-end shall support customizable dashboards and alert conditions and shall integrate into City's existing systems using either flat file transfers (CSV), web service API commands, and/or real-time access through MultiSpeak without any human intervention unless there is a change in the City's software not provided by Contractor. Contractor will facilitate discussions with the City and Sensus Professional Services to determine the best integration method as appropriate for the target interfaces.

Contractor shall provide the Sensus Analytics Enhanced Bundle of applications for meter data management and analytics support, including but not limited to:

a) Alert Manager (text and email notifications)
b) Network Command Suite (includes outage visualization)
c) Xylem Data Lake
d) Service Management
e) Pressure Profile (Optional for an extra fee)

Contractor shall provide the SpryPoint customer engagement web portal and smartphone apps supporting iOS or Android devices. SpryPoint shall support a single sign-on from the City's existing customer payment portal, BS&A, and vice versa such that logging on to either portal allows a single click to go to and be logged onto the other. SpryPoint shall also support billing history, active notifications for Outage/Restoration, and estimated projected billing amounts using information retrieved from the City's BS&A accounting system. Contractor shall be responsible for ensuring and managing the successful on-time delivery of the new SpryPoint Multispeak support feature required to support Outage/Restoration notifications. During the kick-off meeting, the City will determine whether to utilize the SpryPoint payment platform or choose to integrate with single sign-on with BS&A. The parties will agree on any changes in pricing resulting therefrom.

Contractor shall work with City on the potential incorporation of non-metering intelligent devices in support of Smart Utility functions integrated within the Sensus FlexNet head-end and supported by the Sensus Smart Gateway communication device (examples applications include use of level sensors, pressure sensors, acoustic leak detectors, and water quality).

9. Software as a Service

Contractor, working in conjunction with the manufacturer, Sensus shall provide the City with Software as a Service to host the head end system and any other current or future head-end applications and software integrations as further described in APPENDIX E – Network as a Service, Software as a Service and Spectrum Lease Agreement throughout the Managed Services term of the Contract, and any renewal.

10. Meter Demonstration Board

Contractor, working in conjunction with Sensus, shall provide the City with two meter demonstration boards/test fixtures (one water, one electric), which shall be suitable as a platform for system testing, in-depth training of the City personnel and City community events if desired.

Each fixture shall be able to be read by the deployed network and head-end system and provide a platform to give demonstrations of system capabilities in various venues such as City Council meetings or customer engagement "AMI day". The fixtures are not meant to be used for meter accuracy testing but shall support system testing of:

- New firmware releases prior to field installation
- Billing and other integrations prior to field rollout
- Testing of new third-party devices offered by Contractor and its sub-suppliers

The fixtures shall support the following general requirements:

- Fixtures shall consist of a portable, wheel mounted, frame capable of self-contained operation
- Fixtures shall have the ability to test each type of non-metering field device to be deployed as part of the project or was offered as an option
- The water test fixture shall:
    - Contain a water reservoir, pump, valves, piping, etc. capable of generating forward and reverse water flow though the meters under test. Configuration must allow testing of all meter functionality (reverse flow, empty pipe, etc.) included in supplier's proposal.
    - Have the ability to test multiple meters (3 minimum – 4+ preferred)
    - Support meter sizes of up to 1 inch. Larger sizes to be supported as can be reasonably designed and would provide added value.
- The electric test fixture shall:
    - Supply sufficient meter sockets to test each type of proposed electric meter
    - Be wired to support loss of phase testing for polyphase meters
    - Contain appropriate visual indicators to demonstrate applicable functions (i.e. meter connect/disconnect, demand response cutoff, etc.)

The fixtures shall contain:

- At least one of each type of field device to be deployed as part of the project.
- An LCM load control device.
- A Smart Gateway endpoint.

These devices shall be representative of the devices that will be installed in the field, and configured to the City's requirements, including nameplates.

11. Integration Services

Contractor shall provide the following system integrations working in conjunction with Sensus Professional Services. Contractor shall require that Sensus provide a lead resource(s) to support all system integration activities required by the project including but not limited to statement of work, design, development, FSAT testing, and acceptance. The City shall assist the integration efforts by ensuring integrating partners are contracted (for those that have integration responsibilities outside C&M or Sensus responsibilities) and enabled to perform their work as well as support any project escalations as required. Contractor and Sensus software integration fees are included in this Contract pricing. Any charges from third parties contracted directly by the City for integration services shall be paid by the City. It must be noted that all integrations must be completed and tested as a part of FSAT before and field deployment occurs. As noted previously, it is contractor's responsibility to ensure ongoing support of any integration is provided via NaaS/SaaS support. Any integration that ceases to function or has degraded performance resulting from a Sensus head end system or other Contractor software upgrade or patch is the responsibility of the Contractor to resolve.

It should be noted and understood that, while the pilot deployment of water meters is only to ensure functionality, all integration, test board, test plans, etc. must treat this project as preparing to fully mass deploy water meters in the future should the city later decide to do so outside this specific contract scope.

a. CIS & Billing

Contractor shall provide software integration services that will result in the automatic transfer of the vflex file transfer between the AMI system and the City's existing BS&A billing system, as approved by the City. Fully automatic transfer of billing data is not supported in this process. In all cases, the City's billing operations must continue to operate without disruption.

2. Customer Portal

Contractor will provide software integration services that will result in the automatic transfer of all pertinent data and notifications between AMI system and the SpryPoint Customer Portal system, as approved by the City.

3. Outage Management

Contractor shall provide outage/restoration notifications to the AMI head-end application as well the ability to provide text/e-mail notifications to City staff using the Sensus Alarm Message & Manager application Outage visualization will also be provided via the Network Command Suite, allowing outage and restoration indications to display on a map of the City without user intervention.

The Customer Portal shall have the capability to report outages, validate AMI meter outage information, and receive call-back notifications upon power restoration.

4. Work Order Management System (WOMS)

Contractor shall integrate their field installation WOMS (for both electric and water meter exchanges) with the City's billing system to allow for the automatic transfer of all pertinent meter exchange information in support for the City's billing operations. Any applicable fees charged by the City's CIS vendor for alteration of its records shall be the responsibility of the City.

5. GIS LAT/LON integration

Contractor shall collect GIS LAT/LON data for each meter install and include this data as part of the CIS or WOMS integrations. The integration design shall also support any installations done by the City not utilizing Contractor's field installation WOMS. The integration shall also support upload of meter LAT/LON data into the City's existing ESRI ArcGIS system.

All GIS LAT/LON data collected shall be compatible with the City's WindMil distribution modeling software.

12. Training

Contractor shall provide training to the City personnel that includes at least the following topics:

- Overview of the AMI product and head-end software
- System operations and troubleshooting which includes interaction between the endpoints and network devices, network devices and the AMI head end, and interaction between the AMI head-end and other system components such as Sensus Analytics, and customer portal.
- Identification, management, and resolution of events and alarms
- Usage of the BS&A billing system integration & billing cycles
- Meter Installation
- Meter Trouble Shooting
- Meter configuration
- Handheld usage
- Network components
- Installation and maintenance procedures
- Post-deployment maintenance of key field data such as meter LAT/LON by City

There will be no cap on the number of City personnel who can attend the training but standard sessions should accommodate up to 15 participants to ensure effective instruction and hands-on practice.

The City will provide the following equipment for training at City facilities:

- Projector or Similar Display Screen
- Wi-Fi / High Speed Internet
- Adequate seating for projected attendees
- Student computers for practical instruction, if applicable

Refresher training and training for new employees will be available online, on-demand for City employees on an ongoing basis as needed.

13. Meter Installation

a. General Provisions

Contractor's installation subcontractor (Bermex) shall provide meter installation services for electric services. Use of any other meter installation subcontractor requires approval from the City.

The City will supply a list of medical do not disconnect customers to Contractor. Contractor will manage meter installation in accordance with the requirements of these customers. The Installation subcontractor shall have all training and documentation needed to be able to execute safe, high-quality installations of all devices. All installation technicians shall go through extensive qualification training and testing before entering the field and will be subject to independent QA/QC checks conducted by the installation subcontractor and/or the City.

Contractor will supply all required field installation tools including handhelds. Contractor shall reseal all electric meters with seals and rings supplied by the City. Contractor and the City will develop a strategy to avoid billing interference during the installation process and manage the transition from current routes to AMI.

The City will provide Contractor with all required premise data to successfully perform the meter exchange initially and for data refreshes throughout the installation period on a mutually agreed basis. Specific data fields to be defined and tested as part of system integration acceptance prior to mass field deployment.
All required meter programming specifications will be established jointly by Contractor and the City prior to commencing the work.

Contractor shall support an early deployment phase prior to mass meter deployment whereby a small amount of meters (~100 meters) will be installed and will be monitored by the City to validate network coverage, system performance, functionality and processes for a limited to be defined duration as specified by the City. In the event, that meter product lead times exceed the timeframe needed to support the start of early deployment, Contractor shall ensure that the early deployment meters are prioritized and supplied to support the early deployment phase while inventory is being built up to support mass deployment. Contractor will work with the City on the cycle/route release and sequencing of installations to support the mass meter deployment.

Contractor shall collect LAT/LON location data at the point of the physical meter (with accuracy of up to 10 ft of the meter location) with a resolution of 6 digits. City will work with Contractor to determine the preferred method for collection of these location coordinates as part of the project implementation. Collection of suitable LAT/LON coordinates for each meter is considered an integral part of the definition of a successful meter installation for invoicing purposes.

Contractor shall collect all agreed data and photos as part of the installation process. All such data shall be available for the City's inspection via the subcontractor's WOMS and shall be easily searchable within the WOMS system. At the completion of the installation portion of the project, Contractor will maintain access to all installation related documentation (pictures, notes, etc.) and their WOMS system for a period of 3 months after the conclusion of the deployment. After that period, Contractor will provide all documentation (e.g.

pictures) appropriately tagged to allow for easy retrieval as required by the City. Contractor will then purge all City specific data including photos from its system and handhelds at the end of the installation warranty period. Contractor shall not purge these data without prior notification of and approval by City.

b. Background Checks and Drug Testing

Contractor shall perform a criminal background check, a driver's record check, a citizenship check and a drug test on all installation subcontractor employees, both before employment and randomly during deployment.

c. WOMS System

Installers shall be directed by Contractor using a mobile workforce order management system (WOMS) to manage the meter deployment. Contractor will facilitate a secure connection between the WOMS and the City's CIS system to ensure that these systems stay synchronized throughout the deployment process. The WOMS system shall also be used in supporting field processes such as meter inventory management, QA/QC, customer appointment, complaints, etc. The City shall be granted access to the WOMS throughout the field installation period to conduct necessary operations (records review, access reports, etc.)

Contractor shall use handhelds capable of scanning meter/module bar codes and the WOMS must include processes that ensure that the bar code of the installed meter/module is scanned post-installation such that the data export to the City's billing system is ensured to contain the correct meter to customer correlation.

d. Material Issuance to Installers

Contractor will pick, stage, and distribute inventory to its staff daily based on the equipment needs associated with work. All distributed inventory will be assigned to the respective staff in WOMS.

e. Quality Assurance of Field Activities

Contractor will provide a Senior Field Operations Manager and a Working Field Supervisor who will physically QA both completed work and Standard Operating Procedures (SOPs) in the field. They will QA SOPs in real time in addition to auditing completed work so that their management team can provide coaching if necessary and identify/correct negative trends as soon as possible. Physical QA checks will be conducted randomly across installers for at least 2% of all installations. In addition, the installation subcontractor will photo QA 100% of all required installation photographs that it captures in the field as part of its in-house QC program in order to validate the meter attributes before data is transferred to City's CIS.

f. Call Center

Contractor will provide a call center during the deployment period, to provide customer service, appointment scheduling for meter installations as required, managing and recording customer complaints and customer claims. The call center shall be responsible for scheduling all appointments inclusive of proactive call attempts to schedule appointments as part of the due diligence process (item "m" below) as well as reactive calls in response to customer response calls seeking appointments. After hours Call Center hours shall be from 5pm to 7pm (EST). Customers can schedule appointments via an internet portal 24 hours a day or leave a voice message and calls will be returned from 8am to 7pm Monday-Friday.

The call center will track and notify the City promptly of any customer complaints and issue resolutions. The Contractor will respond to and address customer complaints in a timely manner working with the City as necessary. Contractor must initiate resolution of any loss of service customer complaint arising out of installation services by Contractor within 30 minutes, including immediate notification to the City, and Contractor shall work continuously until resolved. Should the Contractor fail to initiate resolution of any loss of service customer complaint within 30 minutes, the City reserves the right to immediately begin work to restore service, and for all costs and expenses associated with restoring service to be paid for by the Contractor, or by the Contractor reimbursing the City for all such costs and expenses. Contractor shall address all other customer complaints arising out of installation services by Contractor within one hour. The call center will schedule an appointment with the customer to investigate any complaint or claim within three days. Contractor shall process and close all claims within two weeks (customer willing). Contractor shall investigate all customer complaints arising out of installation services. . Contractor will provide the City with a weekly written report of all open claims along with relevant customer call notes and will discuss open claims during a weekly project status meeting including all customer complaints and actions taken to resolve the complaints. If the investigation reveals that the complaint did not arise out of the installation services, the matter will be reported to the City for resolution.

All calls to and from the call center shall be recorded allowing the City to perform random audits of calls for compliance and quality control. Calls shall be easily identifiable by date/time and call center representative for ease of retrieval.

g. Return Material Authorization (RMA)

Contractor shall be responsible for RMA of product found to be defective during the relevant product's installation. The City shall be responsible for RMA of product that fails or has a suspected failure after successful installation and acceptance by the City. Contractor will provide adequate training to allow City staff to issue and manage RMA requests it generates. Contractor will follow the RMA procedures outlined in APPENDIX G – RMA Process and note inventory that has been designated as RMA in WOMS.

h. Due Diligence Process

Contractor will follow a mutually agreeable and documented due diligence process to ensure that accounts that are not exchanged upon the initial site visit (e.g. Can't Complete) are systematically processed to maximize installation success rate. The process will include:

- A minimum of 2 physical site visits leaving door hangers with contact information for scheduling
- A minimum of 3 proactive calls by the call center for appointment scheduling inclusive of 1 after hour call (6PM – 8PM local time) in the event that the customer has never responded to the door hanger solicitation.
- Proposed sequence of visits and calls and duration between events to be mutually agreed to during the deployment readiness planning work sessions

i. Return to Utility (RTU) Process

Contractor will follow a mutually agreeable and documented RTU process for remitting accounts to the City. The RTU account represents a final state whereby an account is returned to the City for action in response to a number of factors including safety concerns, completion of the due diligence process, or requested by the City for any reason. In all cases, the City will have the ability to approve acceptance of the account prior to assigning the RTU final state.

j. Utility Intervention Required (UIR) process

Contractor will notify the City in real time, and site anomalies will be photo documented in WOMS if the installer is unable to complete work due to any reason that requires utility intervention to resolve. UIR conditions will be discussed and representative values employed in WOMS reports as part of the deployment readiness preparations. Examples of UIRs include but are not limited to:

- An unsafe or abnormal operating condition is identified
- A permanent obstruction is present
- A customer refuses service
- Evidence of theft or tampering is present
- The installer finds that the work order is found-complete upon arrival or the supplied meter identification data is incorrect preventing the accurate identification of the account

Once the issue has been referred to the City, the City shall use its best efforts to resolve the UIR item. If the City intervenes and resolves the issue within 10 business days of the issue being referred to the City, Contractor will complete the work as planned and at no additional cost. If the City does not resolve the issue within 10 business days, Contractor will return the work to the Utility (RTU) for completion by the City.

k. Safety and Protective Equipment Requirements

Contractor shall only use installers that have completed a mandatory documented safety program. This includes OSHA required training, which shall include, at a minimum, electrical and arc flash hazards as well as safe driver training.

Major safety issues and all accidents will be reported to the City immediately along with a follow-up root cause analysis and measures taken to address the issue and prevent reoccurrence. Minor safety issues or accidents and/or near misses will be reported weekly during project status meetings. The City shall have the right to stand-down the project at no cost in the event of repeated safety violations or the presence of major safety issues. Reporting forms and processes will be mutually defined between the City and Contractor prior to starting any field installation work. The City reserves the right to issue a stand down at no cost due to excessive or significant safety violations.

Installers and any other Contractor field personnel will use the following personal protective equipment, signage, and ID:

- Electric Meter Installers: FR Shirt, FR High Viz Safety Vest, FR Trousers, Protective Work Boots, Hard Hat, Face Shield, Class 0 Insulated Gloves, and Leather Protectors.

- Vehicle Signage: Installation personnel shall drive vehicles that are clearly identifiable with specific signage that is reviewed and approved by the City.

- ID: Installers shall carry and display ID badges approved by the City and must be uniformly dressed.

l. Personnel Behavior and Right to Remove Personnel

Every project team member and installation personnel is expected to treat City staff and end customers with the upmost respect and care. The City shall have the right to deny access to City property to any team member or installer and request their removal from the project for anyone that does not meet this standard of care or for any other reason deemed detrimental to the project or the City's staff/customers.

m. Scrap Materials

All scrap materials shall be returned to the City for disposal processing. The City shall assume responsibility for the handling of batteries and obtaining any related permitting required for proper disposal. The Contractor shall be responsible for delivering disposal meters and materials to appropriate bins or packaging items using a mutually agreeable process to be defined as part of the deployment readiness planning activities.

n. Electric Meter Installation

Contractor shall ensure that electric AMI meters are initially readable from the head-end system post-installation before invoicing, and shall provide the City Supporting Documentation validating the installation was deemed successful as set forth herein. Contractor shall obtain before and after photos for all meters. Photos shall include clear views of meter register reading and serial number. All photos will be time stamped and geotagged.

The City will provide a list of bi-directional metered customers to the Contractor project manager. If bi-directional metering customers require a special meter configuration, the Contractor project manager shall ensure that Contractor provides meters that are enabled for bi-directional metering to these customers.

Contractor will not be responsible for claims of damage or inconvenience by utility customers caused by the necessity to disconnect power temporarily to install the new electric meter, or caused by the power being turned back on after installation, provided that Contractor has followed the agreed installation procedures including customer notification.

o. Water Meter Installation

City shall perform all water meter installations and meter retrofits for the proposed pilot. Contractor shall provide training to the City to properly install the meter, retrofit the meter, and activate the communication module including collection of LAT/LON coordinates and any required installation data.

Should the City decide to retain Contractor for a larger water meter deployment, an addendum will be prepared for this contract.

p. Non-Metering Network Device Installation

Contractor shall have a process to ensure any non-metering network device is communicating with the head-end system post-installation before invoicing. Appropriate installation photos and any supporting documentation shall be collected as mutually agreed prior to deployment

The City must approve the network design and planned equipment locations, mounting details and power requirements prior to installation. All work shall be performed by Contractor. The City will provide on-site power and will provide Contractor with access to the sites as needed to perform the work.
Contractor will program and configure the Base Stations as a part of their installation process.

14. Supporting Documentation

Contractor will provide a Visio system diagram of the plan, from head-end system down to field devices. An "as-built" update of this Visio diagram will be provided prior to project closure.

A full complement of operator’s manuals, installation instructions, and related materials will be furnished as part of the training.

ARTICLE IV – SYSTEM ACCEPTANCE & PERFORMANCE

System Verification & Acceptance

1. **Functional System Acceptance Testing (FSAT)**

   The Contractor will submit an FSAT test plan to allow the City to verify the functionality defined in the project specification inclusive of integrations to the City systems as specified. The City shall have the right to review this plan and require changes before approving it for use.

   If any special test equipment is needed to exercise a system function, Contractor shall loan such devices to the City for the test duration.

   Contractor will provide sufficient electric and water meters (of each meter form, size which the City will order) to support FSAT testing on the system test fixtures. Contractor shall also expedite electric meters required to support the limited electric field deployment immediately after FSAT acceptance should meter lead times exceed six months. Contractor will also make best efforts to have pilot water meters available for installation by the City shortly after FSAT acceptance.

   This test will cover, at a minimum, the following items:

   - Communication Network
   - Residential and commercial water and electricity meters
   - Non-metering devices
   - Daily read schedule, including interval data and demand reads
   - On-request reads and connect/disconnect operations
   - Appropriate alarms/event indications for both electric and water meters (e.g. tilt/tamper, reverse flow, leak etc.)
   - Process of updating the CIS with work order files from installer WOMS
   - All integrations including:
     - Billing
     - Customer Portal
     - WOMS
     - GIS LAT/LON

   The Meter Demonstration Board will be used to facilitate this test supplemented with a very small number of select “friendly” field installs if desired by the City. FSAT completion and acceptance must occur and be signed off by the City prior to the start of field deployment. Any exceptions or conditional passes must be approved by the City.

   It is important to note that FSAT and SAT are separate tests with FSAT occurring prior to any field deployment and SAT occurring at 95% deployment completion.

b) System Acceptance Test (SAT)

Contractor will submit a final SAT plan to allow the City to verify the functionality defined in the project specification inclusive of integrations to the City systems as specified with the majority of field meters deployed.

SAT testing will be conducted when 95% or more of meters and field devices are deployed and shall confirm operational readiness of the system and resolution of any outstanding issues from the initial testing. The City shall have the right to review this plan and require changes before approving it for use.

It is important to note that FSAT and SAT are separate tests with FSAT occurring prior to any field deployment and SAT occurring at 95% deployment completion.

2. Ongoing System Performance

The FlexNet head-end system will provide a number of monitoring and real time performance screens that can be tracked by the City to verify the system's performance.

a) System Availability

Throughout the Managed Services term of the Contract, and any renewal, Contractor shall require Sensus to ensure 99% or higher availability (uptime) for the Software as a Service, as described in **APPENDIX E – Network as a Service, Software as a Service and Spectrum Lease Agreement.**
In the event that RF interference affecting system performance occurs, Contractor will require Sensus to determine the source of the interference and resolve it pursuant to the spectrum manager lease.

b) Read Performance

Throughout the Managed Services term of the Contract, and any renewal, Contractor shall require Sensus to ensure the FlexNet network will provide 100% coverage for all of the City's available meters within the territory covered by the propagation study, with 100% redundancy coverage for all available electric meters, and 99.9% redundancy for all water meters, ensuring a 99% or greater daily register and interval read success for electric and water by 6 AM next day. Missing reads from available meters shall automatically be collected by a retry strategy that ensures that 99.5% of register and load profile data for any given day are read within 3 days. If the City's service territory expands, coverage re-evaluation and mutually agreed upon re-design and service costs will apply.

c) On-Demand Read Operations

On-demand reads from the head-end system for any metered or status quantity from any electric meter shall succeed in 60 seconds or less for 97% of read attempts.

For water meters, these on-demand reads shall succeed in 90 seconds or less for 98% of read attempts for an individual meter. Small batches of on-demand reads (<240 meters) shall succeed in 1 minute or less. Large batches of on-demand reads (>240 meters) shall be available in 4 hours.

In all cases, these reads will provide a fresh reading from the meter, not old, stored data in a communication device or database, and only apply to Available Meters.

d) Connect/Disconnect Operations

Electric meter disconnect/reconnect requests shall occur after initiation with confirmation received within 1 minute with the majority confirming in 30 seconds for 99% of disconnect requests and within 60 seconds of reconnect requests. Water disconnect/reconnect requests shall occur after initiation with confirmation received no later than 2 minutes with the majority of confirmations occurring within 1 minute for 98% of requests.

Each disconnect action shall also return the current register read.

e) Outage Reporting

Electric meter outages shall be reported to the head-end system and viewable on the head end application and NetMetrics UI which allows users to visualize outages in near real-time after permanent outage determination for 99% of occurrences for individual meter outages and outages affecting 200 meters or less. Outages affecting more than 200 meters up to the entire electric meter population shall be reported to the head-end and NetMetrics UI within 5 minutes for 99% of affected meters. Text messages and emails sent as part of the Alarm Message & Manager RNI Add-on application can be initiated within 1 minute of the head-end system receiving the related notification. This notification should contain all outages present at the time the message is sent. Sending a text and/or email per outage is not acceptable. All power outage and restoration events are timestamped and logged in the head end system, which supports real-time outage and restoration message integration with the addition of an OMS Outage Management system.

This functionality will be fully tested during FSAT and response and notification times will be documented in the test report and acceptance of that performance will require mutual concurrence.

f) Firmware Updates

The Contractor will be responsible for all firmware updates throughout the life of the system as part of the contracted NaaS/SaaS services. All firmware upgrades will be conducted as needed to maintain the AMI system while allowing for normal operation to occur concurrently during updates.

ARTICLE V – CONTRACTOR RESPONSIBILITIES

1) Supervision and Superintendence

The Contractor shall supervise, inspect, and direct the Work competently and efficiently, devoting such attention thereto and applying such skills and expertise as may be necessary to perform the Work in accordance with the Contract Documents**.**

2) Services, Materials, and Equipment

Unless otherwise specified in the Contract Documents, the Contractor shall provide and assume full responsibility for all services, materials, equipment, labor, transportation, construction equipment and machinery, tools, appliances, fuel, light, heat, telephone, water, sanitary facilities, temporary facilities, and all other facilities and incidentals necessary for the performance, testing, start-up, and completion of the Work, except the City will be responsible for providing electric power to the sites where any infrastructure is installed.

All materials and equipment incorporated into the Work shall be as specified or, if not specified, shall be of good quality and new, except as otherwise provided in the Contract Documents.

All materials and equipment shall be stored, applied, installed, connected, erected, protected, used, cleaned, and conditioned in accordance with instructions of the applicable supplier, except as otherwise may be provided in the Contract Documents.

3) Progress Schedule

The parties shall adhere to the progress schedule established in accordance with APPENDIX C – INITIAL PROJECT SCHEDULE as it may be adjusted from time to time as provided below.

4) Concerning Subcontractors, Suppliers, and Others

The Contractor shall not employ any subcontractor, supplier, or other individual or entity (except those acceptable to City as indicated in this Contract), whether initially or as a replacement, against whom City may have reasonable objection.

The Contractor shall be fully responsible to City for all acts and omissions of the subcontractors, suppliers, and other individuals or entities performing or furnishing any of the Work just as the Contractor is responsible for the Contractor's own acts and omissions. Nothing in the Contract Documents:

- shall create for the benefit of any such subcontractor, supplier, or other individual or entity any contractual relationship between City or its Owner's Engineer and any such subcontractor, supplier or other individual or entity; nor

- shall create any obligation on the part of City or its Owner's Engineer to pay or to see to the payment of any moneys due any such subcontractor, supplier, or other individual or entity except as may otherwise be required by laws and regulations.

The Contractor shall be solely responsible for scheduling and coordinating the Work of subcontractors, suppliers, and other individuals or entities performing or furnishing any of the Work under a direct or indirect contract with the Contractor.

5) Infringement Indemnity

Contractor shall indemnify and hold harmless the City from and against any judgment by a court of competent jurisdiction or settlement reached from any litigation instituted against the City in the United States by a third party which alleges that the FlexNet System provided hereunder infringes upon the patents or copyrights of such third party, provided that Contractor shall have the right to select counsel in such proceedings and control such proceedings. Notwithstanding the foregoing, Contractor shall have no liability under this indemnity unless the City cooperates with and assists Contractor in any such proceedings and gives Contractor written notice of any claim hereunder within fourteen (14) days of receiving it. Further, Contractor shall have no liability hereunder if such claim is related to; (i) any change, modification or alteration made to the FlexNet System by the City or a third party, (ii) use of the FlexNet System in combination with any goods or services not provided by Contractor hereunder, (iii) the City failure to use the most recent version of the Software or to otherwise take any corrective action as reasonably directed by Contractor , (iv) compliance by Contractor with any designs, specifications or instructions provided by the City or compliance by Contractor with an industry standard, or (v) any use of the FlexNet System other than for the Permitted Use. In the event the FlexNet System is adjudicated to infringe a patent or copyright of a third party and its use is enjoined, or, if in the reasonable opinion of Contractor , the FlexNet System is likely to become the subject of an infringement claim, Contractor , at its sole discretion and expense, may; (i) procure for the City the right to continue using the FlexNet System or (ii) modify or replace the FlexNet System so that it becomes non-infringing.

6) Permits

Contractor shall obtain and pay for all construction permits and licenses. The City shall assist Contractor, when necessary, in obtaining such permits and licenses. The City will identify any local known permits or licenses Contractor will be required to obtain.

7) Laws and Regulations

Contractor shall give all notices required by and shall comply with all state, federal, and local laws, regulations, and ordinances applicable to the performance of the Work. Except where otherwise expressly required by applicable laws, regulations or ordinances, neither the City nor Owner’s Engineer shall be responsible for monitoring Contractor’s compliance with any laws or regulations.

8) Record Documents

The Contractor shall maintain in a safe place one record copy of all drawings, specifications, addenda, Change Orders, field orders, and written interpretations and clarifications in good order and annotated to show changes made during construction. These record documents will be available to City for reference. Upon completion of the Work, these record documents will be delivered to City.

9) Safety and Protection

The Contractor shall be solely responsible for initiating, maintaining and supervising all safety precautions and programs in connection with the Work. Such responsibility does not relieve subcontractors of their responsibility for the safety of persons or property in the performance of their work, nor for compliance with applicable safety laws and regulations. The Contractor shall take all necessary precautions for the safety of, and shall provide the necessary protection to prevent damage, injury or loss to:

- all persons who may be affected by the Work;
- all the Work and materials and equipment to be incorporated therein; and
- other property, including trees, shrubs, lawns, walks, pavements, roadways, structures, utilities, and Underground Facilities not designated for removal, relocation, or replacement in the course of construction.

The Contractor shall comply with all applicable laws and regulations relating to the safety of persons or property, or to the protection of persons or property from damage, injury, or loss; and shall erect and maintain all necessary safeguards for such safety and protection. The Contractor shall notify owners of adjacent property and of underground facilities and other utility owners when prosecution of the Work may affect them, and shall cooperate with them in the protection, removal, relocation, and replacement of their property.

The Contractor shall comply with the applicable requirements of City's safety programs, if any. The City will disclose any applicable safety programs in advance of work to Contractor.

The Contractor shall inform City and Owner's Engineer of the specific requirements of the Contractor's safety program with which City's and Owner's Engineer's employees and representatives must comply while at the Site.

All damage, injury, or loss to any property referred to in this Contract caused, directly or indirectly, in whole or in part, by the Contractor, any subcontractor, supplier, or any other individual or entity directly or indirectly employed by any of them to perform any of the Work, or anyone for whose acts any of them may be liable, shall be remedied by the Contractor (except to the extent damage or loss attributable to the fault of drawings or specifications or caused by the acts or omissions of any End User, the City, or anyone employed by any of them, or anyone for whose acts any of them may be liable, or other third parties not under the direction or control of Contractor).

10) Safety Representative

The Contractor shall designate a qualified and experienced safety representative whose duties and responsibilities shall be the prevention of accidents and the maintaining and supervising of safety precautions and programs.

11) Hazard Communication Programs

The Contractor shall be responsible for coordinating any exchange of material safety data sheets or other hazard communication information required to be made available to or exchanged between or among employers in accordance with laws or regulations.

12) Emergencies

In emergencies affecting the safety or protection of persons or the Work or property at the Site or adjacent thereto, the Contractor is obligated to act to prevent threatened damage, injury, or loss. The Contractor shall give the City and Owner's Engineer prompt written notice if the Contractor believes that any significant changes in the Work or variations from the Contract Documents have been caused thereby or are required as a result thereof. If the City or Owner's Engineer determines that a change in the Contract Documents is required because of the action taken by the Contractor in response to such an emergency, a Work Change Directive or Change Order will be issued.

13) Continuing the Work

The Contractor shall carry on the Work and adhere to the progress schedule during all disputes or disagreements with City. No Work shall be delayed or postponed pending resolution of any disputes or disagreements, except as permitted by this Contract or as City and the Contractor may otherwise agree in writing.

14) The Contractor's General Warranty Regarding Performance of the Work

The Contractor warrants that it will perform all Work in a good and workmanlike manner. The extent of the warranty to be provided by Contractor hereunder is set forth in the City of Mount Dora Warranty attached hereto in EXHIBIT F.

15) Indemnification

Contractor shall, to the fullest extent permitted by law, indemnify, defend, and hold harmless the City and all of its officers and employees from third-party claims, suits, liability, loss, expense, or damages, including reasonable attorneys' fees and costs, to the extent caused by the negligent acts or omissions by, the willful misconduct of, or the failure to comply with applicable laws by Contractor or those for whom the Contractor is responsible in the performance of this Contract. The indemnification required under this Contract will not be limited in any way by the limits, terms, or conditions of any insurance policy.

Contractor, for itself and on behalf of its agents, employees, subcontractors, and subconsultants, shall to the fullest extent permitted by law indemnify, and hold the City and all of its officers and employees harmless from and against any and all losses, expenses, claims, demands, and causes of action, including reasonable attorneys' fees and costs, asserted against the Council by any person (including without limitation, Contractor's employees, Contractor's subcontractors and subconsultants, and employees of such subcontractors and subconsultants, for injury to persons, including death, or for loss of or damage to property, to the extent caused by the negligent acts or omissions of Contractor or any entity for which it is responsible in performing the Work, or the violation by Contractor or any entity for which it is responsible of any law, regulation, ordinance, code or standard applicable

to the Work. The indemnification required under this Contract shall not be limited in any way by the limits, terms, or conditions of any insurance policy.

This Indemnification provision shall survive the completion, expiration or termination of this Contract.

16) Jessica Lunsford Act (Section 1012.32, Florida Statutes)

Background screening requirements for certain non-instructional school district employees and contractors.—(1) Except as provided in s. 1012.467 or s. 1012.468, non-instructional school district employees or contractual personnel who are permitted access on school grounds when students are present, who have direct contact with students or who have access to or control of school funds must meet level 2 screening requirements as described in s. 1012.32. Contractual personnel shall include any contractor, individual, or entity under contract with a school or the school board. (2) Every 5 years following employment or entry into a contract in a capacity described in subsection (1), each person who is so employed or under contract with the school district must meet level 2 screening requirements as described in s. 1012.32, at which time the school district shall request the Department of Law Enforcement to forward the fingerprints to the Federal Bureau of Investigation for the level 2 screening. If, for any reason following employment or entry into a contract in a capacity described in subsection (1), the fingerprints of a person who is so employed or under contract with the school district are not retained by the Department of Law Enforcement under s. 1012.32(3)(a) and (b), the person must file a complete set of fingerprints with the district school superintendent of the employing or contracting school district. Upon submission of fingerprints for this purpose, the school district shall request the Department of Law Enforcement to forward the fingerprints to the Federal Bureau of Investigation for the level 2 screening, and the fingerprints shall be retained by the Department of Law Enforcement under s. 1012.32(3)(a) and (b). The cost of the state and federal criminal history check required by level 2 screening may be borne by the district school board, the contractor, or the person fingerprinted. Under penalty of perjury, each person who is employed or under contract in a capacity described in subsection (1) must agree to inform his or her employer or the party with whom he or she is under contract within 48 hours if convicted of any disqualifying offense while he or she is employed or under contract in that capacity.(3) If it is found that a person who is employed or under contract in a capacity described in subsection (1) does not meet the level 2 requirements, the person shall be immediately suspended from working in that capacity and shall remain suspended until final resolution of any appeals.

17) E-Verify Requirements

Effective January 1, 2021, public and private employers, contractors, and subcontractors must require registration with, and use of the E-Verify system in order to verify the work authorization status of all newly hired employees. Contractor acknowledges and agrees to utilize the U.S. Department of Homeland Security's E-Verify System to verify the employment eligibility of:

(1) All persons employed by Contractor to perform employment duties within the State of Florida during the term of the Contract; and

(2) All persons (including subcontractors/subvendors/subconsultants) assigned by Contractor to perform work pursuant to this Contract with the City. Contractor acknowledges and agrees that the use of the U.S. Department of Homeland Security's E-Verify System during the term of this Contract is a condition of the Contract with the City.

By entering this Contract with the City, Contractor becomes obligated to comply with the provisions of Section 448.095, Florida Statutes, "Employment Eligibility." This includes, but is not limited to, use of the E-Verify System to verify the work authorization status of all newly hired employees, and requiring all subcontractors to provide an affidavit to Contractor attesting that the subcontractor does not employ, contract with, or subcontract with, an unauthorized alien. Contractor agrees to maintain a copy of such affidavit for the duration of this Contract. Failure to comply with this section will result in the termination of this Contract as provided in Section 448.095, Florida Statutes, and Contractor may not be awarded a public contract for at least one (1) year after the date on which the Contract was terminated. Contractor will also be liable for any additional costs to the City incurred as a result of the termination of this Contract in accordance with this section.

ARTICLE VI – CITY'S REPRESENTATIVE (OWNER'S ENGINEER) DURING CONSTRUCTION

CITY'S REPRESENTATIVE

The City will engage an Owner's Engineer, who is Quanta Technology, to act on their behalf on technical matters during the construction period. The City's Owner's Engineer shall also serve as the City's project manager.

a) **Visits to Properties**

The City's Owner's Engineer will make visits to the properties at intervals appropriate to the various stages of construction as the Owner's Engineer deems necessary in order to observe as an experienced and qualified design professional the progress that has been made and the quality of the various aspects of the Contractor's executed Work. Based on information obtained during such visits and observations, the Owner's Engineer, for the benefit of City, will determine, in general, if the Work is proceeding in accordance with the Contract Documents. The Owner's Engineer will not be required to make exhaustive or continuous inspections to check the quality or quantity of the Work. Owner's Engineer's efforts will be directed toward providing for City a greater degree of confidence that the completed Work will conform generally to the Contract Documents. On the basis of such visits and observations, the Owner's Engineer will keep City informed of the progress of the Work and will endeavor to guard City against defective Work.

b) **Rejecting Defective Work**

The Owner's Engineer will have authority to reject Work which they believe to be defective, or that they believe will not produce a completed project that conforms to the Contract Documents or that will prejudice the integrity of the design concept of the completed Project as a functioning whole as indicated by the Contract Documents. The Owner's Engineer will also have authority to require special inspection or testing of the Work, whether or not the Work is fabricated, installed, or completed.

ARTICLE VII – PAYMENTS TO THE CONTRACTOR

Delivery and Installation Project payments are governed by this article. Managed Services payments are governed by passing the FSAT as set forth elsewhere in this Contract. Notwithstanding anything to the contrary herein, invoicing and payment terms are set forth in APPENDIX D - Advanced Metering Infrastructure (AMI) System Pricing Sheet.

a) Supporting Documentation for Invoice Validation: Contractor shall submit the following documentation to support each invoice:

a. Contractor shall submit supporting documentation validating the installation was deemed successful. including a report from the head-end system listing each meter (ID) that is being invoiced, communication module (ID), site address, last reading date, electric meter form, electric meter class, water meter size, LAT/LON coordinates. Successful installations are deemed those that have successfully read within the last 5 days (for the purposes of invoicing), and have valid LAT/LON coordinates in accordance to system requirements.

b. Contractor will provide lien waivers from Contractor and its subcontractors within 30 days after each payment from the City. For clarity, manufacturers are not subcontractors.

c. Prior to final payment for the Delivery and Installation Project, Contractor will provide an affidavit stating (a) the work was completed in accordance with the Contract; (b) that all previous progress payments received on account of the work performed have been applied on account to discharge Contractor's legitimate obligations associated with prior invoices; ; and (c) that Contractor has provided City all product warranties, operating manuals, instruction manuals and other record documents customarily required for AMI systems.

b) Payment Becomes Due:

a) Thirty days after presentation of the invoice to the City, the amount will (subject to the provisions of this article) become due, and when due will be paid by the City to the Contractor.

c) Reduction in Payment:

a) The City may refuse to make payment of the full amount because:

a. claims have been made against the City on account of the Contractor's performance or furnishing of the Work;

b. liens have been filed in connection with the Work, except where the Contractor has delivered a specific bond satisfactory to the City to secure the satisfaction and discharge of such liens;

c. there are other items entitling the City to a set off against the amount recommended; or

d. the City has issued a notice of breach to the Contractor and the Contractor has not substantially commenced efforts to cure the breach within 15 days of the notice and thereafter diligently pursued correction.

b) If the City refuses to make payment of the full amount, the City will give the Contractor immediate written notice (with a copy to the Owner's Engineer) stating the reasons for such action and promptly pay the Contractor any amount remaining after deduction of the amount so withheld. The City shall promptly pay the Contractor the amount so withheld, or any adjustment thereto agreed to by the City and the Contractor, when the Contractor remedies the reasons for such action.

d) **Project Milestone Payment Schedule**

During the contract period APPENDIX D – PRICING AND PAYMENT SCHEDULE shall be used for all City responsible charges.

The Contractor shall not be entitled to an adjustment in contract price or contract times for delays within the control of the Contractor. Delays attributable to and within the control of a subcontractor or supplier shall be deemed to be delays within the control of the Contractor.

a. Consent to Use of City Data. City hereby irrevocably grants to the Contractor a royalty-free, non-exclusive, irrevocable right and license to access, store, and use such City Data and any other data or information provided to the Contractor, to (1) provide the Service; (2) analyze and improve the Service; (3) analyze and improve any Contractor or affiliate equipment, software, or service; or (4) for any other internal use. As used herein, "Service" means the Contractor's obligations under this Contract.

b. All City data will be treated as confidential by the Contractor and will not be released to any third party unless required by law. Any such release must be approved by the City prior to any release.

c. Contractor to provide all WOMS data at end of project if not stated elsewhere, or throughout the Delivery and Installation Project in a searchable format. Contractor will provide the City with access to the WOMS system throughout the Delivery and Installation Project.

ARTICLE VIII – CHANGES IN THE WORK; CLAIMS

1) Unauthorized Changes in the Work

a) Contractor shall not be entitled to an increase in the contract price or an extension of the contract times with respect to any work performed that is not required by the Contract Documents as amended, modified, or supplemented, except in the case of force majeure, an emergency, or in the case of uncovering a change in assumptions related to the Work.

b) In the event, however, a change to the Work becomes necessary resulting from conditions that are clearly unforeseen and that could not have been discovered, or that are the result of force majeure or an emergency, the costs for adjusting the Work in response to such unforeseen conditions shall be addressed as stated herein.

2) Authorized Changes in the Work and Change Orders

a) The Engineer may issue to the Contractor a written Field Order to authorize minor changes to the Work having no impact on Contract Price or Contract Time. If the Contractor anticipates that the Field Order work will impact the Contract Price or Contract Time the Contractor should immediately notify the Engineer.

b) In the event of an emergency endangering life or property where it is appropriate for the Contractor to take action, the Contractor shall undertake such actions to preserve life and property. The City and the Contractor will determine after emergency is concluded, the extent of out-of-scope work performed by the Contractor, and the City will issue a Change Order or amend the Contract for such work, if any and as necessary.

c) Without invalidating the Contract and without notice to any surety, City may order additions, deletions, or revisions in the Work by a Change Order. Upon both parties signing any such Change Order, Contractor shall promptly proceed with the Work, which will be performed under the applicable conditions of the Contract.

d) The City will determine the value of work covered by a change order using one of the following methods:

1. Where the work is covered by established unit prices contained in the contract, the unit price, if the City agrees that this is a fair and reasonable price; otherwise, a negotiated price will be applied to the quantity of work at the discretion of the City;

2. By mutual acceptance of lump sum price;

3. By actual cost and a mutually acceptable fixed amount for overhead and profit; or

4. Where Bid Price was based on estimated quantities, prior to making final payment, the City will determine actual quantities using sampling, surveying and other industry recognized means and prepare a Change Order adjusting the price to reflect actual volumes.
5. If Contractor is unable to agree on the amount or extent, if any, of an adjustment to the Contract price or Contract times, or both, resulting from the Change Order, Contractor may file a Notice of Claim as provided in the Contract.

e) All Work defined on Field Orders, Work Change Directives and Change Orders shall be subject to the conditions of the Contract, unless specifically noted on the Field Order Form, Work Change Directive Form, or Change Order.

ARTICLE IX -- CHANGE OF CONTRACT PRICE; CHANGE OF CONTRACT TIMES

1) Change of Contract Price

a) Contract prices may only be changed by a Change Order. Any Claim for an adjustment in a contract price shall be based on written notice submitted by the party making the Claim.

b) The value of any Work covered by a Change Order or of any Claim for an adjustment in contract price will be determined as set forth in Article VIII, Section 2(d) above.

2) Change of Contract Times

a) The contract times may only be changed by a Change Order. Any Claim for an adjustment in the contract times shall be based on written notice submitted by the party making the Claim.

3) Delays

a) If the City or other contractors performing other work for the City , or anyone for whom the City is responsible, delays, disrupts, or interferes with the performance or progress of the Work, then Contractor shall be entitled to an equitable adjustment in the contract price or the contract times, or both,

b) If Contractor is delayed in the performance or progress of the Work by Force Majeure, then Contractor shall be entitled to an equitable adjustment in contract times, contract price, or both. Such adjustments shall be Contractor’s sole and exclusive remedy for the delays described in this subsection.

c) Contractor shall not be entitled to an adjustment in contract price or contract times for delays within its control. Delays attributable to and within the control of a subcontractor or supplier shall be deemed to be delays within the control of Contractor.

ARTICLE X - SUSPENSION OF WORK AND TERMINATION

1) The City May Suspend Work

a) At any time and without cause, the City may suspend the Work or any portion thereof for a period of not more than 90 consecutive days by providing Contractor notice in writing, which written notice will fix the date on which Work will be resumed. Contractor shall resume the Work on the date so fixed. Contractor shall be granted an adjustment in the contract price or an extension of the contract times, or both, directly attributable to any such suspension. Contractor will submit a claim for any increase in price resulting from the suspension, but Contractor will automatically be granted an extension of time equivalent to the suspension without the need to submit a claim. No adjustment in the contract price shall be granted where the suspension of Work is caused by Contractor's negligence, or the negligence of any of its subcontractors, or where the suspension is caused by Contractor's failure to perform, or the failure to perform by any of Contractor's subcontractors.

2) The City May Terminate for Cause

a) The City may provide Contractor written notice to discontinue all Work upon the occurrence of any of the following events, which constitute an Event of Default justifying termination for cause:

1. Contractor assigns the Work without prior written permission;

2. Any petition is filed or any proceeding is commenced by or against Contractor for relief under any bankruptcy or insolvency laws;

3. A receiver is appointed for the Contractor's properties or Contractor commits any act of insolvency (however evidenced);

4. Contractor makes an assignment for the benefit of creditors;

5. Contractor suspends the operation of a substantial portion of its business that directly impacts its performance under this Contract;

6. Except when arising from City's failure to pay Contractor for Contractor's undisputed Work as specified herein, if Contractor suspends the whole or any part of the Work to the extent that it impacts its ability to meet the Work schedule, or Contractor abandons the whole or any part of the Work;

7. Contractor at any time, violates any of the material conditions or provisions of the Contract Documents, or substantially fails to perform as specified in the Contract Documents, or is not substantially complying with the Contract Documents and Contractor fails to substantially commence efforts to cure within 10 days of notice from the City and thereafter fails to diligently pursue correction;

8. Contractor attempts to willfully impose upon the City items or workmanship that are defective or of unacceptable quality;

9. Contractor breaches any of the representations or warranties (excluding product warranties) contained herein;

10. Contractor is determined, in the City's sole opinion, to have misrepresented the utilization of funds or misappropriated property belonging to the City; or

b) If, within twenty (20) days after service of such notice of an Event of Default upon Contractor, an arrangement satisfactory to the City has not been made by Contractor for continuance of the Work, the City may declare Contractor in default by written notice to the Contractor and the surety.

c) Once Contractor is declared in default, without further notice to Contractor, the City may terminate the Contract and shall have the power to complete the Work herein described as it may determine. In such a case, the City shall have the right to take possession of and use any of the materials, tools, equipment, supplies and property of any kind provided by Contractor for the purpose of this Work. However, the City may not take possession of the RF Field Equipment provided by Contractor.

d) The City will charge the expense of completing the Work to Contractor and will deduct such expenses from monies due, or which at any time thereafter may become due, to Contractor. If such expenses are more than the sum that would otherwise have been payable under the Contract, then Contractor shall pay the amount of such excess to the City upon notice of the expenses from the City. The City will, however, make reasonable efforts to mitigate the excess costs of completing the Work.

e) This provision shall in no way limit the City's right to all remedies for nonperformance provided under law or in equity, except as specifically set forth herein. In the event of termination for nonperformance, Contractor shall immediately surrender all Work records to the City. In such a case, the City may offset any money owed to Contractor against any liabilities resulting from Contractor’s nonperformance.

f) The City shall have no liability to Contractor for termination costs arising out of the Contract, or any of Contractor’s subcontracts, as a result of termination for default.

3) Contractor May Stop Work or Terminate

a) If, through no act or fault of Contractor, (i) the Work is suspended for more than 90 consecutive days by the City or under an order of court or other public authority, or (ii) the City fails to act on any Application for Payment within 60 days after it is submitted, or (iii) the City fails for 60 days to pay Contractor any sum finally determined to be due, then Contractor may, upon 10 days written notice to the City and the City’s Engineer, and provided the City does not remedy such suspension or failure within that time, terminate the Contract and recover from the City the payment at issue.

b) In lieu of terminating the Contract and without prejudice to any other right or remedy, if the City has failed to act on an Application for Payment within 60 days after it is submitted, or the City has failed for 60 days to pay Contractor any sum finally determined to be due, Contractor may, 10 days after written notice to the City and the City’s Engineer, stop the Work until payment is made of all such amounts due Contractor, including interest thereon. The provisions of this section are not intended to preclude Contractor from making a Claim as provided in this Contract for an adjustment in contract price or contract times or otherwise for expenses or damage directly attributable to Contractor’s stopping the Work as permitted by this section.

ARTICLE XI - MISCELLANEOUS

1) Giving Notice

1. Whenever any provision of the Contract Documents requires the giving of written notice, it will be deemed to have been validly given if delivered at or sent by registered or certified mail, postage prepaid, or by recognized national carrier with evidence of delivery, to the addresses set forth in the Notice section herein, which address may be modified in writing by either party.

2) Computation of Times

1. When any period of time is referred to in the Contract Documents by days, it will be computed to exclude the first and include the last day of such period. If the last day of any such period falls on a Saturday or Sunday or on a day made a legal holiday by the law of the applicable jurisdiction, such day will be omitted from the computation.

3) Cumulative Remedies

1. Except as otherwise expressly provided in this Contract, the duties and obligations imposed by this Contract and the rights and remedies available hereunder to the parties hereto are in addition to and are not to be construed in any way as a limitation of, any rights and remedies available to any or all of them which are otherwise imposed or available by laws or regulations, by special warranty or guarantee, or by other provisions of the Contract Documents. The provisions herein will be as effective as if repeated specifically in the Contract Documents in connection with each particular duty, obligation, right, and remedy to which they apply.

4) Survival of Obligations

1. All representations, indemnifications, warranties, and guarantees made in, required by, or given in accordance with the Contract Documents, as well as all continuing obligations indicated in the Contract Documents, will survive final payment, completion, and acceptance of the Work or termination or completion of the Contract or termination of the services of Contractor.

5) Controlling Law

1. This Contract, and the rights and duties of the parties arising from or relating to this Contract or its subject matter, shall be construed in accordance with the laws of the State of Florida and the ordinances of the City of Mount Dora without regard to its conflicts of provisions.

6) Headings

1. Article and section headings are inserted for convenience only and do not constitute parts of the agreement.

7) Limitation of Liability

1. The aggregate liability of each party to this Contract, in any and all causes of action arising under, out of or in relation to this Contract, its negotiation, performance, breach or termination (collectively “Causes of Action”), shall not exceed the amount of this Contract, as may be amended by written, fully executed change orders. This is so whether the Causes of Action are in tort, including, without limitation, negligence or strict liability, in contract, under statute or otherwise. As separate and independent limitations on liability, both the City’s

and Contractor's liability shall be limited to direct damages. The City and Contractor shall not be liable for any indirect, incidental, special, or consequential damages.

8) Intellectual Property

1. Software and Materials. No Intellectual Property is assigned to the City hereunder. Excluding the City Data, Contractor shall own or continue to own all right, title, and interest in and to the Intellectual Property associated with the Software and related documentation, including any derivations and/or derivative works (the "Contractor IP"). To the extent, if any, that any ownership interest in and to such Contractor IP does not automatically vest in Contractor by virtue of this Contract or otherwise, and instead vests in the City, the City agrees to grant and assign and hereby does grant and assign to Contractor all right, title, and interest the City may have in and to such Contractor IP. The City agrees not to reverse engineer any Contractor Products purchased or provided hereunder.

    1. The City Data. Notwithstanding the prior section, as between the City and Contractor, the City remains the owner of all right, title or interest in or to any City Data. The "City Data" means solely usage data collected by the Field Devices. To avoid doubt, The City Data does not include non-End User usage data collected by the Field Devices, Software, or FlexNet System, such as network and equipment status information or the like.

    2. Consent to Use of the City Data. The City hereby irrevocably grants to Contractor a royalty-free, non-exclusive, irrevocable right and license to access, store, and use such the City Data and any other data or information provided to Contractor, to (1) provide the Service; (2) analyze and improve the Service; (3) analyze and improve any Contractor or affiliate equipment, software, or service; or (4) for any other internal use. As used herein, "Service" means Contractor's obligations under this Contract.

    3. Copy of the City Data. Upon the City's written request, Contractor will provide the City a quote to deliver a CMEP file consisting of the most recent 60 days of CMEP interval file data. Contractor will deliver the CMEP file in accordance with the quote upon the City's acceptance of the quote

9) Independent Contractor

A. This Contract does not create an employer/employee relationship between the parties. The parties agree and intend that the Contractor is a separate and independent enterprise from the City. This Contract shall not be construed as creating any joint employment relationship between the Contractor and the City and the City will not be liable for any obligation incurred by the Contractor, including but not limited to unpaid minimum wages and/or overtime, or any other obligation of the Contractor, whether arising under state or federal law, or contract, to Contractor's employees, subcontractors, or subvendors.
B. Contractor undertakes performance of the Services as an independent contractor and shall be wholly responsible for the methods of performance.
C. The Contractor shall not pledge the City's credit or make it a guarantor of payment or surety for any contract, debt, obligation, judgment, lien or any form of indebtedness and shall have no right to speak for or bind the City in any manner.
D. Contractor further warrants and represents that it has no obligation or indebtedness that would impair its ability to fulfill the terms of this Contract.

10) Ambiguous Contract Provisions

The parties agree that this Contract has been the subject of meaningful analysis and/or discussions of the specifications, terms and conditions contained in this Contract. Therefore, doubtful or ambiguous provisions, if any, contained in this Contract will not be construed against the party who physically prepared this Contract. The rule commonly known as "Fortius Contra Proferentem" will not be applied to this Contract or any interpretation thereof.

11) Conflict of Interest

This Contract is subject to Chapter 112, Florida Statutes, and Contractor shall disclose the name of any officer, director, employee, or other agent who is also an employee of the City of Mount Dora. The Contractor shall also disclose the name of any City of Mount Dora employee who owns, directly or indirectly, more than a 5% interest in Contractor's, or its affiliates, business entity.

12) Entire Contract

This Contract, including the Contract Documents, contains all of the understandings and agreements of the parties hereto in respect of the subject matter hereof as of the Effective Date of the Contract. Any and all prior understandings and agreements, expressed or implied, between the parties hereto in respect of the subject matter hereof shall be superseded hereby. Parol or extrinsic evidence will not be used to vary or contradict the express terms of this Contract.

APPENDIX A – CITY RFP

The City's RFP consists of the following documents:

File Name	Date
RFP 24-EL-014 Advanced Metering Infrastructure (AMI) REBID	
RFP 24-EL-014 Addendum 1	
Exhibit A – RFP Requirements	
Addendum 1 – Exhibit A – REVISED – Exhibit B – Pricing sheet	
Exhibit C – Electric Utility Service Boundary	
Exhibit D Geographic Locations Active Customers - Incorporated by Reference	
Exhibit E Inventory Form Factors	

Request for Proposals

NUMBER
RFP #24-EL-014

CITY OF MOUNT DORA

Advanced Metering Infrastructure (AMI) System (REBID)

LEGAL NOTICE

The City of Mount Dora is accepting electronic responses only for sealed Request for Proposals, under RFP# 24-EL-014, to provide for an "Advanced Metering Infrastructure (AMI) System (REBID)." Responses will be received until 12:00 p.m. on October 21, 2024.

RFP# 24-EL-014
"Advanced Metering Infrastructure (AMI) System (REBID)"

A pre-proposal meeting is not applicable to this solicitation.

This Public Notice has been posted as follows: www.cityofmountdora.com, www.demandstar.com and in the Lobby of City Hall.

All meetings, unless noted otherwise, will be held in person. Please be advised that dates and times, are subject to change and updates posted on the City of Mount Dora's website at www.cityofmountdora.com, on www.demandstar.com and in the lobby of City Hall.

Remainder of Page Intentionally Left Blank

Electronic responses will be the only method allowed for Proposers to respond to this solicitation. **Electronic responses are to be provided via DemandStar only.** All submittals must be compatible with Microsoft Office 2007. Bidding will be done through a secure locked box. Proposers can only view/submit their Bid and will not have access to any other Proposer's submittals. The Proposer's Bid may be changed at the Proposer's discretion until the due date and time have been reached at which time the Proposer will no longer change or have access to the electronic bid submittal. The City will then open the Bids. All bids must be received by the date and time specified above, when they will be opened, via computer, and proposer names publicly read aloud. The bid time shall be scrupulously observed. The City shall not be responsible for delays or internet outages caused by any occurrence. The City website does not accommodate electronic responses to bids. Receipt of a bid in any other form does not satisfy this requirement. No exceptions will be made.

If you have obtained this document from a source other than directly from DemandStar by Onvia.com you are not on record as a plan holder. The Purchasing Department takes no responsibility to provide Addenda to parties not listed as plan holders. The Proposer is responsible for verifying they have received all Bid Addenda.

Table 1 - Procurement Schedule

Event	**Date**
Issue RFP Notice	August 18, 2024
Last Date for Receipt of Written Questions	September 13, 2024 @ 4:00 p.m.
Addendum Issued (If Applicable)	September 24, 2024
Opening Date **(via ZOOM)**	October 21, 2024 @ 12:00 p.m. (See Exhibit F)
Evaluation Committee Meets to Shortlist Firms	October 29, 2024 @ 2:00 p.m.
Evaluation Committee - Presentations/Q&A's (if requested by the Committee)	November 06, 2024 1:00 9 p.m. – 4:00 p.m.
Evaluation Committee to Recommend (if not done at initial Evaluation Committee Meeting)	November 06, 2024 @ 04:15 p.m.
Notice of Recommendation	November 06, 2024
City Council Hearing Date (Anticipated)	December 03, 2024

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SECTION 1 - GENERAL OVERVIEW

1.1 Introduction and Scope of Services

The purpose of this RFP is to solicit proposals for the delivery and implementation of an Advanced Metering Infrastructure (AMI) Systems Solution. Mount Dora is seeking requested information, description of services, and price quotes to implement a communication system to obtain data as well as have the ability to control and manage the meters.

The City of Mount Dora has approximately 950 commercial and 6,100 residential electric meters and approximately 13,000 combined commercial and residential water meters which is spread across about seven square miles for electric and 23 square miles for water. This project will involve exchanging only all existing electric AMR drive-by read meters within the Electric Service territory with communications infrastructure established to adequately and reliably cover this area and capability to expand the communication to all water meters in the future. It is extremely critical the proposed AMI system have detail to explain integration in to the billing system and meter outage reporting capability.

Mount Dora objective is to institute Smart Metering throughout the service territory utilizing managed service provider for the communication infrastructure and all related software. The City anticipates the following four (4) areas of concentration in the project, and apprehends the order these areas are listed does not represent the sequence necessary for successful project integration.

- **CUSTOMER EDUCATION AND ENGAGEMENT**
  - Supplier shall develop and provide a customer communication strategy with regards to AMI integration and benefit
- **AMI DEPLOYMENT**
  - Supplier shall provide at materials, software, communications and integration for the City's CIS billing systems
  - Supplier shall provide all labor for meter programming, field exchange, and CIS customer data update.
- **TRAINING**
  - Supplier shall train City staff in the use and application of software and communications systems to enable success of the AMI metering infrastructure.
- **MANAGED SERVICE ADMINISTRATION AND METER DATA MANAGEMENT**
  - The supplier shall provide at materials, software, training for both short and long term meter data management, to include firmware updates, meter data contingency and annual daylight savings integration

The City plans to implement an AMI system that is established and proven over multiple similar scale projects. First-generation and other unproven equipment and software are not acceptable. The City will not pay for a heavily customized solution that achieves all the objectives and features below but rather a reliable, time-tested platform that provides as many of the features as possible at a reasonable price. Supplier shall provide a Visio system diagram of the plan, from head-end system down to field devices. An "as-built" update of this Visio diagram will be required prior to project closure.

The following subsections provide more detail of the current state of our Metering and Customer Information and Billing System (CIS).

The City currently utilizes an Itron AMR drive-by read system for Electric and Water meters using Itron Centron-ERT Electric meters and Neptune E-coder R900M water meters. The City maintains one-Itron vehicle mounted read system which reads each meter read route. The system is divided into six (6) Read Routes. Each cycle route is read in a one-week process, with the flat file transferred from the vehicle at the end of each cycle. The flat file is uploaded into BS&A, followed by work orders generated for a Re-Read process conducted manually.

1.2 City Customer Information / Billing System (CS) and Relevant Software Applications

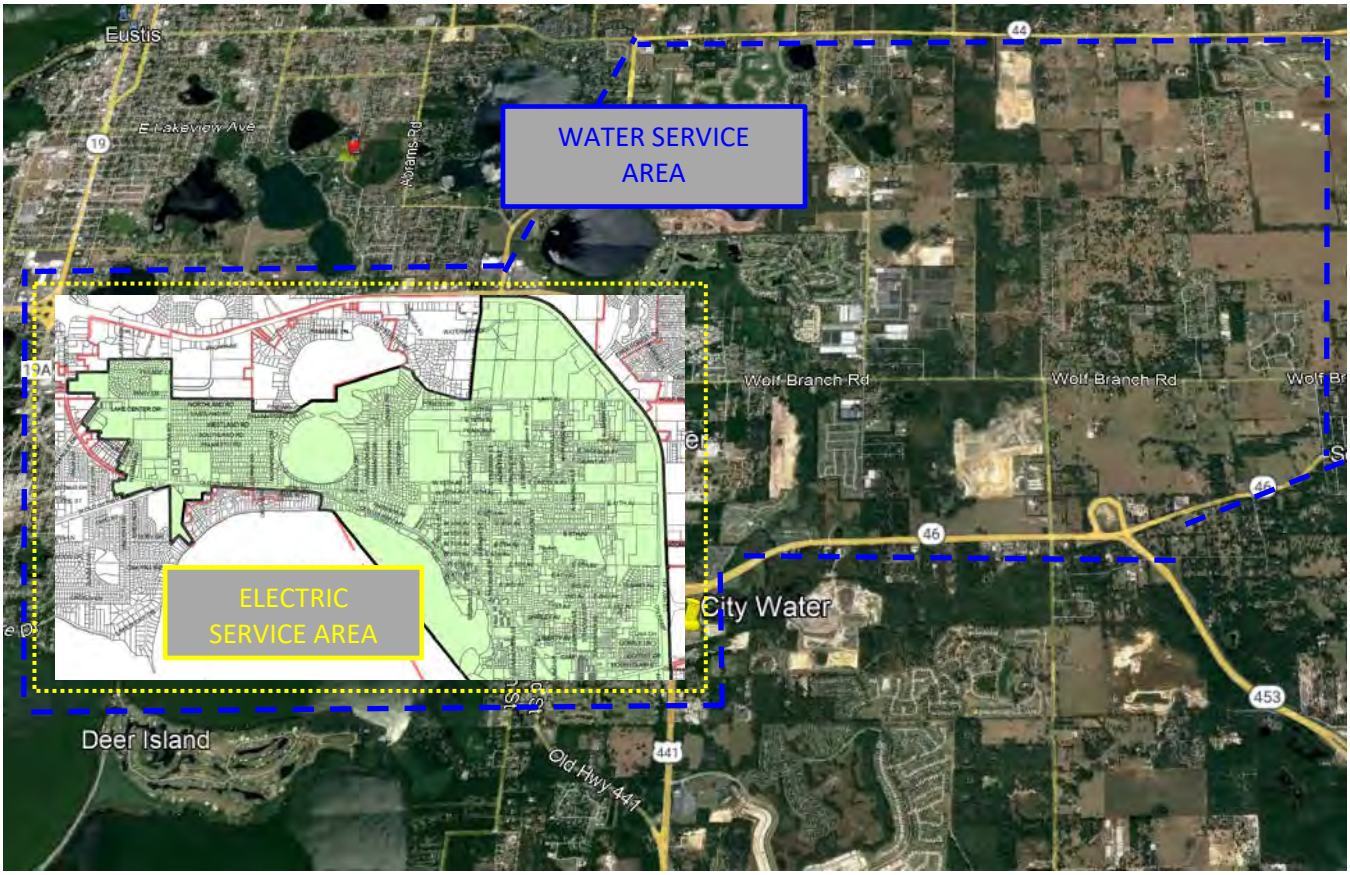
The City will maintain BS&A as the primary CIS system, recognizing that a long-term migration to a platform that will be most conducive to data reads of greater granularity (e.g. hourly for electric and water reads to support more robust retail rates) may be necessary. The City's expectation is that the successful Proposer has enough command over the needed systems integration steps to ensure maximum viability of the City's existing systems while maintaining flexibility for the future. It is critical the proposed new AMI and existing water AMR system have full compatibility into the BS&A customer information and financial billing system.

Software Application	Customer Information System (CIS) Billing and Accounting	Outage Management Call Center Dispatch Services	Distribution Modeling Software	Distribution Mapping
Name	BS&A	ENCO Utility Services	Milsoft WindMil Enterprise	ESRI Arc GIS Desktop 10.6.1
Email	ubsupport@bsaoftware.com	https://www.encous.com	www.milsoft.com	https://www.esri.com/en-us/home
Version	3/1/2023 (1.0.8456.15089) Net Version 4.7.1	Cloud Based - Filemaker Pro 14	Windmil 8.7.34.5060.35e1d5d5 Build 2019	Ersi ArcCatalog 10.6.1.9270 Esri Arc Globe 10.6.1.9270 Esri Arc map 10.6.1.9270 Ersi ArcScene 10.6.1.9270
	Miscorsoft Windows 10 Enterprise Version 10.0.18363 Build 18363	14.0.6	Core E&O	
Address	14965 Abbey Lane, Bath MI 48808	8141 Easat Kaiser Blvd	4400 Buffalo Gap Road Suite 5150	Regional Office St Louis
Phone	855-272-7638	951-236-1571	800-344-5647	888-377-4575

Table 1-1

1.3 Electric and Water Service Territories

The electric and water service territories overlap by approximately 50%, with the City electric utility serving 1/2 the total water customer service territory. The City also maintain lift stations within the remaining water service territory not served by City Electric.



1.4 Communications Infrastructure

The City owns and maintains multiple locations with tower elevation connected to an extensive fiber network, with power and back-up generation power. The City also maintains wifi in the down-town district.

1.5 AMI Managed Services

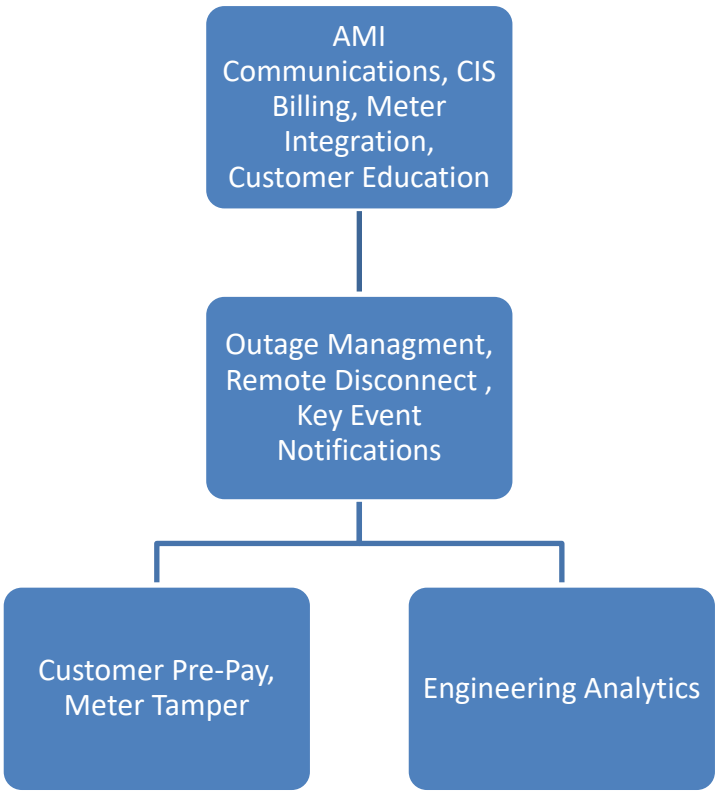
Mount Dora has opted to implement its AMI system in a Managed Services environment to avoid any incremental staffing requirements. The City will operate and maintain the physical assets of the AMI system; however, other than desktop computers, all AMI computational infrastructure will be located at the Supplier's managed services facility. Additionally, the City would like optional pricing for the Proposer to manage non-meter field communications assets.

1.6 AMR to AMI Integration

During the first project milestone the successful proposer shall demonstrate to a group of approximately 100 electric meters the new read to billing process. These meters will be strategically selected from City of Mount Dora Electric accounts for their facilities. In the subsequent milestone the Electric Meters for two (2) routes will be exchanged. This process will repeat unit all six (6) routes are completed.

1.7 Core Competency AMI Hierarchy

The supplier shall propose a system that best represents the hierarchy shown below of core competencies while achieving the Objectives and Technical requirements given in Sections two (2) and three (3).



- **Level 1 - Foundational Requirements**
  - AMI Communications, CIS Billing, Meter Integration, customer education and engagement.
- **Level 2 - Outage Management and Key Data Reporting**
  - Reliable Outage/restoration identification, customer portal, electric meter remote disconnect, and event notifications.
- **Level 3 - Pre-Pay, Meter Tamper and Engineering Analytics**
  - Customer pre-payment plans, meter tamper detection and notification, engineering analytics

SECTION 2 - AMI PROGRAM OBJECTIVES

2.1 Improve Meter to CIS Billing Accuracy and Customer Service

The AMI system shall reduce manual meter RE-READS by improving meter read accuracy and reporting to the CIS billing system. The AMI proposer shall provide customer services to include, email, text and or outgoing messaging related to outage notification, estimated time of restoration, and service restoration. A customer portal expanding the monthly consumption data to greater detail, allowing consumer education and understanding to enable efficiency and costs. Reduce the time-frame from cycle read to CIS billing, with automatic triggers and reporting for non-read (RE-READ) along with historical information use for troubleshooting.

2.2 Promote Safety and Theft Detection

Enable detection and reporting of reverse power flow of non-utility approved back-feed, and or back-feed during system outages events. Meter data indices to include theft deterrent detection and reporting, power

quality metrics.

2.3 Effective and Dependable Communications Design
An effective design solution for communications infrastructure for both electric billing meters. This communications equipment shall have a well-established history of reliability, with capability to supplement both short term and long term power interruption, without data interruption.

2.4 Reliable Outage/Restoration Information System
The city seeks to improve outage notification and visualization capabilities based upon AMI meter. The two areas of improvement

a. A web-based portal representing a geo-spatial map to indicate electric customer outages in real-time.
b. A customer outage notification portal to provide capability of reporting a power outage, validating AMI outage information for an outage, and customer call-back upon AMI meter power restoration.

It is expected large scale outages (200 meters or larger) and/or restorations including up to the entire city electric meter population shall be reported to the head-end system and viewable on the UI within 5 minutes for 99% of the affected meters. These are all system requirements regardless of which managed services component provides the capability.

2.5 Limit Use of Proprietary Interface
The use of proprietary based interfaces shall be limited and listed in adjoining AMI Software application interfaces to include Outage Management Systems (OMS), Geographical Information Systems (GIS), Customer Information System (CIS) and Electric Modeling softwares such as MilSoft.

2.6 Software Application Services
The system requirements listed in this section are broadly grouped by the system component in which these capabilities would logically reside. However, the architecture of the proposer's system is in no way dictated by these sections. Rather, the functionality is being specified in what is envisioned as one or more applications embodied in the managed services offering regardless of which managed services component actually provides the capability.

2.7 Managed Services
The AMI head-end MDM and OMS, Customer Portal and Pre-pay systems are shown in separate boxes. This is a logical construct for presentation purposes only. The system architecture of Proposer's offering is not dictated by this RFP. Whether any or all these functions are performed in separate physical servers, partitions in a virtual server or otherwise are to be determined by the proposer. In many sections of this RFP, these systems are referred to separately. It is important to note that many functions described separately in this way are requirements regardless of the overall architecture. Any requirements for system security are fully applicable across all offerings by the proposer. This is just one example of such broadly applicable requirements.

2.8 Customer Portal / Education / Engagement
One of the key features of the AMI system is to be able to provide consumers the ability to view their information, including outage information.

2.9 Customer Service Application Systems Integration and Security
The Supplier shall provide the appropriate software integration to automatically transfer appropriate data to and from the billing and Customer Information System (CIS). License to use any Supplier- provided

integration software will be issued to City. The Supplier shall provide the appropriate software integration to implement any other functionality described herein. Supplier shall outline their data flow back to the AMI head-end system and the City BS&A billing system. It is critical that the existing BS&A billing system remain fully functional during the rollout of the system, and the Water AMR meter field inventory. With meters being removed and replaced daily, describe how the proposer will support this need and ensure a smooth transition to full AMI billing operations. The successful Proposer must work to ensure that all devices within the managed services platform, network equipment, meters, and other field-deployed equipment are sufficiently protected from malicious attacks and unintended cyber and physical events that threaten the core purpose of the service. Specifically, the system must (i) ensure sufficient information availability regarding a security-related event, (ii) ensure confidentiality of the information regarding security services, (iii) prevent a security incident from compromising the safety of personnel, stakeholders, and the electrical system, and (iv) avoid the AMI platform or meters from being used as a "stepping stone" or conduit for attacks on end- users, external service providers (e.g. cell phone networks) or any other interconnected entity. Additionally, the system must provide adequate evidence to support the assurance of confidence and trust in the process, including the accuracy of billing statements, the safety and reliability of electricity services, and the fairness of energy markets.

Minimizing the likelihood of material loss to the City and their stakeholders must also be addressed in the context of responsibilities and accountabilities of the successful Proposer in relation to the City given their respective ownership of elements of the system. Examples of such considerations include loss of trust/reputation, theft of money or services, "gaming" (or modifying, deleting, or otherwise altering information), privacy violations, hijacking control of a neighbor's equipment, and physical tampering, among other considerations. The entire network from the AMI head-end system through meters and other field devices shall have an overall security scheme. For all system components including head- end, network components, backhaul communications, meters, and field devices (handhelds, etc.), over the air security is required. Please describe for each system and device the encryption method used, key management process, and any other related functions and any applicable standards.

SECTION 3 – TECHNICAL REQUIREMENTS

3.1 General AMI Network and Endpoints requirements

a) The use of open standards throughout the AMI system is preferred, Supplier shall provide a detailed description of the use of open standards, including, but not limited to, protocols, discovery, authentication, system monitoring, diagnostics and management within the proposed solution.

b) All meter and communication module programming and installation is within and responsible in this scope of project.

c) Supplier shall describe how interoperability is supported across all the elements of the proposed AMI solution.

d) All system components shall have the capability for remote firmware and software upgradeability. Supplier shall describe in detail the mechanisms and processes used to update the system and all necessary components including, but not limited to, meters/modules, network equipment, communication modules, etc. without system service interruption. Software/firmware updates shall be processed remotely and run automatically once initiated.

e) Supplier shall describe in detail the process to recover from a corrupted software/firmware update to any device on the system including, but not limited to, meters, communication modules, network equipment, etc.

f) Minimum expected operating life of the system must be 10 years following deployment. The system is further expected to remain operational, with slightly degraded failure rates, for an extended operating life of five years, in order to enable replacement of the system at end-of-life.

g) Supplier shall provide a plan to provide continuity for all product lines, including a description of how it handles routine obsolescence of critical electronic components that are integral to its products.

h) Supplier shall ensure and describe how the AMI network and endpoints will be supported for the life of the system and that network parts, equipment and software shall be available to maintain the required level of system performance.

i) Supplier shall describe how the proposed AMI solution employs sufficient fault tolerance, weather resistance, redundancy, failover, self-diagnostics and/or self-healing and reporting to guarantee it meets or exceeds the system information and data delivery performance requirements.

j) Supplier shall specify and deliver an initial system that supports the collection, storage and timely processing of 15-minute interval data for all the electric meters within the City of Mount Dora service territory. The system shall be readily scalable to accommodate up to 6% annual growth.

3.2 Requirements for AMI Head End System (HES)

a) The HES shall operate 24 hours a day, 7 days a week, 365 days a year and demonstrate annual availability of at least 99.99%. It shall have the ability to re-run/restart/recover without loss of data (e.g., checkpoint/restart capability).

b) The HES should be easily upgraded. Supplier shall describe the process for release and implementation of software upgrades.

c) The HES shall provide and maintain a minimum of 60 days of on-line storage for all AMI endpoint data collected in accordance with this specification. Storage shall include all data and events from the metering endpoints including, but not limited to, all meter reading data, power outage/restoration information, endpoint diagnostic information, revenue integrity events, power quality information, etc.

d) The HES shall have the ability to archive and purge data according to a data strategy.

e) The HES shall be scalable to manage the growth in number of endpoints as well as the data collected. Supplier shall describe how the system can be scaled as the number of endpoints and data increases and how the environment capabilities can be scaled for improved performance or as required by growth.

f) The HES shall provide authorized users with direct access to the database to create custom reports. Alternatively, the HES shall provide tools or applications for users to create and export custom reports.

g) The HES shall support the following features:

- Time-of-Use rates
- Pre-pay services
- Bi-directional (dual register) meters

- On-demand and scheduled remote disconnect/reconnect for electric meters and provide a way of identifying energy usage for meters that have been disconnected
- Load limiting for an electric meter
- On-demand meter read for amps, voltage and real and reactive power
- Electric meter low Battery
- Electric meter tamper alert
- Electric voltage events, IEEE 1159
- On-demand and scheduled demand re-set
- Processing of alarms generated by a meter, including tilt, tamper, power quality, etc.
- Outage management visualization with ability to filter out momentary outages
- Meter configuration and errors

h) Supplier shall provide a history of major releases for the HES over the past 24 months.

i) Supplier shall define the planned major releases of the head-end product over the next three years and provide an overview of the significant features and capabilities planned or anticipated to be provided.

3.3 Requirements for Communications Network

a) The AMI communications network shall cover 100% of all meters with the features, resolution and performance specified herein. Supplier shall identify areas of the City's service territory that will challenge the ability of the proposed AMI solution to achieve 100% service territory coverage and describe means to address said challenges including topology, private and government critical communications, population density, etc.

b) The network shall support sufficient redundancy to facilitate automatic and/or programmatic re-routing of communications from the endpoint through the network if the existing route is unavailable.

c) Supplier shall commit to a Service Level Agreement to meet all performance requirements. The solution shall provide availability for reading of meter register reads and load profile data and reporting of that information daily for any meter ***with minimum performance*** of:

- 99% of intervals and registers collected and available to the MDM, or other utility systems, by 6:00 a.m. next day
- 99.5% of intervals and registers from the previous day collected and available to the MDM, or other utility systems, by 6:00 a.m. the second day
- 97% on-demand read successfully executed within 60 seconds
- 98% connect or disconnect operations successfully executed within 30 seconds

d) Supplier shall describe the steps taken for the solutions to address the guidelines defined within the latest revision of NISTIR 7628, Guidelines for Smart Grid Cybersecurity. Description shall include the results of the Supplier's analysis of the solutions, and how it applies to and addresses the Guidelines.

e) Supplier shall outline their approach to supply chain selection and review for cyber and virtual components including physical and non-physical security.

f) Supplier shall provide verification that all individual devices comprising the AMI system meet FCC guidelines, are approved by the FCC and that they shall operate within all FCC regulation limits. Supplier shall provide FCC documentation in its response, inclusive of all relevant FCC standards to which such equipment complies.

g) Supplier shall ensure that its system will not cause any harmful interference to other systems. Supplier shall resolve any impact to other parties.

h) If the proposed solution utilizes a licensed radio frequency spectrum, the Supplier shall provide detailed information on license requirements, viable licensors and estimated costs of acquiring required licenses for operating and extended life of the AMI system.

i) If the proposed solution makes use of public communications networks, the Supplier shall provide certification from the carrier to operate on the public communications network, availability of network within the City's service territory (by segment utilized), ability of the overall system to meet the information and performance requirements detailed herein, and provide detailed monthly public network usage estimates for the operating and extended life of the system. Supplier shall demonstrate that the proposed public network(s) support the reliability requirements and security provisions detailed herein.

j) Supplier shall provide a detailed analysis of all potential sources of communications interference (external) on or by the AMI system (self-inflicted) and the impact of said interference. The Supplier proposal shall include a discussion on methods that the Supplier has included within the proposed system to monitor and detect all potential interference. Include all known potential sources and the actions the Supplier has taken to either eliminate or mitigate the impact of interferers and the costs to mitigate. In addition, provide a listing of all known sources of interference to the proposed AMI technology solution, such as paging systems, cellular systems, wide-area data networks, distribution automation systems, power line carrier systems, etc.

k) The proposed network equipment shall comply with the following environmental equipment standards: i.) operating and storage temperature -40° to +85°C; ii.) operating vibration IEC 68-2-6; iii.) operating shock IEC 68-2-27; and iv.) humidity ANSI 12.20 and 5.4.3.18.

l) Supplier shall provide evidence that all network equipment meets FCC electromagnetic radiation standards, including: i.) electromagnetic susceptibility ANSI C37.90.2; ii.) surge withstand capability ANSI C37.90.1 and ANSI C62.41; and iii.) electrostatic discharge IEC 801.2.

m) All network communications equipment shall utilize non-volatile memory for storing and retaining data. Data storage shall be sufficient to provide redundancy for a minimum of 45 days (e.g., should any communications link malfunction prevent data from reaching the AMI HES, the AMI communications network will provide redundant storage to ensure no data loss within a complete billing cycle). Describe the memory capabilities to meet this requirement, including electric AMI meters/endpoints.

- Provide a detailed explanation of storage capacity, where the data resides, how it is protected/secured and the level of risk involved with respect to potential data loss. Supply this information as it applies to each type of AMI network equipment, including electric AMI meters/endpoints.
- All network communications equipment shall provide a means for extracting stored data directly from the device in the event of network communications or equipment failure. Supply this

information as it applies to each type of AMI network equipment, including electric AMI meters/endpoints.

n) All network communications equipment shall be capable of utilizing a voltage source ranging from 120V to 480V AC. Any equipment to be installed inside a substation shall require 120V AC.

o) All non-meter equipment shall be capable of operating on 120V or 120/240V AC with a tolerance of +/- 10% and use battery backup as required to maintain system integrity and outage reporting functionality in the event of loss of AC power.

p) Sufficient battery power shall be provided to meet the power outage notification requirements from the end points and provide a minimum of eight hours of communications infrastructure operation after a power outage.

q) All network communications equipment firmware shall support head-end, remote and on-site upgrades.

r) Supplier shall provide equipment that is expected to experience less than 0.75% annual failure rate for all network communications equipment over the required operating life of the system and less than 1.50% annual failure rate over the extended operating life of the system.

s) All network communications equipment shall support local (on-site) and remote (AMI HES) non-intrusive diagnostics capable of detecting any abnormal operating parameters including, but not limited to, network communications, memory failure, power supply/battery degradation, microprocessor failures, firmware/software problems, excessive device temperature, etc.

t) All network communications equipment shall be time synchronized to a single head-end source to within 30 seconds of NIST and should provide for synchronization of all applicable (time based) endpoint equipment to top of the hour. Time synchronization shall support Eastern Standard and Daylight Savings Time. All network communications equipment shall support remote Daylight Savings Time switch programmability in support of any future date changes due to energy bill enactment.

u) Network shall support automatic and/or programmatic discovery of all endpoint devices (meters/modules, load control devices, etc.) and communications equipment (relays/routers, concentrators, etc.) for both initial deployment and maintenance of all endpoint equipment.

v) Supplier shall provide network traffic simulation and/or propagation studies showing the required number of network devices (e.g., collectors/concentrators, aggregators, etc.) with 100% confidence level in order to meet the specifications described herein. Supplier shall explain the level of redundancy achieved in the proposed network design.

w) Supplier shall furnish, install, test, commission and verify all AMI network communications equipment to provide the services specified herein, including, but not limited to, all data collection software, hardware and facilities required to provide the data services covered in this specification.

x) Supplier shall be responsible for ensuring device communication to the network and is responsible for installation of all equipment necessary to establish and maintain communications with the network including, but not limited to, external antennas, signal boosters, filters, etc.

3.4 Software Hosting and Management

a) Managed service for complete AMI solution shall include, utility and customer portals and geospatial outage visualization compatible with ESRI GIS and BS&A customer service and accounting applications.

b) AMI software shall be accessible to the City of Mount Dora via web browsers. The Supplier shall list all supported browsers and indicate the web security protocols utilized.

c) Supplier shall operate a primary and a backup data center. Data center locations, backup procedures, expected disaster recovery times and level of redundancy shall be described by the Supplier.

d) Supplier shall describe any backdoors into the managed services systems and how these are managed.

e) Supplier shall describe help desk process including ticket resolution service level agreements.

3.5 Security Requirements

a) The Supplier policies, procedures, personnel, products and services used to design, build, code, configure, deliver, manage data, integrate, test, deploy and support the AMI solution shall comply with the latest version of applicable security standards including, but not limited to, NIST SP 800-53 and FIPS 140-2 and NISTIR 7628.

b) Supplier shall fully describe its approach, methods and artifacts for security testing. The description shall further include, but not be limited to, the following scenarios: internal passive and active testing, third party external passive and active testing, third-party certifications achieved, detailed reports of vulnerabilities found, remediation conducted and evidence of re-testing.

c) Supplier shall describe all capabilities and mechanisms for maintaining resiliency within the system, including but not limited to, self-healing, intrusion detection/prevention, denial of service prevention/resistance and disaster recovery. Include head-end and mechanisms to detect and alert system failed resiliency status and/or events.

d) Supplier shall describe all operational capabilities and mechanisms for maintaining system security such as, but not limited to, authentication content, encryption, key management, device addressing, device ID to premise association, during the installation and initialization phases of deployment, and for the recurring operations of AMI network system elements, and end point devices (i.e., gateways, collectors, meters etc.).

e) Describe capabilities and mechanisms for generating audit records/logs within the system for the minimum list of auditable events with the minimum list of information items identified below (ref. NIST SP 800-53 AU-2, AU-3, AU-12, MA-4, and NISTIR 7628). Scope of response shall include system (e.g., internal workstations, servers, etc.) and external systems/devices (e.g., collectors, gateways, access points, field tools, mobile devices, meters, etc.).

- Unsuccessful access attempts
- Alteration of configuration files
- Alteration of database files
- Alteration of authenticator content
- Application error events (i.e., oracle DB errors)
- Application failure events
- Maintenance and diagnostic events (for local and remote accesses)

f) Supplier shall describe the security standards and practices in place to safeguard customer information from the time it enters the system via the AMI endpoints until it is delivered to the AMI head-end system.

g) AMI solution shall encrypt all communications and user credentials at rest and in transit on the network. Describe the type of encryption utilized and whether all communications with the AMI meter are encrypted.

h) Supplier shall describe all mechanisms and boundary protection devices for monitoring, controlling and protecting network communications at the external boundary of the system and at key internal boundaries within the system environment. Supplier shall also describe HES mechanisms to detect and alert for attempts to compromise communications integrity (ref. NIST SP 800-53 SC-7, and NISTIR 7628). Include external systems/devices (i.e., collectors, gateways, access points, field tools, mobile devices, meters, etc.).

i) Describe all mechanisms for maintaining data integrity within the system, including, but not limited to, encryption and Key Management, PKI, hashing, CCM, CBC-MAC and any others. Supplier shall also describe HES mechanisms to detect and alert failed data integrity compromise attempts (ref. NIST SP 800-53 SC-13, and NISTIR 7628). Include internal system (i.e., workstations, servers, etc.) and external systems/devices (i.e., collectors, gateways, access points, field tools, mobile devices, meters, etc.).

3.6 Requirements for Electric Meters

a) Meters shall be solid-state with a configurable minimum eight-digit scrolling LCD display, utilize non-volatile memory for storing data and include an integral wireless communications module. Supplier shall provide evidence that all meters comply with the following industry standards:

- ANSI C12.1, C12.10. C12.19, C12.20, and C37.90.1
- ANSI C12.20 for accuracy class 0.5 and 0.2
- UL 2735
- IEC 61000-4-4 and C62.45
- Applicable FCC standards

b) All meters, including the communications module, shall be programmed as requested by the City of Mount Dora, tested at the factory and shipped with the test report.

c) Meters shall be able to operate in temperatures ranging from -40ºC to 85ºC.

d) Single-phase meters shall be available from two different manufacturers. The primary single-phase meter, as offered by Supplier, shall have been in production for more than a year at the time of the bid.

e) Meter shall be able to be programmed to perform and self-read, as well as a demand reset, at a specific time and day of the month

f) All electric meters shall provide the following:

- Energy metered in WHr, VAHr or VARHr (delivered, received, net)
- Maximum demand in W, VA, VAR
- Voltage, power factor, line current
- The standard 2S meter shall have dual registers for measurement of bi-directional energy.
- Time-of-Use energy metering using minimum of four seasons, four rates and four switch points for energy quantities
- Meter data using configurable intervals (5, 15, 30 or 60 minutes)

- An outage message after a user-definable interval when it has lost power
- Alarms for the following conditions: reverse energy, tilt, tilt/outage combination, attempted magnetic tamper, voltage outside defined limits
- The reverse energy alarm shall be capable of turning ON or OFF for an individual meter by the utility
- Remote upgradeability of meter and communications firmware. Meter shall have firmware rollback capability. Meter shall continue to meter during firmware transfer

g) Additional requirements for single-phase meters

- Meters shall include a port for configuration and reading. There should be a means to disable the port.
- Single-phase meters shall include a 200A bi-stable latching disconnect switch matching the rating of the meter.

h) Additional requirements for poly-phase meters

- Meter shall be auto-ranging when connected to services in the range of 120-277 Volts RMS, ± 20% with the exception that Form 12S must auto-range when connected to services in the range of 120-480 Volts RMS, ± 20%.
- Meters shall be available with an optional ANSI C12.18 compliant optical port for local reading and programming.
- Meters shall monitor voltage, current, per phase and phase angles to detect incorrect polarity/phase sequencing.

i) Additional requirements for remote disconnect switch

j) Disconnect switch shall be remotely operated via AMI system, RF tool or optical port. Switch shall not connect if there is load-side voltage.

k) Electric meter disconnect and reconnect requests shall occur after initiation with confirmation received within 30 seconds for 99% of requests. Meter disconnect and reconnect requests shall occur after initiation with confirmation received within 1 minute for 99% of requests. Any disconnect request must also return the correct register read.

3.7 Software CIS Integration

a) Supplier shall be responsible for integrating the AMI system to the City of Mount Dora's customer information system, BS&A Software Inc. The integration shall include all functionality specified herein.

3.8 Customer Engagement and Portal

a) Supplier shall create a secure customer web portal to allow electric utility customers to initialize a new portal account. The portal shall have the following features:

- Display on-demand readings for electric meters
- Allow customers to evaluate the cost of switching to a different rate (such as TOU) using their own consumption interval data

- Allow customers to sign up for email and phone notifications for events such as service interruption, leak detection, high consumption and other regular notices such as projected bill and remaining use on a pre-paid account.

b) Supplier must support a minimum of one day on-site for an AMI open house event for the public. The goal of the event is to promote the AMI technology and answer any questions from the public.

c) Supplier shall develop, with input from the utility, the following marketing materials:

- A bill insert designed to educate customers on the benefits of the AMI project
- Postcards advising customers that AMI meters will be installed
- Doorhangers to be left at premises where the AMI meter installer has visited a premise. The doorhanger should advise the customer that either the meter change out was successful or explain why the meter change out could not be completed.

3.9 Installation of Meters and Network Equipment

a) Supplier shall be responsible for ensuring that personnel performing field installations (either employees of Supplier or subcontractor) have been adequately trained and are considered qualified to safely perform work on energized equipment.

b) Field personnel must wear uniforms and carry visible badges. The logos on the badges, vehicles and uniforms shall clearly identify the installer's company name.

c) Field personnel must wear long sleeve shirt and pants rated for a minimum of 8 cal/cm^2 and shoes and hard hat rated for electrical hazard.

d) Installers shall utilize a mobile work order management system to manage the meter deployment. The utility shall have access to the work order system with the ability to see in real time the meters scheduled to be replaced and all completed replacements on a given day.

e) The work order system shall be able to store scanned meter bar code data from AMI meters installed, meter GPS locations with sub-meter accuracy, old and new meter readings, installer field notes and a digital photograph of each meter installed.

f) All data transferred from the work order management system to the utility CIS must be executed using software integration.

g) Installer shall report all abnormal equipment conditions discovered, including the following:

- Unsafe meter enclosure
- Sites requiring repairs
- Leak found on arrival
- Evidence of tampering
- Obstructed meters
- Other safety concerns

3.10 Warranty

a) Supplier ***shall provide and include in its base pricing a minimum standard full warranty of 60 months for network equipment and meters.*** This warranty shall commence at time of installation and cover 100% of the cost of all hardware including meters that serve as network devices, communications devices, network devices and other such devices as provided under this specification, without proration.

b) Supplier shall provide and include warranty of up to two-years for communications equipment, collectors, routers and or towers not included in the original proposal, but necessary to meet the read-rates and outage reporting expectations of the City. The indices for acceptable read-rates and outage-reporting will be clearly defined within the contract to the successful proposer.

c) Supplier shall be responsible for device failures that exceed 3% of any given category of installed devices in a rolling 12-month period. Remedy shall be complete replacement of all potentially affected devices including field in/out costs for the affected population.

SECTION 4 - DEPLOYMENT INSTALLATION

4.1 Personnel

The proposer shall provide services for installation and programing. City of Mount Dora customer, employee, and subcontractor safety is of paramount importance to the City of Mount Dora. Personnel safety only supersedes environmental protection as a City concern. The City expects any Supplier or subcontract personnel on City property to observe City of Mount Dora safety and environmental processes as well as all applicable federal and state of Florida rules and regulations. Supplier's Installation subcontractor shall have a documented safety training program that all installers must adhere to. Provide this document if subcontractor has been selected. Any safety issues or accidents that occur during the term of the installation must be reported to the City immediately. Provide this proposed process.

The training must be comprehensive enough to ensure that City staff can effectively install all products offered and operate all systems and software. Areas that shall be included (but not limited to) in the training are:

- Meter Installation
- Meter Trouble Shooting
- Meter configuration
- Handheld usage
- Network components
- Overview of the AMI product and head-end software
- System operations and troubleshooting (including interaction between the endpoints and network devices, network devices, and the AMI head-end, and interaction between the AMI head-end and other system components such as MDM, OMS, and customer portal.
- Identification, management, and resolution of events and alarms
- Customer portal administration
- BS&A billing system integration usage

Provide a typical training schedule that contains lessons, suggested attendees, and durations.
The number of trainees allowed for any or all types of training must be clearly defined in Proposer responses. Provide a training plan which outlines the requirements listed above. Plan should include facilities and/or resources required. At the end of training, maintenance personnel will understand proper installation and maintenance procedures, as well as the utilization of the AMI head-end software system. Describe the training

materials to be provided for each course. Describe the availability of refresher training and future training for new employees.
OSHA required training must be provided to all installers by Supplier. Training shall include, at a minimum, electrical and arc flash hazards. Describe your overall safety program including training, audits, reporting, etc. Supplier's installation subcontractor shall have a process to ensure electric AMI meters are readable from the head-end system post-installation before leaving the site.

The City will supply fenced storage and limited office space for Supplier's installation subcontractor. Supplier shall ensure that their installation subcontractor is provided with all training and documentation of Supplier's products needed to be able to execute safe high-quality installations of all devices. Installation labor shall include adequate supervision in the per unit price of individual meter exchange and programing listed in EXHIBIT B – Pricing. All required field installation tools including handhelds will be supplied by the Supplier or their subcontractor. The supplier will be responsible for resealing meters. Required seals and rings to be supplied by the city. Supplier and their installation subcontractor shall use handhelds capable of scanning meter module bar codes and the WOMS must include processes that ensure that the bar code of the installed meter/module is scanned post-installation such that the data export to the City billing system is ensured to contain the correct meter to customer correlation.

The Supplier will need to work with the City to develop a strategy to avoid billing interference during the installation process. This may or may not require a billing blackout window. Proposer shall provide their initial input to this approach as a part of their proposal. Handheld devices must be secure. Describe the security features enabled in installer handhelds. Installers shall utilize a mobile work-order management system (WOMS) to manage the meter deployment. Describe the integration process for establishing data exchange between your WOMS system and the City's CIS system and to ensure these systems stay synchronized throughout the deployment process. Proposer should describe the premise data that the City will need to provide per premise for use by the installer. Proposer shall discuss how changes to the City's metering system data such as new accounts are communicated to the supplier for updating their WO systems during the project. Proposer shall describe any meter programming data requirements that will need to be supplied by the City. Proposer shall include in EXHIBIT B, pricing, attached as a spreadsheet for your convenience in submittal, for the appropriate number of City-owned handheld devices that will be required for the meter population in this RFP for future meter programming and troubleshooting required by City field personnel. Describe in detail the field and material management processes including:

- Receipt inspection material issuance to installers
- Inventory control and periodic true-up
- QA of field activities
- RMA - Return to Utility (RTU) process – number of attempts, etc.
- GPS coordinates will be captured for all field-installed devices and meters and will be uploaded to the head- end system and be available for the outage visualization portal. Lat/Lon in decimal degrees are preferred with 6 decimal place accuracy.

Supplier shall submit any proposed City-owned facility device attachments to the City for prior approval. Supplier's installer shall document and notify the City of any as found site anomalies that prevent the replacement of the meter (for the City to address) including:

- Broken or unsafe meter socket
- Meter pit not centered over meter
- Apparent tampering

- Safety concerns
- Sites requiring repairs
- Obstructed Meters
- Damaged electric service entrance

4.2 Call Center

The proposer shall provide a call center during the deployment period(s) to be used during deployment meter exchange installation. A customer complaint resolution from initial call to final issue resolution shall be outlined, integration with internal City call processes, and operational during reasonable business hours for the task. Planned notifications with door hanger(s), given opportunity for the customer to respond prior meter exchange. The call center should have visibility into the WOMS field scheduling so that they can have informed discussions with customers.

Installation subcontractor shall obtain before and after photos for all meters. Photos shall include clear views of meter register reading and serial number. Proposer shall describe the file naming convention and process for capturing and storing these photos. Photos will be provided to the City on mutually agreeable secure media at the end of the project. All photos will be date and time stamped and geotagged. Installer will purge all City of Mount Dora specific data including photos from their system and handhelds at the end of the project. Supplier will submit an initial acceptance test plan to allow the city to verify the functionality defined in this specification inclusive of integrations to City systems as specified herein.

Supplier will provide adequate project support personnel for the duration of the project including a project manager. Any files that must be imported into the head-end system to allow the system to recognize and register meters as they are installed are the responsibility of the Supplier and/or their installation subcontractor. Training for the City must include managing this process before & after the project is complete. Supplier will support City business redesign in support of new processes that will exist as part of going to AMI as well as revisions required to existing City processes. Proposer will include pricing for these services in their AMI proposal in EXHIBIT B.

4.3 Meter Demonstration Board

The meter demonstration board defined previously will be used to support initial acceptance testing. As such, Supplier should ensure this board is populated with all devices needed to fully test the system. If any special test equipment is needed to exercise a system function, supplier shall loan such devices to the City for the test duration. Initial acceptance testing will be performed successfully prior to the deployment of any field hardware. It is the City's intent that meters configured to their requirements including nameplates be tested as a part of this acceptance test. Supplier must ensure meters meeting these requirements are populated on the meter demonstration board. Supplier will submit a final acceptance test plan to allow the city to verify the functionality defined in this specification inclusive of integrations to City systems as specified herein with the majority of field meters deployed. Final acceptance testing will be conducted when 95% or more of field meters are deployed and shall confirm operational readiness of the system and resolution of any outstanding issues from the initial acceptance testing. As noted in the Pricing section, system payments are governed by passing the initial and final acceptance testing. Field device and installation costs are governed by mutually agreed upon % completions.

All scrap meters are to be returned to the city. The City will be responsible for disposal including batteries. Any related permits are the responsibility of the City. Identify and describe Proposer's prior experience with the planned installation subcontractor. Note that the location data used to create the following figures and maps are not included in this document but will be provided as a separate file for Proposer's network design

and planning.

SECTION 5 –RFP PROPOSAL

5.1 Proposal Submission Format Requirements

All documents must be submitted electronically via Demand Star in a word-searchable format accompanied by the ms-excel spreadsheet containing answers to EXHIBITS A and B, attached as a spreadsheet for your convenience in submittal.

Sealed Proposals must be delivered by 12:00 p.m. on or before October 21, 2024 via electronic submission at www.demandstar.com only. There is no cost to proposer for submitting a response.

The bid documents may be download in PDF format at www.mountdora.gov and at www.demandstar.com. A pre-proposal conference is not applicable for this solicitation. The City of Mount Dora does not discriminate based on age, race, color, sex, religion, national origin, disability or marital status. This Public Notice is posted in the lobby of the City of Mount Dora City Hall and on the following websites: www. mountdora.gov and www.demandstar.com.

Electronic responses will be the only method allowed for Bidders to respond to this solicitation. Electronic responses are to be provided via DemandStar only. All submittals must be compatible with Microsoft Office 2007 or later. PDF files are acceptable. Bidding will be done through a secure locked box. Bidders can only view/submit their Bid and will not have access to any other Bidder's submittals. The Bidder's Bid may be changed at the Bidder's discretion until the due date and time have been reached at which time the Bidder will no longer change or have access to the electronic bid submittal.

The City will then open the Bids. Bidders who are bidding for the first time are strongly encouraged to contact Demandstar by e-mailing questions to DemandStar at www.demandstar.com. All bids must be received by the date and time specified above, when they will be opened, via computer, and publicly read aloud. The bid time shall be scrupulously observed. The City shall not be responsible for delays or internet outages caused by any occurrence. The City website does not accommodate electronic responses to bids. Receipt of a bid in any other form does not satisfy this requirement. No exceptions will be made.

If you have obtained this document from a source other than directly from DemandStar by Onvia.com, you are not on record as a plan holder. The Purchasing Department takes no responsibility to provide Addenda to parties not listed as plan holders. It is the Bidder's responsibility to check with our office prior to submitting your proposal to ensure you have a complete, up to date package. The Bidder is responsible for verifying they have received all Bid Addenda. For the purpose of this bid, the term Bidder, Proposer Qualifier, Contractor and Respondent may be used interchangeably.

CAUTION: Bidders should take caution that the City is not responsible for any power outages or internet failures. It is suggested that you upload your response in adequate time to assure that it will post on the day prior to the closing date. A proposer may be referred to herein as the "Bidder, Contractor, Proposer, Qualifier or Respondent" either with capitalization or without.

An award, if made, will be made to the best overall proposer(s) whose bid is most advantageous to the City, taking into consideration the evaluation factors set forth in this RFP. The City will not use any other factors or criteria in the evaluation of the bids received.

The City reserves the right to withdraw this RFP at any time and for any reason, and to issue such clarifications, modifications, and/or amendments, as it may deem appropriate.

Receipt of a Response by the City or submission of a Response to the City confers no rights upon the Proposer nor obligations upon the City in any manner.

Acceptance of a Response does not guarantee issuance of any other governmental approvals. The City is using the competitive sealed qualifications method of source selection for this procurement. Each response will be reviewed to determine if it is responsive to the RFP. Responses deemed non-responsive may be rejected without being evaluated by the Evaluation Committee appointed by the City Manager, which shall be comprised of a minimum of three (3) City employees. The committee will make a recommendation to the City Council who will make the final selection(s). A response which has been signed, and submitted, by the specified deadline and which has provided the information required to be submitted will be deemed responsive. Poor formatting, poor documentation, incomplete or unclear information may be considered as a substandard submission and may adversely affect the evaluation of a response. Respondents who fail to comply with the required and/or desired elements of this RFP do so at their own risk.

The City may, as it deems necessary, conduct discussions with proposers for the purpose of clarification to assure full understanding of, and responsiveness to solicitation requirements. The Response shall be deemed an offer to provide services to the City. In submitting a Response, the Proposer declares that he/she/it understands and agrees to abide by all specifications, provisions, terms and conditions of same, and all ordinances and policies of the City. The Proposer agrees that if a contract is awarded to their firm they will perform the work in accordance with the provisions, terms and conditions of the contract.

To facilitate the fair evaluation and comparison of Responses, all Responses must conform to the guidelines set forth in this RFP. Any portion of a Response that does not comply with these guidelines must be so noted; however, any Response that contains such variances may be considered non-responsive.

Responses should be prepared simply and economically, providing a straightforward concise description of the Proposer's approach and ability to meet the City's needs, as stated in the RFP.

The items listed below shall be submitted with each Response and should be submitted in the order shown. Each section should be clearly labeled, with pages numbered and separated by a tab or tab "page". Failure by a proposer to include all listed items may result in the rejection of its Response.

Copies of these documents may be viewed on www.mountdora.gov. The City of Mount Dora is exempt from any and all state, local and Federal taxes.

Pre-Proposal Conference

A pre-proposal conference is not applicable for this solicitation.

Respondents should organize their response to this RFP as follows:

Title Page - **REQUEST FOR PROPOSALS (RFP) #24-EL-014**
Advanced Metering Infrastructure (AMI) System (REBID)

TAB 1 - PROPOSER'S TABLE OF CONTENTS

TAB 2 - PROPOSED AMI SOLUTION

The proposer is encouraged to provide explanation and detail for each of the following sections as outlined in the RFP.

SECTION

1.1 Summary of the proposed AMI system
1.2 Integration to the City Customer Information / Billing System (CS) and Relevant Software Applications
1.3 Demonstrate the ability to design and implement an AMI in the Electric and Water Service Territories
1.4 Communications Infrastructure Design
1.5 AMI Managed Services
1.6 AMR to AMI Integration
1.7 Core Competency AMI Hierarchy
2.1 Improve Meter to CIS Billing Accuracy and Customer Service
2.2 Promote Safety and Theft Detection
2.3 Effective and Dependable Communications Design
2.4 Reliable Outage/Restoration Information System
2.5 Limit Use of Proprietary Interface
2.6 Software Application Services
2.7 Managed Services
2.8 Customer Portal / Education / Engagement
2.9 Customer Service Application Systems Integration and Security
3.1 General AMI Network and Endpoints requirements
3.2 Requirements for AMI Head End System (HES)
3.3 Requirements for Communications Network
3.4 Software Hosting and Management
3.5 Security Requirements
3.6 Requirements for Electric Meters
3.7 Software CIS Integration
3.8 Customer Engagement and Portal

3.9 Installation of Meters and Network Equipment
3.10 Warranty
4.0 Deployment Installation

TAB 3 - RESPONSE TO EXHIBIT A

Include the attachments requested within Exhibit "A" questions.

TAB 4 - RESPONSE TO EXHIBIT B (Pricing)

TAB 5 - LICENSES, AND CERTIFICATES, REFERENCES

TAB 6 - LITIGATION AND PENALTIES

TAB 7 - FINANCIAL STATEMENTS, BONDING CAPACITY AND INSURANCE

TAB 8 - CONFLICT OF INTEREST AFFIDAVIT

TAB 9 - REQUIRED FORMS

Vendor Inquiries/Questions:

Respondents are required to submit relevant questions to this RFP to Whitney Donovan, Purchasing Coordinator, in writing to donovanw@mountdora.gov. All questions must be submitted prior to 09/13/2024. On 09/24/2024, an addendum to the RFP will be posted with answers to the questions that have been submitted. Respondents are highly encouraged to submit any questions they may have regarding the scope or any other details needing clarification. Questions asked, along with the answers rendered will be electronically distributed to all interested proposers registered for this solicitation, and additionally, posted on the City website (www. mountdora.gov) and on DemandStar (www.demandstar.com).

Proposal Submission:

In order to maintain comparability and enhance the review process, proposals shall be organized in the manner specified below and include all information required herein. The proposal must name all persons or entities interested in the proposals as principals. The proposal must declare that it is made without collusion with any other person entity submitting a proposal pursuant to the RFP.

To be eligible for this RFP, the Respondent must demonstrate that it has sufficient capacity, resources and experience to provide the Services identified/requested under this RFP. Any Respondent that fails to meet ALL of the following minimum qualification requirements shall be noted as "NON-RESPONSIVE."

The applications noted below are required for integration into various existing utility systems and the

contractors submitting under this RFP must be able to provide the following functionality within their respective system. Failure to provide the following required service functionality shall be noted as "NON-Responsive". Proposals must be in strict compliance with this RFP. Failure to comply with all provisions of the RFP may result in disqualification.

Proposer > TAB 1 - Table of Contents

Provide a table of contents for your proposal following the tabs outlined in section 5.1

Proposer > TAB 2 - Proposed AMI Solution

Provide a concise and easy to understand overview of the proposed hardware and software solution and the proposer's vision for successful systems integration and ongoing managed services administration. Technical information to be detailed in this document includes proposed meters, physical interconnection, communications backbone (including available options), required communications studies to ensure appropriate coverage, and a summary of any and all software programs required to achieve the City's desired AMI project objectives (i.e. web-based customer portal, OMS, MDM, etc.) and the proposers' plan to fuse proposed products with existing City systems in a manner that minimizes risk of failure and burden to the City's limited staff. Critical to this section will be disclosure regarding the attributes of the system being proposed as defined in the technical requirements throughout this document. A plan to migrate from the City's existing AMR while transitioning to the new AMI system. It is critical that the existing BS&A billing system remain fully functional during the rollout of the system and ensure a smooth transition to full AMI billing operations with meters being removed and replaced daily. At various times throughout the process, OE may be asked to make presentations to the City Commission or other public meetings (potentially in concert with key City staff) to discuss the project and may request information or materials from the Supplier. The Supplier should plan to make themselves available during key milestone periods or propose what they believe is a reasonable level of engagement locally as the deployment progresses that will ensure adequate and specific communication with all parties that have a vested interest in the success of the program.

Proposer > TAB 3 - Response to EXHIBIT A

This document defines the requirements and the Proposer's compliance (yes or no). A "yes" reply indicates complete compliance. An area is included to support Proposer comments. However, failure to offer certain features, components, or services identified in the sections below as mandatory requirements will result in disqualification. The attached EXHIBIT A, is a spreadsheet for your convenience to complete the required information for this section.

The proposer shall complete and submit the tables as represented in EXHIBIT A, any exception(s) to the requested information shall be noted and provided with adequate detail in "Exceptions". Many of the requirements are strictly submittals. For such requirements, compliance should be marked as "yes", and a numerical corresponding reference number should be provided to a proposer's separate document that is not to be included in the RFP Tables. A "No" response in the compliance tables is by no means a disqualifier. However, failure to offer certain features, components, or services identified in the sections below as mandatory requirements will result in disqualification. The selection process will result in a recommendation to the City Council. The Council has the final say, and has the sole right to accept any or all proposals unless deemed non-responsive to the RFP. Please upload, as a separate file, the Exhibit "A – Required Proposal Information Sheet" as part of your submittal.

Proposer > TAB 4 Response to EXHIBIT B (Pricing)

The proposer shall submit pricing by completing the tables as represented in EXHIBIT B, and attached as a spreadsheet for your convenience in submittal. Please upload, as a separate file, the Exhibit "B - Pricing Sheet", as part of your submittal. Any exception(s) to the requested information shall be noted and provided with adequate detail in "Exceptions".

Proposer > TAB 5 Licenses, and Certificates, References

Provide copies of current State of Florida registration/license(s) renewal(s) for the Applicant (Corporate and all key professional personnel) with the appropriate State Board governing the services offered. The Committee may verify the status with the appropriate State Board.

Proposer > TAB 6 Litigation and Penalties

Identify all litigation in which your firm or any separate firm of a joint venture has been a party to legal action (including arbitration, administrative proceedings, etc.) or lawsuits during the last five (5) years. **Include this information under TAB 6 on a separate sheet(s) in the format shown below.**

Brief Description of Dispute and Circumstances	Current Status	Action Taken to Settle Prior to and/or After Law Suit was Filed

As a separate document placed under Tab 6, describe in detail any projects within the last five (5) years where liquidated damages, penalties, liens, default, mitigation, cancellations of contract or termination of contract were imposed, sought to be imposed, threatened or filed against your organization.

_____

_____

_____

Proposer > TAB 7 FINANCIAL STATEMENTS, BONDING CAPACITY AND INSURANCE:

Financial Statements: Upload Financial Statement, as a separate electronic file, when uploading your proposal to DemandStar. Identify said file as "Solicitation Response – Financial Statement."

Bonding Capacity: Include/Attach a certified, notarized letter from a Surety (said Surety Company must have an AM Best rating of A – VII licensed to do business in the State of Florida) as part of the financial package.

Surety Name _____
Contact _____
Telephone _____
Local Bonding Agent _____
Insurance Agency _____

Surety Name _____
Contact _____
Telephone _____
Local Bonding Agent _____
Insurance Agency _____

Insurance Requirements: Provide a sample insurance statement confirming the following limits as proof of ability to obtain the required coverage and limits:

General Liability

COMMERCIAL GENERAL LIABILITY INSURANCE, INCLUDING CONTRACTUAL LIABILITY, TO COVER THE HOLD HARMLESS AGREEMENT SET FORTH HEREIN, WITH LIMITS OF NOT LESS THAN:

EACH OCCURRENCE	$2,000,000
PERSONAL/ADVERTISING INJURY	$1,000,000
PRODUCTS/COMPLETED OPERATIONS AGGREGATE	$5,000,000
GENERAL AGGREGATE	$5,000,000
FIRE DAMAGE	$100,000 ANY 1 FIRE
MEDICAL EXPENSE	$5,000 - $10,000 ANY 1 PERSON

AN ADDITIONAL INSURED ENDORSEMENT MUST BE ATTACHED TO THE CERTIFICATE OF INSURANCE. THE ADDITIONAL INSURED ENDORSEMENT SHOULD BE ISSUED ON AN ISO OR SIMILAR FORM AND APPLY ON A PRIMARY AND NONCONTRIBUTORY BASIS. VENDORS PROVIDING CONSTRUCTION SERVICES MUST PROVIDE AN ADDITIONAL INSURED ENDORSMENT INCLUDING COVERAGE FOR COMPLETED OPERATIONS (SHOULD BE ISO CG20101185 OR CURRENT EDITIONS OF CG2037 & CG2010) UNDER THE GENERAL LIABILITY POLICY. PRODUCTS & COMPLETED OPERATIONS COVERAGE TO BE PROVIDED FOR A MINIMUM OF 10 YEARS FROM DATE OF POSSESSION BY OWNER OR COMPLETION OF CONTRACT TO INCLUDE PRODUCT MATERIAL FAILURE AND PRODUCT REPLACEMENT LABOR INSTALLATION COSTS.

ADDITIONAL INSURED SHALL BE LISTED AS: CITY OF MOUNT DORA, FLORIDA 510 N. BAKER STREET, MOUNT DORA FL 32757

□ COVERAGE IS TO BE WRITTEN ON AN OCCURRENCE FORM BASIS AND SHALL APPLY AS PRIMARY.
□ A PER PROJECT AGGREGATE LIMIT ENDORSEMENT MUST BE PROVIDED.
□ DEFENSE COSTS ARE TO BE IN ADDITION TO THE LIMIT OF LIABILITY.
□ A WAIVER OF SUBROGATION MUST BE PROVIDED IN FAVOR OF THE CITY.
□ POLICY SHALL CONTAIN NO EXCLUSION FOR THIRD PARTY ACTION-OVER CLAIMS (INJURY TO SUBCONTRACT WORKERS)

 XCU COVERAGE IS TO BE INCLUDED WHEN INDICATED BY THE SCOPE OF SERVICE. COVERAGE SHOULD EXTEND TO INDEPENDENT CONTRACTORS AND FELLOW EMPLOYEES.
 COVERAGE IS TO INCLUDE A CROSS LIABILITY OR SEVERABILITY OF INTERESTS PROVISION AS PROVIDED UNDER THE STANDARD ISO FORM SEPARATION OF INSUREDS CLAUSE.

2. Automobile Liability
BUSINESS AUTOMOBILE LIABILITY FOR ANY AUTO (ALL OWNED, HIRED, AND NON- OWNED AUTOS) WITH LIMITS OF NOT LESS THAN $1,000,000 PER ACCIDENT. IN THE EVENT VENDOR DOES NOT OWN ANY AUTOMOBILES, THE CITY WILL ACCEPT PROOF OF HIRED AND NON OWNED AUTO LIABILITY ONLY.

 CERTIFICATE HOLDER MUST BE LISTED AS ADDITIONAL INSURED.
 A WAIVER OF SUBROGATION MUST BE PROVIDED.
 COVERAGE SHOULD APPLY ON A PRIMARY BASIS.

3. Workers' Compensation
 WORKERS' COMPENSATION INSURANCE WITH LIMITS EQUAL TO FLORIDA STATUTORY REQUIREMENTS.
 EMPLOYERS LIABILITY MUST INCLUDE LIMITS OF AT LEAST $500,000 EACH ACCIDENT, $500,000 EACH DISEASE/EMPLOYEE, $500,000 EACH DISEASE/MAXIMUM.
 A WAIVER OF SUBROGATION ENDORSEMENT MUST BE PROVIDED IN FAVOR OF THE CITY.
 COVERAGE SHOULD APPLY ON A PRIMARY BASIS. SHOULD SCOPE OF WORK PERFORMED BY VENDOR QUALIFY ITS EMPLOYEE FOR BENEFITS UNDER FEDERAL WORKERS' COMPENSATION STATUTE (EXAMPLE, U.S. LONGSHORE & HARBOR WORKERS ACT OR MERCHANT MARINE ACT), PROOF OF APPROPRIATE FEDERAL ACT COVERAGE MUST BE PROVIDED.
 WORKERS' COMPENSATION EXEMPTION FORMS WILL NOT BE ACCEPTED FOR THE PROJECT MANAGER, ENGINEER, GENERAL CONTRACTOR, OR SOLE PRACTITIONER THAT INTENDS TO SUB-CONTRACT THE WORK TO OTHER INDIVIDUALS OR COMPANIES. THESE ENTITIES OR INDIVIDUALS ARE REQUIRED TO PURCHASE A WORKERS' COMPENSATION INSURANCE POLICY.

4. *UMBRELLA LIABILITY –May be given consideration NO LESS THAN $2M - $5M EACH OCCURRENCE. COVERAGE TO APPLY AS EXCESS OVER GL, AL, EMPLOYERS LIABILITY ON A FOLLOW FORM BASIS*

5. Professional Liability
WHEN INDICATED BY THE SCOPE OF SERVICE, VENDOR MUST MAINTAIN PROFESSIONAL LIABILITY OR EQUIVALENT ERRORS & OMISSIONS LIABILITY WITH LIMIT OF NOT LESS THAN $2,000,000 PER OCCURRENCE.

FOR POLICIES WRITTEN ON A CLAIMS MADE BASIS, VENDOR SHALL MAINTAIN A RETROACTIVE DATE PRIOR TO OR EQUAL TO THE EFFECTIVE DATE OF THIS CONTRACT.

IN THE EVENT THE POLICY IS CANCELED, NON-RENEWED, SWITCHED TO AN OCCURRENCE FORM OR THERE IS A CHANGE IN RETROACTIVE DATE, VENDOR MUST PURCHASE AN

EXTENDED REPORTING PERIOD RIDER DURING THE LIFE OF THIS CONTRACT OF NOT LESS THAN 3 YEARS.

COVERAGE IS TO APPLY ON A PRIMARY BASIS.

6. Contractors Pollution Liability:
MAY BE REQUIRED DEPENDING ON SCOPE OF SERVICES. LIMIT OF LIABILITY NO LESS THAN $2M EACH OCCURRENCE. ALL NETWORK EQUIPMENT MUST BE WITHIN ALL APPLICABLE FEDERAL COMMUNICATION COMMISSION (FCC) GUIDELINES.

Proposer > TAB 8 CONFLICT OF INTEREST AFFIDAVIT FORM

See this Required Form under Section 10 of this RFP. Please complete the form and include it under TAB 8 of the submitted proposal.

Proposer > TAB 9 REQUIRED FORMS

See Section 10 of this RFP for all Required Forms. Proposers' failure to **return ALL required forms** will result in the proposal being deemed as non-responsive.

SECTION 6 – CITY EVALUATION AND SELECTION (Method of Source Selection)

6.1 City Evaluation

The City's procedure for selecting is as follows, the City Manager shall approve an Evaluation Committee to review all Responses submitted. There shall be a minimum of three members of the committee, but always an odd number. Subsequent to the closing of the RFP, the Purchasing Coordinator shall review the submittals received and verify whether each submittal appears to be responsive to the requirements of the published RFP. All Evaluation Committee members shall review the Request for Qualifications (RFP) issued.

The committee members shall review each responsive Response individually and score the same based on the evaluation criteria state herein. Prior to the first meeting of the Evaluation Committee, the City will post a notice announcing the date, time and place of the first committee meeting. Said notice shall be posted, in the lobby of the City of Mount Dora City Hall, not less than three (3) working days prior to the meeting. The City shall also post prior notice of all subsequent committee meetings and shall post such notices at least one (1) day in advance of all subsequent meetings.

6.2 Qualification Evaluation Committee and Evaluation Factors

All Responses will be subject to a review and evaluation process. It is the intent of the City that all proposers responding to this RFP, who are responsive and meet the requirements, will be ranked in accordance with the criteria established in these documents. The City will consider all responsive and responsible Responses received in its evaluation and award process. For evaluation purposes, the term "Responsible" means: A business entity or individual who is fully capable of meeting all of the requirements of the solicitation and subsequent contract. A Proposer must possess the full capability, including financial and technical, to perform as contractually required and be able to fully document the ability to provide good faith performance.

A Response shall include all of the information solicited in this RFP, and any additional data that the Proposer deems pertinent to the understanding and evaluation of the Response. Proposers should not withhold any information from the written response in anticipation of presenting the information orally or in a demonstration, since oral presentations or demonstrations may not be solicited. Each proposer will be ranked based on the criteria herein addressed.

Proposers submitting the required criteria will have their Responses evaluated by an evaluation committee and scored for non-price factors as listed in section 6.3. The evaluation committee will not assign weights or score for cost.

During the evaluation process and at the sole discretion of the City, requests for clarification of one or more proposer submittals may be conducted. A request for clarification may be performed by the City in a written format, or through scheduled oral interviews. Such clarification request will provide proposers with an opportunity to answer any questions the City may have on a proposer's submittal.

Drug-Free Workplace: In accordance with Florida Statutes, Section 287.087, preference shall be given to businesses with drug-free workplace programs. Whenever two or more Responses which are equal with respect to quality and service are received by the City for the procurement of commodities or contractual services, a Response received from a business that furnishes a form certifying that it is a Drug Free Workplace shall be given preference in the award process. NOTE: In the event, the submitter wishes to provide items specified above and beyond the stated requirements of this request at "no cost" to the City of Mount Dora, these services should be identified and included in the request response.

Tie Breaker: If there are tie bids, meaning everything except the information relating to the bidder is the same, the following methods shall be used in the order below to break the tie:

- Drug free workplace policy in place.
- The bidder that has an existing Business Tax Receipt (BTR) within the City limits.
- Prior contract with the City performed satisfactorily will result in the win of a tiebreaker and prior contract with the City performed unsatisfactorily will result in the loss of a tiebreaker.
- Timeliness of delivery.

6.3 Evaluation Criteria & Calculation of Points for Cost

The following criteria will be used in this evaluation process to determine the successful respondent(s):

	Selection Criteria	Proposer Response to Exhibit A - Section Numbers	
			Maximum Possible Points
1	**Safety, Claims, Judgements and Data Security**	**2.0, 10.0**	**200**
2	**Meter Requirements, Compatibility**	**3.0, 4.0**	**200**
3	**AMI Communications, Software Application Services, Managed Services and Meter Data Management**	**5.0, 6.0, 7.0**	**400**
4	**Outage Management Performance and Accuracy**	**8.0**	**60**
5	**Customer Portal / Education / Engagement**	**9.0**	**55**
	Cost Criteria	**Purchasing Coordinator**	
6	**Calculation of Points for Cost**		**85**
	TOTAL POINTS		**1000**

Calculation of points for cost (per Exhibit "B" Pricing Sheet - Grand Total Amount) will be completed, by the City's Purchasing Coordinator, and added to the Evaluation Committee members' total scoring for each proposer. Points for cost are calculated from the lowest to highest proposer's submitted Grand Total Amount, with a maximum of 85 points to be assigned.

	PROPOSAL COST	LOWEST COST PROPOSED	% OF LOW	MULTIPLIER	TOTAL POINTS ASSIGNED
Company #1	$100,000.00	$100,000.00	100.0%	85	85.0
Company #2	$108,000.00	$100,000.00	92.6%	85	78.7
Company #3	$120,000.00	$100,000.00	83.3%	85	70.8

Note: Evaluation Committee scoring plus Purchasing Coordinator's calculation of points for cost will be added together, for a possible maximum of 1000 points, to determine a final total score for each proposer. The final total score for each proposer will determine proposer ranking.

6.4 Formal Oral Presentation/Interview Scoring (if requested):

If Presentations/Interview sessions are requested for shortlisted firms the following stand-alone scoring process, will apply:

A maximum of four (4) points can be assigned to each firms' session. The points assigned will be multiplied by a weight of 2.5 to equal a maximum of 10 possible points for a final scoring.

The Presentation/Interview final scoring will determine the final ranking of shortlisted firms.

SECTION 7 – TERMS AND CONDITIONS OF CONTRACT

The City anticipates the negotiation of an Agreement for this service. An agreement resulting from this RFP shall be subject to the terms and conditions set forth in a City Contract and any terms and conditions included in this RFP. The City reserves the right to include in any contract document such terms and conditions, as it deems necessary for the proper protection of the rights of the City. The City will not be obligated to sign any contracts, agreements or other documents provided by the Contractor(s) with their submittal.

A successfully negotiated and Council approved Agreement will remain in effect for the duration of the project completion. The City will make the sole determination of a completed project.

SECTION 8 – INSURANCE AND INDEMNIFICATION

As referenced under Section 5.1, Tab 7, respondents must submit with their responses, proof of insurance meeting or exceeding the coverage requirements stated in this RFP.

SECTION 9 – GENERAL TERMS AND CONDITIONS

Licenses

The successful Consultant/Contractor is required to possess the correct occupational license, professional license, and any other authorizations necessary to carry out and perform the work required by the project pursuant to all applicable Federal, State and Local Law, Statute, Ordinances, and rules and regulations of any kind.

If you have questions, regarding required professional licenses and Business Tax Receipt, contact the Planning Department at (352) 735-7120.

Principals/Collusion

By submission of a response to this RFP, the undersigned, as Proposer, does declare that the only person or persons interested in this RFP, as principal or principals, is/are named in the response. No other person has any interest in this Proposal or in the contract to be entered into; that this Proposal is made without connection to any other person, company or parties, and that this Response is, in all respects, fair and submitted in good faith without collusion or fraud.

Taxes

The City is exempt from Federal Excise and State of Florida Sales Tax.

Relation of City

It is the intent of the parties that the Contractor/Consultant shall be considered an independent Contractor/Consultant and that neither the Contractor/Consultant nor their employees shall, under any circumstances, be considered employees or agents of the City, and that the City shall be at no time legally responsible for any negligence on the part of said Contractor/Consultant, its employees or agents, resulting in either bodily or personal injury or property damage to any individual, firm, or corporation.

Fund Availability

Any contract executed for the services set forth in this RFP shall be subject to fund availability.

Termination

Should the Contractor(s) be found to have failed to perform services in a manner satisfactory to the City, the City may terminate the Agreement immediately for cause; further the City may terminate the Agreement for convenience with a thirty (30) day written notice. The City shall be sole judge of non-performance.

Liability

The Contractor(s) will not be held responsible for failure to complete contract, in a timely manner, due to causes beyond its control, including, but not limited to, work stoppage, fires, civil disobedience, riots, rebellions, Acts of Nature and similar occurrences making performance impossible or illegal.

Indemnity

The successful Contractor(s) shall indemnify and hold the City harmless from any and all liabilities, damages, losses and costs, recognizing any applicable limitations under Florida law, with such indemnification and hold harmless requirements included in the final Agreement executed between the City and said successful proposer.

Lobbying/Cone of Silence

All proposers are placed on NOTICE that the City does not wish to be lobbied, either individually or collectively about a matter for which a proposer has submitted a Response to this RFP.

Proposers are not to contact members of the City Council for such purposes as meeting or introduction, luncheons, dinners, etc. During the process, from RFP announcement to final Council approval, no firm or their agent shall contact any other employee of the City in reference to this Proposal, with the exception of the Finance Director or his designee(s) for questions related to the solicitation or the process. Failure to abide by this provision may serve as grounds for disqualification under this RFP.

Single Bid/Proposal

Each Proposer must submit, with their Proposal, the required signed contract/agreement and all forms included in this RFP. Only one Proposal from a legal entity as a primary will be considered. A legal entity that submits a Proposal as a primary or as part of a partnership or joint venture submitting as primary may not then act as a sub-consultant to any other firm submitting under the same RFP.

If a legal entity is not submitting as a primary that legal entity may not act as a sub-CONTRACTOR to any other firm or firms submitting under the same **RFP** nor act as part of a partnership or joint venture to the primary. All submittals in violation of this requirement will be deemed non-responsive and rejected from further consideration.

Protest Procedures

Any appeal or protest to the Request for Proposal shall be governed by the City of Mount Dora's Purchasing

Policy Manual.

Public Entity Crime

A person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a Proposal to provide any goods or services to a public entity; may not submit a Proposal with a public entity for the construction or repair of a public building or public work; may not be awarded or perform work as a contractor, supplier, consultant, sub-contractor, or sub-consultant under a contract with any public entity; and may not transact business with any public entity for a period of 36 months following the date of being placed on the convicted vendor list.

Conflict of Interest

Proposer shall complete the Conflict of Interest Affidavit included as an attachment to this RFP document. Disclosure of any potential or actual conflict of interest is subject to City staff review and does not in and of itself disqualify a firm from consideration.

These disclosures are intended to identify and or preclude conflict of interest situations during the selection, award and contract execution processes.

Responsible Vendor Determination

Prospective Vendor is hereby notified that Florida Statutes, Section 287.05701, requires that the City may not request documentation of or consider a vendor's social, political, or ideological interests when determining if the responding party is a responsible Vendor.

Prohibition of Gifts to City Employees

No organization or individual shall offer or give, either directly or indirectly, any favor, gift, loan, fee, service or other item of value to any City employee, as set forth in Chapter 112, Part III, Florida Statutes, the current City Ethics Ordinance, and City Administrative Policy. Violation of this provision may result in one or more of the following consequences:

a. Prohibition by the individual, firm, and/or any employee of the firm from contact with City staff for a specified period of time

b. Prohibition by the individual and/or firm from doing business with the City for a specified period of time, including but not limited to: submitting bids/proposals, responses, and/or quotes

c. Immediate termination of any contract held by the individual and/or firm for cause

Immigration Reform and Control Act

Proposer acknowledges, and without exception or stipulation, any firm(s) receiving an award shall be fully responsible for complying with the provisions of the Immigration Reform and Control Act of 1986, 8 U.S.C. 1324, and regulations relating thereto, as either may be amended. Failure by the awarded firm(s) to comply with the laws referenced herein shall constitute a breach of the award agreement and the City shall have the discretion to unilaterally terminate said agreement immediately.

Scrutinized Company List

Florida Statutes, Sections 287.135, prohibits Florida municipalities from contracting with companies, for goods or services over $1,000,000, that are on the Scrutinized Companies with Activities in Sudan List, the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List engaged in any Business operations with Cuba or Syria or which are on the list of Scrutinized Companies that Boycott Israel.
The list of "Scrutinized Companies" is created pursuant to Section 215.473, Florida Statutes. A copy of the current list of "Scrutinized Companies" can be found at the following link:

https://www.sbafla.com/fsb/Portals/FSB/Content/Performance/Quarterly/2019_01_29_Web_Update_PFIA_Prohibited_List.pdf?ver=2019-01-29-130702-420

Billing Instructions –Awarded Contractor

Specific format of the invoice will be addressed between the City and the contractor/firm prior to submission of a first invoice. Payment will be made in accordance with the Florida Prompt Payment Act, as amended from time to time.

Acknowledgment of Insurance Requirements

By signing the Insurance Requirements included in this RFP, Proposer acknowledges these conditions include Insurance Requirements.

It should be noted by the Proposer that, in order to meet the City's requirements, there may be additional insurance costs to the Proposer's firm. It is, therefore, imperative that the proposer discuss these requirements with the Proposer's insurance agent, as noted on the Insurance Check List, so that allowances for any additional costs can be made by the Proposer.

The Proposer's insurance obligations shall not be limited in any way by the agreed upon contract price, or the Proposer's limit of, or lack of, sufficient insurance protection.

Proposer also understands that the evidence of required insurance may be required within five (5) business days following notification of its offer being accepted; otherwise, the City may rescind its acceptance of the Proposer's response.

Acknowledgment of Bonding Requirements

A Bid Bond is required to be submitted under this RFP. However, Proposer shall also provide proof, with their response, of their ability to obtain the required Performance and Payment bonds at the levels indicated in this RFP if awarded a contract. By signing its Response, Proposer acknowledges that it has read and understands the bonding requirements for this solicitation.

☐ Not Applicable

☒ Bid Bond: Bond shall be submitted with bid response in the most recent form of an AIA form 310 for 5% of the total bid amount.

The Bid Bond shall be retained by the City as liquidated damages if the successful Proposer fails to execute and deliver to the City the unaltered contract, or fails to deliver any required Performance and Payment Bonds

or Certificates of Insurance, all within twenty-one (21) calendar days after receipt of the Notice of Selection for Award. Bid Bonds shall be executed by a corporate surety licensed under the laws of the State of Florida to execute such bonds, with conditions that the surety will, upon demand, forthwith make payment to the City upon said bond. The Bid Bonds of the three (3) highest ranked Proposers shall be held until the contract has been executed by the successful Proposer and same has been delivered to the City together with the required bonds and insurance. No bids including alternates shall be withdrawn within one hundred and eighty (180) days after the bid closing date thereof. If a bid is not accepted within said time period it shall be deemed rejected. In the event that the City awards the contract prior to the expiration of the one hundred and eighty (180) day period without selecting any or all alternates, the City shall retain the right to subsequently award to the successful Proposer said alternates at a later time and approved by the Finance Director or designee, and the successful Proposer.

☒ Performance and Payment Bonds: For projects in excess of $200,000, bonds shall be submitted to the Purchasing Coordinator within 7 days of receipt of the City's accepted cost proposal and written for 100% of the total project cost. The cost shall be borne by the Proposer receiving an award. The Performance and Payment Bonds shall be underwritten by a surety authorized to do business in the State of Florida and otherwise acceptable to Owner; provided, however, the surety shall be rated as A or better as to general policy holders rating and Class V or higher rating as to financial size category and the amount required shall not exceed 5% of the reported policy holders' surplus, all as reported in the most current Best Key Rating Guide, published by A.M. Best Company, Inc. of 75 Fulton Street, New York, New York 10038.

Should the contract amount be less than $500,000, the requirements of Florida Statutes, Section 287.0935, shall govern the rating and classification of the surety.

If the surety for any bond furnished by Contractor is declared bankrupt, becomes insolvent, its right to do business is terminated in the State of Florida, or it ceases to meet the requirements imposed by the Contract Documents, the Contractor shall, within five (5) calendar days thereafter, substitute another bond and surety, both of which shall be subject to the City's approval.

Delivery of Proposals

All RFP responses are to be delivered **before 12:00 p.m., local time**, on or before **October 21, 2024** via electronic submission at www.demandstar.com **only.**

Ambiguity, Conflict, or Other Errors in the RFP

If a Proposer discovers any ambiguity, conflict, discrepancy, omission, or other error in the RFP, Proposer shall immediately notify the Purchasing Manager of such error in writing and request modification or clarification of the document. The Purchasing Manager will make modifications by issuing a written addendum/revision and will give written notice to all parties who have received this RFP.

The Proposer is responsible for clarifying any ambiguity, conflict, discrepancy, omission, or other error in the RFP prior to submitting a Response or such ambiguity, conflict, discrepancy, omission or other error shall be waived to be determined by the City in its sole discretion.

Qualification, Presentation, and Protest Costs

The City will not be liable in any way for any costs incurred by any proposer in the preparation of its Response to this RFP, nor for the presentation of its Response and/or participation in any discussions, negotiations or,

if applicable, any protest procedures.

Proposals, Presentation, and Protest Costs

The City will not be liable in any way for any costs incurred by any proposer in the preparation of its Proposal in response to this **RFP**, nor for the presentation of its Proposal and/or participation in any discussions, negotiations, or, if applicable, any protest procedures.

Acceptance or Rejection of Proposals

The right is reserved by the City to waive irregularities in any Response received, to reject any or all Responses received, to re-solicit for new Responses, if desired, and upon recommendation and justification by the City to accept the Response which in the judgment of the City is deemed the most advantageous for the public and the City.

Any Response which is incomplete, conditional, obscured or which contains irregularities of any kind, may be cause for rejection. In the event of default of the successful proposer, or refusal to enter into a City contract, the City reserves the right to accept the Response of any other proposer or to re-advertise/re-solicit using revised documentation, in its sole discretion.

Requests for Clarification of Qualifications

Requests by the Purchasing Manager to a proposer(s) for clarification of a Response shall be in writing. A proposer's failure to respond to a request for clarification may deem proposer to be non-responsive, and may be just cause to reject its Response.

Validity of Responses

No Response may be withdrawn after it is filed unless the proposer makes such a request in writing to the City prior to the time set for the closing of the RFP.

All Responses shall be valid for a period of one hundred twenty (120) days from the submission date to accommodate the evaluation and selection process.

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REQUIRED FORMS

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PROPOSER CHECK LIST

I M P O R T A N T: **Please read carefully, sign in the spaces indicated and return with your Response.**

Proposer should check off each of the following items as the necessary action is completed:

- ☐ All applicable forms have been signed and included
- ☐ All information as requested in the Proposer's Qualification Form is included.
- ☐ Any addenda have been signed and included.
- ☐ The Response will be **electronically** delivered in time to be received no later than the specified due date **October 21, 2024** and time of 1**2:00 pm**. (Otherwise the Response WILL NOT be considered.)

Company	Address
Authorized Signature	City, State, Zip Code
Printed Name & Title	Telephone No.
Email	Fax No.

REQUIRED FORMS & PROPOSAL CHECKLIST

All REQUIRED forms MUST BE signed and returned as part of the submitted proposal. Use this Proposer Checklist to ensure all applicable forms are completed and returned:

- ☐ 1. Required Forms & Proposers Checklist Form
- ☐ 2. Affidavit of Compliance with Florida Statutes, Section 288.0071
- ☐ 3. Conflict of Interest Affidavit
- ☐ 4. Vendor Certification Regarding Scrutinized Companies' List
- ☐ 5. Firm Qualification Form
- ☐ 6. Declaration Statement Form
- ☐ 7. Insurance Requirements Form
- ☐ 8. Drug Free Workplace Certification Form
- ☐ 9. Non-Collusion Affidavit of Prime Bidder Form
- ☐ 10. Acknowledgements Form
- ☐ 11. Compliance with Public Records Law Form
- ☐ 12. Reference Form
- ☐ 13. Public Entity Crimes Statement Form
- ☐ 14. Firm Information Form
- ☐ 15. Sub-Contractor Listing Form
- ☐ 16. F.S.S. Section 287.138 Certification Form
- ☐ 17. Completed W9
- ☐ 18. Addenda (if applicable)

AFFIDAVIT OF COMPLIANCE WITH SECTION 288.0071, FLORIDA STATUTES, ECONOMIC INCENTIVES TO FOREIGN ENTITIES OF CONCERN

Before me, a notary public, in and for the State of Florida – at large, personally appeared, _____, and having first made due oath or affirmation, states:
(Write Name Here)

1. My name is _____.
(Write Name Here)

2. I am the _____ of _____.
(Insert Job Title) *(Insert Company Name)*

3. The Company was formed in _____and is a _____.
(Country and State) *(List the Type of Entity (ex.: LLC, Inc., etc.)*

4. I am duly authorized and empowered and have sufficient knowledge to execute and deliver this Affidavit.

5. I affirm that the Company is not:

a. Owned or controlled by the government of the People's Republic of China, the Russian Federation, the Islamic Republic of Iran, the Democratic People's Republic of Korea, the Republic of Cuba, the Venezuelan regime of Nicolás Maduro, or the Syrian Arab Republic (collectively and individually, a Foreign Country of Concern), including any agency of or any other entity of significant control of such Foreign Country of Concern. Where 'controlled by' means *having possession of the power to direct or cause the direction of the management or policies of a company, whether through ownership of securities, by contract, or otherwise; or a person or entity that directly or indirectly has the right to vote 25 percent or more of the voting interests of the company or that is entitled to 25 percent or more of its profits is presumed to control the foreign entity*; or

b. A partnership, association, corporation, organization, or other combination of persons organized under the laws of or having its principal place of business in a Foreign Country of Concern, or a subsidiary of such entity.

Under penalties of perjury, I declare that I have read the foregoing Affidavit and that the facts stated in it are true.

Signed and Delivered on this _____ day of _____, 202__.

BY: _____
Signature of Affiant

_____
Printed Name

STATE OF FLORIDA
COUNTY OF _____

The foregoing instrument was acknowledged before me by means of [ ] physical presence or [ ] online notarization of _____, as _____, of _____, who personally swore or affirmed that he/she is authorized to execute this Agreement and thereby bind the Firm, and who is personally known to me or who produced as identification, and who did/did not take an oath this day of _____, 2024.

(stamp)

_____
NOTARY PUBLIC

AFFIDAVIT OF COMPLIANCE WITH SECTION 288.0071, FLORIDA STATUTES, ECONOMIC INCENTIVES TO FOREIGN ENTITIES OF CONCERN

Before me, a notary public, in and for the State of Florida – at large, personally appeared, _____, and having first made due oath or affirmation, states:
(Write Name Here)

1. My name is _____.
(Write Name Here)

2. I am the _____ of _____.
(Insert Job Title) *(Insert Company Name)*

3. The Company was formed in _____and is a _____.
(Country and State) *(List the Type of Entity (ex.: LLC, Inc., etc.)*

4. I am duly authorized and empowered and have sufficient knowledge to execute and deliver this Affidavit.

5. I affirm that the Company is not:

b. Owned or controlled by the government of the People's Republic of China, the Russian Federation, the Islamic Republic of Iran, the Democratic People's Republic of Korea, the Republic of Cuba, the Venezuelan regime of Nicolás Maduro, or the Syrian Arab Republic (collectively and individually, a Foreign Country of Concern), including any agency of or any other entity of significant control of such Foreign Country of Concern. Where 'controlled by' means *having possession of the power to direct or cause the direction of the management or policies of a company, whether through ownership of securities, by contract, or otherwise; or a person or entity that directly or indirectly has the right to vote 25 percent or more of the voting interests of the company or that is entitled to 25 percent or more of its profits is presumed to control the foreign entity*; or

b. A partnership, association, corporation, organization, or other combination of persons organized under the laws of or having its principal place of business in a Foreign Country of Concern, or a subsidiary of such entity.

Under penalties of perjury, I declare that I have read the foregoing Affidavit and that the facts stated in it are true.

Signed and Delivered on this _____ day of _____, 202__.

BY: _____
Signature of Affiant

_____
Printed Name

STATE OF FLORIDA
COUNTY OF _____

The foregoing instrument was acknowledged before me by means of [ ] physical presence or [ ] online notarization of _____, as _____, of _____, who personally swore or affirmed that he/she is authorized to execute this Agreement and thereby bind the Firm, and who is personally known to me or who produced as identification, and who did/did not take an oath this day of _____, 2024.

(stamp)

_____
NOTARY PUBLIC

CONFLICT OF INTEREST AFFIDAVIT

By the signature below, the Proposer, and its employees, officers and/or agents, certifies, and hereby discloses, that, to the best of its knowledge and belief, all relevant facts, concerning past, present or currently planned interest or activity (financial, contractual, organizational or otherwise) which relates to the proposed work and bears on whether the Proposer and/or any of its employees, officers and/or agents, has a possible conflict, have been fully disclosed.

Additionally, the Proposer and its employees, officers and/or agents, agree to immediately notify in writing the City of Mount Dora Purchasing Department, if any actual or potential conflict of interest arises during the solicitation process.

_____	_____
Company	Address
_____	_____
Authorized Signature	City, State, Zip Code
_____	_____
Printed Name & Title	Telephone No.
_____	_____
Email	Fax No.

STATE OF FLORIDA
COUNTY OF _____

The foregoing instrument was acknowledged before me by means of [ ] physical presence or [ ] online notarization of _____, as _____, of _____, who personally swore or affirmed that he/she is authorized to execute this Agreement and thereby bind the Contractor, and who is personally known to me or who produced _____ as identification, and who did/did not take an oath this _____ day of _____, 2024.

(stamp) _____
NOTARY PUBLIC

VENDOR CERTIFICATION REGARDING
SCRUTINIZED COMPANIES' LISTS PURSUANT TO
FLORIDA STATUTES, SECTION 187.135

Respondent Vendor Name: _____
Name of Company: _____
FEIN: _____
Authorized Representative's Name and Title _____
_____
Address: _____
_____
Phone Number: _____ Email Address: _____

Florida Statutes, Sections 287.135, prohibits Florida municipalities from contracting with companies, for goods or services over $1,000,000, that are on the Scrutinized Companies with Activities in Sudan List, the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List engaged in any Business operations with Cuba or Syria or which are on the list of Scrutinized Companies that Boycott Israel.

The list of "Scrutinized Companies" is created pursuant to Florida Statutes, Section 215.473. A copy of the current list of "Scrutinized Companies" can be found at the following link: https://www.sbafla.com/fsb/FundsWeManage/FRSPensionPlan/GlobalGovernanceMandates/QuarterlyReports.aspx

As the person authorized to sign on behalf of the Respondent Vendor, I hereby certify that the company identified above in the section entitled "Respondent Vendor Name" is not listed on either the Scrutinized Companies with Activities in Sudan List, the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, is not participating in a boycott of Israel and does not have any business operations with Cuba or Syria. I understand that pursuant to Florida Statutes, Section 287.135, the submission of a false certification may subject the Respondent Vendor to civil penalties, attorney's fees and/or costs.

I understand and agree that the City may immediately terminate any contract resulting from this solicitation if the company referenced above is found to have submitted a false certification related to the Scrutinized Companies that Boycott Israel List, engaging in a boycott of Israel, the Scrutinized Companies with Activities in Sudan List, the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List or engaging in business operations in Cuba or Syria.

Certified By: _____
Authorized Signature _____
Print Name: _____
Print Title: _____

DECLARATION STATEMENT FORM

City of Mount Dora 510 N. Baker Street Mount Dora, FL 32757

RE: RFP #24-EL-014 “Advanced Metering Infrastructure (AMI) System (REBID)”

Dear Mayor and Council Members:

The undersigned as Proposer, or on behalf of Proposer, declares that this Response is submitted without any other understanding, agreement or connection with any person, corporation, or firm submitting a Response for the same purpose and that the Response is in all respects fair and without collusion or fraud.

The undersigned as Proposer, or on behalf of Proposer, further declares that this Response is in compliance in every respect with all the Instructions to Proposers issued prior to the opening of the Responses.

The undersigned as Proposer, or on behalf of Proposer, if selected, agrees to commence negotiations in good faith and execute an appropriate City document for purpose of establishing a formal contractual relationship with the City for the performance of all requirements to which the Response pertains as set forth in RFP #24-EL-014 “Advanced Metering Infrastructure (AMI) System (REBID)”.

IN WITNESS WHEREOF, WE have hereunto subscribed our names on this _____ _____, 20___, in the State of_____.

_____	_____
Company	Address
_____	_____
Authorized Signature	City, State, Zip Code
_____	_____
Printed Name & Title	Telephone No.
_____	_____
Email	Fax No.

INSURANCE REQUIREMENTS

INSURANCE TYPE REQUIRED LIMITS
==========

☒ 1. Worker's Compensation Statutory Limits of Florida Statutes, Chapter 440 and all Federal Government Statutory Limits and Requirements.

☒ 2. Commercial General Liability Bodily Injury & Property Damage (Occurrence Form) patterned
after the current I.S.O form
with no limiting endorsements. $2,000,000 single limit per occurrence

☒ 3. Indemnification: To the maximum extent permitted by Florida law, the Contractor/Vendor/Consultant shall indemnify and hold harmless the City of Mount Dora, its officers and employees from any and all liabilities, damages, losses and costs, including, but not limited to, reasonable attorneys' fees and paralegals' fees, to the extent caused by the negligence, recklessness, or intentionally wrongful conduct of the Contractor/Vendor/Consultant or anyone employed or utilized by the Contractor/Vendor/Consultant in the performance of this Agreement. This indemnification obligation shall not be construed to negate, abridge or reduce any other rights or remedies which otherwise may be available to an indemnified party or person described in this paragraph.

This section does not pertain to any incident arising from the sole negligence of the City of Mount Dora.

☒ 4. Automobile Liability $ 500,000 Each Occurrence Owned/Non-owned/Hired Automobile Included

☒ 5. Other Insurance as indicated below: $ 1,000,000 Per Occurrence Errors and Omissions or Professional
Malpractice Coverage

☐ 6. Aircraft Liability $1,000,000 each occurrence combined single limit for bodily injury liability and property damage liability.

☒ 7. Contractor/Vendor/Consultant shall ensure that all subs comply with the same insurance requirements that he is required to meet. The same Consultant shall provide City with certificates of insurance meeting the required insurance provisions.

☒ 8. The City of Mount Dora must be named as "ADDITIONAL INSURED" on the Insurance Certificate for Commercial General Liability where required.

☒ 9. The City of Mount Dora shall be named as the Certificate Holder.

NOTE: The "Certificate Holder" should read as follows:

City of Mount Dora Mount Dora, Florida

No City Division, Department, or individual name should appear on the Certificate. No other format will be acceptable.

☒ 10. Thirty (30) Days Cancellation Notice required.

☒ 11. The Certificate must state the RFP #24-EL-014 "Advanced Metering Infrastructure (AMI) System (REBID)

= =

PROPOSER'S AND INSURANCE AGENT'S STATEMENT:

We understand the insurance requirements of these specifications and that the evidence of insurability may be required within five (5) days of the award of RFP.

_____	_____
Company	Address
_____	_____
Authorized Signature	City, State, Zip Code
_____	_____
Printed Name & Title	Telephone No.
_____	_____
Email	Fax No.

_____

Insurance Agency

_____

Signature of Proposer's Agent

Remainder of Page Intentionally Left Blank

DRUG-FREE WORKPLACE PROGRAM CERTIFICATION

Preference to businesses with drug-free workplace programs. -- Whenever two or more bids, proposals, or replies that are equal with respect to price, quality and service are received by the state or by any political subdivision for the procurement of commodities or contractual services, a bid, proposal, or reply received from a business that certifies that it has implemented a drug-free workplace program shall be given preference in the award process. In order to have a drug-free workplace program, a business shall:

(1) Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.

(2) Inform employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for drug abuse violations.

(3) Give each employee engaged in providing the commodities or contractual services that are under bid a copy of the statement specified in subsection (1).

(4) In the statement specified in subsection (1), notify the employees that, as a condition of working on the commodities or contractual services that are under bid, the employee will abide by the terms of the statement and will notify the employer of any conviction of, or plea of guilty or nolo contendere to, any violation of Chapter 893 or of any controlled substance law of the United States or any state, for a violation occurring in the workplace no later than 5 days after such conviction.

(5) Impose a sanction on, or require the satisfactory participation in a drug abuse assistance or rehabilitation program if such is available in the employee's community by, any employee who is so convicted.

(6) Make a good faith effort to continue to maintain a drug-free workplace through implementation of this section.

Does the company responding to this solicitation certify that it has implemented a drug-free workplace program in accordance with the provision of Florida Statues, Section 287.087, as stated above?

YES ☐
NO ☐

_____	_____
Company	Address
_____	_____
Authorized Signature	City, State, Zip Code
_____	_____
Printed Name & Title	Telephone No.
_____	_____
Email	Fax No.

NON-COLLUSION AFFIDAVIT OF PRIME QUALIFIER

THIS FORM MUST BE SIGNED AND SWORN TO IN THE PRESENCE OF A NOTARY PUBLIC OR OTHER OFFICIAL AUTHORIZED TO ADMINISTER OATHS.

State of_____
County of_____

_____, being first duly sworn, deposes and says that:

I am the _____of _____, (Proposer) which has submitted a Response to City of Mount Dora RFP #24-EL-014.

I am fully informed respecting the preparation and contents of the Response to RFP #24-EL-014, and of all pertinent circumstances respecting such Response.

Neither the Proposer nor any of its officers, partners, owners, agent representatives, employees or parties in interest, including this Affiant, has in any way colluded, conspired, connived or agreed, directly or indirectly, sought by agreement or collusion or communication or conference with any other proposer, firm or person, to fix the price or prices in the Proposer's Response to RFP #24-EL-014, or that of any other proposer, or to fix any overhead, profit or cost element of the Response price or the price of any other proposer, or to secure through any collusion, conspiracy, connivance or unlawful agreement any advantage against the CITY OF MOUNT DORA.

The price or prices quoted in the Proposer's Response to RFP #24-EL-014 are fair and proper and are not tainted by any collusion, conspiracy, connivance or unlawful agreement on the part of the Proposer or any of its agents, representatives, owners, employees, or parties in interest, including this Affiant.

Company _____ Address _____

_____ _____
Authorized Signature City, State, Zip Code

_____ _____
Printed Name & Title Telephone No.

_____ _____
Email Address Fax No.

STATE OF FLORIDA
COUNTY OF _____

The foregoing instrument was acknowledged before me by means of [ ] physical presence or [ ] online notarization of _____, as _____, of _____, who personally swore or affirmed that he/she is authorized to execute this Agreement and thereby bind the Consultant, and who is personally known to me or who produced _____ as identification, and who did/did not take an oath this _____ day of _____, 2024.

_____
(stamp) NOTARY PUBLIC

ACKNOWLEDGEMENTS
RFP #24-EL-014
"ADVANCED METERING INFRASTRUCTURE (AMI) SYSTEM (REBID)"

To: City of Mount Dora
510 N. Baker Street
Mount Dora, FL 32757

_____(Proposer) guarantees its Response to RFP #24-EL-014 for a period not to exceed one hundred twenty (120) days from the date its Response was submitted to the City of Mount Dora unless an extension is granted by the Proposer.

The Contractor, by signing these RFP Submittal pages, acknowledges and agrees to abide by all the terms, conditions, and specifications contained in this RFP Document.

Dated this_____day of_____,_____
(Month) (Year)

INDIVIDUAL, LIMITED LIABILITY COMPANY, PARTNERSHIP, OR OTHER FORM OF ENTITY WHICH IS NOT A CORPORATION

By:_____/_____ (Signature) _____ (Print name)

Address: _____

_____

_____

Telephone: (__)_____Fax: (__) _____

Taxpayer/Employer Identification Number (TIN/EIN): _____

CORPORATION

By:_____/_____ (Signature) _____ (Print name)

Address: _____

_____

_____

(Form Continued on Next Page)

Telephone: (__)_____Fax: (___) _____

Taxpayer/Employer Identification Number (TIN/EIN): _____

State of Incorporation:
Corporate President: _____
(Print Name)

Corporate Secretary: _____
(Print Name)

Corporate Treasurer: _____
(Print Name)

CORPORATE SEAL

Attest By: _____
Secretary

Signature:_____Date: _____

Remainder of Page Intentionally Left Blank

CITY OF MOUNT DORA

COMPLIANCE WITH THE PUBLIC RECORDS LAW
RFP #24-EL-014

THIS FORM MUST BE SIGNED AND SWORN TO IN THE PRESENCE OF A NOTARY PUBLIC

Upon award, recommendation, or ten (10) days after opening, submittals become a "public record" and shall be subject to public disclosure consistent with Florida Statutes, Chapter 119. Proposers must clearly mark information within a Response which is exempt from disclosure under Florida law, and must state the reasons why such exclusion from public disclosure is permitted. To the extent any protected information is submitted to the City, it must be submitted in a separate envelope marked accordingly.

The Proposer agrees that it will fully defend the City in any cause of action or litigation associated with non-disclosure of that information identified by the Proposer as exempt under Florida's public records law. It is understood and agreed by the Proposer that in the event the Proposer fails to defend the City in any such litigation, the City may take such action as it deems necessary in order to avoid a third-party cause of action, including disclosure of the information. In such an event, the Proposer shall hold the City harmless and free of any liability.

Company Name: _____

Authorized representative (printed): _____

Authorized representative (signature): _____

STATE OF FLORIDA
COUNTY OF _____

The foregoing instrument was acknowledged before me by means of [ ] physical presence or [ ] online notarization of _____, as _____, of _____, who personally swore or affirmed that he/she is authorized to execute this Agreement and thereby bind the Consultant, and who is personally known to me or who produced _____ as identification, and who did/did not take an oath this _____ day of _____, 2024.

_____
(stamp) NOTARY PUBLIC

REFERENCE FORM

Provide the business names, contact person, email and telephone number of four (4) Electric Utility references, with preference in the state of Florida, for which the Proposer has provided services similar to the services described in this RFP for three (3) years or more within the last five (5) year period. Include relationships with governmental agencies. It is our intent to contact these references during the evaluation process.

The Proposer will identify whether the business entity is incorporated in Florida, another state, or is in a foreign country. If a proposer is a corporation, provide a copy of the Certification from the Florida Secretary of State verifying the Proposer's corporate status and good standing. The Proposer shall include a copy of its business license with the submittal.

1. Name of Company: _____ Address:_____ Point of Contact: _____
   Phone #:_____Email address: _____ Service(s) Provided: _____
   _____

Dates of Service: _____

2. Name of Company: _____ Address:_____ Point of Contact: _____
   Phone #:_____Email address: _____ Service(s) Provided: _____
   _____

Dates of Service: _____

3. Name of Company: _____ Address:_____ Point of Contact: _____
   Phone #:_____Email address: _____ Service(s) Provided: _____
   _____

Dates of Service: _____

4. Name of Company: _____ Address:_____ Point of Contact: _____
   Phone #:_____Email address: _____ Service(s) Provided: _____
   _____

Dates of Service: _____

PUBLIC ENTITY CRIMES FORM

SWORN STATEMENT PURSUANT TO FLORIDA STATUTES, SECTION 287.133(3) (A) PUBLIC ENTITY CRIMES

THIS FORM MUST BE SIGNED AND SWORN TO IN THE PRESENCE OF A NOTARY PUBLIC OR OTHER OFFICIAL AUTHORIZED TO ADMINISTER OATHS.

1. THIS SWORN STATEMENTIS SUBMITTED to the City of Mount Dora by:_____ [NAME] as the _____ _____[TITLE] of _____[BUSINESS ENTITY] and its Federal Employer Identification Number (FEIN) is_____ _____.

2. I understand that a "public entity crime" as defined in Florida Statutes, Section 287.133 (1)(g), means a violation of any state or federal law by a person with respect to and directly related to the transaction of business with any public entity or with an agency or political subdivision of any other state or of the United States, including, but not limited to, any bid or contract for goods or services to be provided to any public entity or an agency or political subdivision of any other state or of the United States and involving antitrust, fraud, theft, bribery, collusion, racketeering, conspiracy, or material misrepresentation.

3. I understand that "convicted" or "conviction" as defined in Florida Statutes, Section 287.133(1)(b), means a finding of guilt or a conviction of a public entity crime, with or without an adjudication of guilt, in any federal or state trial court of record relating to charges brought by indictment or information after July 1, 1989, as a result of a jury verdict, nonjury trial, or entry of a plea of guilty or nolo contendere.

4. I understand that an "affiliate" as defined in Florida Statutes, Section 287.133(1)(a), means:

    a. A predecessor or successor of a person convicted of a public entity crime; or

    b. An entity under the control of any natural person who is active in the management of the entity and who has been convicted of a public crime. The term "affiliate" includes those officers, directors, executives, partners, shareholders, employees, members and agents who are active in the management of an affiliate. The ownership by one person of shares constituting a controlling interest in another person, or a pooling of equipment or income among persons when not for fair market value under an arm's length agreement, shall be a prima facie case that one person controls another person. A person who knowingly enters into a joint venture with a person who has been convicted of a public entity crime in Florida during the preceding 36 months shall be considered an affiliate.

5. I understand that a "person" as defined in Florida Statutes, Section 287.133(1)(e), means any natural person or entity organized under the laws of any state or of the United States with the legal power to enter into a binding contract and which bids or applies to bid on contracts for the provisions of goods or services let by a public entity, or which otherwise transacts or applies to transact business with a public entity. The term "person" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in management of an entity.

6. The statement which I have marked below is true in relation to the entity submitting this sworn statement. (Indicate which statement applies).

_____Neither the entity submitting this sworn statement, nor any of its officers, directors, executives, partners, shareholders, employees, members, and agents who are active in management of an entity, nor any affiliates of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989.

_____The entity submitting this sworn statement, or one or more of its officers, directors, executives, partners, shareholders, employees, members, and agents who are active in management of an entity, or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989.

_____The entity submitting this sworn statement, or one or more of its officers, directors, executives, partners, shareholders, employees, members, and agents who are active in management of an entity, or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989. However, there has been a subsequent proceeding before a Hearing Officer of the State of Florida, Division of Administrative Hearings and the Final Order entered by the Hearing Officer determined that it was not in the public interest to place the entity submitting this sworn statement on the convicted vendor list. (Attach a copy of the final order).

I UNDERSTAND THAT THE SUBMISSION OF THIS FORM TO THE CITY OF MOUNT DORA IS FOR THE CITY OF MOUNT DORA ONLY AND, THAT THIS FORM IS VALID THROUGH DECEMBER 31 OF THE CALENDAR YEAR IN WHICH IT IS FILED. I ALSO UNDERSTAND THAT I AM REQUIRED TO INFORM THE CITY OF MOUNT DORA PRIOR TO ENTERING INTO A CONTRACT IN EXCESS OF THE THRESHOLD AMOUNT PROVIDED IN FLORIDA STATUTES, SECTION 287.017, FOR CATEGORY TWO, OF ANY CHANGE IN THE INFORMATION CONTAINED IN THIS FORM.

_____

(Signature)

STATE OF FLORIDA
COUNTY OF _____

The foregoing instrument was acknowledged before me by means of [ ] physical presence or [ ] online notarization of _____, as _____, of _____, who personally swore or affirmed that he/she is authorized to execute this Agreement and thereby bind the Consultant, and who is personally known to me or who produced _____ as identification, and who did/did not take an oath this _____ day of _____, 2024.

(stamp) _____

NOTARY PUBLIC

FIRM INFORMATION FORM

Firm is a:

( ) Corporation
( ) Partnership
( ) Sole Proprietorship
( ) Other_____(Explain)

Federal Employer Identification Number: _____

Firm Name: _____

Mailing Address: _____

_____

Telephone No.:_____Fax No.: _____

Email Address:_____Web Address:_____

If remittance address is different from the mailing address so indicate below.

Firm Name: _____

Remittance Address: _____

_____

_____

Submitted by: _____

Name & Title Printed: _____

RFP #24-EL-014
"Advanced Metering Infrastructure (AMI) System (REBID)"

SUB-CONSULTANT/CONTRACTOR LISTING

Provide a name, and address of all sub-consultants/contractors that have the potential to work on this project

Sub-Consultants/Contractors: Phone Number/E-Mail:

FLORIDA STATUTES, SECTION 287.138
CERTIFICATION

I, _____(person)_____, as the _____(title)_____ of _____(entity)_____, do hereby certify that _____(entity)_____: (i) is not owned by the government of a foreign country of concern as defined by Florida Statutes, Section 287.138; (ii) does not have the government of a foreign country of concern, as defined by Florida Statutes, Section 287.138, as a controlling interest owner; (iii) is not organized under the laws of a foreign country of concern, as defined by Florida Statutes, Section 287.138; and (iv) does not have its principal place of business in a foreign country of concern as defined by Florida Statutes, Section 287.138.

_____
Print: _____
Title: _____

STATE OF FLORIDA
COUNTY OF _____

The foregoing instrument was acknowledged before me by means of [ ] physical presence or [ ] online notarization of _____, who personally swore or affirmed that he/she is authorized to execute this Oath and who is personally known to me or who produced _____ as identification, and who did/did not take an oath this _____ day of _____, 2024.

(stamp)

_____
NOTARY PUBLIC, State of Florida

Form **W-9**
(Rev. October 2018)
Department of the Treasury
Internal Revenue Service

Request for Taxpayer Identification Number and Certification

▸ **Go to *www.irs.gov/FormW9* for instructions and the latest information.**

Give Form to the requester. Do not send to the IRS.

Print or type. See **Specific Instructions** on page 3.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.

2 Business name/disregarded entity name, if different from above

3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only **one** of the following seven boxes.

Individual/sole proprietor or single-member LLC | C Corporation | S Corporation | Partnership | Trust/estate

Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▸ _____

Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is **not** disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.

☐ Other (see instructions) ▸

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):

Exempt payee code (if any)

Exemption from FATCA reporting code (if any) _____

(Applies to accounts maintained outside the U.S.)

5 Address (number, street, and apt. or suite no.) See instructions.

Requester's name and address (optional)

6 City, state, and ZIP code

7 List account number(s) here (optional)

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Social security number

			–			–				

or

Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Employer identification number

		–							

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here	**Signature of U.S. person** ▸	**Date** ▸

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to *www.irs.gov/FormW9.*

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)
- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, *later.*

SECTION 11 – LIST OF EXHIBITS

EXHIBIT	TITLE	DESCRIPTION
A - See Separate File as Uploaded	RFP Requirements Spreadsheet of Questions for Proposer(s)	Fillable spreadsheet for proposers to answer questions from required SECTION 5.2
B – See Separate File as Uploaded	RFP Pricing	Fillable spreadsheet for proposers for pricing required SECTION 5.3
C – See Separate File as Uploaded	Electric Utility Service Boundary	As presented in map
D – See Separate File as Uploaded	Geographic Locations of Active Electric Customers	As presented in map
E – See Separate File as Uploaded	Inventory Form Factors	As presented in Spreadsheet
F – As Included (See next page)	ZOOM – RFP Opening Meeting Access Information	ZOOM Meeting Access Information for RFP Opening

Exhibit “F”

ZOOM Meeting Access Information

Solicitation Opening:

Whitney Donovan is inviting you to a scheduled Zoom meeting.

Topic: RFP 24-EL-014- Opening
Time: Oct 21, 2024 12:00 PM Eastern Time (US and Canada)

Join Zoom Meeting
https://us06web.zoom.us/j/88234838486?pwd=HNlXJMNIEFO6vkrFfGbKknxq7u50og.1

Meeting ID: 882 3483 8486
Passcode: 741688

One tap mobile
+13052241968,,88234838486#,,,,*741688# US
+16469313860,,88234838486#,,,,*741688# US

Dial by your location
• +1 305 224 1968 US
• +1 646 931 3860 US
• +1 301 715 8592 US (Washington DC)
• +1 309 205 3325 US
• +1 312 626 6799 US (Chicago)
• +1 646 558 8656 US (New York)
• +1 689 278 1000 US
• +1 719 359 4580 US
• +1 720 707 2699 US (Denver)
• +1 253 205 0468 US
• +1 253 215 8782 US (Tacoma)
• +1 346 248 7799 US (Houston)
• +1 360 209 5623 US
• +1 386 347 5053 US
• +1 507 473 4847 US
• +1 564 217 2000 US
• +1 669 444 9171 US

Meeting ID: 882 3483 8486
Passcode: 741688

Find your local number: https://us06web.zoom.us/u/kdf5D8BuJ5

RFP # 24-EL-014
ADVANCED METERING INFRASTRUCTURE (AMI) REBID
ADDENDUM NUMBER 1

To All Plan Holders:

The following changes, clarification and additions are hereby made part of the **RFP #24-EL-014 ADVANCED METERING INFRASTRUCTURE (AMI) REBID** for the above as fully and completely as if the same were fully set forth therein.

~~~
~~~

Q4. Can we get an updated quantity of meters? Exhibit D has approximately 5965. Exhibit B and Exhibit E are different at around 6700.

A4. The quantity of meter for this project is 6700, encapsulating the existing 5965 + and additional new 735 customers expected in 2024/2025.

Q4a. What is the breakdown of the quantities for meters, for both residential and commercial?
A4a. The breakdown for residential is approximately 5718 meters, and 832 commercial.

Q4b. What is the breakdown for the pilot project vs. full deployment?
A4b. Please provide reference, page and section regarding a pilot versus full deployment.

Q4c. Can we get additional clarification or estimates on the 6 routes?
A4c. City Response includes Six (6) meter report cycle.csv files

Q4d. Can you provide clarity on how many (if any) meters are installed inside a building versus outside a building?
A4d. At this time we do not have any meter within buildings and or meter rooms.

Q5. Section 2.9: Customer Service Application Systems and Security. Can you elaborate on the statement "License to use any Supplier- provided integration software will be issued to City."?

A5. *2.9 Customer Service Application Systems Integration and Security*
The Supplier shall provide the appropriate software integration to automatically transfer appropriate data to and from the billing and Customer Information System (CIS). License to use any Supplier- provided integration software will be issued to City. The Supplier shall provide the appropriate software integration to implement any other functionality described herein. Supplier shall outline their data flow back to the AMI head-end system and the City BS&A billing system.

Software licenses generally fall into the following categories:

- Public domain license
- GNU Lesser General Public License (LPGL) ...
- Permissive license
- Copyleft license
- Proprietary license.

https://www.indeed.com/career-advice/career-development/types-of-software-license

Q6. Section 4.3: Meter Demonstration Board. Can you elaborate on the Meter Demonstration Board?

A6. A meter demonstration board has exhibit to the fundamentals of Advanced Metering Infrastructure providing information and education to project shareholders, such as internal business groups, including executives, customer service, electric construction staff, meter readers, and customers.

Q7. Ref: pg. 6, "RFP 24-EL-014 Advanced Metering Infrastructure (AMI) REBID" / Subsection 1.1 – The City mentions "…expand the communication to all water meters in the future." When does the City intend to update their water meters?

A7. There is no definitive date nor budget for expansion into AMI water meter update.

Q8. Ref: pg. 9&10, "RFP 24-EL-014 Advanced Metering Infrastructure (AMI) REBID" / Subsection 1.7 – The City refers to Engineering Analytics – can more specifics be provided as to what this entails?

A8. AMI engineering analytics typically entails data that increases the return on investment for an AMI system, the most widely recognized statistics from AMI engineering analytics is load forecasting. Below is link to more information:

The Power of Bid Data and Data Analytics for AMI Data
https://www.ncbi.nlm.nih.gov/pmc/articles/PMC7309066/

Q9. Ref: pg. 13, "RFP 24-EL-014 Advanced Metering Infrastructure (AMI) REBID" / Subsection 3.2 – Bullet f) states "The HES shall provide authorized users with direct access to the database to create custom reports. Alternatively, the HES shall provide tools or applications for users to create and export custom reports." – Can the Contractor add further pricing items to the pricing sheet to support the above additional tools or should all tools be included within the base rate for the AMI HES or MDM?

A9. This general access to database information to create and export customer reports shall be included in the base rate pricing for the HES and or MDM.

Q10. Ref: pg. 14, "RFP 24-EL-014 Advanced Metering Infrastructure (AMI) REBID" / Subsection 3.2 – Bullet g) lists required features to be supported by the AMI HES. One of the requirements is support for "Load limiting for an electric meter" – Does the City have load limiting in place today? Also, can the City provide details as to how they have or plan to implement load limiting?

A10. The City does not have a mechanism for load control at the meter level. We recognize existing AMI technology has capability of providing load control for individual meter, applied in many Pre-Paid programs, group load control for emergency peak-shaving measures, and internal meter temperature algorithms to limit and or interrupt for meter safety.

Q11. Ref: pg. 14, "RFP 24-EL-014 Advanced Metering Infrastructure (AMI) REBID" / Subsection 3.3 – Does the city have a preference on which communication technology is utilized for AMI meter communication – mesh or cellular? More specifically, does the City have a preference for water meter communications – or is there flexibility for both electric and water meters to utilize their own communication technology and consolidate at the HES level?

A11. The proposer shall recommend a communication solution given the RFP requirements. This RFP requires a high level of communications ability in reporting meter data and individual meter outages.

Please refer to Exhibit A:

Below is two examples of many within this exhibit asking the proposer their capabilities.

4.12	What is the an acceptable monthly read rate with the AMI system proposed.	ELECTRIC: _____.___% WATER: _____.___%

4.3	Supplier shall submit network design and planned equipment locations, mounting details, and power requirements to the City for approval prior to installation. Identify any supporting work to be performed by the city.	Describe:

4.7	Identify the type of network topology used (e.g. mesh, point-to-multipoint, combination), frequencies used, and transmit power.	Describe:

Q12. Ref: pg. 14, "RFP 24-EL-014 Advanced Metering Infrastructure (AMI) REBID" / Subsection 3.3 – Does the city have an existing cellular carrier to support data backhaul or should the Contractor propose a cellular communications solution where applicable?

A12. The proposer shall recommend a communication solution given the RFP requirements.

Q13. Ref: pg. 16, "RFP 24-EL-014 Advanced Metering Infrastructure (AMI) REBID" / Subsection 3.4 – Item c) requires that the "Supplier shall operate a primary and a backup data center. Data center locations, backup procedures, expected disaster recovery times and level of redundancy shall be described by the Supplier." – Does the city require a high availability or hot standby infrastructure configuration for the AMI, MDM, OMS or customer portal? Also, does the City require a specific combination of instances – production, back-up, test, development?

A13. Please clarify a definition for High Availability, Hot Standby. Given the RFP scope the proposer should recommend when production, back-up, test procedures. The City's position on development is stated in page Page 6 – *"The City plans to implement an AMI system that is established and proven over multiple similar scale projects. First-generation and other unproven equipment and software are not acceptable. The City will not pay for a heavily customized solution that achieves all the objectives and features below but rather a reliable, time-tested platform that provides as many of the features as possible at a reasonable price. Supplier shall provide a Visio system diagram of the plan, from head-end system down to field devices. An "as-built" update of this Visio diagram will be required prior to project closure."*

Q14. Ref: pg. 14, "RFP 24-EL-014 Advanced Metering Infrastructure (AMI) REBID" / Subsection 3.3 – Bullet c) outlines minimum performance requirements of communications network. It specifically mentions success percentages (98%) and an execution window (30 seconds) for disconnects/reconnects. Section 3.6 k) states that disconnects/reconnects should occur 99% of the time within 30 seconds and within 1 minute? Can the City provide some clarity on the requirement?

A14. The purpose and intent of this RFP requirement is to give the proposer opportunity to provide their solution by proposal.

Q15. Ref: pg. 19, "RFP 24-EL-014 Advanced Metering Infrastructure (AMI) REBID" / Subsection 3.7 – Does the city have a preference as to how the AMI/MDM system should integrate with the BS&A CIS system - file-based, web API or other?

A15. The purpose and intent of this RFP requirement is give the proposer opportunity to provide their solution by proposal.

Q16. Ref: pg. 19, "RFP 24-EL-014 Advanced Metering Infrastructure (AMI) REBID" / Subsection 3.7 – Does the city have active support from BS&A to fulfill an integration effort?

A16. This RFP requires compatibility with the City's existing BS&A CIS.

Q17. Ref: "RFP 24-EL-014 Advanced Metering Infrastructure (AMI) REBID" / EXHIBIT B – Within the pricing table is the Contractor able to create separate line items for certain solution elements (integration vs. license) or should costs for each element be consolidated?

A17. Exhibit B of the RFP has provision for lines in software integration and network device pricing listed as "Other (specify)".

Q18. Ref: pg. 18, "RFP 24-EL-014 Advanced Metering Infrastructure (AMI) REBID" / Subsection 3.6 & EXHIBIT B – The requirements for single phase meters mentions in section 3.6 states that "Single-phase meters shall be available from two different manufacturers". Can the Contractor add line items for additional meters within the pricing table?

A18. "Single-phase meters shall be available from two different manufacturers. The primary single-phase meter, as offered by Supplier, shall have been in production for more than a year at the time of the bid."

To clarify, the City asks for availability of the 2S meter from two different manufactures. If you do not have this capability it should be listed as an exception to this requirement. We are not asking for pricing from both manufactures.

Q19. Ref: "Exhibit B – Pricing Sheet" / Subsection "ELECTRIC METERS" – Items 14 – 19 within the spreadsheet add to 6700 meters which is the value in cell G33. I would assume that to be the total meter count. However, the description for Item 20 ("Form 36 S") shares the same row. The meter count within section 1.1 details "approximately 950 commercial and 6,100 residential electric meters". Is there a form 36 s count missing from the table which should contribute to the total meter count?

A19. See Clarification 1 and Exhibit "A" of this Addendum for **REVISED** Pricing Form.

Q20. Ref: "Exhibit A – RFP Requirements" / Subsection 6.4 – The requirement for outage notification to be reported to the HES is 99% of meters within 3 minutes. Section "2.4 Reliable Outage/Restoration Information System" states that the requirement for outage notification reporting to the HES is 99% of the affected meters within 5 minutes - Which requirement should the Contractor follow?

A20. Section 2.4 It is expected large scale outages (200 meters or larger) and/or restorations including up to the entire city electric meter population shall be reported to the head-end system and viewable on the UI within 5 minutes for 99% of the affected meters. These are all system requirements regardless of which managed services component provides the capability.

If you cannot meet this requirement, you would need to take exception to this requirement.

Whereas Section 6.4 asks for a "Yes" or "No" if your system can attain 3 minutes.

Q21. (General) – The "REQUIRED FORMS & PROPOSAL CHECKLIST" references a "Firm Qualification Form". This form appears to be missing.

A21. This form is now included under this Addendum 1 – Exhibit "A".

Q22. (General) – The "AFFIDAVIT OF COMPLIANCE" form appears twice (on page 44 & 45) – Is there a reason the form is duplicated? Please confirm it is necessary to complete only one copy to include in the proposal.

A22. This is an error. This only needs to be filled out once.

Q23. (General) – The "Vendor Certification" form requires the Contractor to fill in both "Respondent Vendor Name" and "Name of Company" – Can the City provide some clarification as to the information desired in each response field.

A23. Respondent Vendor Name is the name of the person authorized to sign on the behalf of the company.

Q24. (Ref: pg. 6, "RFP 24-EL-014 Advanced Metering Infrastructure (AMI) REBID" / Subsection 1.1 Introduction and Scope of Services) Based on the details provided here, it is our understanding that the City will not be replacing 100% of their existing electric meter population. Please confirm if our understanding is correct, and if yes, please confirm if the meters to be replaced are located within saturated service areas, requiring a contiguous, premise-to-premise in-field service requirement, or will said meters be primarily sporadically located throughout the City's general service areas?

A24. To clarify all electric meters will be exchanged in coordination with the existing 6 read cycles.

Q25. (Ref: pg. 20, "RFP 24-EL-014 Advanced Metering Infrastructure (AMI) REBID" / Subsection 3.9 Installation of Meters and Network Equipment / Item d.) Please confirm how many user licenses the City requires for their internal purposes, as it relates to access to the Installation Contractor's in-field work order management system (WOMS).

A25. One (1) Contractor WOM temporary license may be needed based upon WOM capabilities and the meter exchange process.

"d) Installers shall utilize a mobile work order management system to manage the meter deployment. The utility shall have access to the work order system with the ability to see in real time the meters scheduled to be replaced and all completed replacements on a given day. "

Q26. (Ref: pg. 20, "RFP 24-EL-014 Advanced Metering Infrastructure (AMI) REBID" / Subsection 3.9 Installation of Meters and Network Equipment / Item e.) It has been our experience to date that the standard GPS precision requirements are typically +/- 3 meters, versus "sub-meter accuracy" as noted here. To reduce associated costs, would the City be willing to accept this precision versus that noted in the RFP?

A26.
"e) The work order system shall be able to store scanned meter bar code data from AMI meters installed, meter GPS locations with sub-meter accuracy, old and new meter readings, installer field notes and a digital photograph of each meter installed. "

It is the proposer judgement to take exception to this requirement. If requirement exception is chosen, narrative to propose an alternative can be proposed.

Q27. (Ref: pg. 20, "RFP 24-EL-014 Advanced Metering Infrastructure (AMI) REBID" / Subsection 3.9 Installation of Meters and Network Equipment / Item e.) If the Contractor is unable to capture GPS as based on RFP specifications (e.g. inside and/or obstructed meters, no satellite signal available, etc.), what is the expected correction service to obtain accuracy?

A27. It is the proposer judgement to take exception to this requirement. If requirement exception is chosen, narrative to propose an alternative can be proposed.

Q28. (Ref: pg. 20, "RFP 24-EL-014 Advanced Metering Infrastructure (AMI) REBID" / Subsection 3.9 Installation of Meters and Network Equipment / Item e.) What is the acceptable alternative for GPS data collection if the GNSS signals are unavailable or obstructed for an asset?

A28. It is the proposer judgement to take exception to this requirement. If requirement exception is chosen, narrative to propose an alternative can be proposed.

Q29. (Ref: pg. 20, "RFP 24-EL-014 Advanced Metering Infrastructure (AMI) REBID" / Subsection 3.9 Installation of Meters and Network Equipment / Item e.) How will the City validate the accuracy of the GPS coordinates collected?

A29. Quality assurance / Quality measures will be taken throughout the meter exchange process.

Q30. (Ref: pg. 20, "RFP 24-EL-014 Advanced Metering Infrastructure (AMI) REBID" / Subsection 3.9 Installation of Meters and Network Equipment / Item e.) Which metadata are expected to be provided along with the GPS position captured?

A30. *"e) The work order system shall be able to store scanned meter bar code data from AMI meters installed, meter GPS locations with sub-meter accuracy, old and new meter readings, installer field notes and a digital photograph of each meter installed."*

Q31. (Ref: pg. 20, "RFP 24-EL-014 Advanced Metering Infrastructure (AMI) REBID" / Subsection 3.9 Installation of Meters and Network Equipment / Item e.) Is there a specific format in which the GPS position should be provided?

A31. Format compatible with ESRI shown below and on page 7 of the solicitation.

1.2 City Customer Information / Billing System (CS) and Relevant Software Applications

The City will maintain BS&A as the primary CIS system, recognizing that a long-term migration to a platform that will be most conducive to data reads of greater granularity (e.g. hourly for electric and water reads to support more robust retail rates) may be necessary. The City's expectation is that the successful Proposer has enough command over the needed systems integration steps to ensure maximum viability of the City's existing systems while maintaining flexibility for the future. It is critical the proposed new AMI and existing water AMR system have full compatibility into the BS&A customer information and financial billing system.

Software Application	Customer Information System (CIS) Billing and Accounting	Outage Management Call Center Dispatch Services	Distribution Modeling Software	Distribution Mapping
Name	BS&A	ENCO Utility Services	Milsoft WindMil Enterprise	ESRI Arc GIS Desktop 10.6.1
Email	ubsupport@bsaoftware.com	https://www.enecous.com	www.milsoft.com	https://www.esri.com/en-us/home
Version	3/1/2023 (1.0.8456.15089) Net Version 4.7.1	Cloud Based - Filemaker Pro 14	Windmil 8.7.34.5060.35e1d5d5 Build 2019	Ersi ArcCatalog 10.6.1.9270 Esri Arc Globe 10.6.1.9270 Esri Arc map 10.6.1.9270 Ersi ArcScene 10.6.1.9270
	Miscorsoft Windows 10 Enterprise Version 10.0.18363 Build 18363	14.0.6	Core E&O	
Address	14965 Abbey Lane. Bath MI 48808	8141 Easat Kaiser Blvd	4400 Buffalo Gap Road Suite 5150	Regional Office St Louis
Phone	855-272-7638	951-236-1571	800-344-5647	888-377-4575

Q32. (Ref: pg. 20, "RFP 24-EL-014 Advanced Metering Infrastructure (AMI) REBID" / Subsection 3.9 Installation of Meters and Network Equipment / Item e.) Is there any additional information that needs to be specified in the RFP regarding the collection of geospatial data for the purposes of this contract?

A32. Historically, AMI GIS information is primarily used for propagation studies, data transfer and bandwidth capacity, meter to HES transfer time, and reporting and outage management mapping. However each type proprietary AMI system may use GIS differently to achieve these or similar goals. The proposer may include and provide narrative of additional GIS information for the City proposed scope.

Q33. (Ref: pg. 23, "RFP 24-EL-014 Advanced Metering Infrastructure (AMI) REBID" / Subsection 4.2 Call Center) Please confirm that end-use customers are not to be given the opportunity to request appointments until after the Installation Contractor has completed their initial in-field cold call attempts to replace said meter(s). Note: It has been our experience that if customers are allowed to book appointments prior to the initial in-field cold call attempt, many requested appointments are not necessary (no access related issues to meter), plus under this format the ability to strategically schedule said appointments, as required to forecast / reduce associated costs is diminished.

A33. Meter exchange appointments will only become available following a second documented attempt. The first and second attempt shall be reported in the contractors' WOM system

Q34. (Ref: pg. 23, "RFP 24-EL-014 Advanced Metering Infrastructure (AMI) REBID" / Subsection 4.2 Call Center) Please confirm who is to be responsible for the provision / management of end-use customer related consumables for the purposes of this contract such as pre-installation notification postcard mailers, door hangers, etc. (ref: City or Contractor). If Contractor, please provide a summary of the associated consumables that are to be provided / managed by the Contractor.

A34. The City is requires "consumables", relative to the AMI scope to be supplied by the proposer, such as door hangers. Successful demonstration of an AMI proposer would provide detail within their proposal in the areas they would provide and include documents to insure success.

One such example: Educational material during Meter Demonstration Board presentation.

Q35. (Ref: pg. 29, "RFP 24-EL-014 Advanced Metering Infrastructure (AMI) REBID" / Proposer> Tab 7 Financial Statement, Bonding Capacity and Insurance / Bonding Capacity) Is the Contractor required to provide a bond(s) for the purposes of this contract (e.g. bid bond, performance and/or payment bond)? If yes, please provide details regarding the bond requirements and associated value of said bonds (e.g. performance bond required for 100% value of the contract).

A35. We will require a bid bond at 5% of the proposed amount. The bid bond must be included with your proposal. Payment and Performance Bonds in the amount of 100% of contract value must be provided from the awarded vendor.

Q36. (Ref: pg. 6, "RFP 24-EL-014 Advanced Metering Infrastructure (AMI) REBID" / Section 9 Licenses) Please confirm the correct professional license the City anticipates the successful bidder would hold.

A36. Refer A1 above.

Q37. (General) It is our understanding that all residential metering applications are located on the outside of the dwelling / building. Please confirm.

A37. Residential ELECTRIC meters are located on the exterior of the structure. If exception is identified during exchange this information shall be documented and return in the contractor WOM to the City.

Q38. (General) Please confirm the City's anticipated / preferred in-field deployment commencement and completion dates for the mass deployment phase.

A38. Please refer to the anticipated schedule shown below. This schedule is subject to change.

ITEM #	TASK	Original C& M Schedule	Adjusted C& M Schedule	C&M Proposed Activity (Days to Deployment)	Mount Dora Adjusted Schedule (Begin Activity)	Activity End Period	Mount Dora Adjusted Activity (Days to Deployment)	C&M Activity Interval
1	Mount Dora Contract Negotiation		300			2/15/2024		
2	Utility Scoping Session	2/20/2024	12/16/2024	497	12/16/2024	12/20/2024	497	4
3	Purchase Order Issued	2/26/2024	12/22/2024	491	12/22/2024	12/24/2024	491	2
5	Order First Article Meters	2/28/2024	12/24/2024	489	1/23/2025	1/25/2025	459	2
10	Order Single Phase Electric Meters	6/10/2024	4/6/2025	386	2/15/2025	2/17/2025	436	2
8	Initiate Integration between CIS and MDM	3/1/2024	12/26/2024	487	2/24/2025	6/27/2025	427	123
7	Meter Demonstration Board (Order)	6/15/2024	4/11/2025	381	11/27/2025	12/3/2025	151	6
11	Order Poly Phase Electric Meters	6/10/2024	4/6/2025	386	11/22/2025	11/24/2025	156	2
19	Order Customer Portal Software	10/1/2024	7/28/2025	273	11/25/2025	11/27/2025	153	2
12	Ship Misc. AMI Equipment	6/10/2024	4/6/2025	386	11/22/2025	11/24/2025	156	2
6	Setup Regional Network Interface (RNI)	3/1/2024	12/26/2024	487	11/22/2025	1/23/2026	156	62
13	Install Collectors/Base Stations on Existing Infrastructure	7/1/2024	4/27/2025	365	12/13/2025	2/14/2026	135	63
9	Ship & Test First Article Meters	6/3/2024	3/30/2025	393	12/25/2025	12/30/2025	123	5
4	Order NaaS	2/27/2024	12/23/2024	490	12/28/2025	12/30/2025	120	2
14	Setup Software and Handhelds for Programming	8/28/2024	6/24/2025	307	2/9/2026	2/14/2026	77	5
15	Install Test Meters (Mount Dora to Install)	9/2/2024	6/29/2025	302	2/14/2026	2/25/2026	72	11
17	Ship Initial Single Phase Electric Meters (Qty 200 - 3% of Meter Form Population)	9/2/2024	6/29/2025	302	2/14/2026	4/17/2026	72	62
18	Start Informal Training by Core & Main	9/2/2024	6/29/2025	302	2/14/2026	2/17/2026	72	3
16	Test Data for Conformance to Specifications	9/13/2024	7/10/2025	291	2/25/2026	3/16/2026	61	19
20	Integration Between Customer Portal and MDM and CIS	10/3/2024	7/30/2025	271	3/17/2026	7/19/2026	41	124
MD-1	PILOT SYSTEM VALIDATION - NaaS, SaaS, MDM to BSA CIS,Portal, OMS, EasyLink	3/1/2024	12/26/2024	487	3/21/2026	3/23/2026	37	2
22	~~Ship~~ Single Phase Electric Meters Received	3/1/2025	12/26/2025	122	3/26/2026	9/27/2026	32	185
23	Ship Poly Phase Electric Meters	3/1/2025	12/26/2025	122	3/26/2026	3/27/2027	32	366
21	Formal Training	3/3/2025	12/28/2025	120	3/28/2026	3/31/2026	30	3
24	Installation Phase Kickoff Meeting	6/1/2025	3/28/2026	30	3/28/2026	3/30/2026	30	2
25	Interface Installer WOMS with CIS	6/2/2025	3/29/2026	29	3/29/2026	4/28/2026	29	30
26	Informal Training II	7/1/2025	4/27/2026	0	4/27/2026	4/30/2026	0	3
4	NaaS Service Begins	7/1/2025	4/27/2026	0	4/27/2026	4/27/2026	0	0
27	Start Deployment of Single Phase Electric Meters	7/1/2025	4/27/2026	0	4/27/2026	7/29/2026	0	93

Estimated project schedule. Subject to change due to force majeure, due to material unavailability, or increased manufacturing lead times

- Oringinal C&M Schedule
- Mount Dora Adjusted

Q39. (General) Prior to the installation of the new electric meter, are the meter installation required to perform a jaw tightness test while on-site?

A39. Formal jaw tightness measurements are not required within this scope. However the proposer may provide narrative to demonstrate value in the meter exchange process if this condition is suspect.

Q40. (General) Does the City intend to apply SLA, performance-based penalties and/or liquidated damages for the purposes of this contract? If yes, please provide associated details, including penalty / LD amounts.

A40. Liquidated damages will be assessed at $500 per day for every day beyond the contract completion date or approved extension date. The performance bond will not be released until all contract obligations have been met and accepted in writing by the City.

Q41. (General) It is our understanding that the Contractor is to be responsible for the provisioning of the associated call center / appointment scheduling services for the purposes of this contract. Please confirm.

A41. See Page 23, Section 4.2 Call Center of the issued solicitation document.

Q42. (General) As part of the City's download file for the Installation Contractor, will there be account specific notes (special instructions) and codes indicating physical meter locations, access issues, safety issues/alerts, etc. (e.g. "key" numbers, "bad dog", "meter in backyard", etc.)?

A42. City CIS/BS&A customer meter will include field for "Location ID" which denotes extenuating circumstance to meter field conditions

Q43. (General) As part of the City's download file for the Contractor, will all meters be "blended" within the same route/route sequencing structure (ref: residential and commercial metering applications)? If no, please provide the associated details regarding metering applications that the City's download file for the Contractor is to be downloaded as a separate file (e.g. all polyphase / commercial meters to be downloaded as a separate file).

A43. The City plans to assign meter exchange to the contractor in sequence with previous meter routes. Self-contained meter forms 1S, 2S, 2S-320,12S, 16S, within this route will be assigned for exchange. However poly-phase, 45S and 9S instrument class meters, which will be exchanged by the City.

Q44. (General) Do prevailing wage requirements apply for the purposes of this contract (ref: Davis-Bacon Act)?

A44. No.

Q45. (General) Is the Contractor required to utilize unionized meter installation personnel for the purposes of this contract?

A45. No.

Q46. (General) Given the general size/scope of this RFP, plus to allow the Contractor adequate time to complete detailed on-site analysis of the various service divisions, would the City consider an extension to the RFP due date (e.g. 3-week extension)?

A46. No

Q47. (General) Is it acceptable for the Contractor to include pricing notes for clarity purposes as part of their RFP response?

A47. Yes

Q48. (General) Are there any unique in-field meter installation service-related requirements (e.g. boats, ferries, ATVs, etc.)? If yes, please provide associated details including total applicable metering applications, by meter classification / form.

A48. The City's service territory is shown on page 8 of the RFP document and does not necessitate specialized transportation requirements.

Q49. (General) Please provide the approx. total number and/or percentage of urban properties where the meter installation personnel would require the use of a vehicle from premise to premise to ensure efficiencies (ref: lot frontage greater than 300').

A49. The City's service territory is shown on page 8 of the RFP. Exhibit C and D also provides relative customer density by physical address and location.

Q50. (General) Please provide the approx. total number and/or percentage of rural properties where the meter installation personnel would require the use of a vehicle from premise to premise to ensure efficiencies (ref: large and/or small farms).

A50. The City's service territory is shown on page 8 of the RFP. Exhibit C and D also provides relative customer density by physical address and location.

Q51. (General) Please provide the approx. total number and/or percentage of urban properties with lot frontage ranging from approx. 100' to 300' (ref: estate lots/subdivisions).

A51. The City's service territory is shown on page 8 of the RFP. Exhibit C and D also provides relative customer density by physical address and location.

Q52. (General) Please provide the approx. total number and/or percentage of residential metering applications which would be considered as "hard to access" and/or potentially inaccessible (e.g. inside metering applications, backyards, gate access required, etc.).

A52. This statistic is undetermined.

Q53. (General) Please provide the approx. total number and/or percentage of small commercial metering applications (e.g. strip malls, convenience stores, etc.).

A53. Commercial represents less than 4% of meter sites.

Q54. (General) Will secure, or non-secure, overnight parking be made available for the Installation Contractor's contract related fleet vehicles at the City's facility and/or warehouse?

A54. The City will provide a staging area for the purposes of meter exchange for warehousing project meters and parking

Q55. (General) Are there any mandatory City hosted training sessions for the Contractor's meter installation personnel (e.g. City hosted "health & safety orientation")? If yes, how long is the session or sessions (e.g. ½ day)?

A55. There are no planned City training sessions for proposer contract staff.

Q56. (General) Will the Contractor's meter installation personnel be required to physically enter underground meter vaults / pits to upgrade existing metering applications (ref: "2 person" confined spaces regulations)? If yes, please provide the total number of anticipated sites, by meter classification / form.

A56. No, the City does not have meters within confined space areas

Q57. (General) Please confirm who is to be responsible for the associated warehousing / inventory management for the purposes of this contract (ref: City or Contractor).

A57. The proposer, contractor(s) will manage all aspects of meter inventory. Sufficient secure warehousing space (portable connex) will be provided by the City for project meters. However area for additional activities, such as meter programing will not be provided by the City.

Q58. (General) Assuming that the City's download file to the Installation Contractor will mimic that of their meter reading routes / route sequencing structure, is the current meter reading route sequencing structure considered as efficient allowing for optimal in-field productivity (e.g. contiguous, "premise-to-premise" with no skips and minimal "dead walks"/downtime)? If no, please provide associated details.

A58. Yes, see attached meter routes

Q59. We are working through the best solution offering and the metering manufacturer has requested a 1-2 week extension. Would that be possible?

A59. No.

Q60. Under the requirements of the RFP there is mention of a Meter Data Management solution and my questions is will the city consider a separate proposal for just the MDM? Since your RFP will be responded to by mostly Distributors who represent the various AMI vendors, most of they do not have a turnkey AMI /MDM offering and will partner with MDM suppliers. Please let me know if a MDM proposal will be accepted by the City.

A60. No, the Meter Data Management shall be part of the proposed solution, not separate. The MDM shall be integrated in the Saas, Nass and extending to customer portal information.

Q61. We're currently reporting on the above-mentioned project and I was hoping you can help me obtain the estimated construction budget?

A61. Budget amount is not available at this time.

Q62. I was looking over the AMI RFP that was released and wanted to clarify that no Meter Boxes or lids are required?

A62. Correct. The exchange of water meters, meters boxes and or lids is not a part of this initial scope.

Q63. We understand that the RFP appears to be seeking a full turnkey solution, including meter hardware, software, integration, managed services, and field deployment. However, we would like to understand if City of Mount Dora is interested in respondents that only offer professional, consulting, and/or field deployment services.

A63. No, the scope of this RFP has preference and requirements outlining meter manufacture participation.

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EXHIBIT “A”

“REVISED Pricing” Form (See Separate Document)

“Human Trafficking Affidavit” Form

“Proposer Qualification” Form

HUMAN TRAFFICKING AFFIDAVIT

In compliance with § 787.06, Florida Statutes, this Affidavit must be completed by an officer or representative of a nongovernmental entity that is executing, renewing, or extending a contract with the City of Mount Dora (the "Governmental Entity").

The undersigned, on behalf of the entity listed below (the "Nongovernmental Entity"), hereby attests under penalty of perjury as follows:

1. I am over the age of 18 and I have personal knowledge of the matters set forth herein.
2. I am an officer or representative of _____, a nongovernmental entity, and I am authorized to provide this affidavit on behalf of the Nongovernmental Entity.
3. Nongovernmental Entity, and any of its subsidiaries or affiliates, do not use coercion for labor or services, as those terms are defined in § 787.06, Florida Statutes, as may be amended from time to time.
4. If at any time in the future the Nongovernmental Entity does use coercion for labor or services, the Nongovernmental Entity will immediately notify the Governmental Entity and no contracts may be executed, renewed, or extended between the parties.
5. I have read the foregoing Affidavit and confirm that the facts stated in it are true and are made for the benefit of and reliance by the Governmental Entity.

_____ _____

Authorized Signature Company

_____ _____

Printed Name Title

STATE OF FLORIDA
COUNTY OF

The foregoing instrument was acknowledged before me by means of [ ] physical presence or [ ] online notarization of _____, as _____ of , who personally swore or affirmed that he/she is authorized to execute this Agreement and thereby bind the Nongovernmental Entity, and who is personally known to me or who produced as identification, and who did/did not take an oath this ____ day of _____, 2024.

(stamp)

_____
NOTARY PUBLIC

PROPOSER'S QUALIFICATION FORM

LIST MAJOR WORK PRESENTLY UNDER CONTRACT:

% Completed	Project	Contract Amount
		$
		$
		$

LIST CURRENT PROJECTS IN WHICH YOU ARE THE CANDIDATE FOR AWARD:

_____

_____

_____

OTHER INFORMATION ABOUT PROJECTS:

_____

_____

_____

Have you, at any time, failed to complete a contract? ☐ Yes ☐ No

STATEMENT OF LITIGATION:

Are there any judgments, claims or suits pending or outstanding by or against you?
☐ Yes ☐ No

If the answer to either question is yes, submit details on separate sheet. List all litigation(s) that have been filed by or against the division of your firm that will be responsible for the scope of work in this solicitation, in the last ten (10) years:

_____

_____

CONTRACT VALUES:

List total value of contracts for work done on all completed and similar projects in the past five (5) years, whether as an individual firm or as part of a joint venture. ***Values must be listed individually by contract or project and then summarized as a total dollar amount.***
Attach additional page if necessary.

$_____Total Value for work done on all PAST completed and similar projects.

REFERENCES:
Bank(s) Maintaining Account(s): _____

_____

Surety/Underwriter: (if required)_____

_____

Other References: (Use additional sheets if necessary)
_____

_____

TYPE OF FIRM:

☐ Corporation/Years in Business: _____. If firm is a corporation, please list state in which it is incorporated: _____. If firm is a corporation, by signing this form, Proposer certifies that the firm is authorized to do business in the State of Florida.

☐ Partnership/Years in Business: _____

☐ Sole Proprietorship/Years in Business: _____

☐ Other: Please list: _____ _____

Pursuant to information for prospective Proposers for the above-mentioned proposed project, the undersigned is submitting the information as required with the understanding that it is only to assist in determining the qualifications of the organization to perform the type and magnitude of work intended, and further, guarantee the truth and accuracy of all statements herein made. We will accept your determination of qualifications without prejudice.

Company	Address
Authorized Signature	City, State, Zip Code
Printed Name & Title	Telephone No.
Email	Fax No.

EXHIBIT A

RFP #24-EL-014
ADVANCED METERING INFRASTRUCTURE (AMI) SYSTEM (REBID)
REQUIRED PROPOSAL INFORMATION *

*** THE FOLLOWING ITEMS WILL BE USED IN BY THE CITY IN THE EVALUATION PROCESS**

1. The City will deem an RFP proposal submitted without designation to each item in Exhibit A, requesting a (YES or NO) response, or response by requested description, as an **UNRESPONSIVE BID.**

Requirement Item #				
1.0	**PROPOSER**			
	Name			
	Address			
	Contact			
	Email			
	Phone			
2.0	**CLAIMS / JUDGEMENTS / SAFETY**	**Response Detail**		
2.1	List any claims or judgements, outstanding against your company or sub-suppliers. To include product failure rates above 1% in the first 3 years	Description: Proposer shall complete the Disputes Disclosure Form Section of the accompanying terms document attached. List any failed or defaulted projects here.		
2.2	Identify any claims or judgments outstanding against your company or suppliers	Description: Proposer shall complete the Disputes Disclosure Form Section of the accompanying terms document attached. List any relevant claims or judgements here.		
		YES	**NO**	Response Detail
2.3	Proposer to provide historical annualized hardware (Electric and Water Meter) failure rates for the past 3 years, of electric and water meter supplied by the proposer. Failure rate = (failed meters that were produced in year x)/ (total meters produced in year x). Is the failure rate less than 1% in each year?			

2.4	If the electric meters use a separately manufactured communication module, Proposer to provide historical annualized hardware failure rates over the last 3 years for the communication module used in distributed electric meters. Failure rate = (failed modules that were produced in year x)/ (total modules produced in year x). Is the failure rate less than 1% per year?			
2.5	The proposed Residential Form 2S Remote Disconnect AMI meter enable AMI Opt-Out without system capabilities impact.			
2.6	The meter proposed Electric meter, Form 2S, shall have capability of reporting internal temperature, and capability to remotely de-energize an indivual meter. Describe the design of meter sensors, head-in system logic control and safety related capabilities.			
3.0	**METER REQUIREMENTS, COMPATIBILITY**			
		YES	**NO**	Response Detail
3.1	Meet or exceed ANSI C12.20 - 2010 Class 0.2 for all meter forms proposed.			
3.2	Meter or exceed current versions of the following ANSI industry standards: ANSI C12.1, C12.10, C12.19, C12.20, and C37.90.1.			
3.3	The proposed Meters shall comply with applicable FCC standards.			
3.4	Do the proposed meters comply with ICE 61000-4-4 and C62.45.			
3.5	The meters proposed shall be a solid-state ANSI compliant with a configurable minimum five-digit (not including identifiers) scrolling LCD display for residential meters, six digits for commercial meters.			
3.6	Does the proposer include an Electric and Water meter AMI system, with meter communication boards designed and manufactured by the represented proposer?			
	Attach information to demonstrate 3.6			**LABEL THIS ATTACHMENT 3.6**
3.7	Meters shall include an integrated "under the glass" communications module compatible with the AMI system for both Electric and Water. Is the proposer manufacture of Electric and Water meter internal meter communications board?			
	Attach information to demonstrate 3.7			**LABEL THIS ATTACHMENT 3.7**

3.8	The proposed Single Phase, Form 2S Electric Meter and Meter communications board, contained within the meter, designed and manufactured by the same entity.			List the Manufacture of the Meter followed by the Manufacture of the meter communications board:
3.9	Is the proposed Three Phase, poly Electric Meter(s) and Meter communications board, contained within the meter, designed and manufactured by the same entity.			List the Manufacture of the Meter followed by the Manufacture of the meter communications board:
3.10	The proposed three-phase meters shall have available an ANSI C12.18 compliant optical port for local reading and programming.			If not, how can these meters be programed in the field.
3.11	Capable of Recording: Wh, VAh or VARh (delivered, received, sum, net), Max demand: W, VA, VAR. (Specify if demand is rolling or block)			List Applicable METER FORMS if YES
3.12	The proposed commercial poly phase meters shall be capable of meter measurement values in Voltage, Current, Power factor, Watts, Vars			List Applicable METER FORMS if YES
3.13	The proposed meters shall be capable of Time of use: min 4 seasons, 4 rates, 4 switch points for energy quantities required. If proposing non-TOU meters, describe how the system can calculate TOU billing determinants from interval data.			List Applicable METER FORMS if YES
3.14	The proposed meters shall be capable of Interval data: min 4 channel 35 days, 15min intervals - configurable to 5, 15, 30, or 60 min intervals			List Applicable METER FORMS if YES
3.15	The proposed 2S shall have capability of bi-directional energy metering and to report Reverse Energy as a utility user option.			
3.16	The Meter shall alarm on tilt/outage combination indicative of meter removal from socket.			Describe in detail the process how this would be accomplished.
3.17	Does the proposer have an AMI water meter register that is direct replacement and compatibility with the **Neptune E-coder R900M**?			
	Attach information to demonstrate 3.17			**LABEL THIS ATTACHMENT 3.17**
4.0	**AMI COMMUNICATIONS**			
		YES	**NO**	Response Detail
4.1	Does the meter communications comply with all FCC requirements.			

4.2	Network components combined (meters and communications devices) shall have the ability to retain at least 30 days of data. Describe how this is accomplished. Note that this is a storage requirement for the deployed network and metering equipment. Further longer-term system-level retention requirements are included below.			
	Attach information to demonstrate 4.2			**LABEL THIS ATTACHMENT 4.2**
		Response Detail		
4.3	Supplier shall submit network design and planned equipment locations, mounting details, and power requirements to the City for approval prior to installation. Identify any supporting work to be performed by the city.	Describe:		
4.4	Network transceiver and/or network repeaters devices may be required. Proposer shall state any such requirement for their system and include pricing for the number of such devices being proposed. Any devices required beyond this number to ensure acceptable performance of the system shall be provided free of charge to the City, including installation.	Describe:		
4.5	Based on facility location data supplied by the City, Proposer shall provide an RF coverage plan and maps that demonstrate communications to all devices adequate to address all requirements in this proposal specification.	Describe:		
4.6	How would you manage an RF interference problem disrupting meter communications	Describe:		
4.7	Identify the type of network topology used (e.g. mesh, point-to-multipoint, combination), frequencies used, and transmit power.	Describe:		
4.8	City fiber is the preferred media for data backhaul to the extent possible.	Describe how the proposed system would utilize City Fiber.		
4.9	Outline how the proposed as-built network would be loaded into a GIS system.	Describe:		
4.10	Describe the process that ensures no loss of metering data during a firmware update.	Describe:		
4.11	Describe the remote firmware update process including typical circumstances requiring an upgrade (firmware bug, firmware feature enhancement, etc.). Include all remotely upgradable devices. If any devices are not remotely upgradable, describe how local updates are completed.	Describe:		
4.12	What is the an acceptable monthly read rate with the AMI system proposed.	ELECTRIC: _____.___% WATER: _____.___%		

4.13	Describe the corrective actions that would be taken in a supplier managed network to improve read rates below the indices provided in 4.15.	Describe:
4.14	If the monthly read rate is below acceptable threshold(s) what actions has the proposer conducted in the past to correct / compensate the utility.	Describe:
4.15	During an outage of approximately 1000 electric meters within a centralized location, what percentage of meters is it expected by the proposed design to report the individual outage.	Describe:
4.16	During the same outage of approximately 1000 electric meters within a centralized location, what is the time-frame in seconds thate it is expected for all meters to report and indicate an outage?	Describe:
4.17	During the same outage of approximately 1000 electric meters within a centralized location, what is the time-frame in seconds thate it is expected for all meters to report and indicate an outage?	Describe:
	Attach information to demonstrate 4.17	**LABEL THIS ATTACHMENT 3.17**
5.0	**SOFTWARE APPLICATION SERVICES**	Response Detail
5.1	Describe in detail City's interaction process with managed services support via telephone, email, web portal, hours of support, etc. If 24/7 support is not provided as part of the standard managed services offering, state the options available for upgrading to 24/7 support, including pricing	Describe:
5.2	Describe head-end system update process, time durations to implement, and frequency of releases.	Describe:
5.3	Describe managed services data centers (primary and disaster recovery locations).	Describe:
5.4	Describe the disaster recovery process and the maximum amount of time from system failure to recovery. Describe the point of recovery (last backup, yesterday, point of failure, etc.)	Describe:
5.5	Describe and provide any applicable service level agreements.	Describe:
5.6	Describe the system and field device software and firmware update processes and durations.	Describe:
5.7	Describe managed services staffing and hours of coverage.	Describe:
5.8	Describe data center physical security, and power security.	Describe:

5.9	Describe City's required efforts associated with Managed services implementation. Include any point to point VPN or other requirements. Assistance will be required by the City to implement this.	Describe:		
6.0	**MANAGED SERVICES**	Response Detail		
6.1	How many AMI Cloud-Based utility meter data management and head-in systems do you currently manage, and the number of endpoint meter customers this encompasses.	List the number and list of utilities.		
		YES	**NO**	Response Detail
6.2	Lifespan of the Managed services contract and shall be reloadable if needed for City data analysis. The City requires that all system data be archived and provided to the City in a documented format that the City can maintain every calendar year. These archives shall include all billing determinants provided by the system. Describe this process and the file format.			
6.3	Head-end system interfaces shall will all be standard web browser accessible and support multiple simultaneous users.			
6.4	Head-end system will support automatic calculations of City standard KPI indices including SAIDI, CAIDI, SAIFI, and MAIFI using the outage and blink data available in the system (monthly and with the ability to annualize). Describe this KPI calculation capability in detail. Note that the state of Florida considers any interruption longer than 1 minute to be a sustained outage.			
6.4	Head-end system shall have the ability to report on outage occurrences and blink counts for all electric meters. Outage notifications will be reported to the head-end within 3 minutes of the occurrence for 99% of meters.			
6.5	Head-end system time shall be synced to a Network Time Server that is synced to a national standard. Time accuracy relative to system time: 1 minute for electric, 5 minutes for water.			
6.5	Head-end system shall support Daylight Savings Time (DST)			
6.6	During any firmware download process, the head-end will provide a robust set of reports or displays to show download status, estimated time to completion, any error conditions, and all other information needed to effectively manage the firmware update process. Firmware updates for all devices will be logged.			

6.7	Head-end system shall support the ability to turn off all radios in any electric meter in support of a potential customer opt- out. A handheld will be required to turn the radios back on. Describe these capabilities and the associated process.			
6.8	Head-end system shall support all interval data recording lengths and channel configurations available in meters.			
6.90	Head-end system shall have the ability to identify and enforce the inability to disconnect accounts identified as "medical do not disconnect".			Explain how this is achieved.
6.10	Head-end system shall support reading all quantities available in meters including but not limited to: kWh / kVAR / Under the cover meter temperature / Disconnect switch status			
6.11	Head-end system will support establishment of billing schedules on a daily, weekly, or monthly basis.			
6.12	Head-end system shall support other non-billing schedules to bring back items of interest to the City such as service voltage. Describe this capability and what metering quantities (water and electric) can be so scheduled.			
6.13	The Head-end system shall support on-request reads of any meter on the system. All data resident in meter shall be capable of being returned by such reads. On-request read capability is a mandatory requirement for both water and electricity meters.			
6.14	Head-end system shall be able to perform an on-request demand reset for electric meters. Describe how this demand reset function works on a scheduled and on-request basis. Include a description of and the time sequence of any data brought back as part of a demand reset.			
6.15	Head-end system shall have the ability to confirm demand reset has occurred by examining demand reset count before and after the request. Describe how this confirmation occurs on the head-end system.			

6.16	The supplier shall complete list of events and alarms supported by the head-end system and endpoints. It shall be possible to collect metering data from deployed meters if the communications network is down. Should there be a temporary failure or unavailability of all or a portion of the communications network, describe the temporary process by which the City would be able to gather their meter reading data until repairs are made. System shall provide reports to address the following: - Water meter low battery - Electric meter low battery (if outage battery is used) - Meter configuration changed - Meter errors - Service Voltage (sags, swells, minimums, maximums, averages, etc.) - Tampers			
6.17	Head-end system shall detect and report time-stamped indications of all electric meter outages and restoration.			
6.18	Head-end system shall report on voltage threshold violations consistent with the thresholds available in electric meters.			
6.19	Head-end system shall support all TOU functionality defined in Table 7-3Table 7-3, including modifying such settings.			
6.20	The supplier shall provide a means to capture screen shot information and export by means of pdf or other listed method for: Disconnect/reconnect management, Outage reporting, Meter read rate performance and Network equipment issues, Leak Summary, Alarms, dashboard summary and usage history.			
6.21	The system shall provide a geo-spatial/map view of all devices on the communications network which includes various device statuses via visual differentiation (color, etc.). Communications paths and health status should be included on these maps.			
6.22	Head-end system shall support pre-pay for electricity and water. Describe this pre-pay capability and any third-party relationships involved in your offering. (Note that the requirement for this RFP is to provide an AMI solution that is “pre-pay-ready”. The utility intends to purchase a pre-pay application separately.)			
	Attach information to demonstrate 6.22	**LABEL THIS ATTACHMENT 6.22**		

6.23	Head-end system shall support remote connect/disconnect status confirmation reads			
6.24	Head-end system shall support secure web-service calls from other systems to allow connect/reconnect operations. Describe these web services.			
6.25	Head-end system shall provide the ability to perform on- request reads of events and alarms (in addition to events automatically alarming up to the head-end system).			
6.26	Duplicate Meter Serial Numbers: The system shall identify the premises where the same serial number has been used more than once.			
6.27	Network Component Status: The system shall report on the health of the supplier's network components, including memory errors, battery status, signal strength, connection errors, redundancy, and whether the network components pass or fail the supplier's operating specifications.			
7.0	**METER DATA MANAGEMENT**	**YES**	**NO**	Response Detail
7.1	System shall support loading and maintaining GPS coordinate data for water and electric meters as well as other field-deployed devices in decimal degrees to at least 6 decimal places.			
7.2	Preconfigured reports for examining meter data shall be provided.			Please give example
	Attach information to demonstrate 7.2	**LABEL THIS ATTACHMENT 7.2**		
7.3	The system shall include water and energy balance analytics and dashboards.			
7.4	The system shall manage the database of meter readings and other related information about the meters and the AMI system.			
7.5	The system shall interface with **City's BS&A CIS System in such a manner as to provide an equivalent set of billing inputs to BS&A and with minimal disruption to existing City processes.** This is a mandatory requirement. Describe in detail how this integration will be achieved.			
	Attach information to demonstrate 7.5	**LABEL THIS ATTACHMENT 7.5**		
7.6	The system shall be able to export data from reports in standard CSV format.			

7.7	The system shall provide a dashboard display Including: Peak Usage Missed Readings (excluding in-process missed read retrieval and missing LP gap fill-in processes) Usage comparisons for like periods of time Alerts and Alarms Current status including current read, disconnect status, etc.			
7.8	System shall provide Validation, Editing & Estimation (VEE) capability for electric meter reads to identify suspicious reads, allow city personnel to override a billing value, and estimate a billing read based on previous like periods of time.			
7.9	System shall support analytic leak and burst pipe detection with a definable rule set for water interval reads over various periods of time including sudden sustained high reads.			
7.10	System shall be able to report on user-defined conditions over a period of time for electric meters.			
7.11	System shall be able to report on water and electric reverse flow conditions.			
7.12	System shall support reporting on user-defined conditions considered to be abnormally high/low consumption over a period of time for water and electric.			
8.0	**OUTAGE MANAGEMENT SYSTEM (OMS)**	**YES**	**NO**	Response Detail
8.1	The system shall provide outage/restoration visualization using a map format (not full outage management functionality).			
8.2	Does the proposed OMS (Viewing) system shall have compatibility with ESRI GIS			
8.3	System must provide per meter email and texting capabilities on outage and restoration			
8.4	System shall provide the ability to ping the electric meter from a map format to confirm meter is still in an outage.			
8.5	Head-end system shall report on outages (blink, momentary, and sustained). These outage types shall be configurable parameters by the City that define power loss duration for each event type. (Note that the state of Florida considers any interruption longer than 1 minute to be a sustained outage.) Describe these blink and outage parameters and how these events are reported.			

9.0	CUSTOMER PORTAL / EDUCATION / ENGAGEMENT			
		YES	NO	Response Detail
9.1	Supplier shall support a minimum of 1 day on-site for City meeting with City of Mount Dora residents.			
9.2	During deployment the Supplier's Installer shall print advance notification customer communication materials. The content of these mailers will be developed in conjunction with the City. Supplier shall manage the timing and mailing of these materials to provide at least 14-day notice to customers prior to installation.			
9.3	Supplier shall print door hangers that installers will distribute at residential locations during successful and attempted installations. The content of these door hangers will be developed in conjunction with the City			
9.4	A customer Web portal functionality shall be available for water and electric services that operates on IOS® and Android based phone devices. Portal key points of functionality: - Consumption - Hourly (or as set in meters) interval readings for water and electric - Current consumption since last billing for water and electric			
	Attach information to demonstrate 9.4	**LABEL THIS ATTACHMENT 9.4**		
9.5	The Customer Web portal software shall allow the customer to set up an e-mail, cell phone number, username, and password.			
	Attach information to demonstrate 9.8	**LABEL THIS ATTACHMENT 9.8**		
10.0	**DATA SECURITY**			
		YES	**NO**	Response Detail
10.1	Has a security issue forced a component or system update in the past 12 months? If yes, describe that incident.			
		Response Detail		
10.2	For managed services, please detail location of servers, backup systems, and associated security plan – cyber and physical.			
10.3	Describe any third-party penetration testing that has been performed on this version of the system hardware, firmware, and software included in your proposal. Please state when completed, any critical findings, and frequency at which such testing is repeated.			

10.4	Proposer should describe their approach to vetting and selecting supply chain partners for the major physical and cyber/virtual components of their solution, particularly regarding security threat mitigation for system elements secured from foreign vendors. Proposer should also provide a concise overview of their entire supply chain management process and how the safety and integrity of parts (both physical and non-physical) included in the proposal are validated.	

EXHIBIT B

RFP #24-EL-014

ADVANCED METERING INFRASTRUCTURE (AMI) SYSTEM (REBID)

REVISED PRICING FORM

Item	Area	Description	Quantity Anticipated	Unit Price	Total	Comments
	AMI SOFTWARE INTEGRATION					
1	Meter Data Management	MDM License Fee and Integration Fee				
2	CIS	Mount Dora CIS Integration to MDM				
3	Customer Portal	New Portal				
4	Outage Management System	OMS License Fee and Integration Fee				
5	Analytics Software	Specify Functionality				
6	Other (specify)					
7	Other (specify)					
8	Other (specify)					
		SOFTWARE LICENSE AND INTEGRATION PRICING - SUB TOTAL			$	
	TRAINING					
9	Training	Proposer Define				
10	Training	Proposer Define				
11	Training	Proposer Define				
13	Training	Proposer Define				
		TRAINING - SUB-TOTAL			$	
	ELECTRIC METERS					
Item	Area	Description	Quantity Anticipated	Unit Price	Total	Comments
14	AMI Electric Meter	Form 1S	150			
16	AMI Electric Meter	Form 2 S - 200 amp Self Contained with Remote Disconnect	5502			
16	AMI Electric Meter	Form 2S CL320 - 400 amp Self Contained	300			

15	AMI Electric Meter	Form 12S	200			
17	AMI Electric Meter	Form 9S	123			
18	AMI Electric Meter	Form 16 S	400			
19	AMI Electric Meter	Form 45 S	25			
				ELECTRIC METERS - SUB-TOTAL		$

NETWORK DEVICE PRICING

Item	Area	Description	Quantity Anticipated	Unit Price	Total	Comments
21	Network	Repeaters				
22	Network	Other				
23	Network	Other				
24	Network	Other				
25	Network	Other				
26		Other				
				NETWORK DEVICES - SUB-TOTAL		$

METER AND NETWORK INSTALLATION - (INCLUDES PROGRAMING)

Item	Area	Description	Quantity Anticipated	Unit Price	Total	Comments
27	Meter Install	Residential - Self contained Meters				
28	Meter Install	Commercial - Self contained				
29	Installation	Network Collector				
30	Installation	Network Repeater				
				INSTALLATION - SUB-TOTAL		$

MISCELLANEOUS AMI EQUIPMENT

Item	Area	Description	Quantity Anticipated	Unit Price	Total	Comments
31	Programing	Handheld Unit to Read / Trouble shoot / meters locally				

32	Portable vehicle affixed Radio Reader	Read existing Itron ERT Electric / Water radios, and new Electric Point to Multipoint Meters				
33	Meter Demonstration Board	Electric Meter				
					INSTALLATION - SUB-TOTAL	$

MANAGED SOFTWARE SERVICES

These services represent recurring pricing for annual service fees, any and all costs to the City for the managed service including any annual license fees, etc. Proposers are encouraged to provide supportive comments or clarifications on pricing structure in the spaces provided

Item			Comments
34	Year 1	$	
35	Year 2	$	
36	Year 3	$	
37	Year 4	$	
38	Year 5	$	
39	Year 6	$	
40	Year 7	$	
41	Year 8	$	
42	Year 9	$	
43	Year 10	$	
MANAGED SOFTWARE SERVICES (TOTAL FOR 10 YEARS)		SUB-TOTAL	$

NETWORK MANAGED SERVICES

These services represent recurring pricing for annual service fees, any and all costs to the City for the managed service including any annual license fees, etc. Proposers are encouraged to provide supportive comments or clarifications on pricing structure.

Item		Price	Comments
44	Year 1	$	
45	Year 2	$	
46	Year 3	$	
47	Year 4	$	
48	Year 5	$	
49	Year 6	$	
50	Year 7	$	

51	Year 8	$	
52	Year 9	$	
53	Year 10	$	
NETWORK SERVICES (TOTAL FOR 10 YEARS) - SUB-TOTAL			$
Grand Total (All Sub-Totals Combined)			

MISCELLANEOUS AND HOURLY RATES

Pricing for ad hoc or consulting services that may be requested by the City that are out of scope of the AMI project.

Item	Description		Price
54	Managed Field Communication Device, (Totalizer / Recorder Endpoint)		$
55	List Title		$ per hour
56	List Title		$ per hour
57	List Title		$ per hour
58	List Title		$ per hour
59	List Title		$ per hour
60	List Title		$ per hour

EXTENDED WARRANTY

Pricing for extended warranty of individual items.

61	List Device		$ per unit
62	List Device		$ per unit
63	List Device		$ per unit
64	List Device		$ per unit
65	List Device		$ per unit
66	List Device		$ per unit
67	List Device		$ per unit

MISCELLANEOUS ADDITIONAL PROPOSER ITEMS

Item	Description	Price
68		$
69		$
70		$
71		$

72		$
73		$
74		$
75		$
76		$

Mount Dora Electric Territory

Legend

Source

- Field check validation

Uplink Source

- M593
- M594
- M595
- M596
- M597
- M598

N

CITY OF MOUNT DORA

PUBLIC WORKS AND UTILITIES

ELECTRIC UTILITY SERVICE BOUNDARY
POLE LOCATIONS

EXHIBIT "E"
RFP 24-EL-014 ADVANCED METERING INFRASTRUCTURE (AMI) SYSTEM (REBID)

Description	FORM	QUANTITY	
METER: CL100 FM1S NON-DEMAND [120V]	1S	150	
METER: CL200 2S ITRON G981634 C12.19	2S	5435	
METER: CL320 FM2S NON-DEMAND [240V]	2SCL320*	300	
METER: CL200 FM2S 120/240 VOLT	2S	67	Bi Directional
METER: CL200 FM12S [120-208] NON DEMAND	12S	200	
METER: CL320 FM16S	16S	400	
METER: FM45S SENTINEL	45S	25	
METER: FM9S	9S	123	
		6700	

APPENDIX B – CONTRACTOR PROPOSAL

All elements of the Contractor's proposal, submitted in response to the RFP are attached hereto or are incorporated herein by reference and form a part of the Contract ("Contractor Proposal"). Contractor's response to Exhibit A - RFP Requirements, is not attached but is incorporated by reference as though fully set forth herein.

RESPONSE TO REQUEST FOR PROPOSALS (RFP) FOR

City of Mount Dora, FL #24-EL-014: Advanced Metering Infrastructure (AMI) System (REBID)

SUBMISSION DEADLINE:
Date: Monday, October 21, 2024
Time: 12:00 p.m.

SUBMITTED TO:
City of Mount Dora, FL
douglasm@cityofmountdora.com

PRIMARY CORE & MAIN CONTACT:
Payton Duncan
Smart Utility Specialist
Payton.Duncan@coreandmain.com
M: 386-473-2165

PRIMARY SENSUS CONTACT:
EJ Gomes
Director of Sales, Electric US
ej.gomes@xylem.com
M: 850.382.1110

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Cover Letter

Core & Main LP ("Core & Main") is pleased to present the following response to the City of Mount Dora Request for Advanced Metering Infrastructure (AMI) System (REBID). Core & Main has a long history of providing high quality products to the City of Mount Dora and is proud to provide a solution that meets the City's objectives to improve Meter to CIS accuracy, reliability, customer service, integration, and security.

Throughout the proposal, we believe the City of Mount Dora will see that **Core & Main fully understands the goals of Mount Dora** in this AMI program. Core & Main supports the City's mission to *Serve and Protect Public Health, Enhance Water Quality, Educate the Public, and Protect the Environmen*t. We are excited to provide the Sensus FlexNet solution of Advanced Metering Infrastructure and Network as a Service (NaaS) in this proposal that will be the Smart Utility Solution the City of Mount Dora can utilize to expand on it's vision to implement Smart Metering throughout the service territory and utilize managed services for the communication infrastructure and all related software.

The Sensus FlexNet AMI network was designed to evolve over time to meet both the current and future needs of utilities and is a carrier-grade, nationwide network, with nearly 1,000 MHz (combined) of dedicated frequencies housed within nearly 650 FCC private spectrum licenses. The key benefit of FCC-licensed, primary-use spectrum is control of the RF noise floor within the network for the life of the system.

Below we have outlined the key benefits of our proposal:

- ***Solution built right for the City of Mount Dora:*** Core & Main sees the value in building the best team for our customers and we have included best-in-class partners to be part of our solution for the City of Mount Dora.
- ***Sensus FlexNet's FCC-Licensed, Primary-Use Spectrum***: Like AT&T, Sprint, Verizon, and other mission-critical data communication networks, FlexNet uses an FCC-licensed, primary-use spectrum. Unlike cellular or third-party networks, FlexNet is dedicated to the purpose of Utility communications, such as reading meter endpoints as is its primary task. Each time the FlexNet system has been improved, backward compatibility of the endpoint has been maintained.
- ***Smart Utility Network*****:** Only FlexNet provides utilities across the Country with the flexibility to communicate and control many third-party devices. This ability will allow FlexNet to be the backbone of a Smart Utility platform Mount Dora can use for many current and future needs. FlexNet, bundled with the CORE+ suite of solutions, will provide the ability to adopt many Smart Applications for the utility's water, wastewater, stormwater, and gas distribution systems.
- ***Industry-leading Warranty*****:** Sensus offers the industry standard 1-year warranty on their electric meter offerings. The standard warranty can be improved upon by offering another 4 years of extended warranty, bringing the total up to 5 years of coverage.

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In 2004, Sensus set the standard for battery warranties at 10-full, 10-year prorated. As battery technology has improved, so has our industry-leading warranty. In 2018 Sensus became the first and only Meter/AMI manufacturer to provide a 15-year full, 5-year prorated warranty on battery-powered meters and endpoints.

- **Industry-leading Solid-State Metrology:** Since the release of the Sensus iPERL water meter in 2012, Sensus has delivered more than 10.3 million composite body iPERL meters nationwide. The City of Mount Dora will have the industry leading residential solid-state water meter installed throughout the service territory.

- ***Dual-Port Endpoints***: With the ability to deploy one endpoint for water two meters, Mount Dora will see a significant reduction in product and deployment costs while maintaining all functionality for endpoints.

- **Minimal Customer Impact Policy:** Core & Main will provide commercial customers maximum flexibility to complete the meter changeout at their convenience (24x7x365). Field staff will personally collaborate with the business community to schedule meter changeouts. This customer-centric policy will help ensure the best experience, with no impact or adverse consequences to the City, its customers, or visitors.

- **Local Branches & Team**: Core & Main is showing our commitment to The City of Mount Dora with over 18 stocking branch locations in the state of Florida. The primary servicing branch for Mount Dora is our Orlando branch.

Below we have outlined key supporting personnel and their locations:

Core & Main:

- Payton Duncan, Florida Smart Utility Specialist – Orlando, FL
- Jason Milhorn, Outside Sales Representative – Orlando, FL
- Joe Holsten, Operations Manager – Orlando, FL
- David Bryant, District Manager –Orlando, FL
- Dewayne Self, Regional Initiative Manager – Metering & Technology
- Ryan Johnson, Regional Vice President – Southeast Region

Sensus:

- Griff Machinski, Sr. Account Development Manager – Jacksonville, FL
- EJ Gomes, Director of Sales, Electric US – Morrisville, NC

Bermex:

- David C Mack, Business Development Manager – Stow, Ohio
- Kenny Murphy, President – Stow, Ohio
- Tommy Combs, Director of Operations
- Ken Warner, Senior Operations Manager – Tampa, FL
- Torrey Duhaney, Water Meter Installation Specialist

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SpryPoint:

- Jim Walters, Account Executive – Charlottetown, PE
- Bob Campbell, Sr. Project Manager – Charlottetown, PE
- Wylie Tanto, Implementation Specialist – Charlottetown, PE

We appreciate the opportunity to partner with the City of Mount Dora on this important and exciting project.

Payton Duncan, Smart Utility Specialist, will be the primary contact throughout the proposal evaluation and next steps:

Payton Duncan
Smart Utility Specialist
Payton.Duncan@coreandmain.com
M: 386-473-2165

Best regards,

David Bryant
District Manager
Core & Main LP
590 Ferguson Dr. Orlando, FL 32805

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Experience and Qualifications

COMPANY BACKGROUND & HISTORY

Core & Main LP was established in 2004 and built on the foundation of 80+ legacy companies, including HD Supply Waterworks, Hughes Supply, and National Waterworks. Our products are integral to building, repairing, and maintaining water and wastewater systems. They serve as part of the basic municipal infrastructure required to support population and economic growth, including residential and commercial construction. C&M holds a **leading market position** in the United States for water, sewer, storm drain, and fire protection products.

Headquartered in St. Louis Missouri, we have over 4,100 employees across 47 states and over 300 locations that strive daily to provide local knowledge, experience, and service nationwide.

OUR VISION

To foster a world where communities thrive because our people and products provide safe, sustainable infrastructure for generations to come.

OUR MISSION

We are industry leaders, supplying local expertise, service, and products nationwide to build innovative water, wastewater, energy and fire protection solutions for our customers and the communities we serve.

We invest in the development and well-being of our people, who are the key to our future. Together, we act with honesty and integrity because we believe strong relationships make for strong communities.

OUR CORE PRINCIPLES

- Our team members are family
- Honesty & integrity guide us
- Everyone is in sales
- We value industry, technical & local expertise
- We are action-oriented & accountable
- We are growth-focused

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COMPANY PROFILE:

BUSINESS STRUCTURE

Core & Main LP (“Core & Main,” the “Company,” “we,” “our” or “us”) is a Florida limited partnership.

CONTACT INFORMATION

Local Knowledge
Local Experience
Local Service, Nationwide®

- **Address:** 1830 Craig Park Court. St. Louis, MO 63146
- **Phone:** 314-432-4700
- **Website:** https://coreandmain.com/
- **President:** Jack Schaller
- **CEO:** Steve LeClair

LOCAL BRANCH – ORLANDO, FL

- **Address:** 590 Ferguson Dr. Orlando, FL 32805
- **Phone:** 407-291-1545
- **Email:** orlando@coreandmain.com
- **Website**: https://coreandmain.com/branches/fl-orlando-32805-051/
- **Operations Manager:** Joe Holsten
- **District Manager:** David Bryant
- **Regional Metering & Technology Initiative Mgr**: Dewayne Self
- **Regional VP:** Ryan Johnson

SIZE & SUPPORT

- **We believe it takes a World Class Team to serve a World Class Utility!** A recently published list of The World’s Top 50 Companies in the Water Industry ranked Xylem (Sensus) #2 and Core & Main #3. Our World Class Team stands ready to be your partner by delivering a successful AMI project for the City of Mount Dora!

- **Publicly Traded** Core & Main became a publicly traded company on the NYSE in July of 2021 with a current market cap of over $7 Billion USD.

LOCAL SUPPORT, NATIONWIDE

Operating approximately **300 branches nationwide**, we combine local expertise with a national supply chain to provide contractors and municipalities with innovative solutions for new construction and aging infrastructure. Core & Main's **4,100 associates** are committed to helping their communities thrive with safe and sustainable infrastructure. As of January 30, 2022, we had

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approximately 1,600 sales representatives offering sales and support on the branch level and nearly 200 technical product specialists at the national and regional levels who have expertise in specific product and service offerings and who support our other sales representatives with product training and technical support.

We support our network of branches with the following company-wide resources: strategic accounts, product specialists, category management, sourcing, supply chain, finance, tax, accounting, pricing analytics, payroll, marketing communications, human resources, legal, safety and information technology.

SUSTAINABILITY

Core & Main is proud to provide safe and sustainable water infrastructure and solutions that help our communities thrive. We view sustainability as an integral element of our business that supports our efforts to address our nation's critical water and essential resource needs while delivering long-term value to our stakeholders.

Our products and services are essential in advancing our customers and the industry's broader sustainability goals. We help drive the adoption of innovative technologies that enhance how water is managed, distributed, and used without compromising performance, durability, or economic value. These offerings are becoming especially vital in a world increasingly challenged by environmental impacts. We will continue to support our customers and suppliers in their efforts to find short- and long-term solutions to conserve water and create a sustainable future for our communities.

In partnership with utility-focused, intelligent water systems providers, Core & Main is driving the adoption of smart metering solutions through our scale, technical expertise, and specialized products. Our CORE+ Smart Utility services provide municipalities with the resources required to add or upgrade meter systems to benefit the cities and their residents. Water meters are essential in conserving water as they help identify water leaks and facilitate rapid repair. Additionally, smart meters can be read remotely, which reduces emissions since trucks do not need to drive to the site to read them. Our Wastewater Advanced Metering Infrastructure (AMI) optimizes wastewater collection through a network of sensors and meters, allowing utilities to monitor critical infrastructure safely and remotely. The community and the environment benefit from wisely managed water resources and wastewater AMI offer four key advantages:

- Mitigate pollution in waterways
- Mitigate hazardous waste overflows
- Reduce greenhouse gas emissions
- Support climate change resiliency

Our Core & Main vision statement defines our most essential, broadest focus: "a world where communities thrive." Our company is a leading distributor of products and services for water infrastructure, which means the earth's most valuable resource is at the core of our business. We align our business strategy and operations with the goal of safe, sustainable infrastructure for generations. For additional detail about Core & Main's Environmental, Social & Governance efforts, view our 2022 ESG report found here: https://coreandmain.com/who-we-are/esg/

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CORE & MAIN AMI EXPERTISE

Core & Main counts AMI and metering as one of its core initiatives. Our company has been selling and supporting automated meter functions for nearly two decades starting with its infancy in touch-read, its evolution into radio read, and now AMI. **We are the largest distributor of Sensus metering products in the United States and are the exclusive Sensus distributor in Florida.** Core & Main has successfully completed over 1,900 metering projects nationwide. This experience has allowed our team to learn best practices and minimize customer disruptions during deployments.

With brick-and-mortar locations across the United States, Core & Main provides our customers with premium waterworks supplies and services. Our primary servicing branch for the City of Mount Dora is in Orlando and we have 17 additional brick-and-mortar locations across the state Florida. We have full-time local AMI service and support technicians and project managers on staff that will be dedicated to the deployment of this project.

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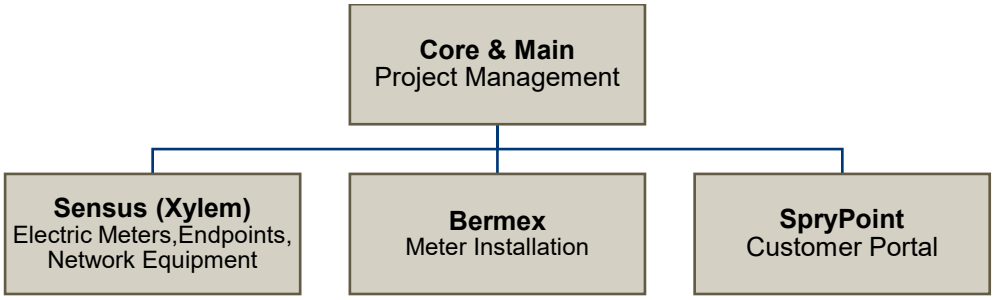
Our Partners

PROPOSED PROJECT TEAM

As the prime contractor, Core & Main accepts responsibility for all aspects of this program. Our team will lead all partner integrations and sub-contractors to see the various portions of our program are completed on time and within budget.

Below is an organizational chart outline for the City of Mount Dora AMI program.



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XYLEM & SENSUS

As a leading global water technology company, Xylem is dedicated to solving the world's most challenging water issues. Xylem Watermark, the company's corporate citizenship platform, was founded ten years ago as part of this mission. The program is integral to realizing Xylem's vision: a world where water issues are no longer barriers to human health, prosperity, and sustainable development.

Our Mission is to provide and protect safe water resources for communities around the world and educate people about water issues.

Our Vision & Values

Our vision and values provide the foundation for how we want to grow as a company as well as the inspiration for how we want to behave as industry leaders and ethical corporate citizens.

Our strong product brands will continue to drive our business forward in moving, testing, analyzing and treating water, and are the essential building blocks of the Xylem brand. With decades of leadership in their categories, these brands are at the core of who we are, and each is part of the new, revitalized future we are creating together at Xylem.

Through our signature citizenship program, Xylem Watermark, we bring clean water, sanitation and hygiene education to schools and communities in emerging markets, and respond with water solutions when disaster strikes around the globe. Here's how Xylem Watermark is solving water around the world.

With greater strategic focus than ever before, a strong and experienced leadership team, a high-performance company culture and a clear plan for short- and long-term growth globally, we are building on the strength of our history to deliver a higher level of customer service, innovation and value — today and well into the future.

SENSUS AMI EXPERTISE

With more than 125 years of experience, Sensus understands what it takes to make reliable and accurate utility products that will endure any environment while delivering consistent performance our customers can rely upon. Sensus has been enhancing its unique FlexNet AMI solutions for water utilities for more than 20 years. With the FlexNet solution, they are proud to be the North American leader in RF radio and AMI technology.

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Since introducing its first water communications technology system in the early 1990s, Sensus has refined and perfected battery quality and power management. With the introduction of FlexNet for water in 2006, Sensus proved the value of a fixed communications network for water utilities. In 2009, Sensus accomplished what no other vendor has done by deploying field-proven smart water networks with true two-way capability available every minute of every day to battery-powered field devices.

Over 2,500 water utilities in the U.S. and Canada use the Sensus FlexNet system, with over 50 million SmartPoints installed and in operation. Based on this experience, Sensus has unparalleled system capabilities and expertise in delivering a proven AMI solution.

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BERMEX

Bermex works towards providing the best solutions by reducing our clients' costs and minimizing customer complaints. We work with gas, electric, and water utility companies to design a plan that best fits the challenges you're facing. Customized service plans include meter reading, billing and collection, AMR and AMI transition assistance, and call center services. We're dedicated to building a strong partnership with our clients in order to provide them with services that benefit their company in the long run. We have been servicing customers with integrity and reliability since 1972.

Bermex was founded on a handshake, and that symbol of trust has carried our business for more than four decades. We hold ourselves to a world-class standard of integrity, because for our business to work, we need your trust. That's our No. 1 priority. Bermex has a rich history, but we're also a part of ACRT Services.

ACRT Services offers expert, independent consulting solutions to utilities and associated organizations throughout the United States, including vegetation management consultation and training, customized safety courses, technology solutions, and utility metering services. We assess and monitor systems for liabilities, consult with decision-makers on planning.

Bermex, Inc. (Bermex) is a wholly owned subsidiary of ACRT Services, Inc. (ACRT Services). Bermex is incorporated in the state of Michigan. Bermex has been performing meter reading and other utility contracted services since 1983.

Bermex Business Organization

Bermex currently has operations in Alabama, Florida, Georgia, Kentucky, Louisiana, Ohio, New York and Texas. Bermex employs 450 team members on 25 projects.

Corporate Headquarters:
Bermex, Inc.
4500 Courthouse Blvd Suite #150
Stow, Ohio 44224

Regional Office:
Bermex, Inc.
8413 Laurel Fair Circle Suite #102
Tampa, Florida 33610

Regional Office:
Bermex, Inc.
1380 Dublin Rd. Suite #200
Columbus, Ohio 43215

Regional Office:
Bermex, Inc.
2880 W. Oakland Park Blvd
Fort Lauderdale, FL 33311

Bermex plans to use VPie Work Order Management Software for the technology component as outlined in the VEPO Solutions Overview page.

Corporate Headquarters - VEPO Solutions: 3 W. Main St. Suite #208, Elmsford, NY 10523

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Board of Directors – Bermex, Inc:

- Kenny Murphy – President
- Brad Schroeder—Treasurer
- Alan Rothenbuecher – Secretary

BERMEX UTILITY SERVICES & INSTALLATION EXPERTISE

Bermex has been a premier meter services vendor since 1972, our customers have a history of staying with us for decades and entrusting us to handle many of their service needs including meter reads, field collections, meter turn-ons and shut-offs, delivery of customer notifications, meter change-outs, installation of AMR devices, and utility locating services. They stay because we consistently save them money, mitigate operational problems, and improve customer service by providing quality personnel and ample support.

Our goal is to present valuable information that empowers our customers to make the best decisions for their organization. We understand the described scope as defined in the request for proposal and our team is committed to completing goals set by the City of Mount Dora. We hope that this proposal provides the information needed for you to evaluate our service and continue our partnership.

Please see Bermex Attachment found in the Appendix for additional information about Project Deployment Quality Assurance, Training, etc.

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SpryPoint

SPRYPOINT

SpryPoint was founded in 2011 on the premise that utilities are in a great position to leverage the technological advances of the last decade. Efficient business processes and technology are at the core of customer satisfaction and operational effectiveness. **Over the last 13 years, SpryPoint has developed a new cloud-based Customer Information System (CIS) designed to make our customers' lives easier to address the evolving utility landscape.** SpryPoint's mission is to help our customers improve customer service and operations through business automation. SpryPoint provides Smart Solutions for Smart Utilities.

SpryPoint firmly believes we are the right partner for the City. Our true SaaS platform is functionally rich, integrated across all modules, and built on state-of-the-art technology. SpryPoint's team has extensive experience delivering utility enterprise solutions and a track record of exceeding expectations. We appreciate the City's consideration, and we look forward to an opportunity to work together with the City on another successful implementation.

Experience

The Senior Management Team has over 80 years of combined experience developing, provisioning, implementing, and supporting Customer Information Systems for utilities. The team drew on this experience when designing SpryCIS to address the evolving needs of utilities where legacy CIS systems fall short. SpryPoint currently works with over 75 utilities in 28 states that use various SpryPoint platform applications. We have earned a reputation as a technology partner that can execute complex implementations on time and within budget with superior customer satisfaction.

Managed Service Cloud Offering

SpryCIS is at the forefront of industry and technology standards. Our platform was architected from the ground up to be delivered as cloud-native Software as a Service (SaaS). The delivery model

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eliminates the need for any hardware or software to be installed on your network, and most importantly, all updates are delivered instantaneously by SpryPoint. Additional technological advantages include:

- True Cloud Architecture – 100% cloud architecture with instantaneous product upgrades.
- No hardware – No hardware costs or ongoing maintenance for customers.
- Improved Security – 100% AWS Cloud to ensure data privacy, security, and 99.5% up-time.
- Performance – Dynamic expansion of computing resources to scale up or down with usage and/or users.
- Data Redundancy – All customer information is replicated in the cloud for backup and recovery purposes.
- Business Intelligence and Reporting Analytics – MetaBase is embedded to provide Improved decision-making capabilities and transparency to data and analysis for decision support.
- API First Integrations - SpryMobile was built API first with integration in mind.

Competitive Advantages

SpryCIS supported new functionality required by regulators and demanded by customers, which many legacy CIS vendors are unable to meet. These advantages include the following:

- Functionality Differentiation – SpryCIS extends beyond the typical functionality of legacy CIS solutions with additional functionality to address mobility, Customer Relationship Management (CRM), Workflow, Customer engagement, Smart Grid, AMI/MDM Integration, complex rates, and conservation, and efficiency initiatives.
- Scalability – SpryCIS is scalable to support both small and large utilities.
- Application Programming Interfaces (APIs) – Our platform includes a comprehensive API framework to enable easier integration with other critical systems.
- Implementation – Significantly faster configuration and implementation capability.
- Workflow and Employee Productivity – Reduction in training time and automation of processes to repurpose staff for more productive activities.
- Customer Engagement and Experience – Multi-channel customer engagement tools to improve customer experience through self-service portals to facilitate payments, consumption analysis, and conservation.

Platform for Growth

SpryPoint provides utilities with an integrated platform to help improve customer service and operations. Over the years, we have continually improved and added to our platform. All proposed applications are developed, implemented, and supported by SpryPoint.

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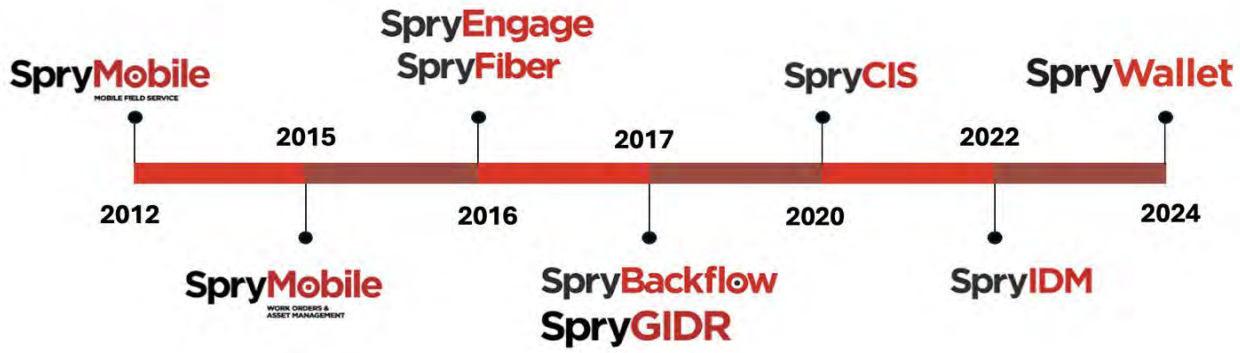
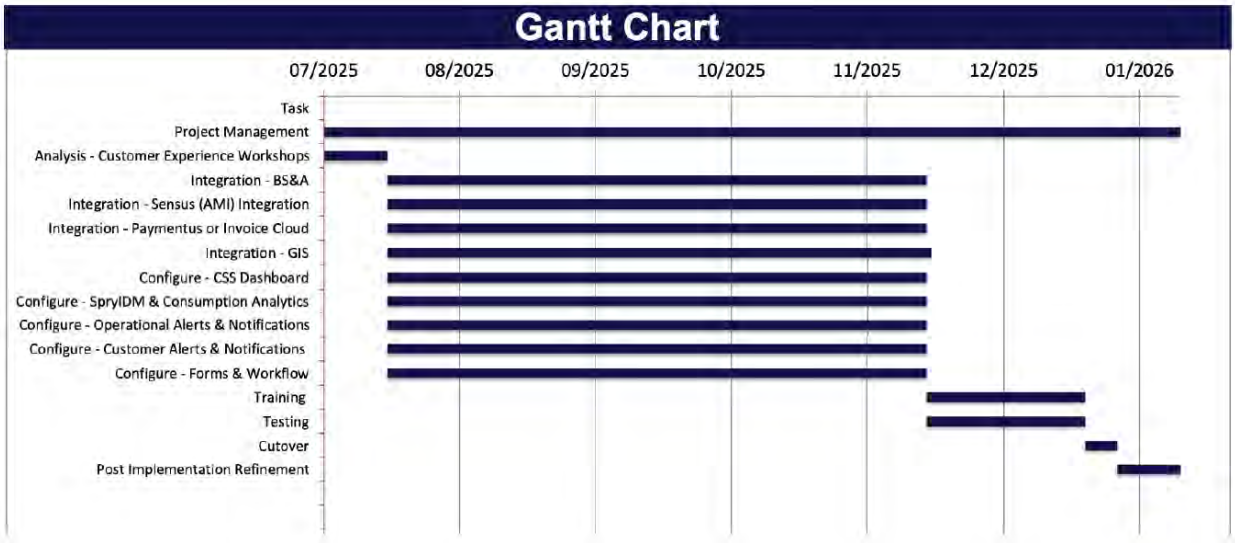


Proposed Implementation Schedule



Please see SpryPoint Attachment found in the Appendix for additional information about Project Team, Payment Processing, Interfaces and API's, etc.

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Proposed Project Team

CORE & MAIN

Payton Duncan

Smart Utility Specialist

Core & Main

PROFILE

Payton Duncan is a graduate from Missouri University of Science & Technology with a bachelor's degree in engineering management., with an emphasis on Management of Technology and Supply Chain Management. Payton is a Smart Utility Specialist, focusing on Sensus Technology. Payton has previous knowledge and experience in project management and technology implementation during his time as an engineering student and in the Water & Wastewater Industry. Payton will help support the project as well as ongoing support. Payton also served as the Digital Project Manager for MDWASD's Wastewater AMI Program.

Jason Milhorn

Outside Sales Representative

Core & Main

PROFILE

Jason Milhorn is an Outside Sales Representative, OSR, for the City of Mount Dora. Jason Milhorn has worked with Core & Main 10+ years. Before coming an OSR, Jason was a metering specialist assisting and supporting utilities across the Southeast with their technical needs. Jason, before joining Core & Main, worked as the Meter Supervisor for Winter Garden. Jason has a vast knowledge of metering, metering projects, and support.

James Hiester

Sr Mgr, Sales – Electric

Core & Main

PROFILE

James Hiester has over 17 years of experience in the Electric Utility industry with multiple AMI technologies including electric metering, radio frequency networks, smart grid, and various other data analytics, asset management, and data management applications. He also has experience working with Utilities such as Florida Power & Light, Duke Energy, and Progress Energy on low to medium voltage Power Distribution Design and asset management. He has been involved in a combined 100+ deployments of AMR/AMI systems while on staff

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with Core & Main and previously Sensus. With a Bachelors of Science in Electrical Engineering from University of Central FL, he has been able to apply knowledge and experience from a broad base to assist customers many topics common to utility personnel.

Noel “Dewayne” Self

Sr. Manager Sales- SE Region Meter Initiative

Core & Main

PROFILE

Dewayne is a 15-year meter industry veteran beginning his career with Core & Main in 2006 and was one of the original members of the National Services Group (NSG). During his time with the NSG he was tasked with selling turn-key metering projects across the United States. Dewayne has served in a variety of functions from implementation and project management to sales support and consultation. Since 2013 Dewayne has served as the regional metering/AMI initiative- manager in his current role Dewayne manages the product specialists and is responsible for ensuring customer support success and sales performance for the region. Dewayne has worked on a variety of Sensus Automated Metering projects ranging in size from 500 touch read endpoints to 200,000 AMI endpoints. Dewayne is a graduate of the University of Arkansas with a degree in business-finance. Additionally, Dewayne served as a communications specialist in the US Army where he attended US Army Signal school and worked with a variety of encrypted HF/UHF/SHF radio systems.

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SENSUS

EJ Gomes

Director of Sales, Electric US

Sensus, a Xylem Brand

PROFILE

EJ is a proven project development and sales leader with 15 years of professional experience managing cross-functional teams from within the governmental, utility, and private sectors of the energy industry.

Griff Machinski

Sr. Account Development Manager

Sensus, a Xylem Brand

PROFILE

Active in the water industry for over 17 years with focus on selling and supporting technology products and solutions for water measurement, communications, and water loss prevention.

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BERMEX

Tommy Combs

Director of Operations

Bermex, Inc.

PROFILE

Tommy Combs, holding a Bachelor of Science in business management from the University of Tampa, is the director of operations at Bermex with more than 20 years of experience in the utility service industry. He has led numerous AMI and AMR projects throughout his career, with his most recent experience working with Riviera Utilities in Alabama and City of Albany, Ga. Previous projects include TECO Peoples Gas- 300,000+ Gas Meters, Peace River Electric- 50,000 Electric Meters, Gulf Power- 400,000 Electric Meters, Shelby Energy- 14,000 Electric, and Bluegrass Energy- 55,000 Meters.

Torrey Duhaney

Water Meter Installation Specialist

Bermex, Inc.

PROFILE

Torrey is a Water Meter Subject Matter Expert at Bermex, possessing over 15 years of experience in water meter installation, ranging from standard residential to 10” lines. In the last decade, he has worked as a project manager, leading numerous high-profile water change-out projects. Torrey has been recognized for his exceptional planning, execution, and ability to meet project timelines and budgets, all while maintaining his safety KPIs. Recent Projects as Project Manager include- Bellview, WA- 40,000 Water Meters, City of Richmond, VA- 30,000 Water, City of Newport Beach, VA- 35,000 Water Meters, City of Raleigh-Durham, NC- 20,000 Water.

Ken Warner

Senior Operations Manager

Bermex, Inc.

PROFILE

Ken, who is currently based in Tampa, Florida, began his career as a meter reader in 1998 with South Central Power in Ohio. Over the past 24 years, he has acquired a wealth of experience in the utility industry, having worked at all levels. Ken's areas of expertise include utility locating, leak surveys, electric and gas meter exchange, as well as safety compliance.

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SPRYPOINT

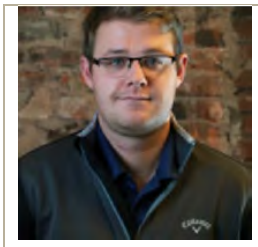
Bob Campbell

Sr. Project Manager

SpryPoint

PROFILE

Bob has been in the Utility space for well over 30 years with over 20 implementing Utility Software solutions across North America and the Caribbean. Effectively management projects of all sizes, with a keen eye for detail, and a disciplined approach to execution, he excels at driving projects through to completion.



Wylie Tanton

SpryEngage & SpryBackflow Implementation Specialist

SpryPoint

PROFILE

Wylie has 5 years of experience in leading and executing software implementations of CMMS, CRM, and data historian platforms. His previous experience has provided him a well-rounded background of the project lifecycle from the initial design phase to client training and support. Wylie has developed a strong knowledge of methodologies around corrective, preventive and predictive maintenance programs and principles. This insight will help ensure that clients receive a solution that aligns with not only their business requirements, but industry best practices.

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TAB 2 – Proposed AMI Solution

1.1 SUMMARY OF THE PROPOSED AMI SYSTEM

The purpose of this RFP is to solicit proposals for the delivery and implementation of an Advanced Metering Infrastructure (AMI) Systems Solution. Mount Dora is seeking requested information, description of services, and price quotes to implement a communication system to obtain data as well as have the ability to control and manage the meters.

As the City of Mount Dora embarks on this transformative project to implement Advanced Metering Infrastructure across its electric service territory, a set of key City objectives will drive Core & Main's approach.

- Improve Meter to CIS Billing Accuracy and Customer Service
- Promote Safety and Theft Detection
- Practical and Cost Effective
- Reliable Outage / Restorage Information System
- Limit Use of Proprietary Interface
- Software Application Services
- Managed Services
- Customer Portal / Education / Engagement
- Customer Service Application Systems Integration and Security

UNDERSTANDING OF SCOPE / CORE & MAIN METHODOLOGY

Core & Main, as the AMI Implementation project prime contractor, will be solely responsible for the performance of subcontractors/partners and equipment warranty. Core & Main will be responsible for the design, engineering, installation, and maintenance of the head-end software (HES), Field Area Network, endpoints, electric meters, and associated equipment.

PROJECT MANAGEMENT

Core & Main will assign a dedicated and qualified Project Manager to manage all scope, schedule, financial, and stakeholder communication elements of the AMI Implementation project through planning, initiation, testing, deployment, risk and issue management, and final acceptance.

NETWORK-AS-A-SERVICE (NAAS)

Core & Main and Sensus will provide a turnkey NaaS for operations and support of the production AMI Fixed Area Network (FAN). The FAN will be built as a solid, flexible, and scalable foundation for AMI metering, advanced system monitoring, and future smart city applications.

METER AND ENDPOINT EQUIPMENT

Core & Main will install the advanced metering infrastructure to provide hourly interval and daily register readings, replacing the City's current billing read capture. **Core & Main will install 6,014 residential electric meters and 944 commercial electric meters.** The metering equipment will provide readings and alarms through the Sensus FlexNet system.

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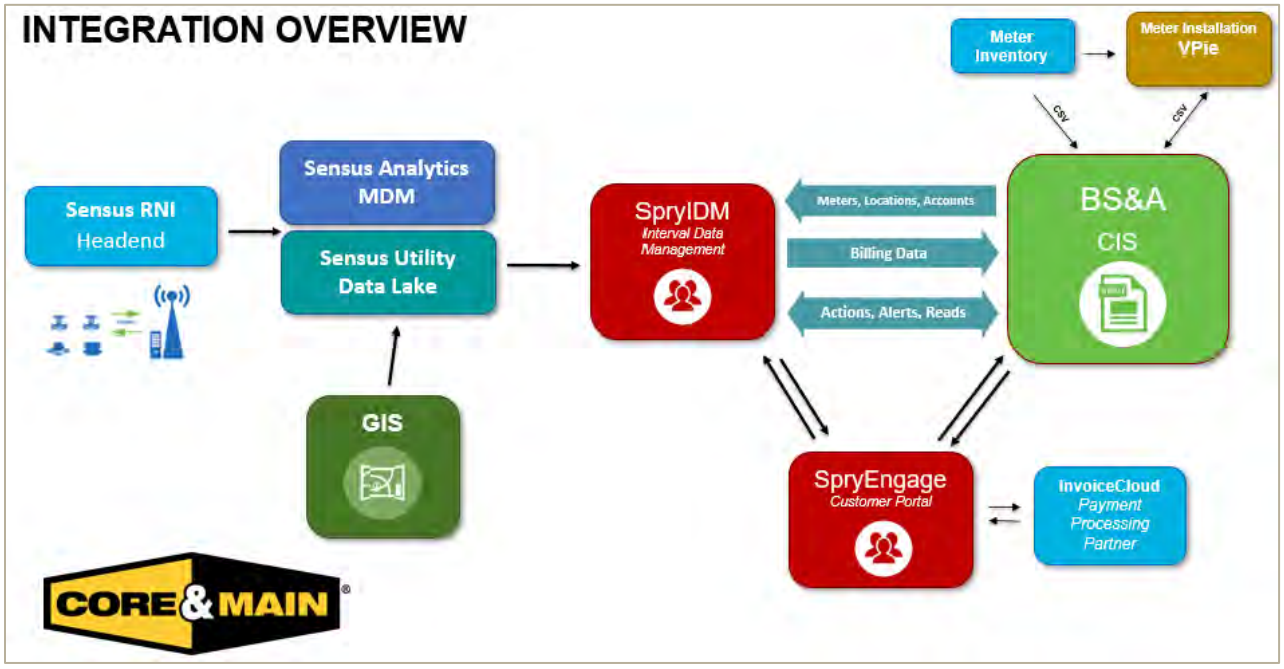
Core & Main will also offer solid state water meter offerings for any water metering needs that the City will have. The water meter offering includes the Sensus iPERL and Sensus ally water meter for residential offering, and the Sensus OMNI+ and Cordonel meter for the commercial offerings. Along with the Sensus water meters, Core & Main will offer the Sensus SmartPoint for the endpoint equipment which will connect to the FlexNet system.

SOFTWARE-AS-A-SERVICE (SAAS)

Core & Main will provide test and production instances of the Sensus head-end system (RNI) as Software-as-a-Service elements. The test RNI will have two connected FAN RF devices. The service will include web-based access for anytime, anywhere use, software release management, patching, testing, disaster recovery/backup, and reporting that meets contracted SLA and KPI requirements. The City will have the option of taking possession of the software during the hosting period, without penalty, to execute on their own or another 3rd party hardware.

SYSTEMS INTEGRATION

Core & Main will collaborate with the City and their software providers to create required system interfaces and integration to support automated mass meter changeout and utility billing. High-Level Integration Overview below:



TRAINING

Our team recognizes that different utilities have diverse needs and we have adapted our training approach to address those needs. Core & Main will tailor a training program to Pinellas Park as part of our AMI Program. In the past, we have created customized solutions that provide one-on-one instruction. Such training supplements the formal instructional training and typically results in a deeper understanding of the operations and maintenance of a customer's specific system.

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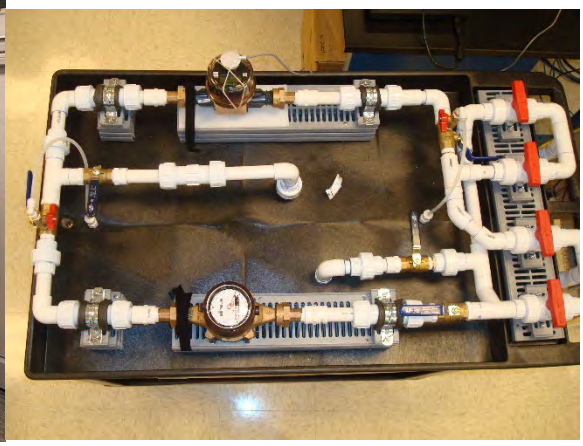
METER DEMONSTRATION BOARD

The Meter Demonstration Board will contain a demonstration layout of the offered electric meters. This Demonstration board will showcase the features and operations of the Sensus Stratus IQ and Aclara kV2c meters. Examples of meter demonstration boards included below:



EARLY DEPLOYMENT / TESTING / SYSTEM ACCEPTANCE

Core & Main will manage project initiation and setup, including network site preparations, AMI network infrastructure installation/testing, meter configuration, equipment delivery/inventory, software setup, system integration, and system testing. The Early Deployment stage will follow for up to six months, with the installation of a subset of the meter population following proven installation best practices. The City will validate network coverage, system performance, functionality, and processes.

MASS METER DEPLOYMENT

After completing the Early Deployment stage, Core & Main will begin the mass meter deployment of the remaining electric meters in the service territory. Work will be released using a cycle/route methodology to minimize the number of open routes at any given time and ensure timely work completion. An electronic work order management system will support the efficient dispatch of work orders to the meter installation technicians. The City will have access to the installer work order management system for views of dashboards, reports, and meter exchange data and photos collected. Mass Meter Deployment is planned to be completed within twenty-four months.

SENSUS FLEXNET AMI SOLUTION INTRODUCTION

The FlexNet system is a point-to-multipoint communication network that uses a primary-use, FCC-licensed RF spectrum. The FlexNet system is the most complete communication network solution available today that can support multiple applications. Sensus develops and manufactures a full complement of AMI communication network products. This includes water and gas meters, communication network modules, solutions for distribution automation communications, lighting control, and communication products that support third-party products and applications that meet the utilities business and operational requirements. The bottom of the following diagram shows the

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FlexNet-enabled endpoints that can be deployed as a part of a FlexNet system. The next layer is the FlexNet communication network, comprised of our long-range communication base stations. At the top of the diagram is the FlexNet Head End System software, which will interface with your utility software systems and passes the appropriate data to each (for example, billing data, outage data, and so on)

SENSUS FLEXNET AMI EXPANDABILITY

The Sensus FlexNet AMI System offers full expandability into the Smart Utility initiative. Through the FlexNet system, the City will have the ability to increase the customer engagement by leveraging smart utility applications. There is also the opportunity to add acoustic leak detection, pressure, temperature, among many other sources of data from the City's infrastructure. The ability to remotely control the meter disconnect is offered through the Sensus Analytics platform.

Sensus is committed to providing systems and solutions that enable utilities to mitigate the risk of stranded assets. The FlexNet system is distinguished from competitive offerings through expandability, performance, efficiency, security, and experience. The solution is purpose-built to meet utilities' needs today and in the future. Obsolescence is avoided through the development of products that bring in new applications while maintaining backward compatibility with network devices in the field for the life of the FlexNet system.

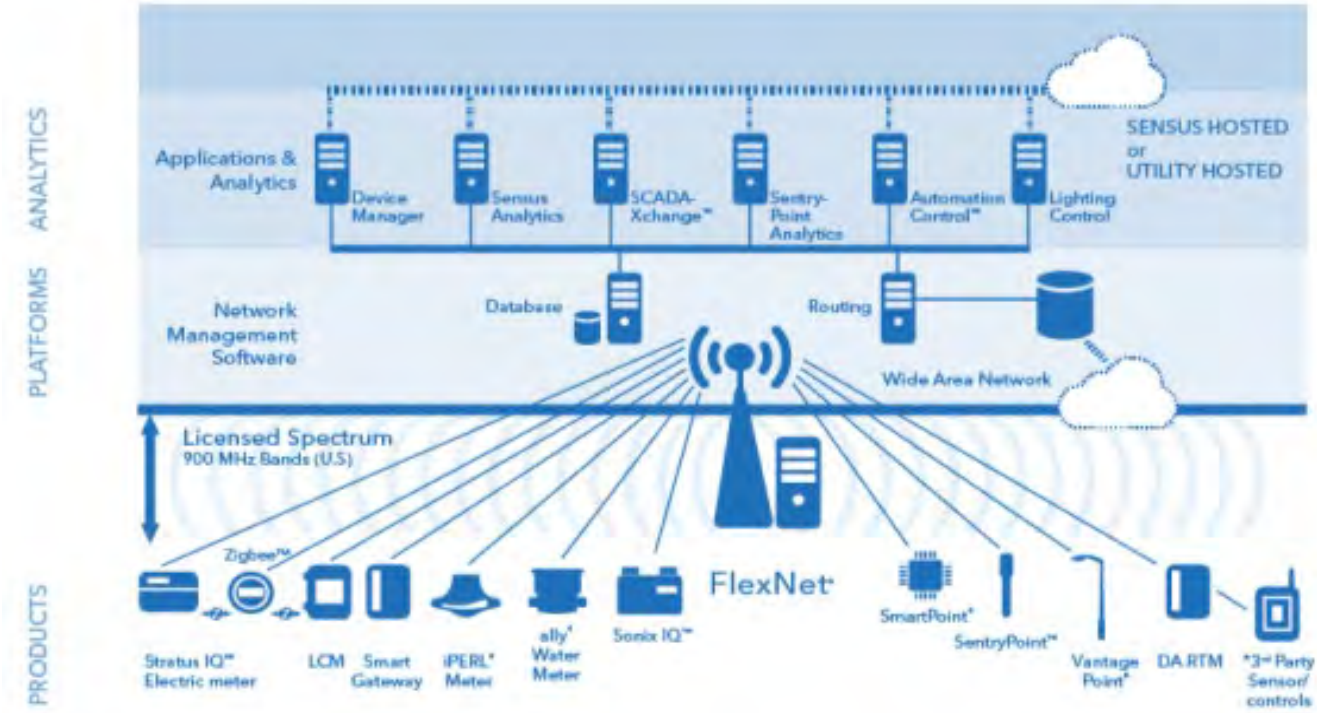

Figure: FLEXNET SYSTEM ARCHITECTURE

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1.2 INTEGRATION TO THE CITY CUSTOMER INFORMATION / BILLING SYSTEM (CS) AND RELEVANT SOFTWARE APPLICATIONS

The City will maintain BS&A as the primary CIS system, recognizing that a long-term migration to a platform that will be most conducive to data reads of greater granularity (e.g. hourly for electric and water reads to support more robust retail rates) may be necessary. The City's expectation is that the successful Proposer has enough command over the needed systems integration steps to ensure maximum viability of the City's existing systems while maintaining flexibility for the future. It is critical the proposed new AMI and existing water AMR system have full compatibility into the BS&A customer information and financial billing system.

To address the City's requirements for system integration and compatibility with the existing BS&A Customer Information System (CIS), while ensuring future flexibility for granular data reads, here are key considerations and how the Sensus FlexNet AMI and existing water AMR systems can support this goal:

1. System Compatibility and Integration with BS&A CIS

- FlexNet's Open Architecture: The Sensus FlexNet system is designed to integrate with third-party systems like BS&A, leveraging standard protocols such as MultiSpeak and CMEP (Common Metering Exchange Protocol). This allows seamless exchange of metering data between FlexNet and BS&A's billing, financial, and customer service platforms.
- Data Flow: The FlexNet system can provide hourly reads for both electric and water meters, ensuring the granularity required for advanced rate structures and usage-based billing. The collected data is processed through the FlexNet system's Regional Network Interface (RNI), where it is prepared for direct transmission to the BS&A CIS for accurate billing.

2. Granular Data Reads for Enhanced Rate Structures

- SmartPoint® Modules: The 520M SmartPoint® Pit Set Module captures hourly data and stores up to 840 consumption intervals (35 days of hourly consumption), which can be integrated with the BS&A CIS for real-time billing analysis and more dynamic rate-setting based on time-of-use (TOU) or demand-based rates.
- Electric Meter Data: For electric meters, the two-way communication of the FlexNet system allows hourly data retrieval, making it possible for the City to shift towards more granular retail rate plans. This functionality is critical for supporting future needs in advanced metering, particularly with the desire to move towards hourly electric and water reads.

3. Flexibility for Future Migration

- Scalability and Flexibility: The FlexNet system is highly scalable, designed to support future growth and system upgrades without significant infrastructure changes. This means

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the City can maintain its current AMR system and migrate to an AMI system gradually while maintaining the integration with BS&A.

- Future-Proofing: FlexNet's licensed spectrum provides a stable and reliable communication platform that minimizes the need for extensive future upgrades, ensuring long-term compatibility with evolving systems and platforms.

4. Proposer's Role in Integration and Future Planning

- System Integration Expertise: The successful proposer must demonstrate the ability to integrate FlexNet with BS&A seamlessly, ensuring data reads from the City's water AMR and the new AMI systems are fully compatible with the CIS. This includes expertise in managing the interfaces between the AMI headend system (RNI), the SmartPoint modules, and the CIS software.
- Custom Integration Services: Proposers should also be prepared to offer custom integration services if needed, ensuring data from multiple utility types (water and electric) are properly aligned within the BS&A system for accurate billing and customer management.

5. Maintaining Current System Viability

- AMI and AMR Compatibility: The FlexNet system allows utilities to migrate gradually from AMR to AMI. The City can maintain the functionality of its existing water AMR system while adding AMI capabilities for electric metering without immediate full-scale infrastructure replacement.

In summary, the proposed Sensus FlexNet AMI system is fully capable of integrating with the City's existing BS&A CIS, while providing a path to more granular data collection and flexible future upgrades. Proposers must have the capability to ensure smooth integration, with a focus on maintaining current systems' viability and future-proofing for further expansion.

1.3 DEMONSTRATE THE ABILITY TO DESIGN AND IMPLEMENT AN AMI IN THE ELECTRIC AND WATER SERVICE TERRITORIES

The electric and water service territories overlap by approximately 50%, with the City electric utility serving 1/2 the total water customer service territory. The City also maintain lift stations within the remaining water service territory not served by City Electric.

Utilizing the vertical assets which are in the City of Mount Dora, we are proposing a solution which will include two Sensus M400 Base Stations. This will allow for full two-way coverage of the entire water and electric service area.

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1.4 COMMUNICATIONS INFRASTRUCTURE DESIGN

The City owns and maintains multiple locations with tower elevation connected to an extensive fiber network, with power and back-up generation power. The City also maintains wifi in the down-town district.

We plan to utilize these existing vertical assets for the proposed FlexNet network.

1.5 AMI MANAGED SERVICES

Mount Dora has opted to implement its AMI system in a Managed Services environment to avoid any incremental staffing requirements. The City will operate and maintain the physical assets of the AMI system; however, other than desktop computers, all AMI computational infrastructure will be located at the Supplier's managed services facility. Additionally, the City would like optional pricing for the Proposer to manage non-meter field communications asset

We have provided pricing for both SaaS and NaaS models in "Exhibit B".

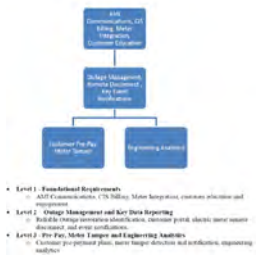
1.6 AMR TO AMI INTEGRATION

During the first project milestone the successful proposer shall demonstrate to a group of approximately 100 electric meters the new read to billing process. These meters will be strategically selected from City of Mount Dora Electric accounts for their facilities. In the subsequent milestone the Electric Meters for two (2) routes will be exchanged. This process will repeat unit all six (6) routes are completed.

The proposed installer for the project will follow the City's guidelines when installing the selected meters.

1.7 CORE COMPETENCY AMI HIERARCHY

The supplier shall propose a system that best represents the hierarchy shown below of core competencies while achieving the Objectives and Technical requirements given in Sections two (2) and three (3)



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Core Competencies Breakdown:

1. Core & Main:

- As the **main proposer**, Core & Main will manage the overall project, ensuring successful integration of the **Sensus FlexNet® AMI system** for electric metering. Core & Main's vast experience in water, wastewater, and electric metering infrastructure projects positions them as a reliable project manager, providing procurement, logistics, and support services throughout the project lifecycle. Their role is to ensure a smooth, timely deployment, managing the coordination between Sensus as the technology supplier and Bermex as the installer.

2. Sensus (Material Supplier):

- Sensus provides the key **FlexNet® AMI technology** components, including:
- **Smart Meters**: Sensus smart electric meters offer two-way communication, enabling real-time data collection and remote operations such as meter reading, disconnects, and reconnects. These meters come equipped with advanced features like voltage monitoring, outage detection, and tamper detection.
- **FlexNet® Communication Network**: FlexNet operates on an FCC-licensed spectrum, providing secure, reliable data transmission with minimal interference. This system's scalability and low infrastructure requirements make it ideal for large-scale electric metering projects, reducing operational costs.
- **CommandLink® II Interface**: This Bluetooth-enabled device allows for efficient programming and diagnostics of SmartPoint modules, ensuring streamlined operation and reduced manual intervention during deployment.
- **SmartPoint® Modules**: These transceivers are integrated into the meters, enabling two-way communication with the utility's head-end system through the FlexNet network, providing real-time data and control.

3. Bermex (Installation Subcontractor):

- **Bermex**, with extensive experience in meter installation and infrastructure projects, will ensure that all electric meters and communication modules are installed properly and efficiently. Their role involves on-site installation, ensuring each meter and communication module is correctly configured, tested, and ready for operation. Bermex's team will also handle the coordination of meter swaps (if necessary), minimizing downtime and customer disruption.

Achieving the Project's Objectives:

1. **Scalability and Flexibility**: The **FlexNet® communication network** provides a flexible, scalable solution that can support future growth or additional functionalities such as smart

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grid integration, demand response, and distributed energy resource (DER) management. The system's architecture allows for easy expansion without significant infrastructure changes.

2. **Two-Way Communication**: The project will leverage Sensus's **two-way communication** capabilities through the **SmartPoint® modules** and the **FlexNet® network**. This will allow the utility to remotely read meters, monitor grid conditions, and control load during peak times. It also provides over-the-air firmware updates, which ensures that the system remains up-to-date without the need for on-site visits.

3. **Improved Operational Efficiency**: The Sensus solution supports features like **remote disconnect/reconnect**, tamper detection, and outage reporting, which can significantly reduce the time and cost associated with manual processes. The system also supports real-time data collection, enabling faster responses to outages and service issues, improving customer satisfaction and operational efficiency.

4. **Data Security and Reliability**: The **licensed spectrum** provided by the FlexNet® network ensures data security and integrity. With the system operating on a **FCC-regulated** spectrum, the risk of interference is minimized, ensuring reliable data transmission for critical electric metering data.

5. **Seamless Integration**: **Core & Main** will coordinate with Sensus and Bermex to ensure seamless integration of the FlexNet® AMI system with the utility's existing infrastructure, ensuring that all components work together to deliver a unified, real-time view of the utility's electric grid.

Conclusion:

- This partnership between Core & Main, Sensus, and Bermex will provide a complete, reliable, and scalable AMI solution for the electric utility, leveraging each party's strengths:
- **Core & Main**'s project management and logistics expertise,
- **Sensus**'s state-of-the-art metering and communication technologies,
- **Bermex**'s hands-on experience with large-scale installations.
- By deploying the **Sensus FlexNet® AMI system**, the utility will benefit from enhanced data accuracy, reduced operational costs, and a more reliable, secure grid infrastructure.

2.1 IMPROVE METER TO CIS BILLING ACCURACY AND CUSTOMER SERVICE

The AMI system shall reduce manual meter RE-READS by improving meter read accuracy and reporting to the CIS billing system. The AMI proposer shall provide customer services to

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include, email, text and or outgoing messaging related to outage notification, estimated time of restoration, and service restoration. A customer portal expanding the monthly consumption data to greater detail, allowing consumer education and understanding to enable efficiency and costs. Reduce the time-frame from cycle read to CIS billing, with automatic triggers and reporting for non-read (RE-READ) along with historical information use for troubleshooting.

The Sensus FlexNet AMI system offers a robust solution for reducing manual re-reads by improving meter read accuracy and automating the reporting of non-read events. With its real-time data transmission and two-way communication, the system seamlessly integrates with the City's BS&A CIS, allowing for faster billing cycles and automated notifications for failed reads. This minimizes manual interventions and streamlines the overall billing process.

Additionally, the system enhances customer service through its integrated customer portal, through SpryPoint, providing users with detailed, granular consumption data and real-time alerts via email or text. Customers can monitor their usage, receive outage notifications, and access educational resources, empowering them to make informed decisions and improve efficiency. These features not only improve operational efficiency but also elevate the customer experience by offering transparency and proactive communication.

2.2 PROMOTE SAFETY AND THEFT DETECTION

Enable detection and reporting of reverse power flow of non-utility approved back-feed, and or back-feed during system outages events. Meter data indices to include theft deterrent detection and reporting, power quality metrics.

The Sensus FlexNet AMI system enables detection and reporting of reverse power flow from non-utility approved back-feed, including during system outage events. The system's meter data indices include theft deterrent features that can detect unauthorized usage, along with power quality metrics such as voltage monitoring. These capabilities provide utilities with critical data to identify and address safety concerns, prevent theft, and ensure system integrity during outages or abnormal operating conditions.

2.3 EFFECTIVE AND DEPENDABLE COMMUNICATIONS DESIGN

An effective design solution for communications infrastructure for both electric billing meters. This communications equipment shall have a well-established history of reliability, with capability to supplement both short term and long term power interruption, without data interruption.

The Sensus FlexNet AMI system provides a reliable communication infrastructure for electric billing meters, designed to withstand both short-term and long-term power interruptions without data loss. FlexNet operates on a secure, licensed spectrum and features robust, two-way communication, ensuring continuous data transmission even during power outages. With battery backup options and non-volatile memory in the SmartPoint® modules, the system securely stores and transmits meter

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data once power is restored, maintaining data integrity and operational continuity. This proven reliability supports both immediate and future communication needs, ensuring consistent performance in challenging conditions.

2.4 RELIABLE OUTAGE/RESTORATION INFORMATION SYSTEM

The city seeks to improve outage notification and visualization capabilities based upon AMI meter. The two areas of improvement

a. A web-based portal representing a geo-spatial map to indicate electric customer outages in real-time.

b. A customer outage notification portal to provide capability of reporting a power outage, validating AMI outage information for an outage, and customer call-back upon AMI meter power restoration.

It is expected large scale outages (200 meters or larger) and/or restorations including up to the entire city electric meter population shall be reported to the head-end system and viewable on the UI within 5 minutes for 99% of the affected meters. These are all system requirements regardless of which managed services component provides the capability.

The Sensus FlexNet AMI system can meet the City's requirements for improving outage notification and visualization capabilities. For real-time outage mapping, the system can integrate with a web-based geo-spatial portal that displays electric customer outages on a map, providing up-to-date visibility of affected areas. This enhances operational response by allowing utility personnel to quickly assess the scope and location of outages.

In addition, the system can support a customer outage notification portal, allowing customers to report outages, validate AMI meter outage information, and receive call-back notifications upon power restoration. The system's two-way communication ensures that large-scale outages, affecting 200 meters or more, are reported to the head-end system and made visible in the user interface within five minutes for 99% of affected meters. This capability enhances response efficiency and customer communication during outage events.

2.5 LIMIT USE OF PROPRIETARY INTERFACE

The use of proprietary based interfaces shall be limited and listed in adjoining AMI Software application interfaces to include Outage Management Systems (OMS), Geographical Information Systems (GIS), Customer Information System (CIS) and Electric Modeling software's such as MilSoft

The Sensus FlexNet AMI system is designed with open architecture to ensure broad compatibility with critical utility software applications, limiting the use of proprietary interfaces. Integration with third-party systems such as Outage Management Systems (OMS), Geographical Information

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Systems (GIS), Customer Information Systems (CIS), and Electric Modeling software like MilSoft is supported through standard protocols, including MultiSpeak and CMEP.

These standard interfaces enable seamless data flow between the AMI system and utility management applications, ensuring efficient operations without relying heavily on proprietary connections. Any necessary proprietary interfaces will be clearly listed and limited, ensuring the system remains flexible and adaptable for future needs. This approach maximizes system interoperability and facilitates smoother integration across various utility platforms.

2.6 SOFTWARE APPLICATION SERVICES

The system requirements listed in this section are broadly grouped by the system component in which these capabilities would logically reside. However, the architecture of the proposer's system is in no way dictated by these sections. Rather, the functionality is being specified in what is envisioned as one or more applications embodied in the managed services offering regardless of which managed services component actually provides the capability.

Core & Main will comply with the given requirements.

2.7 MANAGED SERVICES

The AMI head-end MDM and OMS, Customer Portal and Pre-pay systems are shown in separate boxes. This is a logical construct for presentation purposes only. The system architecture of Proposer's offering is not dictated by this RFP. Whether any or all these functions are performed in separate physical servers, partitions in a virtual server or otherwise are to be determined by the proposer. In many sections of this RFP, these systems are referred to separately. It is important to note that many functions described separately in this way are requirements regardless of the overall architecture. Any requirements for system security are fully applicable across all offerings by the proposer. This is just one example of such broadly applicable requirements.

Core & Main will comply with the given requirements.

2.8 CUSTOMER PORTAL / EDUCATION / ENGAGEMENT

One of the key features of the AMI system is to be able to provide consumers the ability to view their information, including outage information.

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SPRYPOINT – SPRYENGAGE CUSTOMER ENGAGEMENT PORTAL

Often utilities have multiple products or portals (CIS, EBPP, MDM, and Efficiency) which form a complex web of inconsistent technology. All too often the result is a poor customer experience as customers do not know where to go for information. SpryEngage was designed to provide utilities with a holistic omnichannel portal, enabling our clients to easily interact with their customers in their preferred manner at any time. We are focused on always providing utilities a 360-degree view of their customers at all times.

Some of the core functionality includes:

- Customer self-service and enrollment in programs related to your CIS.
- Consumption analytics integrated with your metering system or CIS for the presentation of consumption data.
- Payment processing embedded for a seamless customer experience.
- Single platform to manage all customer alerts and notifications using SMS, email, or voice.
- Forms management with workflow to automate customer service inquiries.
- Program management and campaigns to support efficiency and conservation initiatives.
- Key Account Management and advanced analytics for commercial and industrial customers.

Please see SpryPoint Attachment found in the Appendix for additional information about Project Team, Payment Processing, Interfaces and API's, etc.

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CUSTOMER COMMUNICATION STRATEGY

During initial project planning, the Core & Main Project Manager will host a communications-focused workshop to dive deep into your desired outcomes and lay the groundwork for Communications Strategy & Plan for the AMI Solution Program. We will work with you to:

- Establish overarching goals and measurable objectives for communications, outreach, and engagement.
- Define what success looks like at the end of this program.
- Identify all stakeholders.
- Develop a core set of key messages and identify any nuances or special requirements for specific communities.
- Choose the most appropriate tools and tactics to inform target audiences.
- Establish the schedule for carrying out communications tactics aligned with program milestones.
- Determine the process for measuring return on investment and the effectiveness of communications activities.

The output from this workshop will be the Communications Strategy & Plan that provides a roadmap for Mount Dora and our team to collaborate closely in implementing the public relations and communications activities outlined in the RFP. The plan will detail outreach and engagement tactics, including information-gathering techniques, such as surveys and two-way communications methods; educational sessions, presentations to interested parties, and outreach workshops; meetings with community-based organizations, civic groups, and local businesses; and one-on-one interaction with property owners. We choose tactics for communications and outreach based on a clear understanding of project goals and community needs, with accessibility and environmental justice at the top of our minds. We evaluate our activities at every step to assess what is working and what may need improvement, allowing us to adapt quickly when unique needs arise. The plan will also include guidance for baseline activities, such as developing a core set of branded materials, a briefing package, and web and social media content.

With each service area and type of customer/impacted individual or group, we will identify the most productive channels to disseminate information and design appropriate print and digital materials. Whether it is those who are doing outreach or the field services personnel we help train, we will prioritize people who are customer-service focused. Our team is prepared and has the experience, breadth, and depth of qualified team members to provide the necessary, effective outreach and touchpoints before the meter installation and ensuring they are notified before the meter installation.

Outreach support and a proactive strategy of established messaging and branding for the program ensure the effective communication of branded strategic messaging, program updates, and installation schedules. Effective communication is accomplished using a dedicated website to give updates on the progress and benefits of the program, participating in local events to get the word out about the program, and partnering with the City of Mount Dora's team to work through established social channels and other communication outlets. Tactics for this program may include:

- Programmatic fact sheet

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- Door hanger
- Posters
- Flyers
- Mailers
- Web content
- Social media content
- Video marketing assistance and development
- Talking points for field personnel
- Communications training for field personnel
- Public meetings

2.9 CUSTOMER SERVICE APPLICATION SYSTEMS INTEGRATION AND SECURITY

The Supplier shall provide the appropriate software integration to automatically transfer appropriate data to and from the billing and Customer Information System (CIS). License to use any Supplier- provided integration software will be issued to City. The Supplier shall provide the appropriate software integration to implement any other functionality described herein. Supplier shall outline their data flow back to the AMI head-end system and the City BS&A billing system. It is critical that the existing BS&A billing system remain fully functional during the rollout of the system, and the Water AMR meter field inventory. With meters being removed and replaced daily, describe how the proposer will support this need and ensure a smooth transition to full AMI billing operations. The successful Proposer must work to ensure that all devices within the managed services platform, network equipment, meters, and other field-deployed equipment are sufficiently protected from malicious attacks and unintended cyber and physical events that threaten the core purpose of the service. Specifically, the system must (i) ensure sufficient information availability regarding a securityrelated event, (ii) ensure confidentiality of the information regarding security services, (iii) prevent a security incident from compromising the safety of personnel, stakeholders, and the electrical system, and (iv) avoid the AMI platform or meters from being used as a "stepping stone" or conduit for attacks on end- users, external service providers (e.g. cell phone networks) or any other interconnected entity. Additionally, the system must provide adequate evidence to support the assurance of confidence and trust in the process, including the accuracy of billing statements, the safety and reliability of electricity services, and the fairness of energy markets. Minimizing the likelihood of material loss to the City and their stakeholders must also be addressed in the context of responsibilities and accountabilities of the successful Proposer in relation to the City given their respective ownership of elements of the system. Examples of such considerations include loss of trust/reputation, theft of money or services, "gaming" (or modifying, deleting, or otherwise altering information), privacy violations, hijacking control of a neighbor's equipment, and physical tampering, among other considerations. The entire network from the AMI head-end system through meters and other field devices shall have an overall security scheme. For all

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system components including head- end, network components, backhaul communications, meters, and field devices (handhelds, etc.), over the air security is required. Please describe for each system and device the encryption method used, key management process, and any other related functions and any applicable standards

We, Core & Main, are committed to providing seamless software integration for the automatic transfer of data between the Sensus FlexNet AMI system, the City's BS&A Customer Information System (CIS), and the billing platform. Our integration solution will ensure that the BS&A billing system remains fully operational throughout the rollout. As the water AMR meters are replaced daily, our system will support real-time updates, ensuring a smooth transition with no disruption to the City's billing operations. We will provide a detailed outline of the data flow between the AMI head-end and the BS&A billing system, ensuring the transition to full AMI billing functionality is seamless and efficient.

At Core & Main, we prioritize the security of the entire AMI network, including the AMI head-end, meters, network equipment, and field devices. Our solution employs robust encryption methods and a key management process, ensuring compliance with applicable industry standards for over-the-air security. This security framework protects the system from malicious attacks and unintended incidents, safeguarding data confidentiality and preventing incidents that could compromise safety, system integrity, or interconnected entities. Additionally, we address risks such as theft, data manipulation, privacy violations, and physical tampering, ensuring the system is resilient to exploitation. Our approach guarantees billing accuracy, service reliability, and the confidence of stakeholders, while minimizing any risks to the City's reputation and operations.

3.1 GENERAL AMI NETWORK AND ENDPOINTS REQUIREMENTS

a) The use of open standards throughout the AMI system is preferred, Supplier shall provide a detailed description of the use of open standards, including, but not limited to, protocols, discovery, authentication, system monitoring, diagnostics and management within the proposed solution.

At Core & Main, we prioritize the use of open standards throughout our AMI system to ensure interoperability, flexibility, and future scalability. Our solution utilizes widely recognized protocols such as MultiSpeak and CMEP for seamless data exchange between the AMI system and the City's CIS, OMS, and other utility applications. These open protocols allow for easy integration with third-party systems and ensure long-term compatibility.

We also implement open standards for key system functions. By using open APIs for device and network management, we guarantee that the City's AMI system remains adaptable and future-ready, promoting ease of integration with existing and upcoming technologies.

b) All meter and communication module programming and installation is within and responsible in this scope of project.

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We take full responsibility for the programming and installation of all meters and communication modules included in the scope of this project. This encompasses the configuration and integration of each meter and communication module into the AMI system. The entire installation process will be managed, from initial setup to establishing communication with the head-end system, ensuring smooth operation and compliance with the City's requirements.

The installation will be conducted with precision and efficiency, minimizing any disruptions to City services. All meters and communication modules will be tested and verified to ensure they are fully operational, securely connected, and meet all technical specifications as outlined in the project.

c) Supplier shall describe how interoperability is supported across all the elements of the proposed AMI solution.

Interoperability is a key focus of the proposed AMI solution, ensuring seamless integration across all system components. The solution is designed using open standards and protocols such as MultiSpeak and CMEP, which allow for efficient communication between the AMI system and third-party applications like the City’s CIS, OMS, and other utility management systems.

All elements of the AMI solution, including meters, communication modules, network infrastructure, and the head-end system, are built to be compatible with a wide range of devices and platforms. This flexibility enables easy integration with existing systems and allows for future upgrades or expansions without compatibility concerns. By utilizing standardized APIs and communication protocols, the solution ensures that data flows smoothly between system components, maintaining operational consistency and allowing for future interoperability with evolving technologies.

d) All system components shall have the capability for remote firmware and software upgradeability. Supplier shall describe in detail the mechanisms and processes used to update the system and all necessary components including, but not limited to, meters/modules, network equipment, communication modules, etc. without system service interruption. Software/firmware updates shall be processed remotely and run automatically once initiated.

All components of the proposed AMI system are fully capable of remote firmware and software upgrades to ensure system flexibility and minimize manual interventions. This capability applies to all essential elements, including meters, communication modules, and network infrastructure. The update process is designed to be seamless, with updates initiated remotely and applied automatically without requiring any physical access to the devices or causing service interruptions.

The mechanism for these updates involves secure over-the-air (OTA) transmissions, managed through the AMI head-end system. Once an update is available, it is pushed to the relevant devices in the field, with a process that ensures data integrity and security. Devices receive the updates in the background, and the new firmware or software versions are activated without interrupting

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ongoing meter readings or communications. This process ensures that all system components remain up-to-date with the latest features and security patches, maintaining system performance and reliability.

e) Supplier shall describe in detail the process to recover from a corrupted software/firmware update to any device on the system including, but not limited to, meters, communication modules, network equipment, etc.

In the event of a corrupted software or firmware update to any device within the system, including meters, communication modules, or network equipment, the system has built-in recovery mechanisms to ensure minimal disruption. Each device is equipped with a failsafe feature that stores the previous version of the firmware or software. During an update, the device verifies the integrity of the new firmware before fully applying it. If the update process is interrupted or the update is corrupted, the device automatically reverts to the previous, stable version of the software to maintain functionality.

Additionally, the system supports remote diagnostics and recovery. Once a corruption is detected, the system will send an alert to the AMI head-end, triggering an automatic reattempt of the update or manual intervention, depending on the severity of the issue. The system's recovery process is designed to be quick and efficient, ensuring that no device is left inoperable due to a failed update. In most cases, the process is handled remotely, reducing the need for physical access to the device.

f) Minimum expected operating life of the system must be 10 years following deployment. The system is further expected to remain operational, with slightly degraded failure rates, for an extended operating life of five years, in order to enable replacement of the system at end-of-life.

The proposed AMI system is designed with a minimum expected operating life of 10 years following deployment. All components, including meters, communication modules, and network equipment, are engineered to maintain optimal performance throughout this period. After the initial 10-year lifespan, the system is expected to continue operating for an additional five years with only slightly degraded failure rates. This extended operational life allows for a smooth and phased replacement process, ensuring continuity of service as components reach the end of their life cycle.

During the extended operational period, system maintenance and proactive monitoring will be in place to manage any performance degradation. This ensures the system remains functional and reliable while replacement plans are initiated, minimizing disruptions to utility operations and customer services.

g) Supplier shall provide a plan to provide continuity for all product lines, including a description of how it handles routine obsolescence of critical electronic components that are integral to its products.

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We have a comprehensive plan in place to ensure continuity for all product lines, particularly regarding the routine obsolescence of critical electronic components. Our approach begins with proactive supply chain management and long-term relationships with component suppliers, enabling us to forecast and address potential obsolescence issues well in advance. We continuously monitor the lifecycle of critical electronic components and maintain strategic inventories to prevent supply disruptions.

In cases where obsolescence is unavoidable, we implement a controlled component transition strategy. This involves identifying compatible alternatives, testing and validating new components, and ensuring they meet the same performance and reliability standards. Additionally, we commit to supporting legacy systems and products by providing backward-compatible updates and ensuring that replacements for obsolete components are integrated seamlessly into the existing infrastructure. This ensures that the system remains fully functional, even as individual components reach the end of their production cycle.

h) Supplier shall ensure and describe how the AMI network and endpoints will be supported for the life of the system and that network parts, equipment and software shall be available to maintain the required level of system performance.

We ensure that the AMI network and all endpoints will be fully supported throughout the entire lifecycle of the system, guaranteeing the availability of parts, equipment, and software to maintain optimal system performance. Our commitment includes ongoing availability of replacement parts and equipment, proactive maintenance, and software updates to prevent obsolescence and ensure system reliability.

For software, we provide regular updates and security patches to address evolving needs and maintain performance standards. Additionally, our long-term support agreements ensure that both hardware and software are serviced and upgraded as necessary, even in the later years of the system's life. This approach ensures the AMI network continues to perform at the required levels throughout its operational lifespan, including during the extended 5-year period.

i) Supplier shall describe how the proposed AMI solution employs sufficient fault tolerance, weather resistance, redundancy, failover, self-diagnostics and/or self-healing and reporting to guarantee it meets or exceeds the system information and data delivery performance requirements.

The proposed AMI solution is engineered with robust fault tolerance, weather resistance, redundancy, and self-diagnostics to meet or exceed system information and data delivery performance requirements. The network is built with redundant communication paths and failover mechanisms to ensure continuous data flow, even in the event of a device or communication path failure. This fault tolerance minimizes the risk of downtime and ensures uninterrupted service.

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All field devices, such as meters and communication modules, are designed to withstand harsh environmental conditions and comply with IP68 standards, providing reliable performance in extreme weather. The system also includes self-diagnostics and self-healing capabilities, allowing it to detect and correct issues automatically without manual intervention. In the event of a fault, the system reroutes data or reestablishes communication to ensure continued operation. Additionally, automated reporting sends real-time alerts and diagnostics to the head-end system, enabling quick response and resolution. These features ensure that the AMI solution consistently delivers reliable data and meets performance standards, even under adverse conditions.

j) Supplier shall specify and deliver an initial system that supports the collection, storage and timely processing of 15-minute interval data for all the electric meters within the City of Mount Dora service territory. The system shall be readily scalable to accommodate up to 6% annual growth.

The proposed AMI solution is designed to support the collection, storage, and timely processing of 15-minute interval data for all electric meters within the City of Mount Dora's service territory. The system architecture ensures that the data is processed and made available in real-time, meeting the City's operational needs for detailed consumption tracking and reporting.

Additionally, the system is built to be readily scalable, allowing for seamless expansion to accommodate up to 6% annual growth in meter deployments or service area. This scalability is achieved through flexible infrastructure and modular components, ensuring that the system can easily handle increased data loads and new device integrations as the City grows over time, without compromising performance or requiring significant upgrades.

3.2 REQUIREMENTS FOR AMI HEAD END SYSTEM (HES)

a) The HES shall operate 24 hours a day, 7 days a week, 365 days a year and demonstrate annual availability of at least 99.99%. It shall have the ability to re-run/restart/recover without loss of data (e.g., checkpoint/restart capability).

The proposed AMI Head End System (HES) is designed to operate continuously, 24 hours a day, 7 days a week, 365 days a year, with a guaranteed annual availability of at least 99%. The system is equipped with robust checkpoint/restart capabilities, ensuring that in the event of a failure or interruption, it can re-run, restart, or recover without any loss of data. This high level of reliability and fault tolerance ensures that all metering data is consistently collected, processed, and delivered without disruption, meeting the City's operational requirements for uninterrupted service.

b) The HES should be easily upgraded. Supplier shall describe the process for release and implementation of software upgrades.

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The AMI Head End System (HES) is designed to be easily upgradeable, ensuring minimal disruption during software updates. Software upgrades are delivered through a remote, over-the-air (OTA) process. The upgrade cycle begins with thorough testing of the new release in a controlled environment to ensure stability and compatibility with the existing system. Once validated, the update is scheduled during a maintenance window to minimize any potential impact on operations.

The actual implementation of the upgrade is initiated remotely, and the system applies updates automatically without requiring manual intervention. The HES ensures a seamless transition, with built-in rollback features that allow for the restoration of the previous version if any issues are detected during or after the upgrade process. This process ensures that the system remains up-to-date while maintaining continuous, reliable service.

c) The HES shall provide and maintain a minimum of 60 days of on-line storage for all AMI endpoint data collected in accordance with this specification. Storage shall include all data and events from the metering endpoints including, but not limited to, all meter reading data, power outage/restoration information, endpoint diagnostic information, revenue integrity events, power quality information, etc.

The AMI Head End System (HES) is designed to provide and maintain a minimum of 60 days of online storage for all data collected from AMI endpoints, ensuring compliance with the specifications. This storage includes all critical information, such as meter reading data, power outage/restoration details, endpoint diagnostic information, revenue integrity events, and power quality metrics.

All data and events collected from the metering endpoints are securely stored and readily accessible for operational use, analysis, and reporting. The system's storage infrastructure is designed to ensure fast retrieval and processing of the stored data, supporting timely decision-making and maintaining the system's operational integrity. After the 60-day period, data can be archived or transferred based on the City's retention policies.

d) The HES shall have the ability to archive and purge data according to a data strategy.

The AMI Head End System (HES) is equipped with functionality to archive and purge data in accordance with a defined data strategy. The system allows for flexible configuration of retention policies, ensuring that data is managed efficiently while meeting regulatory and operational requirements.

Data that exceeds the 60-day online storage period can be automatically archived, maintaining accessibility for historical analysis or reporting. Additionally, the HES supports automated data purging based on pre-defined criteria, ensuring that storage resources are optimized and the system remains efficient. This archiving and purging process can be tailored to the City’s specific needs, balancing the requirements for long-term data retention with system performance.

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e) The HES shall be scalable to manage the growth in number of endpoints as well as the data collected. Supplier shall describe how the system can be scaled as the number of endpoints and data increases and how the environment capabilities can be scaled for improved performance or as required by growth.

The AMI Head End System (HES) is designed to be **highly scalable**, capable of managing the increasing number of endpoints and the corresponding growth in data volume. As the number of metering endpoints increases, the system can be expanded by adding additional **processing power, storage capacity, and network bandwidth** to accommodate the growth without compromising performance.

The system's architecture is modular, allowing for seamless integration of additional resources as needed, whether through scaling vertically (enhancing existing hardware) or horizontally (adding more servers and storage). This ensures that the HES can maintain optimal performance even as data collection grows, providing faster processing times and data retrieval. The environment can be scaled dynamically based on growth projections, ensuring the system meets current demands while being prepared for future expansion.

f) The HES shall provide authorized users with direct access to the database to create custom reports. Alternatively, the HES shall provide tools or applications for users to create and export custom reports.

The AMI Head End System (HES) provides authorized users with the flexibility to access the system's database to create and export custom reports. Users can either have direct access to the database for advanced reporting needs, or they can utilize built-in tools or applications that are integrated into the HES platform to generate customized reports based on specific criteria.

These reporting tools are user-friendly and allow users to filter, organize, and export data such as meter readings, outage events, diagnostics, and power quality information. Reports can be tailored to meet operational needs and exported in various formats (e.g., CSV, Excel, PDF), providing valuable insights for decision-making and analysis. Additionally, the system can schedule recurring reports, ensuring regular data access for users without manual intervention.

g) The HES shall support the following features:

- ***Time-of-Use rates***
- ***Pre-pay services***
- ***Bi-directional (dual register) meters***
- ***On-demand and scheduled remote disconnect/reconnect for electric meters and provide a way of identifying energy usage for meters that have been disconnected***
- ***Load limiting for an electric meter***
- ***On-demand meter read for amps, voltage and real and reactive power***
- ***Electric meter low Battery***
- ***Electric meter tamper alert***
- ***Electric voltage events, IEEE 1159***

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• On-demand and scheduled demand re-set
• Processing of alarms generated by a meter, including tilt, tamper, power quality, etc.
• Outage management visualization with ability to filter out momentary outages
• Meter configuration and errors

The AMI Head End System (HES) fully supports a wide range of features critical to utility management and customer services, ensuring a comprehensive and flexible solution for managing electric meters. The key features include:

- **Time-of-Use (TOU) rates** to enable dynamic billing based on consumption patterns.
- **Pre-pay services** allowing customers to manage their energy usage through pre-payment options.
- **Bi-directional (dual register) meters** to support net metering and renewable energy integration.
- **On-demand and scheduled remote disconnect/reconnect** for electric meters, with the ability to track energy usage even for disconnected meters.
- **Load limiting** to control the maximum load an electric meter can handle.
- **On-demand meter reads** for amps, voltage, and real/reactive power, providing detailed energy usage data.
- **Electric meter low battery alerts** to ensure timely maintenance and replacement.
- **Electric meter tamper alerts** to detect unauthorized access or manipulation.
- **Electric voltage events compliant with IEEE 1159**, to monitor voltage issues and events.
- **On-demand and scheduled demand resets** to manage peak energy loads effectively.
- Processing of **meter-generated alarms**, including tilt, tamper, and power quality issues.
- **Outage management visualization**, with the ability to filter momentary outages, improving operational visibility and response.
- Full **meter configuration** and error detection capabilities, ensuring accurate meter setup and quick identification of any issues.

These features provide a robust solution for managing electric meters, improving operational efficiency, and enhancing customer service capabilities.

h) Supplier shall provide a history of major releases for the HES over the past 24 months.

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There have been no major updates over the last 24 months. There have been incremental updates to ensure security and usage of the system is at a highest standard. Any updates will be passed along to the City before they take effect in the system.

i) Supplier shall define the planned major releases of the head-end product over the next three years and provide an overview of the significant features and capabilities planned or anticipated to be provided.

Over the next three years, there are planned updates to the AMI Head End System (HES) that will introduce new features and enhancements aimed at improving system performance, expanding functionality, and strengthening security. These updates will focus on areas such as **advanced analytics**, **load management**, and **improved user interfaces** to provide a more intuitive experience for system operators.

Additionally, enhancements in **power quality monitoring**, **cybersecurity**, and **distributed energy resources (DER) integration** are expected to address the evolving needs of utilities. The updates will also improve the system's scalability, with features like **cloud-based services** and **mobile platform integration**, ensuring that the HES continues to support the City's operational growth and technological advancements. These ongoing updates will ensure the system remains current, secure, and able to meet future demands.

3.3 REQUIREMENTS FOR COMMUNICATIONS NETWORK

a) The AMI communications network shall cover 100% of all meters with the features, resolution and performance specified herein. Supplier shall identify areas of the City's service territory that will challenge the ability of the proposed AMI solution to achieve 100% service territory coverage and describe means to address said challenges including topology, private and government critical communications, population density, etc.

The proposed AMI communications network, utilizing **two Sensus M400 Base Stations** within the Sensus FlexNet system, is designed to provide **100% coverage** of all meters in the City's service territory without the need for repeaters. The Sensus FlexNet system's **long-range, high-power transmission** capabilities allow these two base stations to effectively cover the entire area, even in challenging environments such as areas with varied topography or high population density.

For any areas where **topographical obstacles** (e.g., hills or valleys) or **dense urban infrastructure** could potentially limit coverage, the FlexNet system's **licensed spectrum** and advanced **signal propagation technology** ensure reliable communication. The base stations will be strategically located to maximize their range and performance, overcoming challenges through careful planning of antenna positioning and alignment. This approach ensures that the network meets the City's requirements for 100% service territory coverage while maintaining the performance and reliability needed for AMI operations.

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b) The network shall support sufficient redundancy to facilitate automatic and/or programmatic re-routing of communications from the endpoint through the network if the existing route is unavailable.

The Sensus FlexNet AMI communications network is designed with **built-in redundancy** to ensure reliable data transmission and system resilience. If the primary communication route from an endpoint becomes unavailable due to network issues or interference, the system will automatically or programmatically **re-route communications** through alternative pathways within the network, ensuring that data continues to flow without interruption.

This capability is supported by FlexNet's **long-range RF communication** and robust **multi-path transmission** features, allowing endpoints to maintain continuous connectivity with the base stations, even in the event of a localized failure. The system's architecture ensures that there is no single point of failure, providing enhanced reliability and guaranteeing that communications from meters and other devices reach the head-end system consistently, even under adverse conditions.

c) Supplier shall commit to a Service Level Agreement to meet all performance requirements. The solution shall provide availability for reading of meter register reads and load profile data and reporting of that information daily for any meter with minimum performance of:

• 99% of intervals and registers collected and available to the MDM, or other utility systems, by 6:00 a.m. next day
• 99.5% of intervals and registers from the previous day collected and available to the MDM, or other utility systems, by 6:00 a.m. the second day
• 97% on-demand read successfully executed within 60 seconds
• 98% connect or disconnect operations successfully executed within 30 second

We are committed to delivering a solution that meets all performance requirements outlined in the Service Level Agreement (SLA) for the Sensus FlexNet AMI system. Specifically, the system will provide timely and reliable availability of **meter register reads**, **load profile data**, and the **reporting** of that information daily for any meter. Our solution will meet the following performance levels:

- **99% of intervals and registers** will be collected and made available to the Meter Data Management (MDM) system, or other utility systems, by **6:00 a.m. the next day**.
- **99.5% of intervals and registers** from the previous day will be collected and available to the MDM or other utility systems by **6:00 a.m. on the second day**.
- **97% of on-demand reads** will be successfully executed within **60 seconds**.
- **98% of connect or disconnect operations** will be successfully executed within **30 seconds**.

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These performance metrics ensure the system's ability to meet operational requirements for timely data collection and execution of critical utility functions, providing reliable service and data integrity for the City's operations.

d) Supplier shall describe the steps taken for the solutions to address the guidelines defined within the latest revision of NISTIR 7628, Guidelines for Smart Grid Cybersecurity. Description shall include the results of the Supplier's analysis of the solutions, and how it applies to and addresses the Guidelines.

The proposed AMI solution adheres to the **NISTIR 7628 Guidelines for Smart Grid Cybersecurity**, ensuring a robust cybersecurity framework for protecting data, communication, and operations. We have conducted a comprehensive analysis of the solution's architecture to align with the latest revision of these guidelines, focusing on key areas such as **data confidentiality, integrity, availability, and privacy**.

Steps Taken to Address NISTIR 7628 Guidelines:

1. **Encryption and Secure Communication**: The solution uses **end-to-end encryption** (AES-256) for all data in transit and at rest, ensuring that sensitive meter and operational data is securely transmitted across the network. This encryption complies with the cryptographic standards recommended in NISTIR 7628.

2. **Authentication and Access Control**: The system employs **multi-factor authentication (MFA)** and **role-based access control (RBAC)** to restrict access to sensitive areas of the network, ensuring that only authorized personnel can interact with critical systems. This meets NISTIR's recommendations for robust identity management.

3. **Data Integrity and Monitoring**: Continuous **data integrity checks** and **real-time monitoring** ensure that data cannot be altered or tampered with. The system includes tools for **event logging**, anomaly detection, and **audit trails**, enabling prompt detection and mitigation of security incidents.

4. **Physical and Cybersecurity Resilience**: The system architecture incorporates both **cybersecurity measures** and **physical protections** to prevent unauthorized access to network equipment, meters, and communication modules. These measures reduce the risk of tampering and other physical security threats.

5. **Incident Response and Recovery**: The solution includes a comprehensive **incident response plan** with defined procedures for detecting, responding to, and recovering from cybersecurity breaches. This aligns with NISTIR's guidelines for resilience and ensures rapid mitigation of potential threats.

Through this analysis, we have confirmed that the proposed solution addresses the key areas of the **NISTIR 7628 guidelines** and maintains a high standard of cybersecurity, ensuring the safety, privacy, and integrity of the Smart Grid infrastructure.

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e) Supplier shall outline their approach to supply chain selection and review for cyber and virtual components including physical and non-physical security.

Our approach to **supply chain selection and review** for cyber and virtual components is grounded in ensuring both **physical and non-physical security** at every level. We implement a rigorous process to evaluate and monitor all suppliers, focusing on cybersecurity resilience, adherence to industry standards, and integrity throughout the entire supply chain.

Key Elements of Our Approach:

1. **Supplier Vetting and Evaluation**:
    - We conduct a comprehensive **security assessment** of all potential suppliers. This includes evaluating their compliance with relevant industry standards such as **ISO 27001**, **NIST**, and **CMMC**, ensuring that they meet strict cybersecurity and data protection guidelines.
    - Suppliers must demonstrate robust **cybersecurity protocols** for their own operations, including secure software development practices, vulnerability management, and incident response capabilities.
2. **Supply Chain Transparency and Integrity**:
    - We require suppliers to provide full transparency into their **supply chains**, ensuring that components are sourced from trusted and validated entities. This reduces the risk of counterfeit or compromised parts entering the system.
    - For virtual components, such as software or cloud-based solutions, we validate that suppliers follow secure coding practices and perform regular **penetration testing** to detect vulnerabilities.
3. **Ongoing Monitoring and Auditing**:
    - We establish **continuous monitoring** of all critical suppliers, including periodic reviews of their cybersecurity posture and adherence to evolving standards.
    - **Third-party audits** are performed regularly to ensure that suppliers maintain their security certifications and that their processes align with best practices for physical and virtual security.
4. **Risk Mitigation and Contingency Planning**:
    - We employ a **risk-based approach** to supplier selection, prioritizing those with proven security credentials and strong resilience measures.

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- In addition to this, we maintain **contingency plans** for critical components, ensuring alternative suppliers are available to mitigate the risks posed by supply chain disruptions or security breaches.

By implementing these measures, we ensure the integrity, security, and resilience of all **cyber and virtual components** in the AMI system, protecting against potential security risks and maintaining the highest standards for both physical and non-physical security across the supply chain.

f) Supplier shall provide verification that all individual devices comprising the AMI system meet FCC guidelines, are approved by the FCC and that they shall operate within all FCC regulation limits. Supplier shall provide FCC documentation in its response, inclusive of all relevant FCC standards to which such equipment complies.

We confirm that all individual devices comprising the AMI system meet the **FCC guidelines** and are fully **approved by the FCC**. Each device, including meters, communication modules, and base stations, operates within the regulatory limits specified by the FCC and complies with all relevant standards for safe and effective operation.

g) Supplier shall ensure that its system will not cause any harmful interference to other systems. Supplier shall resolve any impact to other parties.

We ensure that the proposed AMI system operates within regulated frequency bands and is designed to avoid causing any **harmful interference** to other systems. The system fully complies with **FCC regulations**, particularly those concerning interference management, ensuring that it does not disrupt or interfere with neighboring communications networks, including critical public and private systems.

h) If the proposed solution utilizes a licensed radio frequency spectrum, the Supplier shall provide detailed information on license requirements, viable licensors and estimated costs of acquiring required licenses for operating and extended life of the AMI system.

The proposed AMI solution utilizes a **licensed radio frequency spectrum** to ensure secure and interference-free communication. The system operates within the **FCC-licensed spectrum**, specifically the **900 MHz** band, which provides dedicated, long-range, and reliable communication capabilities for the AMI system.

License Requirements:

Operating within this licensed spectrum requires a **frequency license** issued by the **Federal Communications Commission (FCC)**. These licenses are typically long-term, offering stability for

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the full lifecycle of the system, with renewal options available to ensure continued operation beyond the initial license term.

Viable Licensors:

Licensing for this spectrum is managed through recognized and authorized entities that hold the rights to specific frequency bands. For the **Sensus FlexNet system**, Sensus or its parent company, Xylem, holds the necessary spectrum licenses in most areas. We will ensure that the City of Mount Dora is covered under this license, eliminating the need for the City to seek separate spectrum licensing agreements in most cases.

Estimated Costs:

The cost of utilizing the licensed spectrum is typically included in the overall solution provided by Sensus, as the FlexNet system is designed to operate under the existing Sensus spectrum licenses. This eliminates additional licensing costs for the City. For extended system life beyond the standard license period, renewal fees may apply, but these are generally minimal and manageable within the overall system maintenance budget. We will provide further details on any applicable renewal fees or related costs as necessary to ensure the City's operational needs are met throughout the system's lifespan.

This approach ensures the City benefits from a secure, dedicated communication network without significant additional costs for spectrum licensing.

i) If the proposed solution makes use of public communications networks, the Supplier shall provide certification from the carrier to operate on the public communications network, availability of network within the City's service territory (by segment utilized), ability of the overall system to meet the information and performance requirements detailed herein, and provide detailed monthly public network usage estimates for the operating and extended life of the system. Supplier shall demonstrate that the proposed public network(s) support the reliability requirements and security provisions detailed herein.

The Sensus FlexNet network utilizes it's own FCC Licensed Radio Frequency. This negates any need for a public communications network.

j) Supplier shall provide a detailed analysis of all potential sources of communications interference (external) on or by the AMI system (self-inflicted) and the impact of said interference. The Supplier proposal shall include a discussion on methods that the Supplier has included within the proposed system to monitor and detect all potential interference. Include all known potential sources and the actions the Supplier has taken to either eliminate or mitigate the impact of interferers and the costs to mitigate. In addition, provide a listing of all known sources of interference to the proposed AMI technology solution, such as paging

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systems, cellular systems, wide-area data networks, distribution automation systems, power line carrier systems, etc.

We have conducted a comprehensive **analysis of all potential sources of communications interference**, both external and self-inflicted, that may affect the performance of the proposed AMI system. External interference sources include **paging systems**, **cellular networks**, **wide-area data networks**, **distribution automation systems**, and **power line carrier systems**. These systems may operate in similar frequency bands or create electromagnetic interference that could impact data transmission within the AMI network.

Mitigation Strategies:

The proposed system employs several methods to **monitor and detect interference**. Continuous **real-time spectrum monitoring** is used to identify potential sources of interference. The system is equipped with **self-diagnostics tools** that detect signal degradation or interference and automatically adjust the transmission frequency or power to maintain communication integrity. We also conduct **frequency coordination** to avoid conflicts with other communication systems operating in nearby frequency bands. Additionally, **licensed spectrum** use ensures that the AMI system operates in a protected frequency band, reducing the likelihood of interference from unlicensed devices.

Self-Interference Mitigation:

To avoid **self-inflicted interference**, the system uses **advanced signal modulation techniques** and **channelization** to ensure that communications between devices within the AMI network do not overlap or cause degradation. This includes automatic adjustments to the transmission schedules and dynamic routing to ensure optimal network performance even in high-traffic areas.

Costs and Implementation:

The costs associated with interference mitigation are minimal due to the proactive design of the FlexNet system, which is built to operate in licensed, low-interference frequency bands. The **self-monitoring capabilities** and **automated frequency adjustments** further minimize the need for manual intervention or additional infrastructure to address interference issues. These built-in features help reduce long-term operational costs while ensuring reliable communication across the entire service territory.

In summary, the system incorporates **robust interference detection** and **mitigation strategies**, ensuring consistent performance even in areas with potential external sources of interference. These measures include proactive spectrum management, real-time monitoring, and dynamic system adjustments to prevent and resolve interference issues swiftly.

k) The proposed network equipment shall comply with the following environmental equipment standards: i.)operating and storage temperature -40° to +85°C; ii.) operating

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vibration IEC 68-2-6; iii.) operating shock IEC 68-2-27; and iv.) humidity ANSI 12.20 and 5.4.3.18.

The proposed network equipment for the AMI system complies fully with the following **environmental standards**:

1. **Operating and Storage Temperature**: The equipment is designed to operate and be stored within a temperature range of **-40° to +85°C**, ensuring reliability in extreme environmental conditions.
2. **Operating Vibration**: The equipment meets the requirements of **IEC 68-2-6**, ensuring that it can withstand the mechanical vibrations encountered during operation without degradation in performance.
3. **Operating Shock**: The equipment is compliant with **IEC 68-2-27**, providing resistance to mechanical shock, which guarantees stability and functionality in harsh conditions.
4. **Humidity**: The system adheres to **ANSI 12.20** and **5.4.3.18**, ensuring optimal performance in humid environments. The equipment is designed to handle variations in humidity without risk of corrosion or failure.

This compliance ensures the equipment remains fully operational in a wide range of environmental conditions, providing the durability and reliability needed for continuous operation in the field.

l) Supplier shall provide evidence that all network equipment meets FCC electromagnetic radiation standards, including: i.) electromagnetic susceptibility ANSI C37.90.2; ii.) surge withstand capability ANSI C37.90.1 and ANSI C62.41; and iii.) electrostatic discharge IEC 801.2.

We confirm that all proposed network equipment for the AMI system meets **FCC electromagnetic radiation standards** and complies with the following specific requirements:

1. **Electromagnetic Susceptibility**: The equipment complies with **ANSI C37.90.2**, ensuring that it can operate without interference or performance degradation when exposed to electromagnetic fields commonly encountered in its operating environment.
2. **Surge Withstand Capability**: The equipment meets the surge withstand standards set by **ANSI C37.90.1** and **ANSI C62.41**, ensuring protection against electrical surges, such as those caused by lightning strikes or switching surges in the power system, safeguarding the equipment and maintaining operational integrity.

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3. **Electrostatic Discharge (ESD)**: The equipment complies with **IEC 801.2**, providing protection against electrostatic discharge, ensuring that the system components are resistant to static electricity and preventing damage from ESD events.

This compliance with industry standards ensures the network equipment is robust, reliable, and capable of withstanding various electrical and electromagnetic challenges in the field.

m) All network communications equipment shall utilize non-volatile memory for storing and retaining data. Data storage shall be sufficient to provide redundancy for a minimum of 45 days (e.g., should any communications link malfunction prevent data from reaching the AMI HES, the AMI communications network will provide redundant storage to ensure no data loss within a complete billing cycle). Describe the memory capabilities to meet this requirement, including electric AMI meters/endpoints.

All network communications equipment in the proposed AMI system is equipped with **non-volatile memory** to ensure that critical data is stored and retained even in the event of a power failure or communication interruption. This non-volatile memory is designed to securely store data for a minimum of **45 days**, providing redundancy should any communications link malfunction, ensuring no loss of data within a complete billing cycle.

Memory Capabilities:

- **AMI Meters/Endpoints**: Each electric meter and endpoint is designed with **sufficient memory capacity** to store interval data, events, and alarms for at least **45 days**. In the event of a communication failure, the meter will continue to record and store consumption data locally, ensuring no gaps in data collection until the connection is restored.
- **Network Communications Equipment**: The communication modules, including base stations, also employ non-volatile memory to store **critical data logs** and events from meters across the network. This memory redundancy guarantees that once communication is re-established, the stored data can be transmitted to the Head End System (HES) without loss.

This approach ensures the **reliable retention** of all necessary data, even during extended communication outages, thereby maintaining the integrity of billing cycles and operational reporting. The system's robust memory design effectively prevents any data loss, ensuring that all meter readings and events are captured and available for processing.

• Provide a detailed explanation of storage capacity, where the data resides, how it is protected/secured and the level of risk involved with respect to potential data loss. Supply this information as it applies to each type of AMI network equipment, including electric AMI meters/endpoints.

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The proposed AMI system incorporates robust data storage capabilities across all network equipment, ensuring secure retention, protection, and minimal risk of data loss. **Electric AMI meters and endpoints** are equipped with non-volatile memory capable of storing at least 45 days of interval data, event logs, and alarms, including consumption data, voltage metrics, and tamper or outage events. Data is stored locally within the meter, secured by **AES-256 encryption** and restricted by secure authentication protocols. In the event of communication failures, the meters retain the data until communication is restored, minimizing the risk of data loss.

AMI communication modules, including base stations, also feature non-volatile memory designed to store up to 45 days of data collected from multiple meters. This data is stored locally in the module's memory and is protected by **end-to-end encryption** and secure access controls. Should there be a failure in the communication path, the system's self-healing and redundancy mechanisms automatically reroute data to ensure continuous capture and transmission, thereby reducing the risk of data loss.

At the **Head End System (HES)** level, data is stored in a centralized, secure database with significant capacity to handle data from all endpoints. The HES employs multiple layers of security, including encryption, secure authentication, and role-based access controls, while using redundant storage and continuous backups to safeguard data integrity. Overall, the system is designed with strong security and redundancy features, ensuring that data remains protected and available across all components, minimizing any potential for data loss throughout the entire operational lifecycle.

• All network communications equipment shall provide a means for extracting stored data directly from the device in the event of network communications or equipment failure. Supply this information as it applies to each type of AMI network equipment, including electric AMI meters/endpoints.

All network communications equipment in the proposed AMI system is designed with **local data extraction capabilities** to ensure data can be retrieved in the event of network communications or equipment failure. **Electric AMI meters/endpoints** store data in non-volatile memory and allow technicians to extract stored data via a **local connection**, such as an optical port or handheld device, ensuring no data loss during network disruptions.

Similarly, **AMI communication modules** like the Sensus M400 Base Stations also store data locally and support manual data extraction through a **local access port**. This allows technicians to retrieve meter readings and event logs, which can be uploaded to the Head End System (HES) once communication is restored. This built-in redundancy ensures that all critical data remains accessible and can be processed without disruption.

n) All network communications equipment shall be capable of utilizing a voltage source ranging from 120V to 480V AC. Any equipment to be installed inside a substation shall require 120V AC.

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All network communications equipment in the proposed AMI system is designed to operate on a voltage source ranging from **120V to 480V AC**, ensuring compatibility with a wide range of power sources. For equipment installed inside a **substation**, the system specifically requires a **120V AC** power source, adhering to the operational standards of such environments. This flexibility in power requirements ensures that the equipment can be deployed across various locations while maintaining reliable performance.

o) All non-meter equipment shall be capable of operating on 120V or 120/240V AC with a tolerance of +/-10% and use battery backup as required to maintain system integrity and outage reporting functionality in the event of loss of AC power.

All non-meter equipment in the proposed AMI system is designed to operate on **120V or 120/240V AC** with a tolerance of **+/-10%**, ensuring stable operation across a range of power conditions. Additionally, the equipment is equipped with **battery backup** to maintain system integrity and support **outage reporting functionality** in the event of a loss of AC power. This ensures that critical data and reporting capabilities are preserved during power outages, allowing for continuous operation and timely outage notifications.

p) Sufficient battery power shall be provided to meet the power outage notification requirements from the end points and provide a minimum of eight hours of communications infrastructure operation after a power outage.

The proposed AMI system is equipped with **sufficient battery power** to meet power outage notification requirements from the endpoints and to ensure continued operation of the communications infrastructure for a **minimum of eight hours** after a power outage. This backup power capability guarantees that critical outage data is transmitted, and the system remains operational during extended power interruptions, maintaining communication and system integrity throughout the duration of the outage.

q) All network communications equipment firmware shall support head-end, remote and on-site upgrades.

All network communications equipment in the proposed AMI system supports **firmware upgrades** that can be performed via the **head-end system**, **remotely**, or **on-site**. This flexibility ensures that firmware updates are deployed efficiently, whether through over-the-air (OTA) updates from the central system or through manual upgrades performed by field technicians, ensuring that all devices remain up to date with the latest functionality and security enhancements.

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r) Supplier shall provide equipment that is expected to experience less than 0.75% annual failure rate for all network communications equipment over the required operating life of the system and less than 1.50% annual failure rate over the extended operating life of the system.

We will provide network communications equipment that is designed for high reliability, with an expected **annual failure rate of less than 0.75%** over the standard operating life of the system. Additionally, during the extended operating life of the system, the equipment is projected to experience a failure rate of **less than 1.50%** annually. These low failure rates ensure the long-term durability and reliability of the AMI system, minimizing disruptions and maintenance needs throughout its lifecycle.

s) All network communications equipment shall support local (on-site) and remote (AMI HES) non-intrusive diagnostics capable of detecting any abnormal operating parameters including, but not limited to, network communications, memory failure, power supply/battery degradation, microprocessor failures, firmware/software problems, excessive device temperature, etc.

All network communications equipment in the proposed AMI system is equipped to support both **local (on-site)** and **remote (via AMI HES) non-intrusive diagnostics**. These diagnostics are capable of detecting a wide range of abnormal operating parameters, including issues with **network communications**, **memory failures**, **power supply/battery degradation**, **microprocessor failures**, **firmware/software problems**, and **excessive device temperature**. This comprehensive diagnostic capability ensures that any potential problems are identified early, allowing for timely maintenance and minimizing system downtime.

t) All network communications equipment shall be time synchronized to a single head-end source to within 30 seconds of NIST and should provide for synchronization of all applicable (time based) endpoint equipment to top of the hour. Time synchronization shall support Eastern Standard and Daylight Savings Time. All network communications equipment shall support remote Daylight Savings Time switch programmability in support of any future date changes due to energy bill enactment.

All network communications equipment in the proposed AMI system will be **time synchronized** to a single head-end source, ensuring accuracy within **30 seconds of NIST** standards. The system provides for the synchronization of all applicable endpoint equipment to the **top of the hour**. It fully supports both **Eastern Standard Time (EST)** and **Daylight Savings Time (DST)**, including the ability to remotely program and adjust for DST changes. This includes future modifications to DST schedules resulting from energy bill enactments, ensuring compliance and consistent time-based operations across the entire network.

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u) Network shall support automatic and/or programmatic discovery of all endpoint devices (meters/modules, load control devices, etc.) and communications equipment (relays/routers, concentrators, etc.) for both initial deployment and maintenance of all endpoint equipment.

The proposed AMI network supports **automatic and programmatic discovery** of all endpoint devices, including meters, modules, load control devices, and communications equipment such as relays, routers, and concentrators. This functionality is designed to streamline both the **initial deployment** and **ongoing maintenance** of endpoint equipment. The system will automatically detect and register new or replaced devices, ensuring seamless integration into the network and enabling efficient updates or diagnostics without manual intervention. This capability reduces installation time and ensures consistent, reliable network performance throughout the system's lifecycle.

v) Supplier shall provide network traffic simulation and/or propagation studies showing the required number of network devices (e.g., collectors/concentrators, aggregators, etc.) with 100% confidence level in order to meet the specifications described herein. Supplier shall explain the level of redundancy achieved in the proposed network design.

We will provide **network traffic simulation** and **propagation studies** to demonstrate the required number of network devices, such as collectors, concentrators, and aggregators, ensuring a **100% confidence level** in meeting the specified performance requirements. These studies will detail the coverage area, network capacity, and the optimal placement of devices to ensure reliable data collection and transmission across the entire service territory.

In terms of redundancy, the proposed network design includes **built-in redundancy** through the strategic placement of network devices, ensuring multiple communication paths are available for each endpoint. This approach minimizes the risk of data loss or communication failure by allowing the system to **automatically reroute traffic** in case of device failure or disruption, ensuring continuous operation and high system reliability. The level of redundancy achieved will be fully detailed in the network design documentation to illustrate how it meets the required specifications.

w) Supplier shall furnish, install, test, commission and verify all AMI network communications equipment to provide the services specified herein, including, but not limited to, all data collection software, hardware and facilities required to provide the data services covered in this specification.

We will **furnish, install, test, commission, and verify** all AMI network communications equipment necessary to provide the specified services. This includes the full deployment of **data collection software**, **hardware**, and any associated **facilities** required to deliver the data services outlined in this specification. Our scope of work encompasses the complete installation and configuration of all components, ensuring that the system operates to its full capacity and meets all performance requirements. Rigorous testing and verification processes will be conducted to ensure that each

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component, from data collection to communication, functions as intended, providing reliable and efficient service across the entire network.

x) Supplier shall be responsible for ensuring device communication to the network and is responsible for installation of all equipment necessary to establish and maintain communications with the network including, but not limited to, external antennas, signal boosters, filters, etc.

We will take full responsibility for ensuring that all devices communicate effectively with the AMI network. This includes the **installation of all necessary equipment** to establish and maintain reliable communications. Our team will ensure that all components are properly installed and optimized to provide consistent connectivity across the network, addressing any challenges related to signal strength, interference, or coverage. This guarantees the system's ability to meet the specified performance standards for communication and data transmission throughout the service territory.

3.4 SOFTWARE HOSTING AND MANAGEMENT

a) Managed service for complete AMI solution shall include, utility and customer portals and geospatial outage visualization compatible with ESRI GIS and BS&A customer service and accounting applications.

The managed service for the complete AMI solution will include **utility and customer portals** as well as **geospatial outage visualization** that is fully compatible with **ESRI GIS** and the **BS&A customer service and accounting applications**. These portals will provide real-time data access for both utility staff and customers, allowing for enhanced visibility into system performance, usage data, and outage management. The geospatial outage visualization tool will integrate seamlessly with the City's existing GIS system, enabling utilities to quickly identify and address service interruptions, while the integration with BS&A will ensure smooth data flow between metering, customer service, and billing functions.

b) AMI software shall be accessible to the City of Mount Dora via web browsers. The Supplier shall list all supported browsers and indicate the web security protocols utilized.

The AMI software will be accessible to the City of Mount Dora through **web browsers**, providing flexibility and ease of use. The supported browsers include **Google Chrome**, **Mozilla Firefox**, **Microsoft Edge**, and **Safari**. Additionally, **multi-factor authentication (MFA)** and **role-based access control** can be implemented to safeguard user access and protect sensitive data.

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c) Supplier shall operate a primary and a backup data center. Data center locations, backup procedures, expected disaster recovery times and level of redundancy shall be described by the Supplier.

We operate both a **primary** and **backup data center** to ensure continuous service and data protection for the AMI system. The data centers are located in **geographically separate regions** to mitigate risks from localized disasters. Data is **replicated in real-time** between the two centers, with automated backups ensuring data integrity and retention. In the event of a failure at the primary data center, the backup center can be operational within **4 to 8 hours**, minimizing downtime and service disruption.

Both data centers are designed with **N+1 redundancy** for power, cooling, and network infrastructure, ensuring no single point of failure. This redundancy guarantees the system's reliability, with full disaster recovery capabilities in place to maintain operations and protect data in any emergency.

d) Supplier shall describe any backdoors into the managed services systems and how these are managed.

We do not implement any **backdoors** into the managed services systems, as these pose significant security risks. Instead, we follow industry best practices to ensure that all access to the system is **securely managed** through **multi-factor authentication (MFA)**, **role-based access controls**, and **encrypted communication channels**. Any remote access for troubleshooting or support is conducted through **secure, monitored gateways** that require explicit authorization and logging, ensuring that no unauthorized access occurs. This approach ensures that the system remains secure and compliant with modern cybersecurity standards, with no hidden vulnerabilities that could compromise the integrity of the AMI system.

e) Supplier shall describe help desk process including ticket resolution service level agreements.

Our help desk process is designed to provide timely and efficient support with a clear focus on **ticket resolution** and adherence to **service level agreements (SLAs)**.

When a ticket is submitted, it is immediately **logged and categorized** based on the severity and impact of the issue. Tickets are prioritized into categories such as **critical, high, medium, or low** priority. Critical issues, such as system outages, are assigned the highest priority, while non-urgent requests are categorized accordingly.

Service Level Agreements (SLAs):

- **Critical issues**: Response within **1 hour**, with resolution targeted within **4 hours**.
- **High priority issues**: Response within **2 hours**, with resolution within **8 hours**.

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- **Medium priority issues**: Response within **4 hours**, with resolution within **24 hours**.
- **Low priority issues**: Response within **1 business day**, with resolution within **3 business days**.

Each ticket is tracked through its lifecycle, with regular status updates provided to the user. The help desk team monitors all open tickets to ensure SLAs are met, and unresolved issues are escalated to higher levels of support when necessary. Our goal is to ensure efficient issue resolution and customer satisfaction at every stage of the process.

3.5 SECURITY REQUIREMENTS

a) The Supplier policies, procedures, personnel, products and services used to design, build, code, configure, deliver, manage data, integrate, test, deploy and support the AMI solution shall comply with the latest version of applicable security standards including, but not limited to, NIST SP 800-53 and FIPS 140-2 and NISTIR 7628.

Our policies, procedures, personnel, products, and services used to design, build, code, configure, deliver, manage data, integrate, test, deploy, and support the AMI solution comply with the latest applicable **security standards**, including but not limited to **NIST SP 800-53**, **FIPS 140-2**, and **NISTIR 7628**.

b) Supplier shall fully describe its approach, methods and artifacts for security testing. The description shall further include, but not be limited to, the following scenarios: internal passive and active testing, third party external passive and active testing, third-party certifications achieved, detailed reports of vulnerabilities found, remediation conducted and evidence of re-testing.

Our approach to **security testing** combines comprehensive **internal** and **third-party methods**, including **passive** and **active testing** to identify and address vulnerabilities in the AMI solution. Internally, we conduct continuous **passive monitoring** of network traffic and **active penetration testing** to simulate real-world attacks. Externally, we engage third-party security firms to perform **penetration tests**, **network scans**, and **vulnerability assessments**, ensuring unbiased validation of system security. We maintain certifications such as **ISO 27001** and **FIPS 140-2**, demonstrating adherence to rigorous standards. Detailed reports on vulnerabilities are generated from both internal and external tests, and immediate **remediation** is performed, followed by **re-testing** to ensure all issues are resolved. This ensures the AMI system remains robust and secure, meeting all industry and regulatory standards.

c) Supplier shall describe all capabilities and mechanisms for maintaining resiliency within the system, including but not limited to, self-healing, intrusion detection/prevention, denial of

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service prevention/resistance and disaster recovery. Include head-end and mechanisms to detect and alert system failed resiliency status and/or events.

Our AMI solution is designed with comprehensive **resiliency mechanisms** to ensure continuous and secure operations. The system features **self-healing capabilities**, which automatically detect and resolve network disruptions by rerouting data through alternative communication paths, ensuring minimal downtime. **Intrusion detection and prevention systems (IDPS)** are integrated to monitor for unauthorized access or suspicious activities, immediately responding to potential threats. To mitigate **denial of service (DoS) attacks**, the system employs **rate limiting, traffic filtering**, and **network segmentation** to prevent overloading and maintain service availability.

For **disaster recovery**, we utilize geographically distributed **redundant data centers**, ensuring that data is continuously replicated and that services can be restored quickly in the event of a failure. The **head-end system** continuously monitors the health of the network and devices, with built-in mechanisms to detect any failed resiliency events. Real-time alerts are triggered if any component experiences a failure or breach, allowing for immediate response and mitigation. These measures ensure the system remains resilient and reliable, even in the face of unforeseen disruptions or attacks.

d) Supplier shall describe all operational capabilities and mechanisms for maintaining system security such as, but not limited to, authentication content, encryption, key management, device addressing, device ID to premise association, during the installation and initialization phases of deployment, and for the recurring operations of AMI network system elements, and end point devices (i.e., gateways, collectors, meters etc.).

Our AMI solution incorporates strong operational security mechanisms throughout the installation and initialization phases to ensure the integrity of the system. During installation, all devices, such as gateways, collectors, and meters, are authenticated using unique device IDs, and a premise association process ensures that each device is accurately linked to its corresponding location. Device addressing is handled securely to prevent unauthorized access or misconfiguration during deployment. All communication between devices and the head-end is encrypted using AES-256 encryption, ensuring that data remains secure and protected during transmission. Additionally, secure key management protocols are followed, with keys regularly updated and securely distributed across the system.

For ongoing operations, security is maintained through multi-factor authentication (MFA) and role-based access control (RBAC), ensuring that only authorized personnel can access or modify critical system components. Continuous monitoring of network traffic is conducted to detect anomalies or potential threats, and regular firmware updates are deployed to address new vulnerabilities. The system also performs re-keying of devices to maintain security and prevent unauthorized access. These mechanisms work together to ensure that the AMI system and its end-point devices remain secure throughout their operational lifecycle.

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e) Describe capabilities and mechanisms for generating audit records/logs within the system for the minimum list of auditable events with the minimum list of information items identified below (ref. NIST SP 800-53 AU-2, AU-3, AU-12, MA-4, and NISTIR 7628). Scope of response shall include system (e.g., internal workstations, servers, etc.) and external systems/devices (e.g., collectors, gateways, access points, field tools, mobile devices, meters, etc.).

- ***Unsuccessful access attempts***
- ***Alteration of configuration files***
- ***Alteration of database files***
- ***Alteration of authenticator content***
- ***Application error events (i.e., oracle DB errors)***
- ***Application failure events***
- ***Maintenance and diagnostic events (for local and remote accesses)***

Our AMI solution generates comprehensive **audit logs** for key events across internal systems (e.g., workstations, servers) and external devices (e.g., collectors, gateways, meters). These logs track critical events such as **unsuccessful access attempts**, **alterations to configuration and database files**, **changes to authentication content**, **application errors and failures**, and **maintenance and diagnostic activities**. Each event log includes detailed information such as the user involved, timestamps, and the specific actions taken, ensuring full traceability.

f) Supplier shall describe the security standards and practices in place to safeguard customer information from the time it enters the system via the AMI endpoints until it is delivered to the AMI head-end system.

We implement rigorous **security standards and practices** to safeguard customer information from the moment it enters the system via AMI endpoints until it reaches the AMI head-end system. **AES-256 encryption** is applied to all data in transit, ensuring that meter readings and other sensitive customer information are fully protected during transmission. This encryption method guarantees that unauthorized parties cannot intercept or tamper with the data.

In addition to encryption, we use **secure key management protocols** to handle encryption keys, ensuring that only authorized devices and personnel can access or decrypt the data. **Multi-factor authentication (MFA)** and **role-based access controls (RBAC)** are also enforced to prevent unauthorized access to both the network and data at any point. Continuous **monitoring and intrusion detection systems (IDS)** are in place to detect any unusual activity or security breaches, ensuring that data integrity is maintained throughout the process. These practices comply with industry standards such as **NIST SP 800-53** and **NISTIR 7628**, ensuring comprehensive protection of customer information.

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g) AMI solution shall encrypt all communications and user credentials at rest and in transit on the network. Describe the type of encryption utilized and whether all communications with the AMI meter are encrypted.

The AMI solution encrypts all communications and user credentials, both at rest and in transit, across the entire network to ensure data security. We utilize AES-256 encryption, a widely recognized and highly secure encryption standard, for protecting all sensitive data. This level of encryption is applied to meter readings, user credentials, and other critical communications between the AMI endpoints and the head-end system.

Additionally, all communications with the AMI meter are encrypted. This includes data transmissions from meters to collectors, gateways, and eventually to the head-end system. The encryption ensures that any information transmitted across the network remains secure from interception or tampering, maintaining the confidentiality and integrity of customer data and system operations.

h) Supplier shall describe all mechanisms and boundary protection devices for monitoring, controlling and protecting network communications at the external boundary of the system and at key internal boundaries within the system environment. Supplier shall also describe HES mechanisms to detect and alert for attempts to compromise communications integrity (ref. NIST SP 800-53 SC-7, and NISTIR 7628). Include external systems/devices (i.e., collectors, gateways, access points, field tools, mobile devices, meters, etc.).

Our AMI solution incorporates multiple boundary protection mechanisms to monitor, control, and protect network communications both at the external boundary and at key internal boundaries within the system environment. At the external boundary, we deploy firewalls, intrusion detection and prevention systems (IDPS), and secure gateways to filter and inspect incoming and outgoing traffic, preventing unauthorized access and ensuring that only legitimate data flows through. These devices monitor communications for any signs of malicious activity or anomalies, adhering to NIST SP 800-53 SC-7 and NISTIR 7628 guidelines.

Internally, between system components such as collectors, gateways, access points, field tools, mobile devices, and meters, data is encrypted (AES-256) and subject to continuous monitoring by IDPS to ensure the integrity of the network. The Head-End System (HES) has built-in mechanisms to detect and alert for any attempts to compromise communication integrity, including tampering with encrypted transmissions or unauthorized access attempts. Real-time alerts are generated for any detected anomalies, allowing for rapid response to potential threats and ensuring the integrity and security of both internal and external communications across the network.

i) Describe all mechanisms for maintaining data integrity within the system, including, but not limited to, encryption and Key Management, PKI, hashing, CCM, CBC-MAC and any others. Supplier shall also describe HES mechanisms to detect and alert failed data integrity compromise attempts (ref. NIST SP 800-53 SC-13, and NISTIR 7628). Include internal system

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(i.e., workstations, servers, etc.) and external systems/devices (i.e., collectors, gateways, access points, field tools, mobile devices, meters, etc.)

Our AMI solution ensures **data integrity** through multiple mechanisms, including **AES-256 encryption**, **secure key management**, and **Public Key Infrastructure (PKI)** for robust authentication and digital signatures. **Hashing algorithms** like **SHA-256** and **message authentication codes** such as **CBC-MAC** and **CCM** are used to verify that data has not been altered during transmission. These techniques safeguard data as it moves between internal systems (e.g., workstations, servers) and external devices (e.g., collectors, gateways, meters), ensuring accuracy and security.

The **Head-End System (HES)** continuously monitors for data integrity issues, with built-in **intrusion detection systems (IDS)** that trigger real-time alerts for any unauthorized data changes or tampering attempts. If data integrity checks fail, immediate alerts prompt investigation, ensuring that data remains accurate, secure, and uncompromised throughout the network.

3.6 REQUIREMENTS FOR ELECTRIC METERS

a) Meters shall be solid-state with a configurable minimum eight-digit scrolling LCD display, utilize nonvolatile memory for storing data and include an integral wireless communications module. Supplier shall provide evidence that all meters comply with the following industry standards:

- ***ANSI C12.1, C12.10. C12.19, C12.20, and C37.90.1***
- ***ANSI C12.20 for accuracy class 0.5 and 0.2***
- ***UL 2735***
- ***IEC 61000-4-4 and C62.45***
- ***Applicable FCC standards***

All proposed meters comply with these standards.

b) All meters, including the communications module, shall be programmed as requested by the City of Mount Dora, tested at the factory and shipped with the test report.

The proposed meters, and communication modules will comply with this requirement.

c) Meters shall be able to operate in temperatures ranging from -40ºC to 85ºC.

The proposed meters fully comply with this requirement.

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d) Single-phase meters shall be available from two different manufacturers. The primary single-phase meter,as offered by Supplier, shall have been in production for more than a year at the time of the bid.

The Sensus Stratus IQ single-phase meter has been in production for over a year. We have available options for meters from a manufacturer other than Sensus, if requested.

e) Meter shall be able to be programmed to perform and self-read, as well as a demand reset, at a specific time and day of the month

The proposed meters, including the **Sensus Stratus IQ**, is fully capable of being programmed to perform **self-reads** and **demand resets** at a specific time and day of the month. This feature allows for automated meter reading and demand reset functionality, ensuring that data is collected and resets occur at consistent, predefined intervals without manual intervention. This capability enhances operational efficiency and ensures accurate, timely data collection for billing and demand management purposes.

f) All electric meters shall provide the following:

• Energy metered in WHr, VAHr or VARHr (delivered, received, net)
• Maximum demand in W, VA, VAR
• Voltage, power factor, line current
• The standard 2S meter shall have dual registers for measurement of bi-directional energy.
• Time-of-Use energy metering using minimum of four seasons, four rates and four switch points for energy quantities
• Meter data using configurable intervals (5, 15, 30 or 60 minutes)
• An outage message after a user-definable interval when it has lost power
• Alarms for the following conditions: reverse energy, tilt, tilt/outage combination, attempted magnetic tamper, voltage outside defined limits
• The reverse energy alarm shall be capable of turning ON or OFF for an individual meter by the utility
• Remote upgradeability of meter and communications firmware. Meter shall have firmware rollback capability. Meter shall continue to meter during firmware transfer

The proposed electric meters, including the **Sensus Stratus IQ**, provide a comprehensive set of features to support accurate and flexible metering. They are capable of measuring energy in **Watt-Hours (WHr)**, **Volt-Ampere-Hours (VAHr)**, and **Reactive Power-Hours (VARHr)** for delivered, received, and net energy. They also measure **maximum demand** in **Watts (W)**, **Volt-Amperes (VA)**, and **Reactive Power (VAR)**, as well as providing data on **voltage**, **power factor**, and **line current**. The standard **2S meter** includes **dual registers** for bi-directional energy measurement, enabling net metering. Additionally, the meters support **Time-of-Use (TOU) energy metering** with four seasons, four rates, and four switch points, and allow configurable data collection intervals at **5, 15, 30, or 60 minutes**.

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In the event of a power loss, the meters can send an **outage message** after a user-defined interval. They also feature alarms for conditions such as **reverse energy**, **tilt**, **tilt/outage combinations**, **attempted magnetic tampering**, and **voltage outside defined limits**, with the option to turn the reverse energy alarm **ON or OFF** for individual meters. Furthermore, the meters support **remote firmware upgrades** for both the meter and communication modules, with a **firmware rollback capability** to ensure that the meter continues to function during the firmware transfer process. These features ensure high operational reliability, advanced monitoring, and flexibility for the utility.

g) Additional requirements for single-phase meters

• Meters shall include a port for configuration and reading. There should be a means to disable the port.
• Single-phase meters shall include a 200A bi-stable latching disconnect switch matching the rating of the meter.

The proposed single-phase meters will include a **port for configuration and reading**, allowing for easy access during setup and data collection. To enhance security, the meters will also provide a mechanism to **disable the port** when not in use, preventing unauthorized access or tampering. Additionally, each single-phase meter will feature a **200A bi-stable latching disconnect switch** that matches the rating of the meter, enabling remote or manual disconnection of service when necessary. This design ensures flexibility in meter management and secure operation while maintaining compatibility with standard utility requirements.

h) Additional requirements for poly-phase meters

• Meter shall be auto-ranging when connected to services in the range of 120-277 Volts RMS, ± 20% with the exception that Form 12S must auto-range when connected to services in the range of 120-480 Volts RMS, ± 20%.
• Meters shall be available with an optional ANSI C12.18 compliant optical port for local reading and programming.
• Meters shall monitor voltage, current, per phase and phase angles to detect incorrect polarity/phase sequencing.

The proposed poly-phase meters will be **auto-ranging** when connected to services within the range of **120-277 Volts RMS, ± 20%**, ensuring flexibility across various service types. Additionally, **Form 12S meters** will auto-range when connected to services between **120-480 Volts RMS, ± 20%**. These meters will also be available with an optional **ANSI C12.18 compliant optical port** for local reading and programming, providing convenient access for on-site meter management.

Furthermore, the meters will monitor **voltage**, **current**, and **phase angles per phase** to detect incorrect polarity or phase sequencing, ensuring accurate and reliable operation. These features enhance both the flexibility and reliability of poly-phase meter deployments, making them well-suited for various applications within the utility's service territory.

i) Additional requirements for remote disconnect switch

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Our solution will comply with requirements based around the remote disconnect switch.

j) Disconnect switch shall be remotely operated via AMI system, RF tool or optical port. Switch shall not connect if there is load-side voltage.

The disconnect switch on the proposed meters will be **remotely operated** through the **AMI system**, **RF tool**, or **optical port**, allowing for flexible and efficient control of service connections and disconnections. To ensure safety, the switch is designed with a safeguard that prevents it from reconnecting if there is **load-side voltage**, minimizing the risk of equipment damage or safety hazards during reconnection. This feature ensures secure and reliable remote operation of the disconnect switch, enhancing both operational efficiency and safety for the utility.

k) Electric meter disconnect and reconnect requests shall occur after initiation with confirmation received within 30 seconds for 99% of requests. Meter disconnect and reconnect requests shall occur after initiation with confirmation received within 1 minute for 99% of requests. Any disconnect request must also return the correct register read

The electric meters will support **disconnect and reconnect requests** initiated through the AMI system, with **confirmation received within 30 seconds** for 99% of disconnect requests and within **1 minute** for 99% of reconnect requests. Additionally, each **disconnect request** will return the correct **register read**, ensuring accurate data collection and reliable verification of the disconnection. This ensures timely and accurate processing of service requests, providing utilities with efficient control over customer connections.

3.7 SOFTWARE CIS INTEGRATION

a) Supplier shall be responsible for integrating the AMI system to the City of Mount Dora's customer information system, BS&A Software Inc. The integration shall include all functionality specified herein

The proposed solution will comply with the City's requirements.

3.8 CUSTOMER ENGAGEMENT AND PORTAL

a) Supplier shall create a secure customer web portal to allow electric utility customers to initialize a new portal account. The portal shall have the following features:

- ***Display on-demand readings for electric meters***
- ***Allow customers to evaluate the cost of switching to a different rate (such as TOU) using their own consumption interval data***

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• Allow customers to sign up for email and phone notifications for events such as service interruption, leak detection, high consumption and other regular notices such as projected bill and remaining use on a pre-paid account.

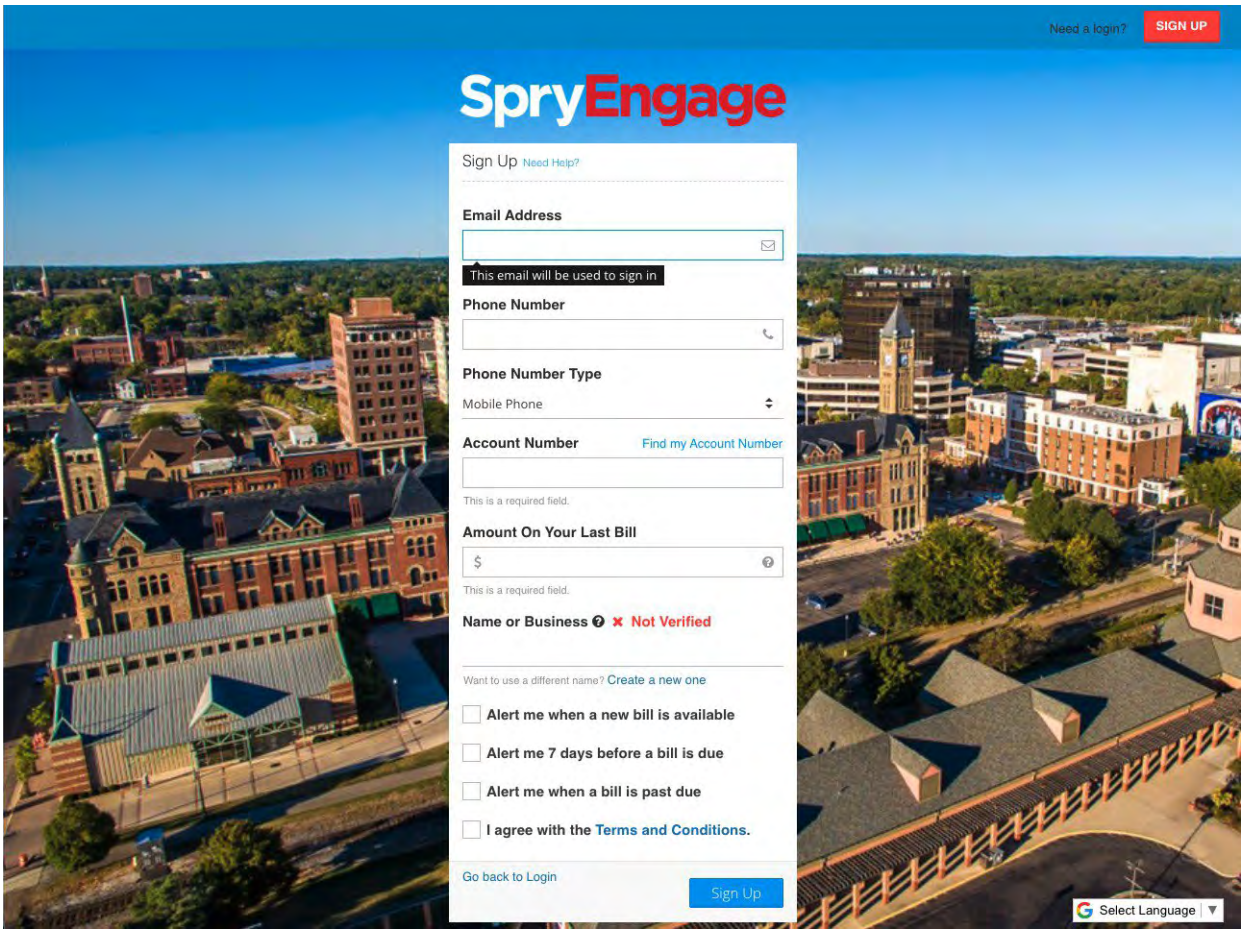
SPRYENGAGE – CUSTOMER ENGAGEMENT PORTAL

Registration Process

SpryPoint's portal contains a registration process which will allow users to sign up for access. The required fields for registration (email, account number, etc.) can be configured as desired.

Customer Login

SpryEngage contains a secure login process to allow customers to access their account. Security measures include options for password complexity requirements and optional multi-factor authentication. In addition, there is automated functionality to reset passwords to minimize the need for maintenance by utility staff.



Mobile Enabled

All SpryPoint solutions are built with a mobile-first approach using responsive web design. SpryEngage is device agnostic and provides customers with an optimized user browsing experience whether they are using a computer, tablet, or phone.

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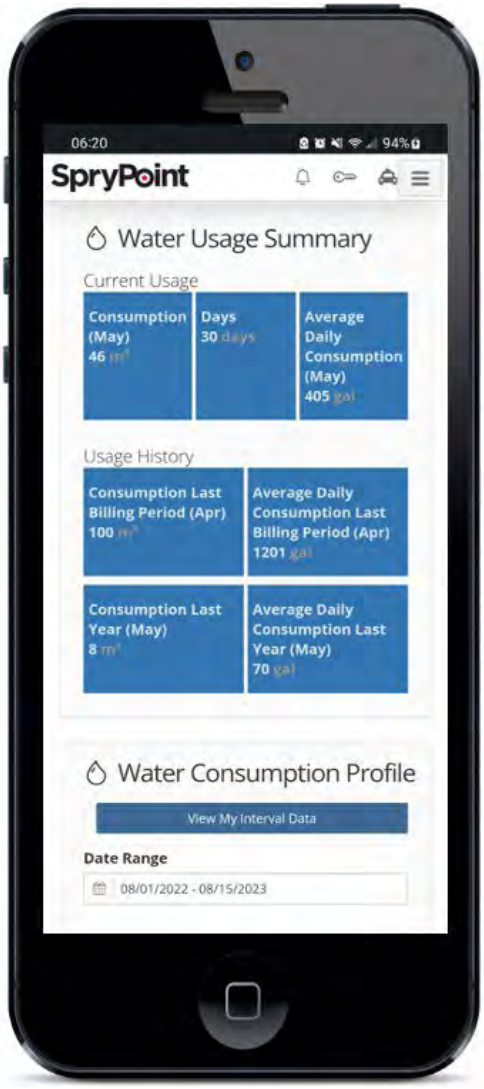

Introductory Tour

Upon logging in for the first time, customers are prompted to walk through a step-by- step introductory tour. The introductory tour will be configured during implementation to highlight functionality within the portal that you would like customers to focus on. The tour provides a step-by-step workflow on how to complete specific processes (payments, sign-up for programs, etc.) and will help minimize calls to customer service when customers first sign-up.

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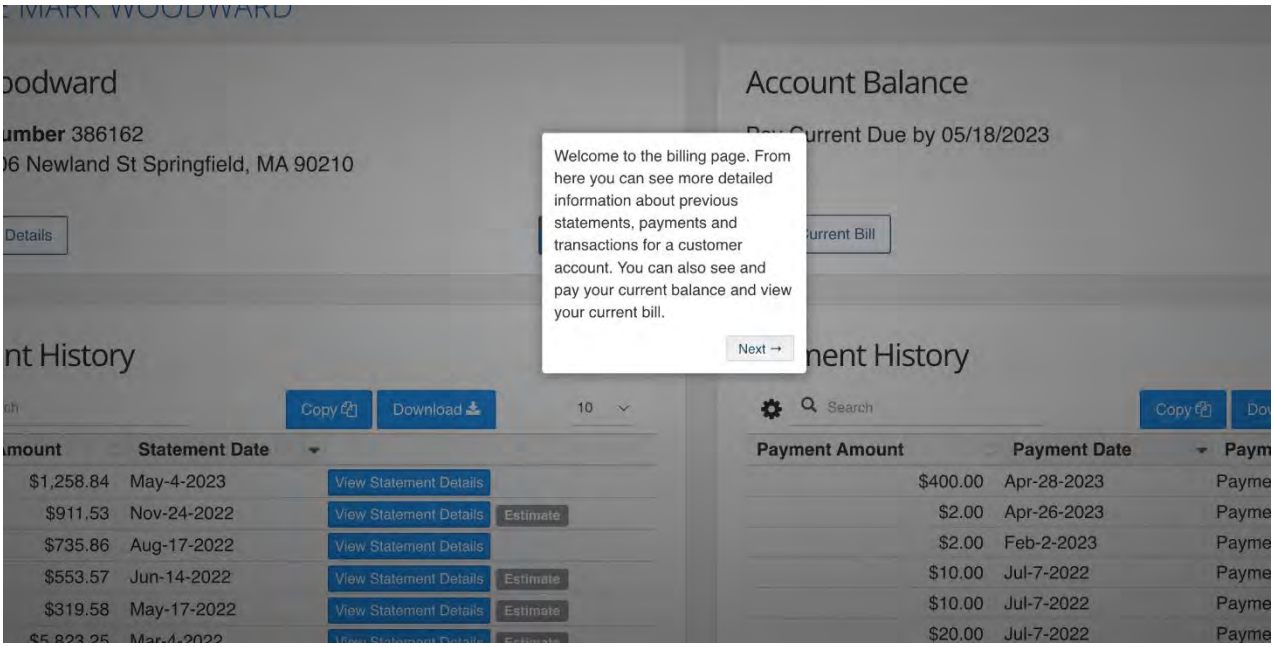
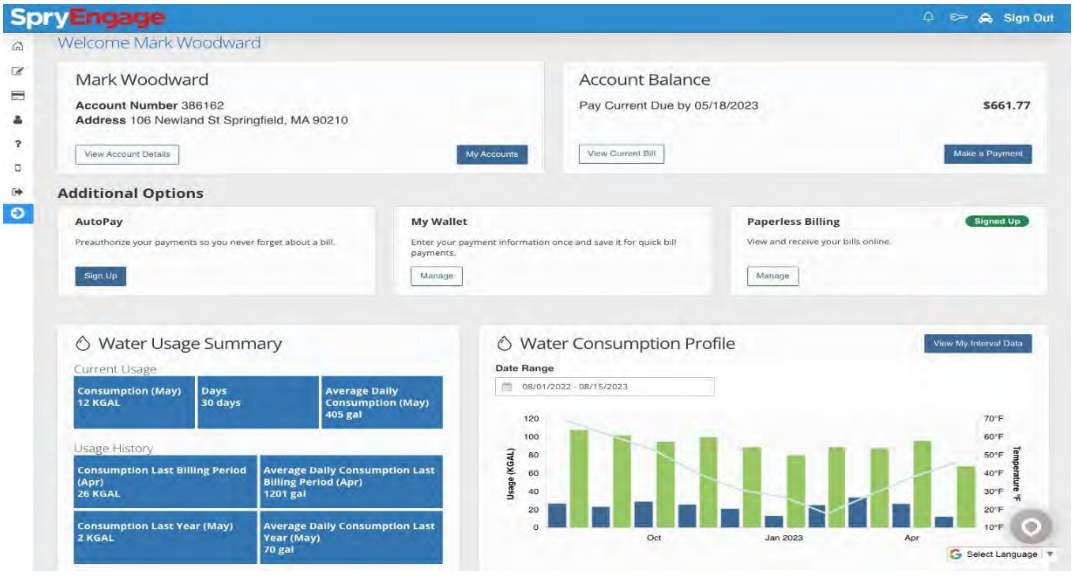


Customer Dashboard

SpryEngage contains a comprehensive customer dashboard with various widgets which can be configured based on your engagement goals defined. The dashboard provides one consolidated view to provide customers one-click access to key information such as payments, program enrollment and usage information. The dashboard can be configured with targeted prompts to guide your customers to sign-up for programs which will benefit them and utility operations.



Profile Management

Empower your customers to view and update pertinent information. This information can be automatically updated in your CIS or be sent by workflow for approval by the utility.

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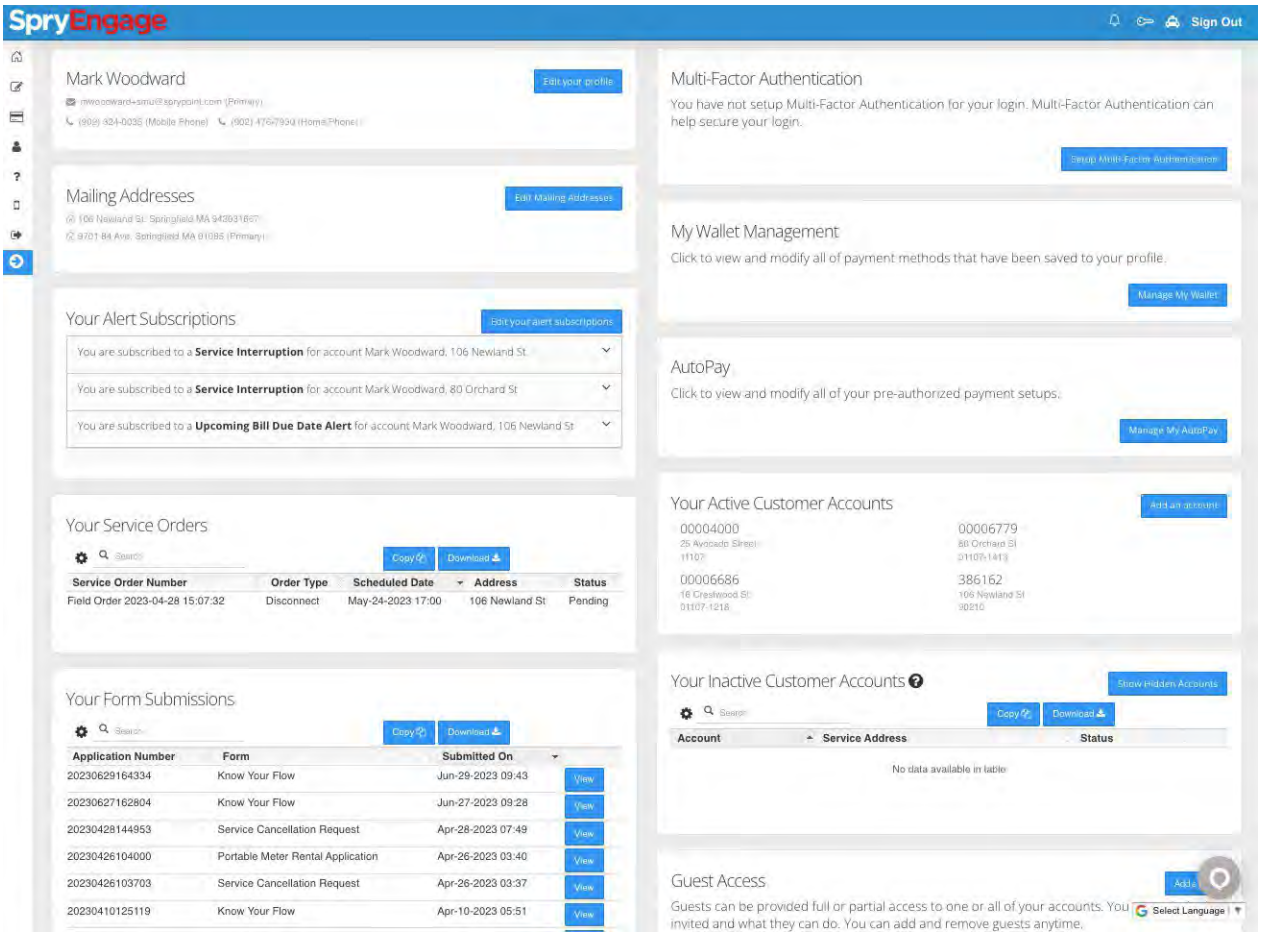
Customers can:

- Update their profile including email address, phone numbers, etc.
- Manage alert subscriptions
- View Service Orders
- Review form submissions
- Link or manage multiple accounts including inactive accounts
- Enroll in multi-factor authentication
- Manage Guest Access
- Manage Wallet and all payment methods



Multiple Account Views

Customers have the option to view information for a single account or all of their accounts with the utility whether active or inactive.

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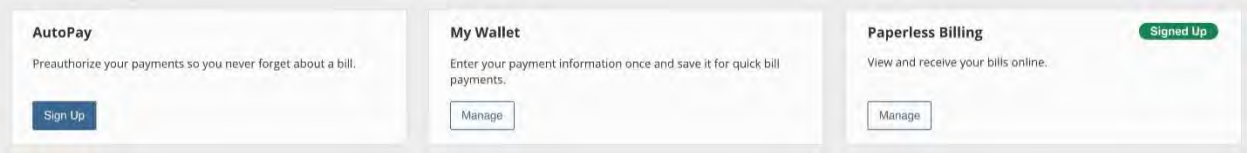
Program Enrollment

Upon first registering for an account, customers are encouraged to enroll in various programs designed to ease the burden of manual requests on your CSRs. SpryEngage uses color-coded visual prompts as a call to action to nudge customers to enroll in various programs designed to save you money.



Examples of enrollment request which are typically configured include:

- Paperless Billing
- Payment Arrangements
- Budget Billing
- Charitable Contributions
- Autopay
- Conservation Programs

Upon completing an enrollment form, applications are automatically routed to the correct individuals or departments for review and approval. Customers are provided transparency throughout the enrollment process to see what programs they have applied for and the current status of their application.

Alerts

SpryEngage provides customers with the ability to opt-in to receive notifications, reminders, subscriptions, and alerts in a single easy-to-navigate interface. Customers can have their alerts delivered by SMS, Email, IVR and in-application. We provide a library of select alerts out of the box, but it is not uncommon to develop custom alerts to address specific needs during implementation.

Alert management will allow your customers to:

- Manage and configure notifications and alerts for all accounts in one interface.
- Easily select which alerts and notifications they'd like to opt-in.
- Select contact method preference, from list of predefined options for each notification and/or alert.
- Modify a prior selection at any time.
- Receive a validation or confirmation of their opt-in or change in status via their preferred method of communication (SMS, Email, Voice or in-app).
- Opt-out of receiving any notifications, preferences, alerts, or reminders.

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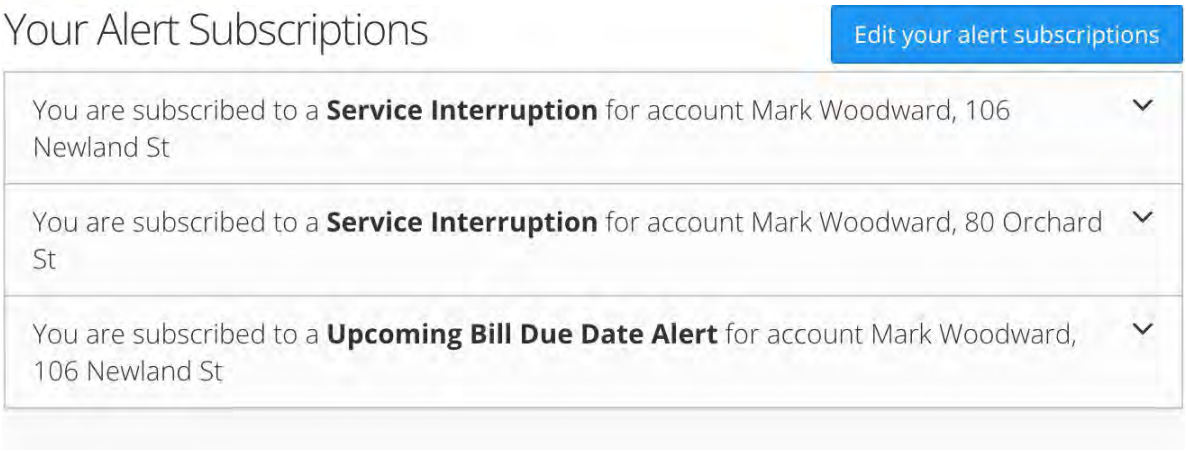

Some standard alert types typically used by our customers include:

Alert Type	Description
Bill Available	Notification to inform customers when bill is available in MyAccount
Collection and Payment Reminders	Notification to remind customers that due date is approaching, and payment has not yet been made
Missed Payment Alert	Notification to inform that payment is overdue
High Bill Alert	Notification that bill may be higher due to change in energy consumption (see High Bill Alerts section below for specific user requirements)
Scheduled Service	Notification that scheduled service is confirmed - could be multiple services

SpryEngage's Alerts and Notification platform can also be used for additional stakeholder communications. Examples include:

Communication	Example
Employee Notification	Some utilities use the platform to alert all staff of impending storms and for call-in scenarios.
Surveys	Some utilities use automated outbound surveys by phone to gauge customer satisfaction after service order completion.

Guest Access

Customers can assign access to other users to have the ability to view and manage their account on their behalf. There is a simple workflow process for customers to:

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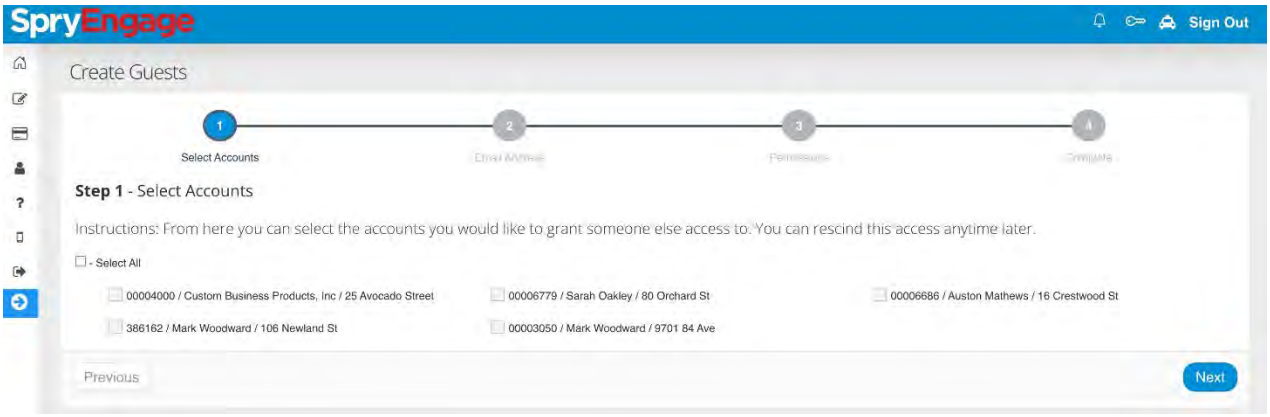
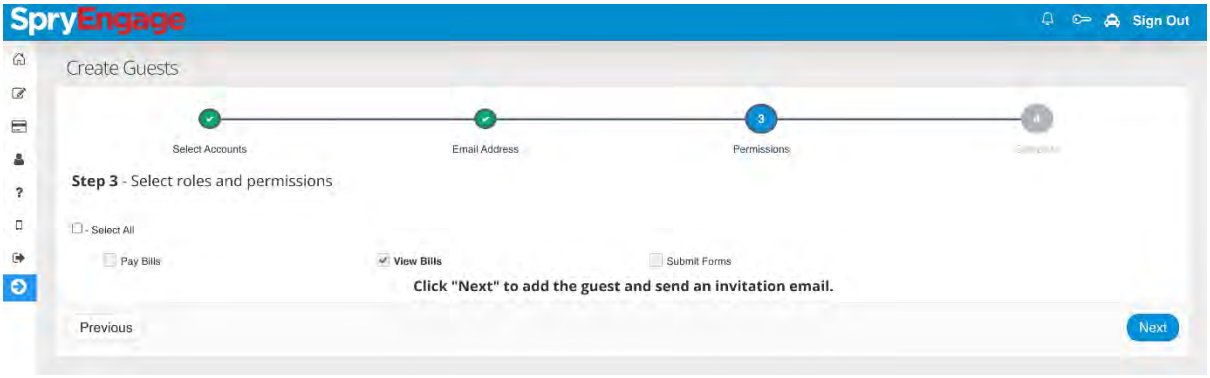


- Select guests to be added to your account or accounts.
- Assign what accounts they have access to.
- Assign permissions on what guests can view and manage (Pay bills, view bills, submit forms, etc.).
- Edit or revise permissions for guests at any time.



Analytics and Consumption

Provide customers with easy access to their data to empower them to manage and adjust their usage. Both regular meter and smart meter consumption information can be made available. Data is viewed through interactive charts which allow customers to drill into daily or even hourly consumption to help them save money and reduce their carbon footprint.

Several views can be made available for your customers including year-over-year comparisons and cohort analysis versus other customer demographics. Consumption information can be overlayed with other variables including temperature, precipitation, and heating degree days. Customer data can be downloaded to excel to enable customers to do their own consumption modelling.

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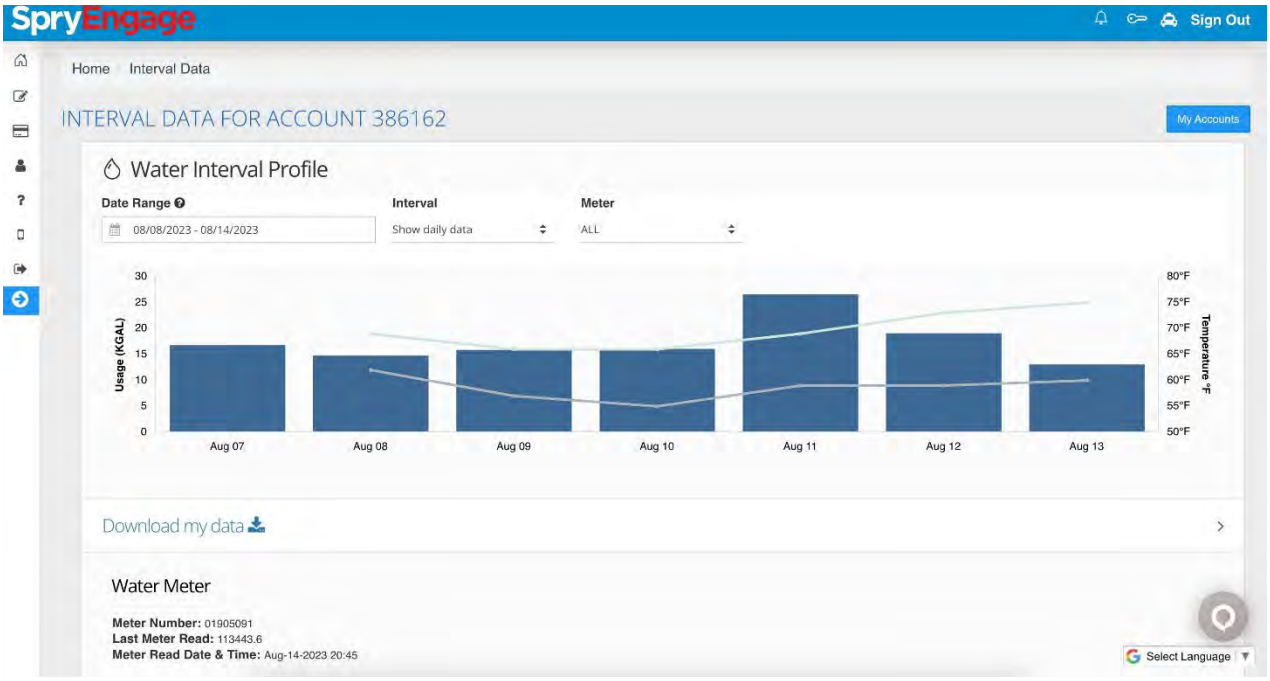

Consumption information can be presented using any of the following options:

- Billed consumption from CIS – Billed consumption display is most commonly used with utilities that do not have AMI Meters or a Meter Data management System.
- Integration with AMI – For customers that do not have an MDM, SpryEngage has APIs to integrate directly to the head-end AMI system to provide access to interval data.
- Integration with MDM – For customers that have an MDM, SpryEngage has APIS available to present interval data. There is also an option to embed pages from your MDM into SpryEngage using an embedded iFrame if allowed by your metering vendor.
- Optional – Storage of Interval Data – For an additional cost, SpryPoint can house interval data and offer it for presentation to your customers in your preferred interval.

Benchmarking and Conservation

Provide customers with easy access to their data to empower them to adjust their consumption patterns to meet conservation and efficiency initiatives. Household consumption can be compared against other customer classes to encourage reduction.

Key Account Management

Key Account Management provides an additional level of service to your commercial, industrial, and institutional customers. Enhanced CRM capabilities, real-time consumption monitoring and demand management are critical features which will allow your key accounts to realize real savings. SpryEngage empowers your key accounts by providing access to the data they need to make informed decisions.

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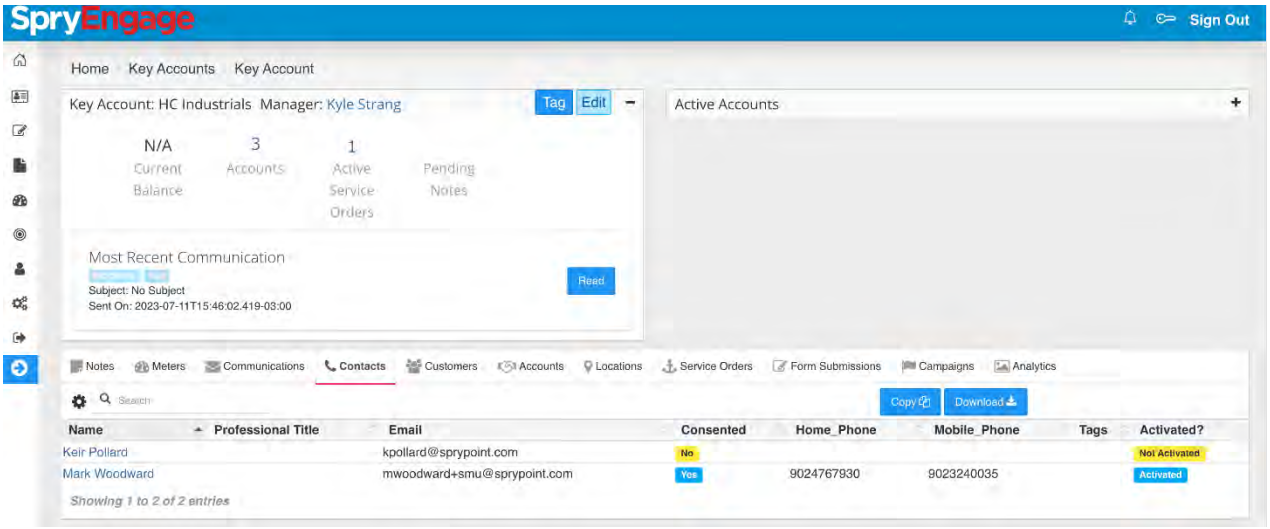
Functionality includes:

- Dynamic and interactive metrics that incorporate data from your AMI, AMR/ MDM and CIS solutions.
- Configurable and interactive Key Performance Indicators (KPI) dashboard to provide consumption and demand information.
- Automated Reporting
- Real-Time Alerts related to consumption and demand.
- Consumption and demand data presented on a per meter or aggregated basis.
- Integration with your numerous AMI Systems.
- Download of consumption, demand and interval data in Green Button format and in CSV/Excel for further modelling.



In addition to all the advanced Metrics, SpryEngage includes a CRM System to track and manage all communication with your Key Accounts.

- Consumption & demand analysis
- Customers
- Meters
- Accounts
- Contacts
- Locations
- Communication history
- Service Orders
- Campaigns
- Form Submissions

Electronic Billing

SpryEngage manages the customer sign-up and the delivery of all electronic bills.

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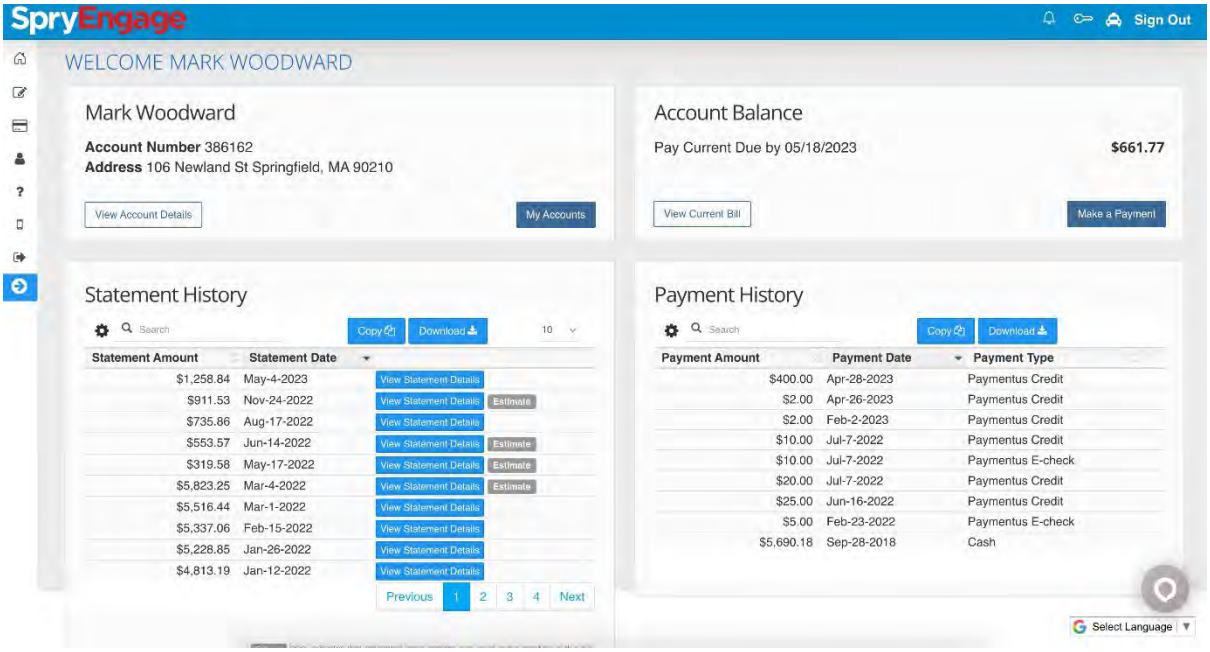
Upon logging in customers can be prompted to sign-up for e-billing to help you save on associated print and mail costs. In addition, administrators can create campaigns to encourage customers to sign-up for e-billing in an effort to save on print and mail costs. There are no additional variable costs associated with electronic billing.

Bill Display

SpryEngage retains a PDF copy of the actual bill statement as received by the customer. Customers can view bills as either a representation or using the actual PDF as received in the mail. In addition, customers can view their statement history, current bill and unlimited historical bills.

Statements & Payments

SpryEngage can integrate with your current payment processor or other payment processors to ensure PCI Compliancy while processing payments. Customers can make payment on a single bill or on multiple bills. Customers can manage their wallets and sign up for automated or recurring payments.



If you choose to use one of SpryPoint's preferred payment processing partners some of the additional available features and benefits include:

One Time Pay

Many customers simply want to know their amount due and make a payment. One-Time pay allows customers to view and pay bills quickly without having to register for an account or remember their login details. It's simple, fast, and easy.

AutoPay (ACH)

With AutoPay, your customers can setup worry-free, automatic recurring payments, choosing the frequency and method of payment from the options you define. The service includes management of

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enrollments, notification preferences, schedules, payment methods, and more. Additionally, your CSRs can be given permission to set-up AutoPay on behalf of a customer. ACH payments are an efficient and cost-reducing alternative to paper checks and credit cards. Customers can add as many payment options as they would like.

IVR Payments

Use a toll-free number to allow your customers to hear their balance and due dates, confirm their last payment, and make payments over the phone. Your call flow is configurable with customized greetings and voice prompts in English and Spanish. Customers can pay in fewer than two minutes with the option to quickly transfer to a CSR if needed.

Pay-by-Text

Communicate directly with customers via a text message with payment capability. Customers can pay directly within the text dialogue with a simple reply.

Charitable Contributions

SpryEngage provides customers with the option to either round up their payment to the nearest dollar or determine an amount they would like to add to their payment for charitable purposes.

Maximum Payments

Maximum payment allows customers to define a maximum value that can be authorized for an automatic payment. In addition, administrators can define the maximum amount which is allowed to be paid via credit card in SpryEngage.

Digital Wallets

SpryEngage supports digital wallet payment options which are considered more secure, convenient, and easier to use. Customers can manage the various payment methods within their digital wallet.

PCI Compliancy

SpryPoint uses PCI-compliant partners to ensure our customers' security is maintained while processing payments. Using a SpryPoint partner is our preferred approach to supporting on-line payments but if you have existing relationships with payment providers, we are open to discuss integration options.

User Adoption and Welcome Letter

User adoption is a key factor in achieving project goals such as improving customer satisfaction, water-use efficiency, and on-line self-service. To drive portal adoption, SpryPoint can coordinate the delivery of an electronic welcome letter to all customers introducing them to your new portal and encouraging them to register.

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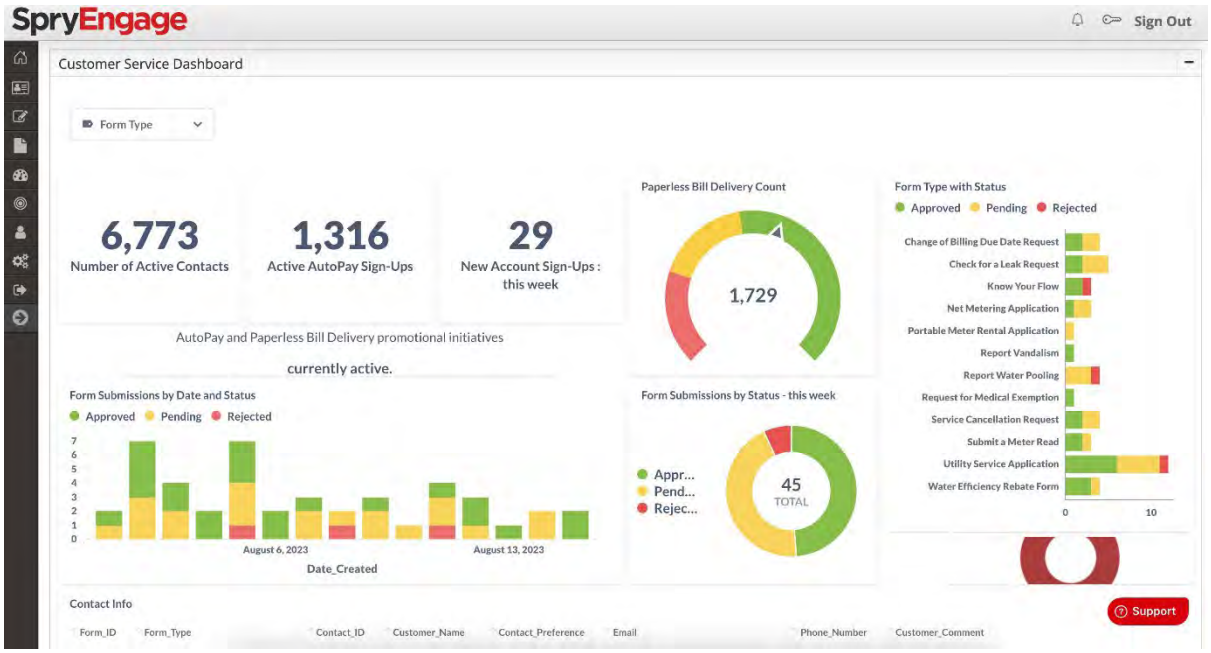
Administration Dashboard:

SpryEngage contains a comprehensive administrative dashboard which provides CSRs access to all pertinent information related to operations and customers. Workflow and routing can be used to track multiple business processes. Examples of information displayed on the dashboard include:

- Form Submissions
- Calendar with Reminders and Tasks
- Customer Analytics and Reports
- Service Orders
- Key Performance Indicators (Billing, Payments, A/R, etc.)
- Customer Usage Patterns (visit frequency, page statistics)
- Mapping with data layers from (CIS or GIS)
- Integrations and Metrics from other solutions
- Customer, premise and account Information from CIS
- Notes and Phone Calls
- Account Tags and Customer Segmentation



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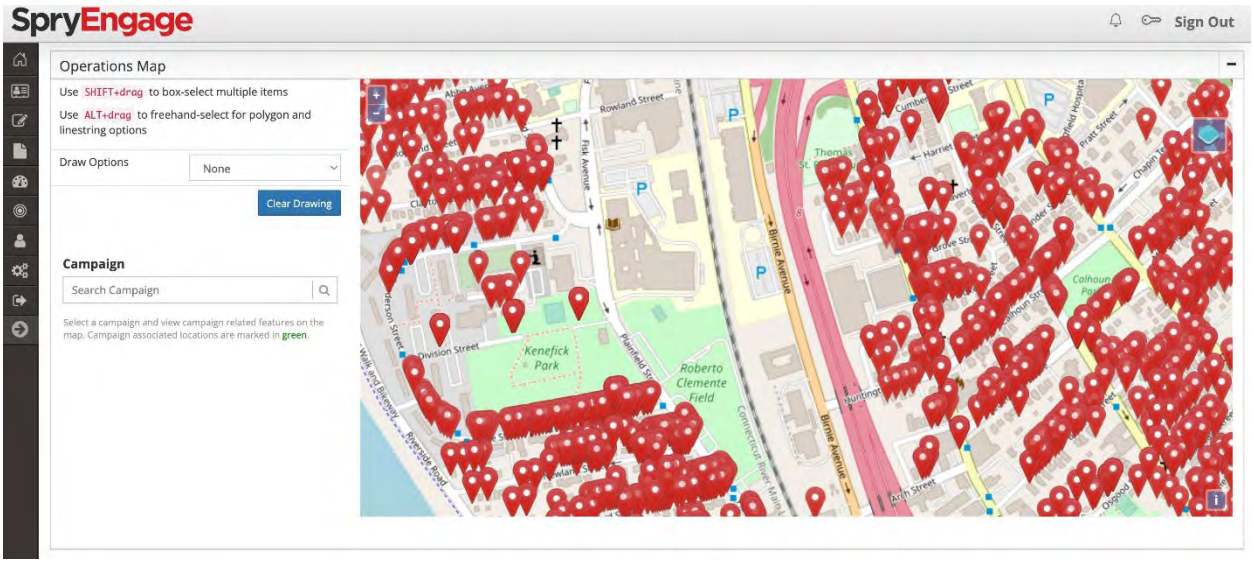
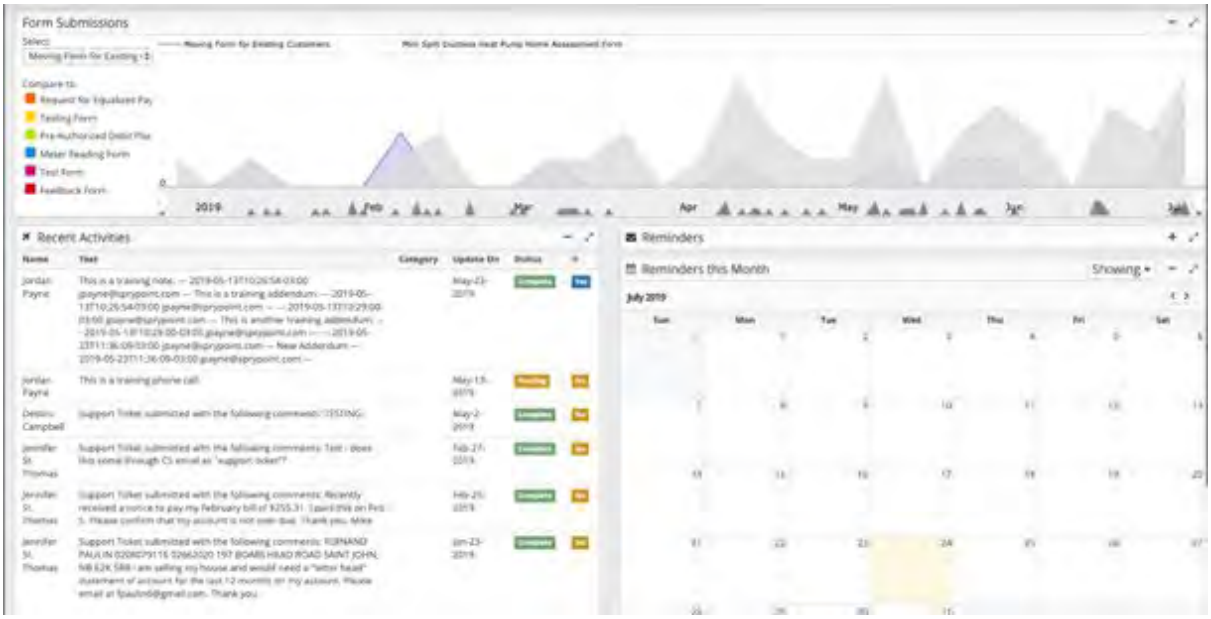


The Administrative Dashboard is normally configured specific to each utility and below are some sample screenshots of our customer dashboards.



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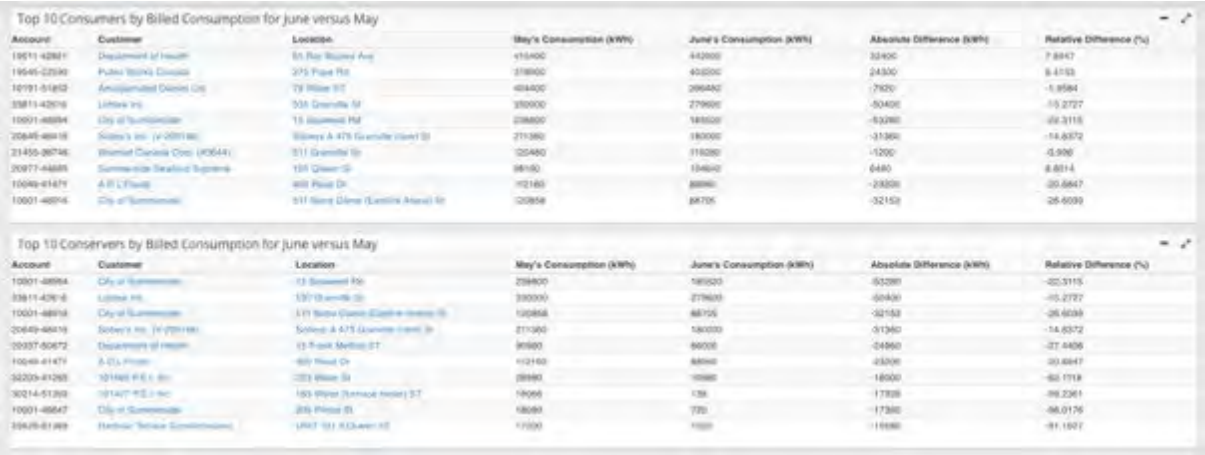

Masquerading

Masquerading allows CSRs or administrators who are assisting customers over the phone, to temporarily switch to a customer's account so they can see what the customer is seeing. A banner will appear at the top of the screen to indicate that the CSR is masquerading as the customer. SpryEngage maintains a record of the original user account, so users can easily switch back to the previous account.

Communications

All communications including notes, calls, texts, and emails can be actioned and tracked from SpryEngage Information that can be synchronized with the CIS includes all contact points including notes, in app messages, SMS Messages, and phone conversations.

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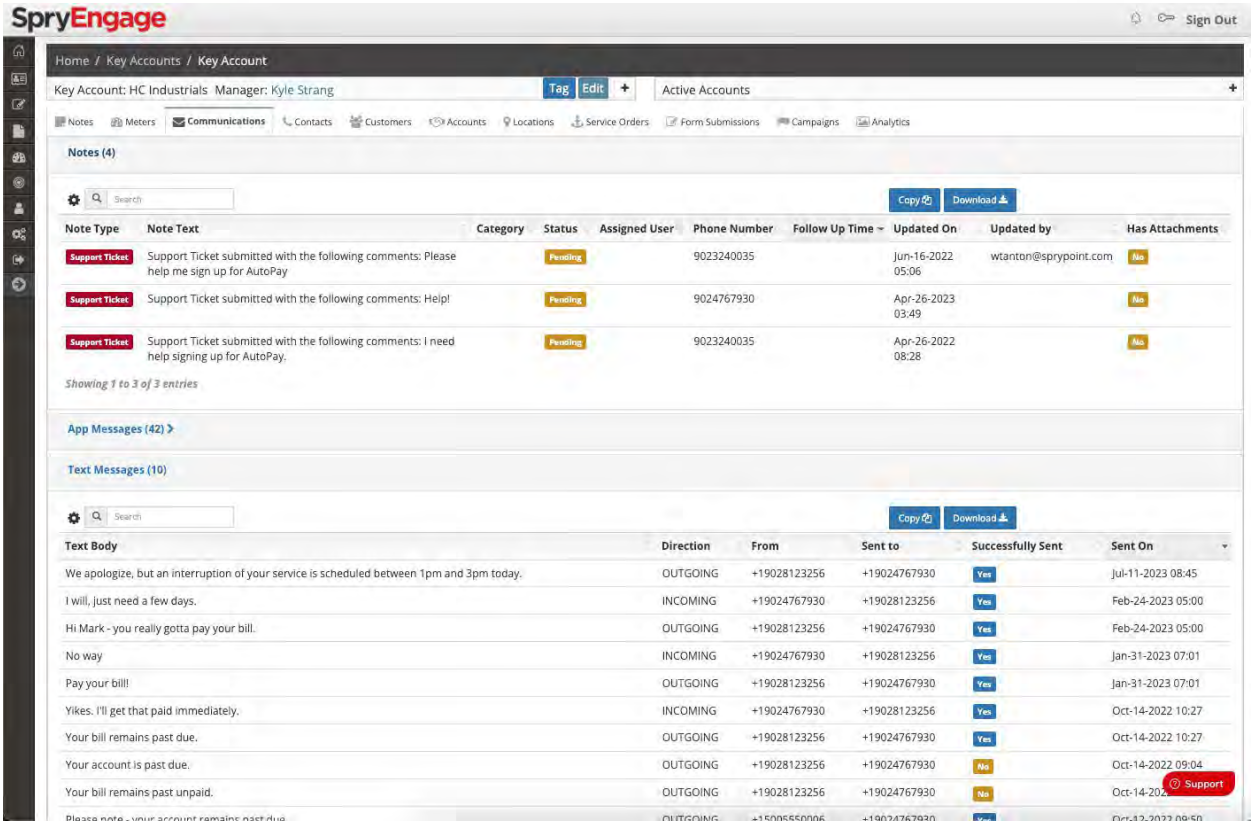

Live Chat

SpryEngage offers optional live chat capabilities. Live chat is used for basic inquiries that can be resolved electronically, reducing the burden on your call center. SpryPoint recommends making live chat available to only authenticated customers as CSRs are generally not able to offer assistance or information to unauthenticated inquiries.

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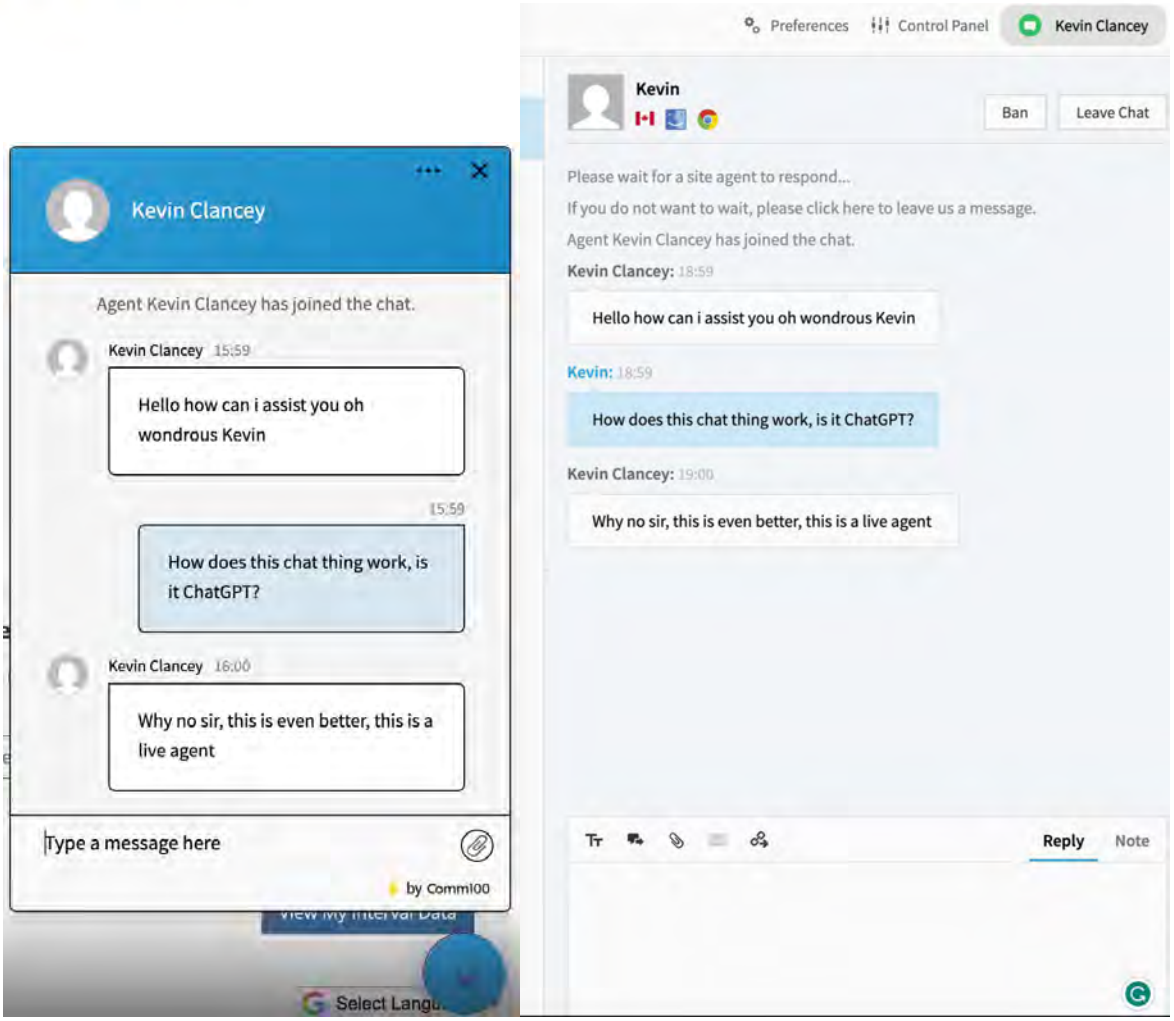

Forms

SpryEngage offers a highly configurable drag and drop forms engine that allows you to easily create an unlimited number of forms without our assistance. We recommend that you avoid complex or intimidating forms to prevent customers from navigating elsewhere. We will work with you to deliver concise easy-to-use forms for your customers during implementation.

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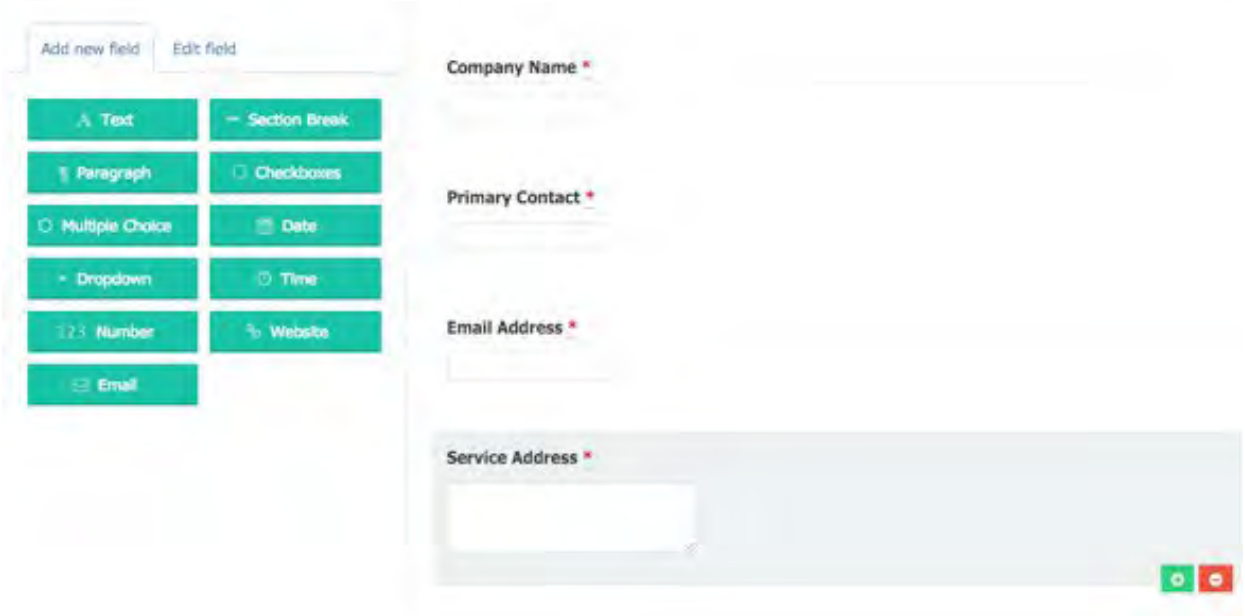

Forms can be used across all departments (Customer Service, Finance and Operations) to automate manual business processes. Examples of form types include:

- New service
- Payment Arrangement application
- Move in/move out requests
- Budget Billing applications
- Pre-Authorized Payments
- Billing inquiries or disputes
- Service Order Requests
- Equipment Rentals
- Program Sign-Up

All Forms can be made available in an unauthenticated environment such as your utility website or in an authenticated environment such as SpryEngage. Within an authenticated environment, customer information can be auto populated to minimize the effort required by customers to submit information.

Form Configuration

Each form has a rich set of configurations, as shown below, to allow for specific workflows to follow the submission of the form:

- Automated communication responses upon submission
- Automated alert to the designated user/department for the type of form
- Tracking of the submission handling required to approve before the form is active.
- Creation of a Service Order based on levels of approval/review configured.

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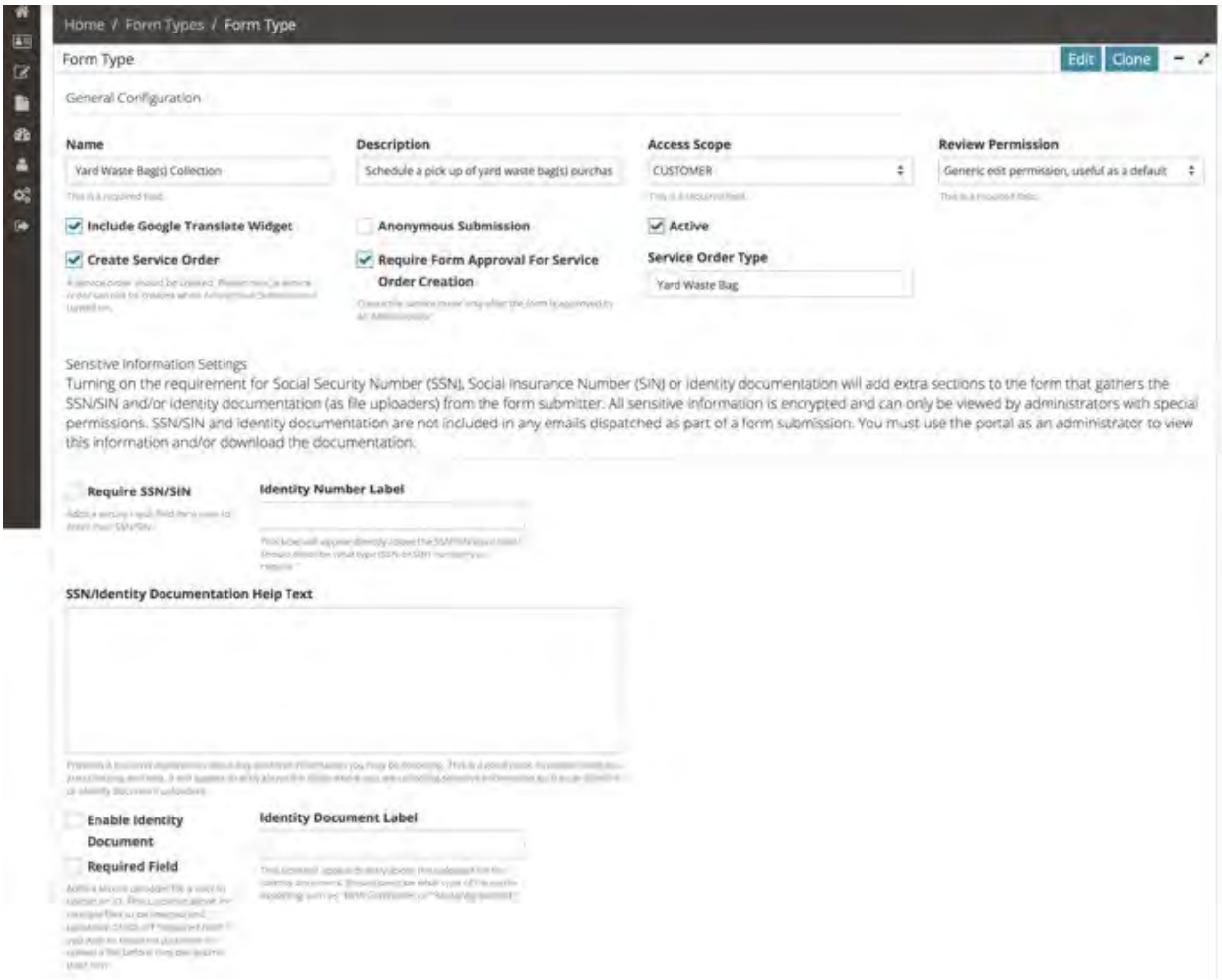
- Automated responses to the customers upon approval/denial of the submission along with ad hoc comments from the reviewer.
- Follow up reminders if required for the submission steps.



Forms Workflow

Administrators can configure workflow which will route completed forms to the correct department or individual for review, approval, and follow-up processing. Your customers will be automatically notified when action is required, and workflow can be established to route forms across multiple departments for multiple approvals. Forms can also be integrated with outside systems to initiate specific processes. Approved forms can also generate service orders within SpryMobile to further automate business process such as in an application for service scenario.

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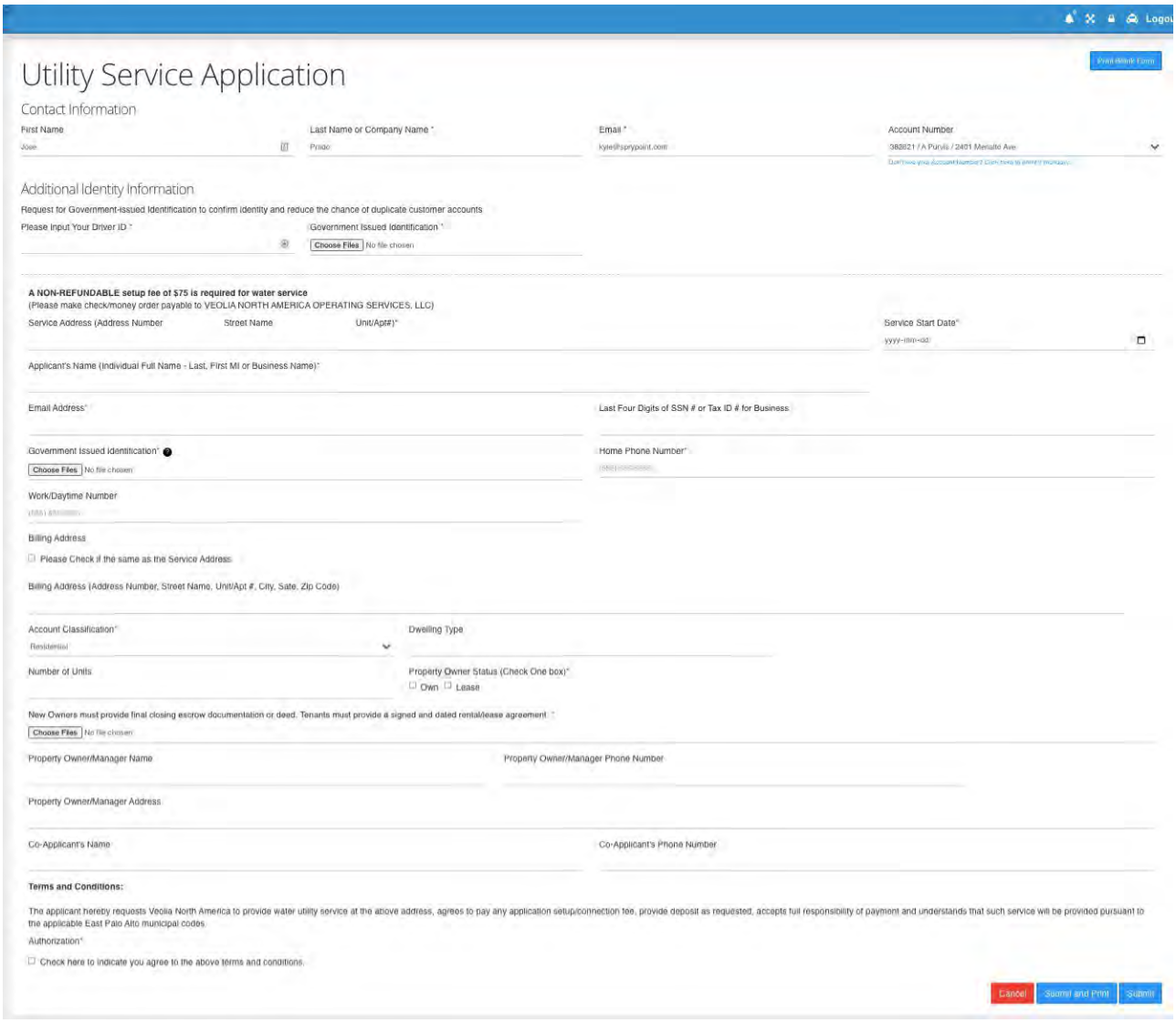

Each form submitted is reviewed/commented and automatically moved to the next workflow step upon completion.

Upon successful completion and submittal of a customer form, SpryPoint's Customer Relationship management solution will automatically associate and ingest the submission and associated customer data. This data can be used to segment your customers based on the services they are inquiring about and allow you to manage outbound marketing campaigns which appeal to that specific customer segmentation.

Reporting and Analytics

SpryEngage provides real-time, interactive dashboards, detailed reports and Key Performance Indicators (KPIs) that allow you to mine customer information and make informed business decisions.

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Understanding the traffic source, bounce rates, and exit pages of your customer portal can provide actionable insights on how to better serve your customers. SpryPoint provides analytics that will provide visibility into pages and functions that need your attention to enhance customer experience.

Operational Mapping and Alerts

Operational Mapping allows utility administrators to send customer alerts to proactively or reactively alert customers to events such as:

Events	Example
Planned Outage	Notification of planned outage that impacts account holder
Unexpected Outage	Notification that an outage has unexpectedly occurred in a specific area or region if integrated with your OMS.
Tree Trimming	Notification to customers of tree trimming in a certain area by selection on a map.
Hydrant Flushing	Notification to customers of hydrant flushing in a certain area by selection on a map.
Planned Restoration	Notification that planned outage event is over and power is restored
Storm Notification	Notification that customer should anticipate possible outage due to pending storm, with link to safety and preparedness instructions

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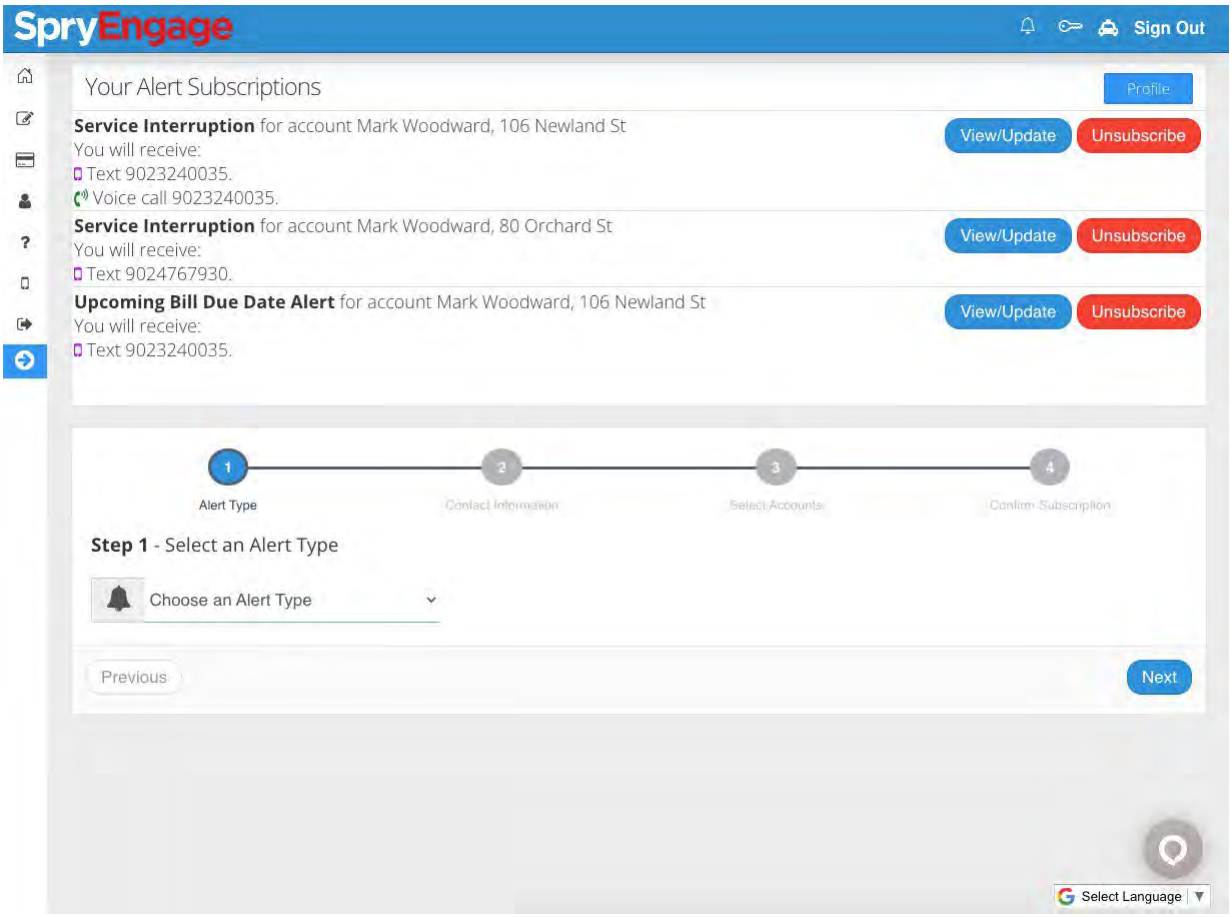

SpryEngage provides the ability to add layers from other business systems (CIS, OMS, AMS, etc.) and drive communication to customers.

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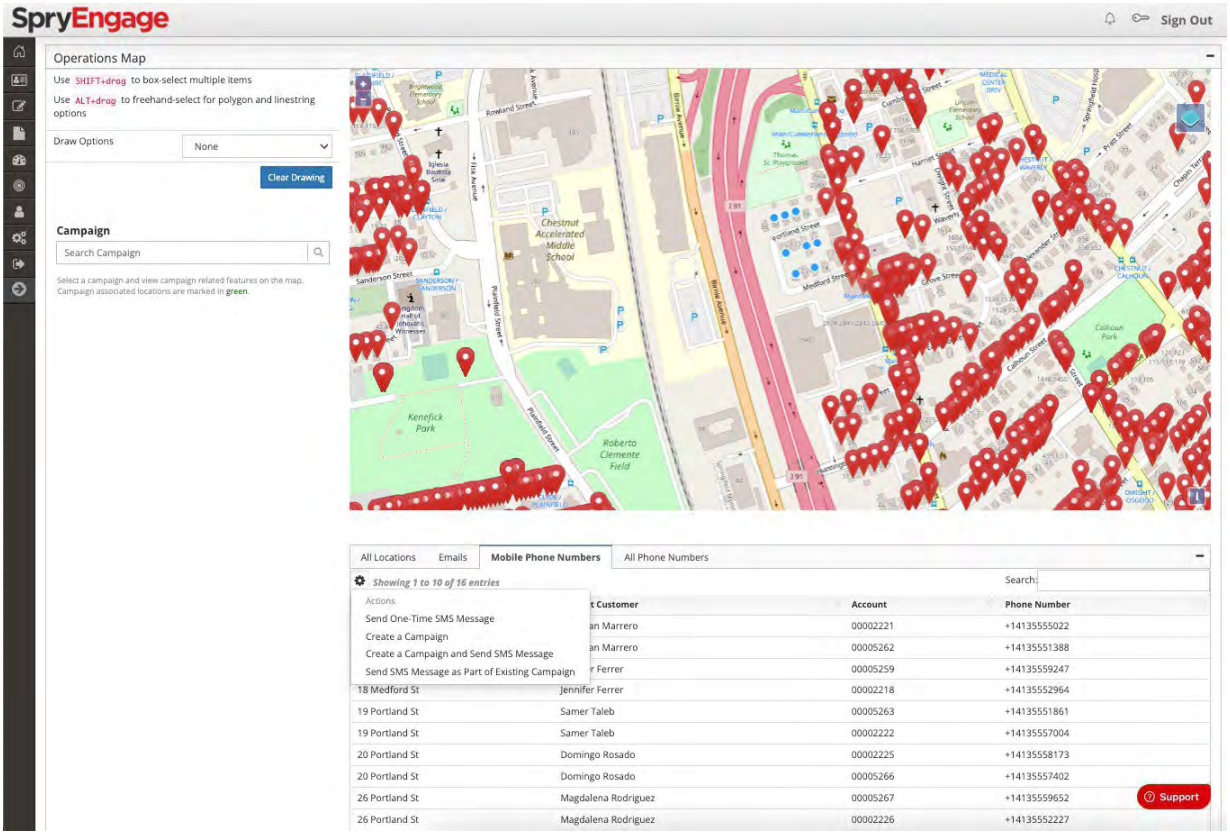

Frequently Asked Questions (FAQ)

SpryPoint helps ease the number of inquiries coming into your CSRs by included a list of FAQs. We can suggest common questions that you will encounter and will work with you to understand what types of questions may be specific to your customer base.

Videos

SpryPoint will work with you during implementation to create training videos which can be included within the Help section of SpryEngage. Training videos are designed to cover navigation of business processes (such as sign up for ACH, etc.). Training videos provide an opportunity for both refresher training for existing employees and introductory training to new employees.

Customer Relationship Management (CRM)

Administrators have easy one-stop access to all pertinent information related to customers. CSRs can view the following on one screen:

- Customer, premise and account Information from CIS
- Submitted forms and applications
- Service Orders
- Billing and Payment History
- Notes and Phone Calls
- Account Tags for segmentation

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Contact Management

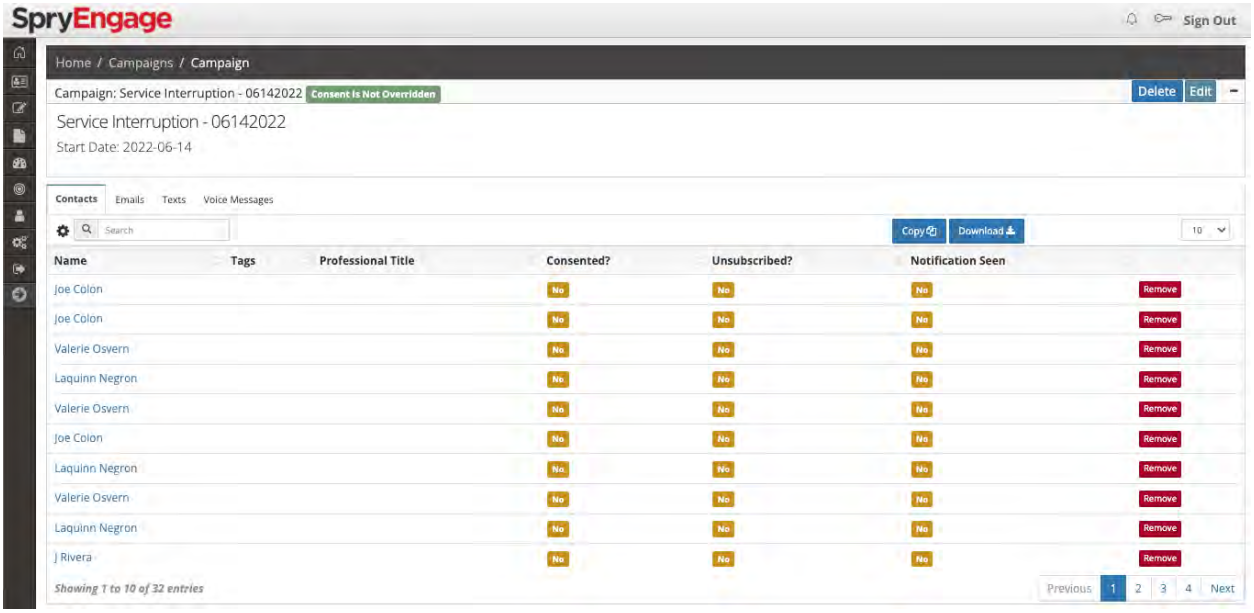
Record and retrieve all applicable customer data including the ability to track all communication by phone call, email, or text. Set follow-up reminders and allow users to create tickets for service departments.

Customer Segmentation

SpryEngage allows you to segment your customers and target specific groups through customized promotional campaigns. Upon the submission of an expression of interest for a service or product, SpryEngage provides a tool to track, nurture, and report on different groups of customers.

Campaigns and Promotions

Create and manage managing campaigns to market to or engage your customers by segments. Inherent workflow allows end users to design, manage, launch, and report on the success of various campaigns.



Campaign Example	Use Case
News and Information	Users can opt-in to receive marketing information individually.
Monthly Newsletter	Subscription to receive ongoing information via email
Cost Saving Programs or Incentives	Subscription to receive cost savings information, incentives or rebates that might be of interest
Safety Tips	Subscription to receive ongoing information via email
Storm Preparedness	Subscription to receive ongoing information via email and/or text

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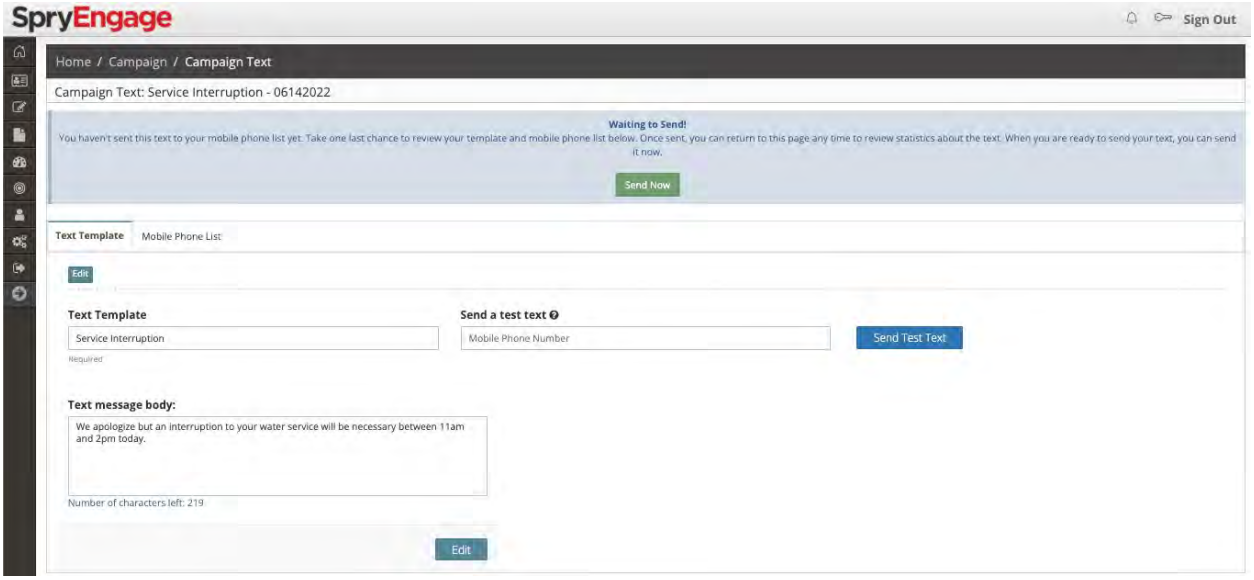
Campaigns provide statistics to allow you to drill into what was delivered, opened, clicked and more.

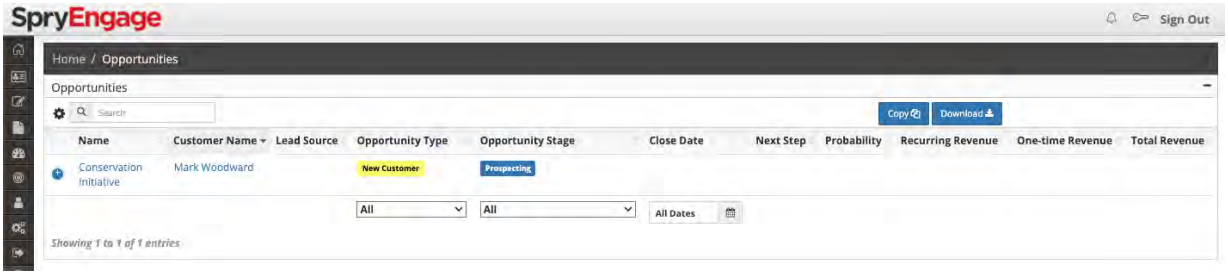


Reminders

As a follow-up to campaign management, SpryPoint's CRM has strong lead management and follow-up reminders and tracking which can be used to track and monitor customer interest in various offerings.

Pipeline and Opportunity Management

Monitor and maintain interest in various programs and initiatives by tracking all interested customers from a pipeline view. Information associated with opportunities includes stage, next step, close date, revenue forecasting, and analysis. All data can be easily exported to Microsoft Excel for further analysis.



SPRYIDM – INTERVAL DATA MANAGEMENT

SpryIDM addresses the challenge of deriving business value from large amounts of interval meter data. Most advanced metering infrastructure systems collect vast amounts of interval metering data, but the data

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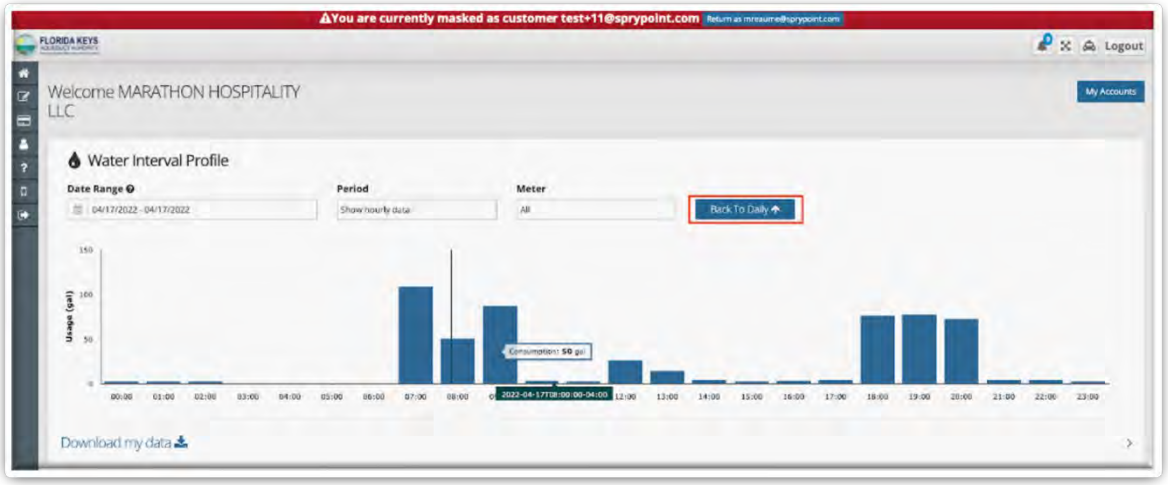
is often difficult to access and use to provide meaningful business value. SpryIDM, SpryPoint's interval meter data management system, allows utilities to maximize the return on the investment that they have made in advanced metering infrastructure and use this data to improve customer service and operations through a focus on interoperability and processing speed.

SpryIDM provides:

- Sub-second access to interval data for meters, service points, and collections of meters. Individual service point data is provided through a simple API for use in customer-facing charts and reports.
- Cost-effective storage and programmatic access to years of interval data, with no vendor-driven requirement for archiving.
- High-performance data ingestion processes. Interval data may be supplied from meters from multiple vendors and intermediate systems. SpryIDM can be easily extended to support a number of data ingestion processes.
- Ability to standardize and normalize interval data. Interval data can be supplied from meters which report at varying intervals. SpryIDM normalizes data so that they can be aggregated and analyzed and correlated to other data.



Payment Processing Partner: InvoiceCloud

SpryEngage integrates with InvoiceCloud to provide a seamless user experience for billing and account management. Users have access to InvoiceCloud's one-time payment page, recent bill listing, and paperless settings directly from SpryEngage. To ensure secure and synchronized interactions, a series of APIs are leveraged for functionalities such as pass-through authentication, password modification, session renewal, account linkage synchronization, and customer sign-ups. These APIs also accommodate scenarios where InvoiceCloud's co-owner functionality is either enabled or disabled, allowing for a comprehensive integration.

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b) Supplier must support a minimum of one day on-site for an AMI open house event for the public. The goal of the event is to promote the AMI technology and answer any questions from the public.

Core & Main will provide on-site support for a minimum of one day to participate in an AMI open house event for the public. Our goal during this event is to promote the AMI technology and ensure that the public has the opportunity to ask questions and gain a clear understanding of the benefits of the system. Core & Main representatives will be available to explain the technology, its advantages, and how it will improve customer service, while addressing any concerns from the community. We are committed to helping the City of Mount Dora build trust and transparency with its residents regarding this important upgrade.

c) Supplier shall develop, with input from the utility, the following marketing materials:

• A bill insert designed to educate customers on the benefits of the AMI project
• Postcards advising customers that AMI meters will be installed
• Doorhangers to be left at premises where the AMI meter installer has visited a premise. The doorhanger should advise the customer that either the meter change out was successful or explain why the meter change out could not be completed.

- **Pre Work Notification Procedure**- 28 days prior to the beginning work a representative will send out an approved postcard to the affected customers. This postcard approved by the Utility will provide details of the services and how to properly identify our representatives or make contact with us if necessary.

- **One Week Prior to Work Procedures**- Bermex will provide door to door notifications to citizens who will be see work being performed in their neighborhood.

- **Day of Customer Notification Procedure** – When a Representative arrives at a customer's premises, and before performing any meter change or other Services, the Representative will notify the customer/occupant and give the customer/occupant time to stop using the water.

- **Door Hanger Notice for Meter Change in Customer's Absence** - If no one answered the door when Representative arrived and Representative was able to complete the meter change, Representative will leave a door hanger (provided by Utility) on the front door notifying the customer that the meter was changed.

- **Door Hanger Notice for Rework/Exceptions** - If Representative cannot change out the meter, Representative will leave a door hanger (provided by Utility) requesting customer to contact Bermex Inc for a return visit

3.9 INSTALLATION OF METERS AND NETWORK EQUIPMENT

a) Supplier shall be responsible for ensuring that personnel performing field installations (either employees of Supplier or subcontractor) have been adequately trained and are considered qualified to safely perform work on energized equipment.

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Core & Main's Installation partner, Bermex, complies with this requirement. Please review additional details regarding Standard Operating Procedures and training found in the Appendix: Bermex Attachment.

b) Field personnel must wear uniforms and carry visible badges. The logos on the badges, vehicles and uniforms shall clearly identify the installer's company name.

- **Professional Appearance** – Representatives will wear a company shirt and pants. Company shirts will have Bermex Inc' name or logo. All Representatives will be well groomed and present themselves professionally to Utility customers.
- **Identification Badge** - Utility will provide a badge (with name and photo) for each Representative, which badge will be worn and clearly visible at all times when performing the Services. If a badge is lost, the Representative will immediately notify Bermex Inc and Bermex Inc will contact Utility to have the badge voided. Bermex Inc will be responsible for facilitating the Representative's procurement of a replacement badge. No Representative may perform field Services without the Representative's Utility Bermex Inc badge (regardless of the reason). Bermex Inc will emphasize to all Representatives the importance of maintaining possession of the badge at all times.

c) Field personnel must wear long sleeve shirt and pants rated for a minimum of 8 cal/cm2 and shoes and hard hat rated for electrical hazard.

- **PPE -** All Representatives will wear the appropriate Personal Protective Equipment (PPE) necessary to perform safely the meter change-out and repair Services. All PPE will be in a clean and safe condition. PPE may include the following: Hard Hat, Overshoes or dielectric, Gloves, Chaps, Eye Protection, Respirators. Any PPE will meet applicable O.S.H.A. requirements.

d) Installers shall utilize a mobile work order management system to manage the meter deployment. The utility shall have access to the work order system with the ability to see in real time the meters scheduled to be replaced and all completed replacements on a given day.

Bermex will use VPie Work Order Management Software to manage the meter deployment.

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Work Order Management Software Designed For Water, Gas, and Electric Utilities

- Mobile Data Collection, Real-Time Dashboards, Key Performance Indicators
- Easy to Create Mobile App with Smart Fields, Take Unlimited Pictures
- Customized Digital Work Orders with Utility Logo
- Asset Management - Track from Warehouse to Installation
- Built in Routing Software to Efficiently Assign Tasks to Field Personnel
- Online Scheduler for Customers to Schedule Appointments
- Powerful Communication Platform - Email, Text, & Voice Blast
- History of all Customer Communications
- Chronological Work Order History
- Easy to Search, Sort, and Filter on All Data Fields Available
- Geo Tagged Data
- Native Mobile App - No Wi-Fi or Cellular Service
- Full Integration to CIS, Billing, other 3rd Party Software

e) The work order system shall be able to store scanned meter bar code data from AMI meters installed, meter GPS locations with sub-meter accuracy, old and new meter readings, installer field notes and a digital photograph of each meter installed.

Bermex's Work Order Management System, VPie, complies with this requirement.

f) All data transferred from the work order management system to the utility CIS must be executed using software integration.

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Bermex's Work Order Management System, VPie, complies with this requirement.

g) Installer shall report all abnormal equipment conditions discovered, including the following:

- ***Unsafe meter enclosure***
- ***Sites requiring repairs***
- ***Leak found on arrival***
- ***Evidence of tampering***
- ***Obstructed meters***
- ***Other safety concerns***

Bermex's Work Order Management System, VPie, complies with this requirement.

3.10 WARRANTY

a) Supplier shall provide and include in its base pricing a minimum standard full warranty of 60 months for network equipment and meters. This warranty shall commence at time of installation and cover 100% of the cost of all hardware including meters that serve as network devices, communications devices, network devices and other such devices as provided under this specification, without proration.

Under the proposed NaaS Solution, the network devices will be maintained and warrantied through Sensus. This will provide the City with a guaranteed network uptime to ensure a fully operational, and functional network. The electric meters have a proposed extended warranty which would provide up to 5 years of coverage.

b) Supplier shall provide and include warranty of up to two-years for communications equipment, collectors, routers and or towers not included in the original proposal, but necessary to meet the read-rates and outage reporting expectations of the City. The indices for acceptable read-rates and outage-reporting will be clearly defined within the contract to the successful proposer.

Under the proposed NaaS Solution, the network devices will be maintained and warrantied through Sensus. This will provide the City with a guaranteed network uptime to ensure a fully operational, and functional network throughout the lifetime of the system.

c) Supplier shall be responsible for device failures that exceed 3% of any given category of installed devices in a rolling 12-month period. Remedy shall be complete replacement of all potentially affected devices including field in/out costs for the affected population

A discussion between the city and the supplier would allow for a replacement program which fits the City's needs to occur in the event of a mass failure.

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4.0 DEPLOYMENT INSTALLATION

4.1 PERSONNEL

The proposer shall provide services for installation and programing. City of Mount Dora customer, employee, and subcontractor safety is of paramount importance to the City of Mount Dora. Personnel safety only supersedes environmental protection as a City concern. The City expects any Supplier or subcontract personnel on City property to observe City of Mount Dora safety and environmental processes as well as all applicable federal and state of Florida rules and regulations. Supplier's Installation subcontractor shall have a documented safety training program that all installers must adhere to. Provide this document if subcontractor has been selected. Any safety issues or accidents that occur during the term of the installation must be reported to the City immediately. Provide this proposed process.

Core & Main's Installation partner, Bermex, complies with this requirement. Please review additional details regarding Standard Operating Procedures and training found in the Appendix: Bermex Attachment.

The training must be comprehensive enough to ensure that City staff can effectively install all products offered and operate all systems and software. Areas that shall be included (but not limited to) in the training are:

- ***Meter Installation***
- ***Meter Trouble Shooting***
- ***Meter configuration***
- ***Handheld usage***
- ***Network components***
- ***Overview of the AMI product and head-end software***
- ***System operations and troubleshooting (including interaction between the endpoints and network devices, network devices, and the AMI head-end, and interaction between the AMI head-end and other system components such as MDM, OMS, and customer portal.***
- ***Identification, management, and resolution of events and alarms***
- ***Customer portal administration***
- ***BS&A billing system integration usage***

The proposed training will encompass all required fields.

Provide a typical training schedule that contains lessons, suggested attendees, and durations.

Due to the custom training format which is offered to best fit each utility's needs, further discussion would be needed to provide a schedule best fit for the City.

The number of trainees allowed for any or all types of training must be clearly defined in Proposer responses. Provide a training plan which outlines the requirements listed above. Plan should include facilities and/or resources required. At the end of training, maintenance

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personnel will understand proper installation and maintenance procedures, as well as the utilization of the AMI head-end software system. Describe the training materials to be provided for each course. Describe the availability of refresher training and future training for new employees.

The training plan for the AMI system will include both **initial and ongoing training** to ensure maintenance personnel are proficient in the proper installation, maintenance procedures, and utilization of the **AMI head-end software system**. The plan will clearly define the number of trainees allowed for each training session, with standard sessions accommodating up to **15 participants** to ensure effective instruction and hands-on practice. An increase of participants is welcome, further change in training plans may need to be adjusted to accommodate.

Training Plan Overview:

- **Initial Training**: Training will be conducted in both **classroom settings** and **field environments**, ensuring personnel are prepared for real-world applications. Classroom sessions will cover theoretical aspects, while field training will focus on practical installation and maintenance procedures.
- **Training Facilities and Resources**: The training will be conducted at **on-site facilities** provided by the utility or at **off-site locations** with appropriate resources, such as hands-on equipment for meter installation, diagnostic tools, and AMI system access for software training. All necessary resources and tools will be supplied to the trainees during the session.
- **Course Materials**: Each course will be accompanied by **detailed training materials**. These materials will also be available in digital format for easy reference.
- **Refresher and Future Training**: Refresher training sessions will be available periodically to ensure that personnel stay current on system updates and best practices. Additionally, **future training** will be provided for new employees as part of ongoing support. Both refresher and new employee training can be scheduled on demand, with access to **online training modules** for flexibility.

This comprehensive training program ensures that personnel will have the necessary knowledge and skills to operate and maintain the AMI system effectively, while also providing long-term support for continued learning and development.

OSHA required training must be provided to all installers by Supplier. Training shall include, at a minimum, electrical and arc flash hazards. Describe your overall safety program including training, audits, reporting, etc. Supplier's installation subcontractor shall have a process to ensure electric AMI meters are readable from the head-end system post-installation before leaving the site.

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Core & Main's Installation partner, Bermex, complies with this requirement. Please review additional details regarding Standard Operating Procedures and training found in the Appendix: Bermex Attachment.

The City will supply fenced storage and limited office space for Supplier's installation subcontractor. Supplier shall ensure that their installation subcontractor is provided with all training and documentation of Supplier's products needed to be able to execute safe high-quality installations of all devices. Installation labor shall include adequate supervision in the per unit price of individual meter exchange and programing listed in EXHIBIT B – Pricing. All required field installation tools including handhelds will be supplied by the Supplier or their subcontractor. The supplier will be responsible for resealing meters. Required seals and rings to be supplied by the city. Supplier and their installation subcontractor shall use handhelds capable of scanning meter module bar codes and the WOMS must include processes that ensure that the bar code of the installed meter/module is scanned post-installation such that the data export to the City billing system is ensured to contain the correct meter to customer correlation.

Bermex, the installer, will comply with these requirements.

The Supplier will need to work with the City to develop a strategy to avoid billing interference during the installation process. This may or may not require a billing blackout window. Proposer shall provide their initial input to this approach as a part of their proposal. Handheld devices must be secure. Describe the security features enabled in installer handhelds. Installers shall utilize a mobile work-order management system (WOMS) to manage the meter deployment. Describe the integration process for establishing data exchange between your WOMS system and the City's CIS system and to ensure these systems stay synchronized throughout the deployment process. Proposer should describe the premise data that the City will need to provide per premise for use by the installer. Proposer shall discuss how changes to the City's metering system data such as new accounts are communicated to the supplier for updating their WO systems during the project. Proposer shall describe any meter programming data requirements that will need to be supplied by the City. Proposer shall include in EXHIBIT B, pricing, attached as a spreadsheet for your convenience in submittal, for the appropriate number of City-owned handheld devices that will be required for the meter population in this RFP for future meter programming and troubleshooting required by City field personnel. Describe in detail the field and material management processes including:

- ***Receipt inspection material issuance to installers***
- ***Inventory control and periodic true-up***
- ***QA of field activities***
- ***RMA - Return to Utility (RTU) process – number of attempts, etc.***

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• GPS coordinates will be captured for all field-installed devices and meters and will be uploaded to the head- end system and be available for the outage visualization portal. Lat/Lon in decimal degrees are preferred with 6 decimal place accuracy.

To avoid billing interference during the installation process, we will collaborate with the City to develop a strategy that may include a **billing blackout window**. Our approach will ensure minimal disruption to the billing system by aligning meter replacements and system updates with the City's billing cycles.

The mobile **Work-Order Management System (WOMS)** will be integrated with the City's **Customer Information System (CIS)**, ensuring that work orders, installation statuses, and account updates remain synchronized. The City will provide **premise data** such as account numbers and service addresses for each location to ensure accurate installation and verification.

Field and material management will include **receipt inspection**, centralized **inventory control**, and periodic audits to ensure accurate tracking of all materials. **Quality assurance (QA)** checks will be performed on completed installations, and an **RMA process** will handle faulty equipment, allowing up to three attempts before returning items. GPS coordinates of all installed meters and devices will be captured with **6 decimal place accuracy** and uploaded to the head-end system for precise location tracking and integration with the **outage visualization portal**.

Supplier shall submit any proposed City-owned facility device attachments to the City for prior approval. Supplier's installer shall document and notify the City of any as found site anomalies that prevent the replacement of the meter (for the City to address) including:

• Broken or unsafe meter socket
• Meter pit not centered over meter
• Apparent tampering
• Safety concerns
• Sites requiring repairs
• Obstructed Meters
• Damaged electric service entrance

The Supplier will submit any proposed **City-owned facility device attachments** to the City for prior approval before installation. During the meter replacement process, the Supplier's installer will document and immediately notify the City of any **site anomalies** that prevent the replacement of the meter. These anomalies may include issues such as a **broken or unsafe meter socket**, a **meter pit not centered over the meter**, **apparent tampering**, **safety concerns**, sites requiring **repairs**, **obstructed meters**, or a **damaged electric service entrance**.

The City will be informed of these conditions so they can address the issues promptly, ensuring that the meter replacement process proceeds smoothly and safely. This proactive communication will help prevent delays and ensure that all meter installations meet safety and operational standards.

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4.2 CALL CENTER

The proposer shall provide a call center during the deployment period(s) to be used during deployment meter exchange installation. A customer complaint resolution from initial call to final issue resolution shall be outlined, integration with internal City call processes, and operational during reasonable business hours for the task. Planned notifications with door hanger(s), given opportunity for the customer to respond prior meter exchange. The call center should have visibility into the WOMS field scheduling so that they can have informed discussions with customers.

The proposer will provide a dedicated **call center** during the meter exchange deployment, operational during **reasonable business**. The call center will handle customer inquiries and complaints, following a clear resolution process from the initial call to issue resolution. **Planned notifications**, such as door hangers, will be used to inform customers and allow them to respond prior to meter exchanges. The call center will have **visibility into the WOMS field scheduling**, enabling informed discussions with customers regarding the deployment schedule.

Installation subcontractor shall obtain before and after photos for all meters. Photos shall include clear views of meter register reading and serial number. Proposer shall describe the file naming convention and process for capturing and storing these photos. Photos will be provided to the City on mutually agreeable secure media at the end of the project. All photos will be date and time stamped and geotagged. Installer will purge all City of Mount Dora specific data including photos from their system and handhelds at the end of the project. Supplier will submit an initial acceptance test plan to allow the city to verify the functionality defined in this specification inclusive of integrations to City systems as specified herein.

Bermex will obtain **before and after photos** for all meters, ensuring that each photo clearly shows the **meter register reading** and **serial number**. These photos will be **date and time stamped** and **geotagged** for accuracy and tracking purposes. Photos will be securely captured and stored using handheld devices, and provided to the City on **mutually agreeable secure media** at the end of the project. All photos and City-specific data will be purged from the installer's system and handheld devices upon project completion. Additionally, the Supplier will submit an **initial acceptance test plan**, allowing the City to verify the functionality as defined in the specification, including integrations with the City's systems.

Supplier will provide adequate project support personnel for the duration of the project including a project manager. Any files that must be imported into the head-end system to allow the system to recognize and register meters as they are installed are the responsibility of the Supplier and/or their installation subcontractor. Training for the City must include managing this process before & after the project is complete. Supplier will support City business redesign in support of new processes that will exist as part of going to AMI as well

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as revisions required to existing City processes. Proposer will include pricing for these services in their AMI proposal in EXHIBIT B.

Core & Main will provide sufficient project support personnel, including a **project manager**, for the duration of the project. Core & Main and Bermex will be responsible for supplying any necessary files to be transferred into the head-end system to ensure the system recognizes and registers meters as they are installed. Training will be provided to the City on managing this process both during and after project completion. Additionally, the Supplier will support the City's **business process redesign** to accommodate new workflows resulting from the AMI system, as well as any revisions to existing processes. Pricing for these services will be included in the Supplier's AMI proposal in **EXHIBIT B**.

4.3 METER DEMONSTRATION BOARD

The meter demonstration board defined previously will be used to support initial acceptance testing. As such, Supplier should ensure this board is populated with all devices needed to fully test the system. If any special test equipment is needed to exercise a system function, supplier shall loan such devices to the City for the test duration. Initial acceptance testing will be performed successfully prior to the deployment of any field hardware. It is the City's intent that meters configured to their requirements including nameplates be tested as a part of this acceptance test. Supplier must ensure meters meeting these requirements are populated on the meter demonstration board. Supplier will submit a final acceptance test plan to allow the city to verify the functionality defined in this specification inclusive of integrations to City systems as specified herein with the majority of field meters deployed. Final acceptance testing will be conducted when 95% or more of field meters are deployed and shall confirm operational readiness of the system and resolution of any outstanding issues from the initial acceptance testing. As noted in the Pricing section, system payments are governed by passing the initial and final acceptance testing. Field device and installation costs are governed by mutually agreed upon % completions.

The referenced Meter Demonstration Board will be provided to the City at an agreed upon pricing. This board will include all necessary products to demonstrate a fully understandable idea of the system to both residents and utility personnel.

All scrap meters are to be returned to the city. The City will be responsible for disposal including batteries. Any related permits are the responsibility of the City. Identify and describe Proposer's prior experience with the planned installation subcontractor. Note that the location data used to create the following figures and maps are not included in this document but will be provided as a separate file for Proposer's network design and planning.

All **scrap meters** will be returned to the City, which will assume responsibility for disposal, including handling the batteries and obtaining any related permits.

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TAB 3 – Responses to Exhibit A

Please see attached spreadsheet for Core & Main's response to Exhibit A.

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TAB 4 – Response to Exhibit B (Pricing)

Please see attached spreadsheet for Core & Main's response to Exhibit B.

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EXHIBIT B

RFP #24-EL-014
ADVANCED METERING INFRASTRUCTURE (AMI) SYSTEM (REBID)
PRICING

Item	Area	Description	Quantity Anticipated	Unit Price	Total	Comments
	AMI SOFTWARE INTEGRATION					
1	Meter Data Management	MDM License Fee and Integration Fee				Included in 6.
2	CIS	Mount Dora CIS Integration to MDM				Included in 6.
3	Customer Portal	New Portal		##########	$ 111,500.00	Pricing Includes: Annual Cost and Implementation Cost
4	Outage Management	OMS License Fee and Integration Fee				Included in 6.
5	Analytics Software	Specify Functionality				
6	Other (specify)		1	$ 41,250.00	$ 41,250.00	FEE INCLUDES ALL: 1.BS&A CIS – Sensus Analytics (SA) DataSync and Billing integrations 2.On-demand reads and Remote Connect/Disconnect will be from SA 3.Outage/Restoration Interfaces for Milsoft OMS 4.Meter Readings for Sprypoint Customer Portal
7	Other (specify)					
8	Other (specify)					
		SOFTWARE LICENSE AND INTEGRATION PRICING - SUB TOTAL			$	152,750.00
	TRAINING					
9	Training	Proposer Define	1	$ 14,722.22	$ 14,722.22	FEE INCLUDES ALL: - AMI Core Education provided by Sensus - Sensus Analytics Training Onsite provided by Sensus - EasyLink Training provided by Sensus
10	Training	Proposer Define				
11	Training	Proposer Define				
13	Training	Proposer Define				
		TRAINING - SUB-TOTAL			$	14,722.22

Item	Area	Description	Quantity Anticipated	Unit Price	Total	Comments
14	AMI Electric Meter	Form 1S	150	$ 235.86	$ 35,378.57	ELEC MTR, 1S, CL200, 120V, STRATUS IQ, REMOTE DISCONNECT
16	AMI Electric Meter	Form 2 S - 200 amp Self Contained with Remote Disconnect	5502	$ 204.36	$1,124,373.00	ELEC MTR, 2S, CL200, 240V, STRATUS IQ, REMOTE DISCONNECT
16	AMI Electric Meter	Form 2S CL320 - 400 amp Self Contained	300	$ 571.43	$ 171,428.57	ELEC MTR, 2S, CL320, 480V, ACLARA i210+c, REMOTE DISCONNECT
15	AMI Electric Meter	Form 12S	200	$ 222.33	$ 44,465.71	ELEC MTR, 12S, CL200, 120V, STRATUS IQ, REMOTE DISCONNECT
17	AMI Electric Meter	Form 9S	123	$ 612.56	$ 75,344.53	ELEC MTR, 9S, CL20, 480V, ACLARA KV2C, REACTIVE

18	AMI Electric Meter	Form 16 S	400	$ 612.56	$ 245,022.86	ELEC MTR, 16S, CL200, 480V, ACLARA KV2C, REACTIVE
19	AMI Electric Meter	Form 45 S	25	$ 612.56	$ 15,313.93	ELEC MTR, 45S, CL20, 480V, ACLARA KV2C, REACTIVE
				ELECTRIC METERS - SUB-TOTAL	$	1,711,327.17

NETWORK DEVICE PRICING

Item	Area	Description	Quantity Anticipated	Unit Price	Total	Comments
21	Network	Repeaters				All network devices are provided through NaaS.
22	Network	Other				
23	Network	Other				
24	Network	Other				
25	Network	Other				
26		Other				
				NETWORK DEVICES - SUB-TOTAL	$	

METER AND NETWORK INSTALLATION - (INCLUDES PROGRAMING)

Item	Area	Description	Quantity Anticipated	Unit Price	Total	Comments
27	Meter Install	Residential - Self contained Meters	6050	$ 69.64	$ 421,339.29	Like for like install.
28	Meter Install	Commercial - Self contained	1000	$ 92.50	$ 92,500.00	Like for like install.
29	Installation	Network Collector				Included in NaaS
30	Installation	Network Repeater				Included in NaaS
				INSTALLATION - SUB-TOTAL	$	513,839.29

MISCELLANEOUS AMI EQUIPMENT

Item	Area	Description	Quantity Anticipated	Unit Price	Total	Comments
31	Programing	Handheld Unit to Read / Trouble shoot / meters locally	2	$ 800.00	$ 1,600.00	Android Tablet loaded with Sensus FieldLogic Tools software. May be replaced by existing City handheld, depending on type,
32	Portable vehicle affixed Radio Reader	Read existing Itron ERT Electric / Water radios, and new Electric Point to Multipoint Meters	1	$ 47,052.10	$ 47,052.10	TOTAL FEE INCLUDES: - 1 EasyLink with ToughBook - 1 EasyLink Server License - 1 WorkSpace License - 1 WorkBook License - EasyLink Server Standard Set
33	Meter Demonstration	Electric Meter	1	$ 13,000.00	$ 13,000.00	
				INSTALLATION - SUB-TOTAL	$	61,652.10

MANAGED SOFTWARE SERVICES

These services represent recurring pricing for annual service fees, any and all costs to the City for the managed service including any annual license fees, etc. Proposers are encouraged to provide supportive comments or clarifications on pricing structure in the spaces provided

Item			Comments
34	Year 1	$ 15,527.41	EasyLink Annual Software Support and Hosting Fee
35	Year 2	$ 15,993.23	EasyLink Annual Software Support and Hosting Fee
36	Year 3	$ 16,473.02	EasyLink Annual Software Support and Hosting Fee
37	Year 4	$ 16,967.21	EasyLink Annual Software Support and Hosting Fee expected to be removed following 100% FlexNet migration away from existing Itron ERT for both electric and water.
38	Year 5	$ 17,476.24	EasyLink Annual Software Support and Hosting Fee expected to be removed following 100% FlexNet migration away from existing Itron ERT for both electric and water.
39	Year 6	$ 18,000.79	EasyLink Annual Software Support and Hosting Fee expected to be removed following 100% FlexNet migration away from existing Itron ERT for both electric and water.

40	Year 7	$	18,540.53	EasyLink Annual Software Support and Hosting Fee expected to be removed following 100% FlexNet migration away from existing Itron ERT for both electric and water.
41	Year 8	$	19,096.76	EasyLink Annual Software Support and Hosting Fee expected to be removed following 100% FlexNet migration away from existing Itron ERT for both electric and water.
42	Year 9	$	19,669.66	EasyLink Annual Software Support and Hosting Fee expected to be removed following 100% FlexNet migration away from existing Itron ERT for both electric and water.
43	Year 10	$	20,259.75	EasyLink Annual Software Support and Hosting Fee expected to be removed following 100% FlexNet migration away from existing Itron ERT for both electric and water.
			MANAGED SOFTWARE SERVICES (TOTAL FOR 10 YEARS) SUB-TOTAL	$ 178,004.59

NETWORK MANAGED SERVICES

These services represent recurring pricing for annual service fees, any and all costs to the City for the managed service including any annual license fees, etc. Proposers are encouraged to provide supportive comments or clarifications on pricing structure.

Item		Price		Comments
44	Year 1	$	135,153.87	TOTAL INCLUDES THE FOLLOWING SERVICES AND ASSUMPTIONS: - NaaS Mobilization Fee - NaaS Annual Fee Assumes 6700 active endpoints by end of year 1.
45	Year 2	$	102,239.47	NaaS Annual Fee Assumes 12,700 active endpoints by end of year 2.
46	Year 3	$	158,592.11	NaaS Annual Fee Assumes 19,700 active endpoints by end of year 3.
47	Year 4	$	165,423.68	NaaS Annual Fee Assumes 19,950 active endpoints by end of year 4.
48	Year 5	$	172,521.05	NaaS Annual Fee Assumes 20,200 active endpoints by end of year 5.
49	Year 6	$	179,896.05	NaaS Annual Fee Assumes 20,450 active endpoints by end of year 6.
50	Year 7	$	187,557.89	NaaS Annual Fee Assumes 20,700 active endpoints by end of year 7.
51	Year 8	$	195,518.42	NaaS Annual Fee Assumes 20,950 active endpoints by end of year 8.
52	Year 9	$	203,786.84	NaaS Annual Fee Assumes 21,200 active endpoints by end of year 9.
53	Year 10	$	212,375.00	NaaS Annual Fee Assumes 21,450 active endpoints by end of year 10.
			NETWORK SERVICES (TOTAL FOR 10 YEARS) - SUB-TOTAL	$ 1,713,064.39
			Grand Total **(All Sub-Totals Combined)**	$ 4,345,359.76

MISCELLANEOUS AND HOURLY RATES

Pricing for ad hoc or consulting services that may be requested by the City that are out of scope of the AMI project.

Item	Description		Price
54	Managed Field Communication Device, (Totalizer / Recorder Endpoint)		$
55	List Title	Professional Services	$ 470 per hour
56	List Title		$ per hour
57	List Title		$ per hour
58	List Title		$ per hour
59	List Title		$ per hour
60	List Title		$ per hour

EXTENDED WARRANTY

Pricing for extended warranty of individual items.

61	List Device	ELEC MTR, 1S, CL200, 120V, STRATUS IQ, REMOTE DISCONNECT - **PER YEAR, UP TO 4 ADDITIONAL YEARS - PER UNIT**	$	9.43
62	List Device	ELEC MTR, 2S, CL200, 240V, STRATUS IQ, REMOTE DISCONNECT - **PER YEAR, UP TO 4 ADDITIONAL YEARS - PER UNIT**	$	8.17
63	List Device	ELEC MTR, 2S, CL320, 480V, ACLARA i210+c, REMOTE DISCONNECT - **PER YEAR, UP TO 4 ADDITIONAL YEARS - PER UNIT**	$	28.57

64	List Device	ELEC MTR, 12S, CL200, 120V, STRATUS IQ, REMOTE DISCONNECT - **PER YEAR, UP TO 4 ADDITIONAL YEARS - PER UNIT**	$	8.90
65	List Device	ELEC MTR, 9S, CL20, 480V, ACLARA KV2C, REACTIVE - **PER YEAR, UP TO 4 ADDITIONAL YEARS - PER**	$	30.63
66	List Device	ELEC MTR, 16S, CL200, 480V, ACLARA KV2C, REACTIVE - **PER YEAR, UP TO 4 ADDITIONAL YEARS - PER**	$	30.63
67	List Device	ELEC MTR, 45S, CL20, 480V, ACLARA KV2C, REACTIVE - **PER YEAR, UP TO 4 ADDITIONAL YEARS - PER**	$	30.63

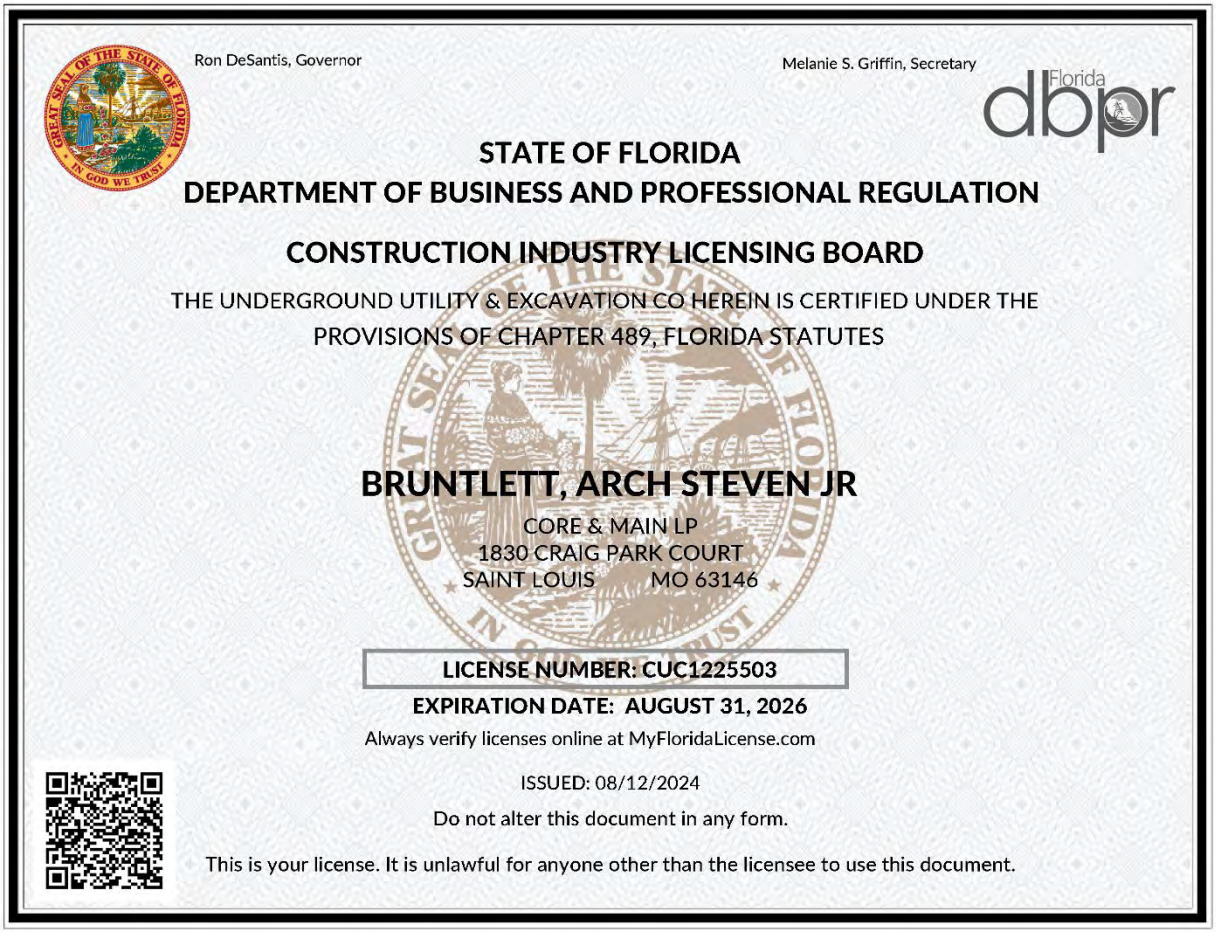
MISCELLANEOUS ADDITIONAL PROPOSER ITEMS

Item	Description	Price
68	Project Management	$ 72,000.00
69	Sensus CommandLink II - Provides connection from handheld devices to meter SmartPoint for activation/troubleshooting. (Reccommended Quantity of 2)	$882.99 Each
70	USB FlexNet Microtransceiver - Provides connection to meter from downloaded software using handheld device. (Recommended Quantity of 2)	$422.03 Each
71		$
72		$
73		$
74		$
75		$
76		$

TAB 5 – Licenses, Certificates, and References

LICENSES & CERTIFICATES:

FLORIDA CONTRACTOR'S LICENSE:



Ron DeSantis, Governor

Melanie S. Griffin, Secretary

Florida dbpr

STATE OF FLORIDA
DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION

CONSTRUCTION INDUSTRY LICENSING BOARD

THE UNDERGROUND UTILITY & EXCAVATION CO HEREIN IS CERTIFIED UNDER THE PROVISIONS OF CHAPTER 489, FLORIDA STATUTES

BRUNTLETT, ARCH STEVEN JR

CORE & MAIN LP
1830 CRAIG PARK COURT
SAINT LOUIS MO 63146

LICENSE NUMBER: CUC1225503
EXPIRATION DATE: AUGUST 31, 2026

Always verify licenses online at MyFloridaLicense.com

ISSUED: 08/12/2024

Do not alter this document in any form.

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ORLANDO BRANCH – LOCAL BUSINESS TAX RECEIPT

2023 - 2024

CITY OF ORLANDO
PERMITTING SERVICES

Local Business Tax Receipt

(Formerly known as "Business License " changed per state law HB1269-2006)

NOTICE-THIS TAX RECEIPT ONLY EVIDENCES PAYMENT OF THE LOCAL BUSINESS TAX PURSUANT TO CH.205, FLORIDA STATUTES. IT DOES NOT PERMIT THE HOLDER TO OPERATE IN VIOLATION OF ANY CITY, STATE, OR FEDERAL LAW. CITY PERMITTING MUST BE NOTIFIED OF ANY MATERIAL CHANGE TO THE INFORMATION FOUND HEREIN BELOW. THIS RECEIPT DOES NOT CONSTITUTE AN ENDORSEMENT OR APPROVAL OF THE HOLDER'S SKILL OR COMPETENTCY.

Business Name
CORE & MAIN LP
C/O DUCHARME MCMILLEN ASSOCIATES
PO BOX 80600
INDIANAPOLIS, IN 46280

Case Number: BUS0021331-001

Issued Date: 10/02/2023

Expiration Date: 09/30/2024

Business type(s):

Description	Year
MERCNT 5096 WSALE MACHINERY	2024

Business Owner
CORE & MAIN LP

Business Location
590 FERGUSON DR
ORLANDO, FL

CITY OF ORLANDO
PERMITTING SERVICES

Local Business Tax Receipt
City Hall, 400 South Orange Avenue, First Floor
Post Office Box 4990
Orlando, Florida 32802-4990

Phone: 407.246.2204 Fax: 407.246.3420

Email: businesstax@orlando.gov

Prompt! Interactive Voice Response System: 407.246.4444
Visit our website: orlando.gov/permits

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FLORIDA BUSINESS REGISTRATION:

NOV. 22. 2004 11:34AM CORPORATION SVC CO NO. 872 P. 2

H04000232505 3

CERTIFICATE OF LIMITED PARTNERSHIP

OF

HUGHES WATER & SEWER, LTD.

(a Florida limited partnership)

The undersigned, desiring to form a limited partnership pursuant to the laws of the State of Florida, does hereby certify as follows:

1. Name. The name of the limited partnership is as follows:

Hughes Water & Sewer, Ltd.

2. Address. The street address of the principal place of business and the mailing address for the limited partnership are as follows:

One Hughes Way
Orlando, FL 32805

3. Registered Agent. The address of the office and the name and address of the agent for service of process required to be maintained by Section 620.105, Florida Statutes, are as follows:

Corporation Service Company
1201 Hayes Street
Tallahassee, FL 32301

4. General Partner. The name and business address of the general partner of the limited partnership are as follows:

Hughes GP & Management, Inc.
One Hughes Way
Orlando, FL 32805

F04-1125

5. Termination. The latest date upon which the limited partnership is to dissolve is December 31, 2054.

04 NOV 22 PM 1:59

DIVISION OF CORPORATIONS

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H04000232505 3

Under penalties of perjury, the undersigned declares that it has read the foregoing and knows the contents thereof and that the facts stated therein are true and correct.

Signed this 19th day of November, 2004.

GENERAL PARTNER:

HUGHES GP & MANAGEMENT, INC.

By: _____

Name: John Z. Paré

Title: Secretary

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FLORIDA DEPARTMENT OF STATE
DIVISION OF CORPORATIONS

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NOV. 22. 2004 11:34AM CORPORATION SVC CO NO. 872 P. 4

#04000232505 3

ACCEPTANCE OF DESIGNATION AS REGISTERED AGENT AND AGENT FOR SERVICE OF PROCESS

The undersigned, having been designated the Agent for Service of Process, pursuant to Section 620.105, Florida Statutes, and Registered Agent, pursuant to Section 620.192, Florida Statutes, of Hughes Water & Sewer, Ltd., a limited partnership to be formed concurrently herewith under the Florida Revised Uniform Limited Partnership Act (1986), does hereby accept such designation and the obligations provided for in Sections 620.105 and 620.192, Florida Statutes.

CORPORATION SERVICE COMPANY

Dated: 11/22, 2004 By: Deborah D. Skipper

Name: Deborah D. Skipper
Asst. V. Pres.

Title:

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DIVISION OF CORPORATIONS
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AFFIDAVIT OF CAPITAL CONTRIBUTIONS

The undersigned, Hughes GP & Management, Inc., the sole general partner of Hughes Water & Sewer, Ltd., a Florida limited partnership, certifies:

1. The amount of capital contributions to date of the limited partners is $0.

2. The total amount of capital anticipated to be contributed by the limited partners at this time totals $1,000.

Signed this 19th day of November, 2004.

FURTHER AFFIANT SAYETH NOT.

Under the penalties of perjury, the undersigned declares that it has read the foregoing and knows the contents thereof and that the facts stated herein are true and correct.

GENERAL PARTNER:

HUGHES GP & MANAGEMENT, INC.

By: _____

Name: John Z. Paré

Title: Secretary

#2300510_v3

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DIVISION OF CORPORATIONS

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CERTIFICATE OF AMENDMENT TO

CERTIFICATE OF LIMITED PARTNERSHIP OF

HUGHES WATER & SEWER, LTD.

Pursuant to the provisions of section 620.1202, Florida Statutes, HUGHES WATER & SEWER, LTD., a Florida limited partnership, adopts the following Certificate of Amendment to its Certificate of Limited Partnership:

FIRST: The name of the limited partnership is HUGHES WATER & SEWER, LTD.

SECOND: The limited partnership's Certificate of Limited Partnership was filed with the Florida Department of State on November 22, 2004.

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DIVISION OF CORPORATIONS

THIRD: Section 1 of the Certificate of Limited Partnership of the limited partnership is hereby amended in its entirety to read as follows:

1. Name. The name of the limited partnership is as follows:

HD Supply Waterworks, Ltd.

FOURTH: This Certificate of Amendment shall be effective at the time of its filing with the Florida Department of State.

The undersigned general partner of the limited partnership hereby executes this Certificate of Amendment to the Certificate of Limited Partnership this 24th day of October, 2006.

GENERAL PARTNER:

HUGHES GP & MANAGEMENT, INC.,
a Delaware corporation

By: _____
David Bearman, Vice President

#4100468_v2

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SECRETARY OF STATE
TALLAHASSEE, FLORIDA

CERTIFICATE OF AMENDMENT TO CERTIFICATE OF LIMITED PARTNERSHIP OF HD Supply Waterworks, Ltd.

Pursuant to the provisions of section 620.109, Florida Statutes, this Florida limited partnership, whose certificate was filed with the Florida Department of State on November 22, 2004, adopts the following certificate of amendment to its certificate of limited partnership:

FIRST: Amendment(s): (indicate article number(s) being amended, added, or deleted)
2. Address. The street address of the principal place of business and the mailing address for the limited partnership are as follows:

3100 Cumberland Blvd., Suite 1700
Atlanta, GA 30339

4. General Partner. The name and business address of the general partner of the limited partnership are as follows:

HD Supply GP & Management, Inc.
3100 Cumberland Blvd., Suite 1700 Atlanta, GA 30339

SECOND: This certificate of amendment shall be effective at the time of its filing with the Florida Department of State.

THIRD: Signature(s)
The undersigned current general partner executed this document on September 29, 2009.

Signature(s) of new general partner(s), if applicable:

HD Supply GP & Management, Inc.
by S. Simons as attorney-in-fact

Corporate Creations International Inc.
11380 Prosperity Farms Road #221E
Palm Beach Gardens FL 33410
(561) 694-8107

H09000209663

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CERTIFICATE OF AMENDMENT
TO
CERTIFICATE OF LIMITED PARTNERSHIP
OF

HD SUPPLY WATERWORKS, LTD.
Insert name currently on file with Florida Department of State

Pursuant to the provisions of section 620.1202, Florida Statutes, this Florida limited partnership or limited liability limited partnership, whose certificate was filed with the Florida Department of State on **11/22/04**, assigned Florida document number **A04000001840**, adopts the following certificate of amendment to its certificate of limited partnership.

This amendment is submitted to amend the following:

A. If amending name, enter the new name of the limited partnership or limited liability limited partnership here:

N/A
New name must be distinguishable and contain an acceptable suffix.

Acceptable Limited Partnership suffixes: Limited Partnership, Limited, L.P., LP, or Ltd.
Acceptable Limited Liability Limited Partnership suffixes: Limited Liability Limited Partnership, L.L.L.P. or LLLP.

B. If amending mailing address and/or principal office address, enter new mailing address and/or principal office address here:

New Principal Office Address: N/A
(Must be STREET address)

New Mailing Address:
(May be post office box)

C. If amending the registered agent and/or registered office address on our records, enter the name of the new registered agent and/or the new registered office address here:

Name of New Registered Agent: N/A

New Registered Office Address:
Enter Florida street address

_____, Florida _____
City *Zip Code*

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New Registered Agent's Signature, if changing Registered Agent:

I hereby accept the appointment as registered agent and agree to act in this capacity. I further agree to comply with the provisions of all statutes relative to the proper and complete performance of my duties, and I am familiar with and accept the obligations of my position as registered agent.

_____

If Changing Registered Agent, Signature of New Registered Agent

D. If amending the general partner(s), enter the name and business address of each general partner being added or removed from our records:

Title	Name	Address	Type of Action
GP	HD Supply Waterworks Group, LLC	3100 Cumberland Blvd. Suite 1700 Atlanta, Georgia 30339	■ Add ❑ Remove

E. If the limited partnership or limited liability limited partnership is amending its "limited liability limited partnership" status, enter change here:

❑ **This Limited Partnership hereby elects to be a "Limited Liability Limited Partnership."**

❑ **This Limited Partnership hereby removes its "Limited Liability Limited Partnership" status.**

(NOTE: If adding or removing" limited liability limited partnership" status, all general partners must sign this amendment.

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F. If amending any other information, enter change(s) here: *(Attach additional sheets, if necessary.)*

N/A

Effective date, if other than the date of filing: August 1, 2017

(Effective date cannot be prior to nor more than 90 days after the date this document is filed by the Florida Department of State.)

Note: If the date inserted in this block does not meet the applicable statutory filing requirements, this date will not be listed as the document's effective date on the Department of State's records.

Signature(s) of a general partner or all general partners*:

(*NOTE: Only one current general partner is required to sign this document unless the limited partnership is adding or removing a "limited liability limited partnership" election statement. Chapter 620, F.S., requires all general partners to sign when adding or removing a "limited liability limited partnership" election statement.)

CD&R Plumb Buyer, LLC
Current General Partner

By: Theresa A. Gore

Name: Theresa A. Gore

Title: Vice President and Secretary

Signature(s) of all new or dissociating general partner(s), if any:

HD Supply Waterworks Group, LLC
New General Partner

By: Theresa A. Gore

Name: Theresa A. Gore

Title: Vice President and Secretary

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DIVISION OF CORPORATIONS

Filing Fee:	$52.50
Certified Copy (optional):	$52.50
Certificate of Status (optional):	$8.75

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State of Florida

Department of State

I certify the attached is a true and correct copy of the Certificate of Amendment, filed on August 29, 2017, for HD SUPPLY WATERWORKS, LTD. which changed its name to CORE & MAIN LP, a Florida limited partnership or limited liability limited partnership, as shown by the records of this office.

I further certify the document was electronically received under FAX audit number H17000232454. This certificate is issued in accordance with section 15.16, Florida Statutes, and authenticated by the code noted below

The document number of this limited partnership is A04000001840.

Authentication Code: 817A00017874-083017-A04000001840-1/1

Given under my hand and the
Great Seal of the State of Florida,
at Tallahassee, the Capital, this the
Thirtieth day of August, 2017

Ken Detzner
Secretary of State

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FLORIDA DEPARTMENT OF STATE
Division of Corporations

August 30, 2017

HOLLAND & KNIGHT

,

Re: Document Number A04000001840

The Certificate of Amendment for HD SUPPLY WATERWORKS, LTD. which changed its name to CORE & MAIN LP, a Florida limited partnership or limited liability limited partnership, was filed on August 29, 2017.

The certification you requested is enclosed. To be official, the certification for a certified copy must be attached to the original document that was electronically submitted and filed under FAX audit number H17000232454.

Should you have any questions concerning this matter, please telephone (850) 245-6051, the Registration Section.

Michelle Milligan
Senior Section Administrator
Division of Corporations Letter Number: 817A00017874

P.O BOX 6327 – Tallahassee, Florida 32314

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CERTIFICATE OF AMENDMENT
TO
CERTIFICATE OF LIMITED PARTNERSHIP
OF

HD SUPPLY WATERWORKS, LTD.
Insert name currently on file with Florida Department of State

Pursuant to the provisions of section 620.1202, Florida Statutes, this Florida limited partnership or limited liability limited partnership, whose certificate was filed with the Florida Department of State on 11/22/2004, assigned Florida document number A04000001840, adopts the following certificate of amendment to its certificate of limited partnership.

This amendment is submitted to amend the following:

A. If amending name, enter the new name of the limited partnership or limited liability limited partnership here:

CORE & MAIN LP
New name must be distinguishable and contain an acceptable suffix.

Acceptable Limited Partnership suffixes: Limited Partnership, Limited, L.P., LP, or Ltd.
Acceptable Limited Liability Limited Partnership suffixes: Limited Liability Limited Partnership, L.L.L.P. or LLLP.

B. If amending mailing address and/or principal office address, enter new mailing address and/or principal office address here:

New Principal Office Address: N/A
(Must be STREET address)

New Mailing Address:
(May be post office box)

C. If amending the registered agent and/or registered office address on our records, enter the name of the new registered agent and/or the new registered office address here:

Name of New Registered Agent: N/A

New Registered Office Address:
Enter Florida street address

City, Florida *Zip Code*

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New Registered Agent's Signature, if changing Registered Agent:

I hereby accept the appointment as registered agent and agree to act in this capacity. I further agree to comply with the provisions of all statutes relative to the proper and complete performance of my duties, and I am familiar with and accept the obligations of my position as registered agent.

_____
If Changing Registered Agent, Signature of New Registered Agent

D. If amending the general partner(s), enter the name and business address of each general partner being added or removed from our records:

Title	Name	Address	Type of Action
N/A			❑ Add ❑ Remove
			❑ Add ❑ Remove
			❑ Add ❑ Remove
			❑ Add ❑ Remove
			❑ Add ❑ Remove
			❑ Add ❑ Remove

E. If the limited partnership or limited liability limited partnership is amending its "limited liability limited partnership" status, enter change here:

❑ **This Limited Partnership hereby elects to be a "Limited Liability Limited Partnership."**

❑ **This Limited Partnership hereby removes its "Limited Liability Limited Partnership" status.**

(NOTE: If adding or removing" limited liability limited partnership" status, all general partners must sign this amendment.)

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F. If amending any other information, enter change(s) here: *(Attach additional sheets, if necessary.)*

Effective date, if other than the date of filing:
(Effective date cannot be prior to nor more than 90 days after the date this document is filed by the Florida Department of State.)
Note: If the date inserted in this block does not meet the applicable statutory filing requirements, this date will not be listed as the document's effective date on the Department of State's records.

Signature(s) of a general partner or all general partners*:

(*NOTE: Only one current general partner is required to sign this document unless the limited partnership is adding or removing a "limited liability limited partnership" election statement. Chapter 620, F.S., requires all general partners to sign when adding or removing a "limited liability limited partnership" election statement.)

CORE & MAIN GP, LLC

By:

Name: Theresa A. Gore, CD&R WW Holdings, LP

Title: Manager

CD&R PLUMB BUYER, LLC

By:

Name: Theresa A. Gore, CD&R WW Holdings, LP

Title: Manager

Signature(s) of all new or dissociating general partner(s), if any:

Filing Fee:	**$52.50**
Certified Copy (optional):	**$52.50**
Certificate of Status (optional):	**$8.75**

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8/5/2019 Division of Corporations

A04000001840

Florida Department of State
Division of Corporations
Electronic Filing Cover Sheet

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H19000233403ABCZ

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To:
Division of Corporations
Fax Number : (850)617-6383

From:
Account Name : HOLLAND & KNIGHT
Account Number : 075350000340
Phone : (407)425-8500
Fax Number : (407)244-5288

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2019 AUG -5 P 12:18
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TALLAHASSEE, FLORIDA

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LP/LLLP AMENDMENT/RESTATEMENT/CORRECTION
CORE & MAIN LP

Certificate of Status	0
Certified Copy	1
Page Count	02
Estimated Charge	$105.00

8-6-19

Electronic Filing Menu Corporate Filing Menu Help

https://efile.sunbiz.org/scripts/efilcovr.exe 1/1

CERTIFICATE OF AMENDMENT
TO
CERTIFICATE OF LIMITED PARTNERSHIP
OF
CORE & MAIN LP

FILED
2019 AUG -5 P 6 12
SECRETARY OF STATE
TALLAHASSEE, FLORIDA

Pursuant to the provisions of section 620.1202, Florida Statutes, this Florida limited partnership, whose certificate was filed with the Florida Department of State on November 22, 2004, adopts the following Certificate of Amendment to its Certificate of Limited Partnership.

FIRST: The name of the limited partnership as identified in the records of the Florida Department of State is CORE & MAIN LP. The limited partnership's Florida document number is: A04000001840 .

SECOND: Article 4 of the Certificate of Limited Partnership of Core & Main LP (the Company) is hereby amended to reflect the admission of a new General Partner Core & Main Intermediate GP, LLC and the dissociation of the previous General Partner Core & Main Midco, LLC to read:

"Article 4 – General Partners

The name and street address of the General Partner of the Company is:

Core & Main Intermediate GP, LLC
1830 Craig Park Court
St. Louis, Missouri 63146

THIRD: This Certificate of Amendment shall be effective as of the "date and time" of its filing with the Florida Department of State.

[Signature Page to follow]

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Signatures of current general partner:

CORE & MAIN MIDCO, LLC, a Delaware limited liability company

By its sole member, Core & Main Holdings, LP
By its general partner, CD&R Plumb Buyer, LLC

By:
Name: Theresa A. Gore
Title: Vice President and Secretary

By its general partner, Core & Main GP, LLC

By:
Name: Theresa A. Gore
Title: Vice President and Secretary

Signature of new general partner:

CORE & MAIN INTERMEDIATE GP, LLC, a Delaware limited liability company

By its sole member, Core & Main Midco, LLC
By its sole member, Core & Main Holdings, LP
By its general partner, CD&R Plumb Buyer, LLC

By:
Name: Theresa A. Gore
Title: Vice President and Secretary

By its general partner, Core & Main GP, LLC

By:
Name: Theresa A. Gore
Title: Vice President and Secretary

[*Signature page to Certificate of Amendment to Certificate of Limited Partnership of Core & Main, LP*]

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Division of Corporations

A04000001840

Florida Department of State
Division of Corporations
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To:
Division of Corporations
Fax Number : (850)617-6380

From:
Account Name : HOLLAND & KNIGHT
Account Number : C75350000340
Phone : (407)425-8500
Fax Number : (407)244-5288

Enter the email address for this business entity to be used for future annual report mailings. Enter only one email address please.

Email Address: _____

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SECRETARY OF STATE
TALLAHASSEE, FLORIDA

MERGER OR SHARE EXCHANGE
Core & Main LP

Certificate of Status	0
Certified Copy	1
Page Count	03
Estimated Charge	$86.25

Electronic Filing Menu Corporate Filing Menu Help

LTS 4-7-2020

https://efile.sunbiz.org/scripts/efilcovr.exe[4/7/2020 9:20:32 AM]

REFERENCES:

Please see references provided in the required References Form. See supplemental references below.

BERMEX

1. TECO Energy - Delivery and installation of 380,000 endpoints throughout the state of Florida

Chris Barrington
904-759-5811
cbarrington@tecoenergy.com

2. Riviera Utilities- Alabama - Delivery and Installation of 500 Gas, Electric and Water meters during the pilot program and the remaining 53,000 in Spring 2023

Trever Reaves
251-269-3946

3. Cobb EMC- Georgia - Installation of 30,000 Electric Meters, Bermex has an annual maintenance contract with Cobb EMC to perform tri-annual inspections of all 200,000 residential and commercial customers. Services include meter audits, investigations and routine maintenance including switching out meters as necessary for the utility.

Jim Gantt
678-355-3112
jim.gantt@cobbemc.com

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Florida Keys Aqueduct Authority

Customer name:	Florida Keys Aqueduct Authority, FL
Number of Accounts	57,000
Services Billed	Water & Wastewater
Date System is going live	June 2020 – SpryMobile October 2022 - SpryEngage
Project Duration	3 months – SpryMobile 12 months – SpryEngage
Customer contact:	Jennifer Fernandez
Customer phone number:	(305) 809-2681
Customer email address	jfernandez@fkaa.com
Delivery Model	Software as a Service (SaaS)
System which Solution Replaced	Not applicable
SpryPoint Products Used	SpryMobile - Mobile Field Service SpryBackflow – Cross Connection Control SpryEngage - Customer Experience Platform

Describe Nature of Project and Services Provided to This Client:

In March 2020, FKAA selected SpryMobile for Mobile Field to manage all Field Activity across the entire Utility. FKAA went live in June of 2020.

In July 2021 FKAA selected SpryEngage for their new Customer Experience platform. Implementation underway.

- **SpryMobile** – Mobile Field Service
- **SpryEngage** – Customer Experience Platform

In September 2022 FKAA selected SpryBackflow

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Jamestown BPU

Customer name:	Jamestown BPU
Number of Accounts	21,000
Services Billed	Electric, Water & Sewer
Go-live	2019 – SpryEngage 2018 - SpryMobile
Project duration	5 months – SpryEngage 3 months – SpryMobile
Customer contact:	Frank Galeazzo
Customer phone number:	(716) 661-1671
Customer email address	fgaleazzo@jamestownbpu.com
Delivery Model	Software as a Service (SaaS)
System which Solution Replaced	Harris Computers - Cogsdale CSM
SpryPoint Products Used	• **SpryEngage –** Customer Engagement Platform • **SpryMobile –** Mobile Field Service • **SpryMobile –** Work Orders & Asset Management • **SpryBackflow –** Cross Connection Control

Describe Nature of Project and Services Provided to This Client:

In 2018, SpryPoint was initially selected by Jamestown to implement SpryMobile for Service Orders as well as for Work Orders & Asset Management. In early 2019, after a competitive bidding process, SpryPoint was selected to implement SpryEngage as a new customer self-service portal for BPU customers.

BPU does not currently use SpryCIS but uses the following SpryPoint solutions:

- **SpryEngage –** Customer Engagement Platform
- **SpryMobile –** Mobile Field Service
- **SpryMobile –** Work Orders & Asset Management
- **SpryBackflow –** Cross Connection Control

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City of Summerside

Customer name:	City of Summerside
Number of Accounts	11,000
Services Billed	Electric, Water and Sewer
Go-live	February 2021
Project Duration	15 months
Customer contact:	Kristen Dunsford - Finance Director
Customer phone number:	(902) 432-9184
Customer email address	kristen.dunsford@city.summerside.pe.ca
Delivery Model	Software as a Service (SaaS)
System which Solution Replaced	Harris Computer Systems - Cogsdale
SpryPoint Products Used	• **SpryCIS** – Customer Information System • **SpryEngage** – Customer Engagement Platform • **SpryMobile** – Mobile Field Service • **SpryGIDR** – Grid Interactive Demand Response

Describe Nature of Project and Services Provided to This Client:

The City of Summerside selected SpryCIS for a new SaaS based CIS after a competitive bidding process. Summerside accomplishments included being faced with several unique rates configured to handle variations that built over time at the city that the current CIS system could not handle easily. Through analysis together with the City, SpryPoint was able to configure SpryCIS to reduce the complexity from 200 rate variants down to 67. This resulted in reduced administration for the City as well as less chance for ongoing billing errors.

The City of Summerside uses the following SpryPoint solutions as Software as a Service:

- **SpryCIS** – Customer Information System
- **SpryEngage** – Customer Engagement Platform
- **SpryMobile** – Mobile Field Service
- **SpryGIDR** – Grid Interactive Demand Response

Testimonials:

Kristen Dunsford
Director of Financial Services

"SpryPoint has been a trusted partner of the City since 2016. Their team has worked very closely with us to identify areas for improvement and to deliver innovative solutions which have substantially improved Customer Service and Operations for our utility. We are fortunate to have their utility expertise in our home province and strongly recommend their services."

Summerside

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TAB 6 – Litigation and Penalties

Identify all litigation in which your firm or any separate firm of a joint venture has been a party to legal action (including arbitration, administrative proceedings, etc.) or lawsuits during the last five (5) years.

To the best of its knowledge, Core &Main LP has not been a party to legal action (including arbitration, administrative proceedings, etc.) or lawsuits during the last five (5) years in the state of Florida involving an AMI meter system it sold to its customer.

Describe in detail any projects within the last five (5) years where liquidated damages, penalties, liens, default, mitigation, cancellations of contract or termination of contract were imposed, sought to be imposed, threatened or filed against your organization.

To the best of its knowledge, during the past five (5) years, in the state of Florida, Core & Main has not been involved in any AMI meter projects where liquidated damages, penalties, liens, default, mitigation, cancellations of contract or termination of contract for cause were imposed, sought to be imposed, threatened or filed against your organization.

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TAB 7 – Financial Statements, Bonding Capacity and Insurance:

FINANCIAL STATEMENTS

Core & Main LP is a publicly traded company. Latest financial statements can be found here: Core & Main, Inc. - Financials - (coreandmain.com)

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BONDING CAPACITY:

intact INSURANCE surety

ATLANTIC SPECIALTY INSURANCE COMPANY

October 18, 2024

City of Mount Dora
510 N. Baker Street
Mount Dora, FL 32757

Re: **Core & Main LP**
Solicitation No.: RFP #24-EL-014
Solicitation: Advanced Metering Infrastructure (AMI) System (Rebid)

Dear Sir/Madame:

Core & Main LP is currently bonded by Atlantic Specialty Insurance Company. The A.M. Best Rating of Atlantic Specialty Insurance Company is A+(Superior) XV and are listed on the U.S. Treasury Department's Listing of Approved Sureties (Department Circular 570; 2024 Revision).

Atlantic Specialty Insurance Company is licensed to do business in the State of Florida and have been providing bonds for Core & Main LP. Core & Main LP has an aggregate total capacity of $300 million with a $30 million per project limit and approximately $172 million in capacity currently available, clearly demonstrating the ability to provide required payment and performance bonds.

We would be more than willing to provide Performance and Payment bonds; however, it must be understood that our ability to provide any surety credit is based upon normal and standard underwriting criteria at the time of their request. This would include, but not be limited to, a review of the contract documents, and bond forms.

This letter is not an assumption of liability, nor is it a bid or performance and payment bond. It is issued only as a bonding reference and compliance letter requested by our client.

Please feel free to contact us with any questions. Marisa Thielen of Aon can be reached at (202) 862-5394; Rick DeVore of Atlantic Specialty Insurance Company can be reached at (781) 332-9489.

Very truly yours,

Atlantic Specialty Insurance Company

By: Patrick Breene
Patrick Breene, Attorney-In-Fact

One State Street Plaza, Floor 31
New York, NY 10004
intactspecialty.com/surety

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intact INSURANCE

Power of Attorney

KNOW ALL MEN BY THESE PRESENTS, that ATLANTIC SPECIALTY INSURANCE COMPANY, a New York corporation with its principal office in Plymouth, Minnesota, does hereby constitute and appoint: **Annmarie Breene, Babette Ward, Cathy H. Ho, Dana Donahue, Joanne C. Wagner, Kimberly G. Sherrod, Lori S. Shelton, Patricia A. Rambo, Patricia Dorsaneo, Patrick Breene, Sara Owens, Wayne G. McVaugh**, each individually if there be more than one named, its true and lawful Attorney-in-Fact, to make, execute, seal and deliver, for and on its behalf as surety, any and all bonds, recognizances, contracts of indemnity, and all other writings obligatory in the nature thereof; provided that no bond or undertaking executed under this authority shall exceed in amount the sum of: **unlimited** and the execution of such bonds, recognizances, contracts of indemnity, and all other writings obligatory in the nature thereof in pursuance of these presents, shall be as binding upon said Company as if they had been fully signed by an authorized officer of the Company and sealed with the Company seal. This Power of Attorney is made and executed by authority of the following resolutions adopted by the Board of Directors of ATLANTIC SPECIALTY INSURANCE COMPANY on the twenty-fifth day of September, 2012:

Resolved: That the President, any Senior Vice President or Vice-President (each an "Authorized Officer") may execute for and in behalf of the Company any and all bonds, recognizances, contracts of indemnity, and all other writings obligatory in the nature thereof, and affix the seal of the Company thereto; and that the Authorized Officer may appoint and authorize an Attorney-in-Fact to execute on behalf of the Company any and all such instruments and to affix the Company seal thereto; and that the Authorized Officer may at any time remove any such Attorney-in-Fact and revoke all power and authority given to any such Attorney-in-Fact.

Resolved: That the Attorney-in-Fact may be given full power and authority to execute for and in the name and on behalf of the Company any and all bonds, recognizances, contracts of indemnity, and all other writings obligatory in the nature thereof, and any such instrument executed by any such Attorney-in-Fact shall be as binding upon the Company as if signed and sealed by an Authorized Officer and, further, the Attorney-in-Fact is hereby authorized to verify any affidavit required to be attached to bonds, recognizances, contracts of indemnity, and all other writings obligatory in the nature thereof.

This power of attorney is signed and sealed by facsimile under the authority of the following Resolution adopted by the Board of Directors of ATLANTIC SPECIALTY INSURANCE COMPANY on the twenty-fifth day of September, 2012:

Resolved: That the signature of an Authorized Officer, the signature of the Secretary or the Assistant Secretary, and the Company seal may be affixed by facsimile to any power of attorney or to any certificate relating thereto appointing an Attorney-in-Fact for purposes only of executing and sealing any bond, undertaking, recognizance or other written obligation in the nature thereof, and any such signature and seal where so used, being hereby adopted by the Company as the original signature of such officer and the original seal of the Company, to be valid and binding upon the Company with the same force and effect as though manually affixed.

IN WITNESS WHEREOF, ATLANTIC SPECIALTY INSURANCE COMPANY has caused these presents to be signed by an Authorized Officer and the seal of the Company to be affixed this first day of January, 2023.

ATLANTIC SPECIALTY INSURANCE COMPANY CORPORATE SEAL 1986 NEW YORK

By _____
Sarah A. Kolar, Vice President and General Counsel

STATE OF MINNESOTA
HENNEPIN COUNTY

On this first day of January, 2023, before me personally came Sarah A. Kolar, Vice President and General Counsel of ATLANTIC SPECIALTY INSURANCE COMPANY, to me personally known to be the individual and officer described in and who executed the preceding instrument, and she acknowledged the execution of the same, and being by me duly sworn, that she is the said officer of the Company aforesaid, and that the seal affixed to the preceding instrument is the seal of said Company and that the said seal and the signature as such officer was duly affixed and subscribed to the said instrument by the authority and at the direction of the Company.

ALISON D. NASH-TROUT
NOTARY PUBLIC - MINNESOTA
My Commission Expires
January 31, 2030

_____
Notary Public

I, the undersigned, Secretary of ATLANTIC SPECIALTY INSURANCE COMPANY, a New York Corporation, do hereby certify that the foregoing power of attorney is in full force and has not been revoked, and the resolutions set forth above are now in force.

Signed and sealed. Dated 18th day of October, 2024.

ATLANTIC SPECIALTY INSURANCE COMPANY CORPORATE SEAL 1986 NEW YORK

This Power of Attorney expires
January 31, 2030

_____
Kara L.B. Barrow, Secretary

Please direct bond verifications to surety@intactinsurance.com

b

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BID BOND

AIA® Document A310™ – 2010

Bid Bond

CONTRACTOR:
(Name, legal status and address)
CORE & MAIN LP
590 Ferguson Dr.
Orlando, FL 32805

SURETY:
(Name, legal status and principal place of business)
ATLANTIC SPECIALTY INSURANCE COMPANY
605 Highway 169 North
Plymouth, MN 55441

This document has important legal consequences. Consultation with an attorney is encouraged with respect to its completion or modification.

Any singular reference to Contractor, Surety, Owner or other party shall be considered plural where applicable.

OWNER:
(Name, legal status and address)
CITY OF MOUNT DORA

510 N. Baker Street, Mount Dora, FL 32757

BOND AMOUNT: Five Percent of Amount bid (5% of Amount Bid)

PROJECT:
(Name, location or address, and Project number, if any)
RFP# 24-EL-014 Advanced Metering Infrastructure (AMI) System (REBID)

Project Number, if any: RFP# 24-EL-014

The Contractor and Surety are bound to the Owner in the amount set forth above, for the payment of which the Contractor and Surety bind themselves, their heirs, executors, administrators, successors and assigns, jointly and severally, as provided herein. The conditions of this Bond are such that if the Owner accepts the bid of the Contractor within the time specified in the bid documents, or within such time period as may be agreed to by the Owner and Contractor, and the Contractor either (1) enters into a contract with the Owner in accordance with the terms of such bid, and gives such bond or bonds as may be specified in the bidding or Contract Documents, with a surety admitted in the jurisdiction of the Project and otherwise acceptable to the Owner, for the faithful performance of such Contract and for the prompt payment of labor and material furnished in the prosecution thereof; or (2) pays to the Owner the difference, not to exceed the amount of this Bond, between the amount specified in said bid and such larger amount for which the Owner may in good faith contract with another party to perform the work covered by said bid, then this obligation shall be null and void, otherwise to remain in full force and effect. The Surety hereby waives any notice of an agreement between the Owner and Contractor to extend the time in which the Owner may accept the bid. Waiver of notice by the Surety shall not apply to any extension exceeding sixty (60) days in the aggregate beyond the time for acceptance of bids specified in the bid documents, and the Owner and Contractor shall obtain the Surety's consent for an extension beyond sixty (60) days.

If this Bond is issued in connection with a subcontractor's bid to a Contractor, the term Contractor in this Bond shall be deemed to be Subcontractor and the term Owner shall be deemed to be Contractor.

When this Bond has been furnished to comply with a statutory or other legal requirement in the location of the Project, any provision in this Bond conflicting with said statutory or legal requirement shall be deemed deleted herefrom and provisions conforming to such statutory or other legal requirement shall be deemed incorporated herein. When so furnished, the intent is that this Bond shall be construed as a statutory bond and not as a common law bond.

Signed and sealed this 18th day of October, 2024

(Witness) Patrick Breene	CORE & MAIN LP *(Principal)* *(Seal)* *(Title)* Wayne McVaugh, Attorney-in-Fact
(Witness) Joanne Wagner	ATLANTIC SPECIALTY INSURANCE COMPANY *(Surety)* *(Seal)* *(Title)* Annmarie Breene, Attorney in Fact

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Applicant Name: ATLANTIC SPECIALTY INSURANCE COMPANY

NAIC No: 27154
FEIN: 133362309

Uniform Certificate of Authority Application (UCAA)
Certificate of Compliance

STATE OF FLORIDA

OFFICE OF INSURANCE REGULATION

I, KEVIN McCARTY, hereby certify that I am the* INSURANCE COMMISSIONER of the State of FLORIDA and have supervision of insurance business in said State and as such I hereby certify that **ATLANTIC SPECIALTY INSURANCE COMPANY** of NEW YORK, NY is duly organized under the laws of said State and is authorized to transact the business of D 010 FIRE,D 020 ALLIED LINES,D 040 HOMEOWNERS MULTI PERIL,D 050 COMMERCIAL MULTI PERIL,D 080 OCEAN MARINE,D 090 INLAND MARINE,D 110 MEDICAL MALPRACTICE,D 160 WORKERS COMPENSATION,D 170 OTHER LIABILITY,D 173 PREPAID LEGAL,D 192 PRIVATE PASSENGER AUTO LIABILITY,D 194 COMMERCIAL AUTOMOBILE LIABILITY,D 211 PPA PHYSICAL DAMAGE,D 212 COMMERCIAL AUTO PHYSICAL DAMAGE,D 220 AIRCRAFT,D 230 FIDELITY,D 240 SURETY,D 250 GLASS,D 260 BURGLARY AND THEFT,D 270 BOILER AND MACHINERY,D 280 CREDIT,D 300 INDUSTRIAL FIRE,D 450 ACCIDENT AND HEALTH,D 520 INDUSTRIAL EXTENDED COVERAGE,D 620 MISCELLANEOUS CASUALTY,** insurance in this State.

IN TESTIMONY WHEREOF, I have hereunto set my hand at Tallahassee, Florida on this 28th day of July A.D. 2011.

Kevin McCarty

* Insurance Commissioner, Officer or Superintendent of Insurance authorized to certify to the insurance business within the domiciliary state.

** Lines of Insurance as shown on Form 3 of UCAA

© 2003 National Association of Insurance Commissioners

February 4, 2004
Form 6

[intact] INSURANCE specialty solutions

Atlantic Specialty Insurance Company

Period Ended 12/31/2023

Dollars displayed in thousands

Admitted Assets	
Investments:	
Bonds	$ 2,666,141
Preferred Stocks	-
Common Stocks	765,847
Mortgage Loans	-
Real Estate	-
Contract Loans	-
Derivatives	-
Cash, Cash Equivalents & Short Term Investments	194,124
Other Investments	9,571
Total Cash & Investments	3,635,684
Premiums and Considerations Due	338,312
Reinsurance Recoverable	127,403
Receivable from Parent, Subsidiary or Affiliates	17,691
All Other Admitted Assets	93,457
Total Admitted Assets	4,212,546

Liabilities and Surplus	
Liabilities	
Loss Reserves	$ 1,191,377
Loss Adjustment Expense Reserves	401,505
Total Loss & LAE Reserves	1,592,881
Unearned Premium Reserve	806,718
Total Reinsurance Liabilities	45,997
Commissions, Other Expenses, and Taxes due	78,425
Derivatives	-
Payable to Parent, Subs or Affiliates	-
All Other Liabilities	810,774
Total Liabilities	3,334,795
Capital and Surplus	
Common Capital Stock	9,001
Preferred Capital Stock	-
Surplus Notes	-
Unassigned Surplus	251,805
Other Including Gross Contributed	616,946
Capital & Surplus	877,751
Total Liabilities and C&S	4,212,546

State of Minnesota
County of Hennepin

I, Kara Barrow, Secretary of Atlantic Specialty Insurance Company do hereby certify that the foregoing statement is a correct exhibit of the assets and liabilities of the said Company, on the 31st day of December, 2023, according to the best of my information, knowledge and belief.

Secretary

Subscribed and sworn to, before me, a Notary Public of the State of Minnesota on this 19th day of March, 2024.

Notary Public

KERRI RIECHERS
Notary Public
Minnesota
My Commission Expires January 31, 2025

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[intact INSURANCE]

Power of Attorney

KNOW ALL MEN BY THESE PRESENTS, that ATLANTIC SPECIALTY INSURANCE COMPANY, a New York corporation with its principal office in Plymouth, Minnesota, does hereby constitute and appoint: **Annmarie Breene, Babette Ward, Cathy H. Ho, Dana Donahue, Joanne C. Wagner, Kimberly G. Sherrod, Lori S. Shelton, Patricia A. Rambo, Patricia Dorsaneo, Patrick Breene, Sara Owens, Wayne G. McVaugh**, each individually if there be more than one named, its true and lawful Attorney-in-Fact, to make, execute, seal and deliver, for and on its behalf as surety, any and all bonds, recognizances, contracts of indemnity, and all other writings obligatory in the nature thereof; provided that no bond or undertaking executed under this authority shall exceed in amount the sum of: **unlimited** and the execution of such bonds, recognizances, contracts of indemnity, and all other writings obligatory in the nature thereof in pursuance of these presents, shall be as binding upon said Company as if they had been fully signed by an authorized officer of the Company and sealed with the Company seal. This Power of Attorney is made and executed by authority of the following resolutions adopted by the Board of Directors of ATLANTIC SPECIALTY INSURANCE COMPANY on the twenty-fifth day of September, 2012:

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Resolved: That the Attorney-in-Fact may be given full power and authority to execute for and in the name and on behalf of the Company any and all bonds, recognizances, contracts of indemnity, and all other writings obligatory in the nature thereof, and any such instrument executed by any such Attorney-in-Fact shall be as binding upon the Company as if signed and sealed by an Authorized Officer and, further, the Attorney-in-Fact is hereby authorized to verify any affidavit required to be attached to bonds, recognizances, contracts of indemnity, and all other writings obligatory in the nature thereof.

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IN WITNESS WHEREOF, ATLANTIC SPECIALTY INSURANCE COMPANY has caused these presents to be signed by an Authorized Officer and the seal of the Company to be affixed this first day of January, 2023.

ATLANTIC SPECIALTY INSURANCE COMPANY CORPORATE SEAL 1986 NEW YORK

By _____
Sarah A. Kolar, Vice President and General Counsel

STATE OF MINNESOTA
HENNEPIN COUNTY

On this first day of January, 2023, before me personally came Sarah A. Kolar, Vice President and General Counsel of ATLANTIC SPECIALTY INSURANCE COMPANY, to me personally known to be the individual and officer described in and who executed the preceding instrument, and she acknowledged the execution of the same, and being by me duly sworn, that she is the said officer of the Company aforesaid, and that the seal affixed to the preceding instrument is the seal of said Company and that the said seal and the signature as such officer was duly affixed and subscribed to the said instrument by the authority and at the direction of the Company.

ALISON D. NASH-TROUT
NOTARY PUBLIC - MINNESOTA
My Commission Expires
January 31, 2030

_____
Notary Public

I, the undersigned, Secretary of ATLANTIC SPECIALTY INSURANCE COMPANY, a New York Corporation, do hereby certify that the foregoing power of attorney is in full force and has not been revoked, and the resolutions set forth above are now in force.

Signed and sealed. Dated 18th day of October, 2024.

ATLANTIC SPECIALTY INSURANCE COMPANY CORPORATE SEAL 1986 NEW YORK

This Power of Attorney expires
January 31, 2030

_____
Kara L.B. Barrow, Secretary

Please direct bond verifications to surety@intactinsurance.com

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FLORIDA DEPARTMENT OF FINANCIAL SERVICES

ANNMARIE BREENE

License Number : W955245

Non Resident Insurance License

- 0920 - NONRES GEN LINES (PROP & CAS)

Issue Date

02/27/2023

NOTICE - This non-resident license is limited to the classes of insurance reflected above and is further limited to ONLY those classes of insurance for which you are licensed in your home state.

Please Note: A licensee may only transact insurance with an active appointment by an eligible insurer or employer. If you are acting as a surplus lines agent, public adjuster, or reinsurance intermediary manager/broker, you should have an appointment recorded in your own name on file with the Department. If you are unsure of your license status you should contact the Florida Department of Financial Services immediately. This license will expire if more than 48 months elapse without an appointment for each class of insurance listed. If such expiration occurs, the individual will be required to re-qualify as a first-time applicant. If this license was obtained by passing a licensure examination offered by the Florida Department of Financial Services, the licensee is required to comply with continuing education requirements contained in 626.2815 or 648.385, Florida Statutes. A licensee may track their continuing education requirements completed or needed in their MyProfile account at https://dice.fldfs.com. To validate the accuracy of this license you may review the individual license record under "Licensee Search" on the Florida Department of Financial Services website at www.myfloridacfo.com/division/agents.

Jimmy Patronis
Chief Financial Officer
State of Florida

CERTIFICATE OF INSURANCE:

Page 1 of 1

CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY): 08/08/2024

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Willis Towers Watson Northeast, Inc. c/o 26 Century Blvd P.O. Box 305191 Nashville, TN 372305191 USA	CONTACT NAME: Willis Towers Watson Certificate Center PHONE (A/C, No, Ext): 1-877-945-7378 FAX (A/C, No): 1-888-467-2378 E-MAIL ADDRESS: certificates@willis.com
INSURED Core & Main LP 1830 Craig Park Court Saint Louis, MO 63146	INSURER(S) AFFORDING COVERAGE — NAIC # INSURER A : ACE American Insurance Company — 22667 INSURER B : Willis Submission Carrier — GENRC INSURER C : Continental Insurance Company — 35289 INSURER D : INSURER E : INSURER F :

COVERAGES **CERTIFICATE NUMBER:** W34442167 **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS		
A	X COMMERCIAL GENERAL LIABILITY CLAIMS-MADE X OCCUR X SIR Each Occurrence: $500,000 GEN'L AGGREGATE LIMIT APPLIES PER: POLICY X PRO-JECT LOC OTHER:			XSL G48900161	08/01/2024	08/01/2025	EACH OCCURRENCE DAMAGE TO RENTED PREMISES (Ea occurrence) MED EXP (Any one person) PERSONAL & ADV INJURY GENERAL AGGREGATE PRODUCTS - COMP/OP AGG	$ $ $ $ $ $	500,000 500,000 15,000 500,000 1,500,000 1,500,000
B	AUTOMOBILE LIABILITY X ANY AUTO OWNED AUTOS ONLY HIRED AUTOS ONLY SCHEDULED AUTOS NON-OWNED AUTOS ONLY			SEE ATTACHED	08/01/2024	08/01/2025	COMBINED SINGLE LIMIT (Ea accident) BODILY INJURY (Per person) BODILY INJURY (Per accident) PROPERTY DAMAGE (Per accident)	$ $ $ $	2,000,000
C	X UMBRELLA LIAB X OCCUR EXCESS LIAB CLAIMS-MADE DED RETENTION $			7039926999	08/01/2024	08/01/2025	EACH OCCURRENCE AGGREGATE	$ $	5,000,000 5,000,000
B	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) Y / N: No If yes, describe under DESCRIPTION OF OPERATIONS below	N / A		SEE ATTACHED	08/01/2024	08/01/2025	X PER STATUTE OTH-ER E.L. EACH ACCIDENT E.L. DISEASE - EA EMPLOYEE E.L. DISEASE - POLICY LIMIT	$ $ $	1,000,000 1,000,000 1,000,000
B	Additional Lines of Coverage			SEE ATTACHED	08/01/2024	08/01/2025			

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

CERTIFICATE HOLDER

Evidence Only

CANCELLATION

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

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SR ID: 26284986 BATCH: 3573545

ADDITIONAL COVERAGE SCHEDULE

NAMED INSURED: Core & Main LP

AUTOMOBILE LIABILITY
Policy Effective & Expiration Dates: See Page 1
Limits: See Page 1

POLICY NUMBER	STATE	INSURER(S) AFFORDING COVERAGE
ISA H10823766	All Other States	ACE American Insurance Company

WORKERS COMPENSATION & EMPLOYERS LIABILITY
Policy Effective & Expiration Dates: See Page 1
Limit: See Page 1

POLICY NUMBER	STATE	INSURER(S) AFFORDING COVERAGE
WLR C55521098	All Other States	ACE American Insurance Company
SCF C55521153	Wisconsin	ACE Fire Underwriters Insurance Company

EXCESS LIABILITY
Policy Effective & Expiration Dates: 08/01/2024-08/01/2025

POLICY NUMBER	TYPE OF INSURANCE	LIMITS	INSURER(S) AFFORDING COVERAGE
140001151	Excess Automobile Liability	*$3M xs $2M	QBE Specialty Insurance Company
MKLM6MM50000091	Excess General Liability	*$5M xs Primary GL	Markel American Insurance Company

*Umbrella Liability policy on page 1 applies after and in addition to Excess Automobile and Excess General Liability policy limits, respectively.

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TAB 8 – Conflict of Interest Affidavit

CONFLICT OF INTEREST AFFIDAVIT

By the signature below, the Proposer, and its employees, officers and/or agents, certifies, and hereby discloses, that, to the best of its knowledge and belief, all relevant facts, concerning past, present or currently planned interest or activity (financial, contractual, organizational or otherwise) which relates to the proposed work and bears on whether the Proposer and/or any of its employees, officers and/or agents, has a possible conflict, have been fully disclosed.

Additionally, the Proposer and its employees, officers and/or agents, agree to immediately notify in writing the City of Mount Dora Purchasing Department, if any actual or potential conflict of interest arises during the solicitation process.

Core & Main LP Company	590 Ferguson Drive Address
 Authorized Signature	Orlando, FL 32805 City, State, Zip Code
David Bryant, District Manager Printed Name & Title	(407) 291-1545 Telephone No.
David.Bryant@coreandmain.com Email	(407) 291-2006 Fax No.

STATE OF FLORIDA
COUNTY OF _____

The foregoing instrument was acknowledged before me by means of [✓] physical presence or [ ] online notarization of David Bryant, as District Manager, of Core & Main LP, who personally swore or affirmed that he/she is authorized to execute this Agreement and thereby bind the Contractor, and who is personally known to me or who produced _____ as identification, and who did/did not take an oath this 21st day of October, 2024.

(stamp) NOTARY PUBLIC

KAYLA MARIE RANDALL
Notary Public - State of Florida
Commission # HH 302382
My Comm. Expires Aug 18, 2026
Bonded through National Notary Assn.

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TAB 9 – Required Forms

1. PROPOSER CHECKLIST FORM

2. AFFIDAVIT OF COMPLIANCE WITH FLORIDA STATUTES, SECTION 288.0071

3. CONFLICT OF INTEREST AFFIDAVIT FORM

Please refer to Core & Main's Conflict of Interest Affidavit Form enclosed in Tab 8 as requested.

4. VENDOR CERTIFICATION REGARDING SCRUTINIZED COMPANIES' LISTS FORM

5. FIRM QUALIFICATION FORM

6. DECLARATION STATEMENT FORM

7. INSURANCE REQUIREMENTS FORM

8. DRUG FREE WORKPLACE CERTIFICATION FORM

9. NON-COLLUSION AFFIDAVIT OF PRIME BIDDER FORM

10. ACKNOWLEDGEMENTS FORM

11. COMPLIANCE WITH PUBLIC RECORDS LAW FORM

12 REFERENCES FORM

13. PUBLIC ENTITY CRIMES STATEMENT FORM

14. FIRM INFORMATION FORM

15. SUB-CONTRACTOR LISTING FORM

16. FLORIDA STATUTES, SECTION 287.138 CERTIFICATION FORM

17. COMPLETED W9

18. SIGNED ADDENDUMS

ADDENDUM #1

19. HUMAN TRAFFICKING AFFIDAVIT

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Appendix:

- Delegation of Signing Authority
- Qualifications
- Warranty
- Product Sheets
- Bermex Attachment
- SpryPoint Attachment

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DELEGATION OF SIGNING AUTHORITY

Docusign Envelope ID: 2DAC77A2-798C-4ABF-856E-EBE30FC9B512

DELEGATION OF AUTHORITY

I, Ryan Johnson, Regional Vice President of Core & Main LP, a Florida limited partnership (the "Company"), hereby delegate authority to David Bryant (the "Delegate"), to execute and deliver the proposal for Advanced Metering Infrastructure (AMI) System (REBID), RFP #24-EL-014 (the "Document") to the City of Mount Dora, Florida, and to take or cause to be taken any and all actions in connection therewith as such individual may consider necessary or desirable, with such necessity or desirability being conclusively evidenced by the actions so taken, on behalf of the Company.

This Delegation is limited to the Document as described above.

The Delegation is personal to the Delegate. The Delegate may not further delegate the authorities granted in this Delegation.

IN WITNESS WHEREOF, I have hereunto set my hand on October 21, 2024.

CORE & MAIN LP, a Florida limited partnership

By: DocuSigned by: RYAN JOHNSON
Ryan Johnson, Regional Vice President

Confidential

QUALIFICATIONS

Qualifications of Core & Main LP
Submitted to the City of Mount Dora
RFP #24-EL-01$
Advanced Metering Infrastructure (AMI) System (REBID)

Notwithstanding anything contained in any bid or contract documents to the contrary, Core & Main LP ("Core & Main") hereby qualifies its bid as follows. The bid of Core & Main and acceptance by Core & Main of any subsequent agreement is made expressly conditioned upon assent by the City of Mount Dora, Florida (the "Owner"), to the following additional or different terms, which shall supersede and control over the terms of any request for bid or request for proposal, any contract documents and specifications, and any prior addenda thereto:

1. Core & Main will use commercially reasonable efforts to deliver materials and services ordered within the time specified in the bid documents or the Agreement. Core & Main reserves the right to extend those delivery times based on manufacturer lead times as impacted events beyond the control of Core & Main or the manufacturer including but not limited to availability of materials, availability of raw materials or component parts, the current pandemic, global shipping delays and resin shortage. Core & Main will not be liable for liquidated damages or other delay damages arising from delays in delivery, increases in manufacturer lead times or other circumstances beyond the control of Core & Main. Availability of materials cannot be guaranteed. This term supersedes all other contractual provisions.

2. Price Lock: Core & Main reserves the right to increase prices at any time in the event of a manufacturer or subcontractor price increase. Core & Main will provide evidence of the manufacturer's or subcontractor's price increase and will only increase its prices by the same percentage the manufacturer's or subcontractor's prices increase. In the event the Owner objects to the price increase, the Owner will delete the affected materials or services from the contract and neither party will have any further obligation to the other with respect to the materials or services removed from the contract except the Owner will be obligated to pay for materials or services delivered.

3. Warranty: The extent of the warranty to be provided for this project is set forth in the attached City of Mount Dora Warranty.

4. Insurance: To the extent provided in its policy, Core & Main LP ("Core & Main") will only be able to provide a certificate of insurance, endorsements and coverage that are current form and meet industry standards subject to agreement by Core & Main's insurance provider. A Memorandum of Insurance is attached to demonstrate the level of coverage carried by Core & Main. Insurance coverage provided by Core & Main, including but not limited to products and completed operations coverage, will be consistent with the provisions of Core & Main's policy, notwithstanding any differing or conflicting provisions in any bid or contract documents, and will be provided for the duration of the project. Insurance limits may be satisfied by a combination of General Liability and Excess/Umbrella coverage. General aggregate limits apply per location. Core & Main will not be required to provide Professional Liability, Pollution Liability, or any

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coverage other than the coverage identified in its certificate of insurance. Neither Core & Main nor its subcontractors or suppliers will be required to provide copies of their respective insurance policies. Notwithstanding anything contained in any bid documents or contract documents to the contrary, by acceptance of Core & Main's bid or proposal, the Owner accepts Core & Main's certificate of insurance in full compliance with all insurance requirements, including but not limited to notice provisions, coverage, language, policy limits, policy forms, self-insured retention and deductible amounts. The parties agree that Core & Main's insurance is provided on a contributory basis, and is primary, but only to the extent of the products, services, and operations of Core & Main LP.

5. Core & Main reserves the right to negotiate contract terms and conditions mutually agreeable to both parties. If the parties are unable to reach an agreement on contract terms, the parties will have the right to discontinue negotiations for the project. In that event, neither party will have any further obligation or liability to the other arising out of this solicitation or the RFP response, Core & Main will not be in default of any obligations under the bid or contract documents and Core & Main will not forfeit its bid security.

Dated this __21___ day of October, 2024

CORE & MAIN LP

David Bryant
District Manager

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WARRANTY – CORE & MAIN

CITY OF MOUNT DORA WARRANTY

The warranties on meters included in Project Materials and Supplies, and on Work, and Services shall be as follows:

1. Project Materials and Supplies.

(a) General. Meters and equipment included in Project Materials and Supplies that Owner purchases from Core & Main LP ("Core & Main") are warranted by the manufacturer to be free from Manufacturers' Defects for the period specified in the manufacturer's warranty. A copy of the present warranty of each manufacturer that will supply meters and equipment as part of the Project Materials and Supplies is attached hereto. The term of such manufacturer's warranty shall be as set forth in such attached manufacturer's warranty (as the same may be changed from time to time during the course of the performance of the Agreement, but with changes to apply only to purchases of meters or equipment occurring after the change becomes effective), but generally the start date for warranties is the date of the manufacturer's shipment of such meters or equipment as noted in the applicable Acceptance Certificate ("Manufacturer's Warranty Period"). PROJECT MATERIALS AND SUPPLIES OTHER THAN METERS AND EQUIPMENT ARE NOT WARRANTED. CORE & MAIN DOES NOT PROVIDE ANY SEPARATE WARRANTY FOR PROJECT MATERIALS AND SUPPLIES.

(b) Core & Main's Responsibility. Upon any breach of the manufacturer's warranty on meters or equipment noticed to Core & Main during the applicable Manufacturer's Warranty Period, Core & Main's sole responsibility shall be to cooperate with Owner in arranging for the manufacturer to repair or replace any defective meters or equipment.

2. Installation Work and Services.

(a) General. Core & Main warrants that all installation Work and Services provided by Core & Main shall be performed by Core & Main in a workmanlike manner and in compliance with any specifications set forth in this Agreement, with such warranty to expire one year from the date when such installation Work was performed or such Services were provided (the "Warranty Period").

(b) Exclusive Remedy. Upon any breach of Core & Main's warranty as to installation Work or Services during the applicable Warranty Period, Core & Main's sole responsibility shall be to perform any corrective installation Work or Services necessary to bring Core & Main's installation Work and Services into compliance with such requirements.

3. DISCLAIMER OF FURTHER LIABILITIES. EXCEPT FOR THE FOREGOING EXPRESS WARRANTY, CORE & MAIN DISCLAIMS ALL EXPRESS AND IMPLIED WARRANTIES INCLUDING ALL IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE. IN NO EVENT, WHETHER ARISING OUT OF WARRANTY, INDEMNITY, TORT, CONTRACT OR OTHERWISE, SHALL CORE & MAIN BE LIABLE FOR ANY INDIRECT, INCIDENTAL, SPECIAL, EXEMPLARY OR CONSEQUENTIAL DAMAGES OF ANY KIND. IN NO EVENT WILL THE LIABILITY OF CORE & MAIN UNDER THIS AGREEMENT EXCEED THE AMOUNTS PAID TO CORE & MAIN BY OWNER HEREUNDER.

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WARRANTY – SENSUS TERMS OF SALE AND WARRANTIES

Sensus Terms of Sale

FEB 2023

1. **DEFINITIONS**. "Customer" means the party purchasing goods or services pursuant to these Terms of Sale ("Terms"). "Sensus" means Sensus USA Inc., a Delaware corporation. "Deliverables" means the Sensus goods and services sold or otherwise provided pursuant to this Agreement. Software licenses are provided solely through a separate Sensus software license.

2. **CONTRACT OF SALE**. All Sensus Deliverables are offered for sale subject to the prices and other terms specified in (a) the applicable Sensus quotation, proposal or pricelist, and (b) these Terms (together, the "Proposal"), all of which are subject to the correction of clerical errors. A Customer's purchase order or similar writing shall constitute an acceptance of the offer to sell; however, any inconsistent, additional or different terms to the Proposal contained in a Customer's request for quotation or purchase order (collectively, "Additional Terms") are hereby objected to and rejected by Sensus. Such Additional Terms will not become part of the contract of sale unless accepted by Sensus in a writing signed by a vice president (or higher) of Sensus.

3. **ENTIRE AGREEMENT**. These Terms, the General Limited Warranty, Customer's purchase order (except any Additional Terms), Sensus' Acknowledgement Form (if any), and Sensus' invoice constitutes the entire agreement ("Agreement") between the parties hereto with respect to the subject matter hereof and supersedes any and all prior agreements, understanding or other communications, whether written or oral, formal or informal, between them in respect of the order. No consent, waiver, alteration, amendment, or modification shall be binding unless in writing and signed by a vice president (or higher) of Sensus.

4. **PRICES**. All prices are subject to change based on Sensus' selling prices in effect as of date of shipment. Prices quoted for blanket orders are subject to review and retroactive adjustment, if necessary, based on actual quantities shipped.

5. **TAXES**. All prices quoted are exclusive of federal, state and municipal taxes. Customer shall be liable for all sales, use and other taxes (whether local, state or federal) imposed on this Agreement or on the Deliverables.

6. **TITLE AND RISK OF LOSS**. All Deliverables are shipped Ex Works shipping point, prepay freight and add. Title to, and property in, the Deliverables shall pass to Customer upon shipment. Risk of loss of the Deliverables shall also pass to Customer upon shipment.

7. **PAYMENT TERMS**. Customer shall pay all invoices in USD within thirty (30) days of the invoice date. No deductions, whether by way of set-off, counterclaim, withholding, or otherwise, shall be made by the Customer. Sensus reserves the right to establish credit limits for Customer and may require full or partial payment prior to provision of any Deliverables. All payments shall be made via electronic payment according to instructions provided by Sensus. The Customer must notify Sensus, in writing, within seven days of receipt of an invoice if the Customer disputes such invoice. In the absence of such notice the Customer shall not be entitled to dispute an invoice. Save for any invoices disputed in good faith in accordance with the previous sentence, if the Customer does not pay within the time provided in this Agreement, the amount due shall bear interest at the lower of (i) one and a half percent (1.5%) per month up to a maximum of eighteen percent (18%) per year, or (ii) the highest rate permitted by applicable law. Should Customer become delinquent in payment of sums due hereunder, Sensus shall not be obligated to continue performance.

8. **PACKAGING**. Sensus reserves the right to select the manner in which Deliverables are packaged. Quoted prices include regular packaging. Special requirements for packaging will be subject to extra charges.

9. **DELIVERY**. Shipping dates and other dates quoted by Sensus are made in good faith but are not guaranteed. Dates cited for delivery are approximate only. If no dates are specified, Sensus will use its discretion to determine the shipping date. Sensus reserves the right to extend shipping dates and/or to make partial shipments as Sensus deems necessary in its sole discretion, without liability to Customer. In the absence of shipping instructions from Customer, Sensus will use its discretion as to the selection of shipping services and routings. If the Customer fails to take delivery of the Deliverables within seven (7) days of notification that the Deliverables are ready for delivery, Sensus shall be entitled, but is not required, on behalf of the Customer to put the relevant Deliverables into storage at the Customer's expense and risk. Delivery to storage shall constitute delivery to the Customer. Installation of Deliverables is the responsibility of the Customer unless otherwise agreed in writing.

10. **FORCE MAJEURE**. If Sensus becomes unable, either wholly or in part, by an event of Force Majeure, to fulfill its obligations under this Agreement, the obligations affected by the event of Force Majeure will be suspended during the continuance of that inability. "Force Majeure" means an event beyond the reasonable control of Sensus, including without limit acts of God, hurricane, flood, volcano, tsunami, tornado, storm, tempest, mudslide, vandalism, illegal or unauthorized radio frequency interference, strikes, lockouts, or other industrial disturbances, immigration, unavailability of component parts of any Deliverables provided hereunder, acts of public enemies, border disputes, border disruptions, delivery vehicle impound, wars, blockades, insurrections, riots, epidemics, earthquakes, fires, restraints or prohibitions by any court, board, department, commission or agency of the United States or any States, any arrests and restraints, civil disturbances and explosions.

11. **CANCELLATION**. Orders submitted to Sensus may not be canceled or amended, or deliveries deferred, by Customer except with Sensus' prior written consent, and then only upon such terms as shall be acceptable to Sensus.

12. **WARRANTIES**. Sensus' sole warranty and remedies associated therewith are set forth in the General Limited Warranty found at: sensus.com/tc, or available at 1-800-METER-IT, which General Limited Warranty is hereby incorporated into these Terms. THE WARRANTIES IN THIS SECTION ARE THE ONLY WARRANTIES GIVEN WITH RESPECT TO DELIVERABLES SOLD OR OTHERWISE PROVIDED BY SENSUS. SENSUS EXPRESSLY DISCLAIMS ANY AND ALL OTHER REPRESENTATIONS, WARRANTIES, CONDITIONS, EXPRESSED, IMPLIED, STATUTORY OR OTHERWISE REGARDING ANY MATTER IN CONNECTION WITH THESE TERMS OF SALE, INCLUDING WITHOUT LIMITATION, WARRANTIES AS TO FITNESS FOR A PARTICULAR PURPOSE, MERCHANTABILITY, NON-INFRINGEMENT AND TITLE.

13. **INTELLECTUAL PROPERTY**. No Intellectual Property is assigned to Customer hereunder. Sensus shall own or continue to own all Intellectual Property used or created in the course of performing this Agreement. To the extent, if any, that any ownership interest in and to such Intellectual Property does not automatically vest in Sensus, and instead vests in Customer, Customer agrees to grant and assign and hereby does grant and assign to Sensus all right, title, and interest that Customer may have in and to such Intellectual Property. Customer agrees not to reverse engineer any Deliverables purchased or provided hereunder. "Intellectual Property" means patents and patent applications, inventions (whether patentable or not), trademarks, service marks, trade dress, copyrights, trade secrets, know-how, data rights, database rights, specifications, drawings, designs, maskwork rights, moral rights, author's rights, and other intellectual property rights, as may exist now or hereafter come into existence, and all renewals and extensions thereof, regardless of whether any of such rights arise under the laws of the United States or of any other state, country or jurisdiction, any registrations or applications thereof, and all goodwill pertinent thereto. The Customer waives any moral rights they may have in the Intellectual Property.

14. **LIMITATION OF LIABILITY**

(a) SENSUS' AGGREGATE LIABILITY IN ANY AND ALL CAUSES OF ACTION ARISING UNDER, OUT OF, OR IN RELATION TO THIS AGREEMENT, ITS NEGOTIATION, PERFORMANCE, BREACH OR TERMINATION (COLLECTIVELY "CAUSES OF ACTION") SHALL NOT EXCEED THE TOTAL AMOUNT PAID BY CUSTOMER TO SENSUS UNDER THIS AGREEMENT. THIS IS SO WHETHER THE CAUSES OF ACTION ARE IN TORT, INCLUDING, WITHOUT LIMITATION, NEGLIGENCE OR STRICT LIABILITY, IN CONTRACT, UNDER STATUTE, OR OTHERWISE.

(b) AS A SEPARATE AND INDEPENDENT LIMITATION ON LIABILITY, SENSUS' LIABILITY SHALL BE LIMITED TO DIRECT DAMAGES. SENSUS SHALL NOT BE LIABLE FOR: (I) ANY INDIRECT, INCIDENTAL, SPECIAL OR CONSEQUENTIAL DAMAGES; NOR (II) ANY REVENUE OR PROFITS LOST BY CUSTOMER OR ITS AFFILIATES FROM ANY END USER IRRESPECTIVE OF WHETHER SUCH LOST REVENUE OR PROFITS IS CATEGORIZED AS DIRECT DAMAGES OR OTHERWISE; NOR (III) ANY IN/OUT COSTS; NOR (IV) CLAIMS MADE BY A THIRD PARTY; NOR (V) MANUAL METER READ COSTS AND EXPENSES. "IN/OUT COSTS" MEANS ANY COSTS AND EXPENSES INCURRED BY CUSTOMER IN TRANSPORTING GOODS BETWEEN ITS WAREHOUSE AND ITS END USER'S PREMISES AND ANY COSTS AND EXPENSES INCURRED BY CUSTOMER IN INSTALLING, UNINSTALLING AND REMOVING GOODS. "END USER" MEANS ANY END USER OF ELECTRICITY/WATER/GAS THAT PAYS CUSTOMER FOR THE CONSUMPTION OF ELECTRICITY/WATER/GAS, AS APPLICABLE.

(c) The limitations on liability set forth in this Agreement are fundamental inducements to Sensus entering into this Agreement. They apply unconditionally and in all respects. They are to be interpreted broadly so as to give Sensus the maximum protection permitted under law.

(d) To the maximum extent permitted by law, no Cause of Action may be instituted by Customer against Sensus more than TWELVE (12) MONTHS after the Cause of Action first arose. In the calculation of any damages in any Cause of Action, no damages incurred more than TWELVE (12) MONTHS prior to the filing of the Cause of Action shall be recoverable.

(e) If Customer is not the sole end user and ultimate owner of the Deliverables, then Customer shall ensure by its contract with the end user and ultimate owner (collectively, "Owner") that Sensus is given the benefit of the exclusions and limitations set out in these Terms. Customer agrees to indemnify, defend, and hold harmless Sensus from and against all Losses (defined below) alleged by any Owner to the extent that Sensus would not be liable to Customer under these Terms if the claim had been made by Customer.

15. **INDEMNIFICATION**. Customer agrees to defend, indemnify and hold harmless Sensus from and against all claims, liabilities, demands, damages, losses, costs and expenses, in law or in equity, of every kind and nature whatsoever (collectively, "Losses"), to the extent arising out of Customer's use of the Deliverables,, except to the extent such Losses arise out of a breach of this Agreement by Sensus.

16. **CONFIDENTIALITY**. Customer shall (and shall cause its employees, contractors and any Owner to) keep all Sensus Confidential Information strictly confidential and shall not disclose it to any third party or use it, except to the extent reasonably required to perform and enforce this Agreement or as required under applicable law, court order or regulation. As used herein, "Sensus Confidential Information" means any and all non-public information disclosed by Sensus, including without limitation, all technical information about products or services, pricing information, marketing and marketing plans, provision of Deliverables, performance of the Deliverables, Deliverables architecture and design, other business and financial information, software and all trade secrets. Sensus Confidential Information may be transmitted orally, in writing, electronically or otherwise observed by Customer. Notwithstanding the foregoing, "Sensus Confidential Information" shall not include: (i) any information in the public domain other than due to Customer's breach of this Agreement; (ii) any information in the possession of the Customer without restriction prior to disclosure by Sensus; or (iii) any information independently developed by the Customer without reliance on or access to the information disclosed hereunder by Sensus.

17. **RETURNS**. No Deliverables may be returned for credit or repair without the prior written authorization of Sensus. Authorized return shipments must be returned in good condition to Sensus' designated receiving point, must be shipped in suitable packaging, must be accompanied by a packing slip, including Sensus' Return Authorization Number, and must have transportation charges prepaid. Deliverables are deemed returned upon Sensus' receipt of the relevant Deliverable (in compliance with this section) at the address designated by Sensus. Correspondence concerning all returned Deliverables must be addressed to the appropriate Sensus office. Sensus reserves the right to deduct an adequate service charge to cover all inspection, testing and handling from any credit.

639 Davis Drive
Morrisville, NC 27560
1-800-638-3748

sensus
a xylem brand

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18. **ASSIGNMENT**. Customer may not assign, transfer or delegate this Agreement or any part of Customer's rights or duties without prior written consent of Sensus. Any attempted assignment in violation of this section shall be null and void.

19. **GOVERNING LAW AND DISPUTE RESOLUTION**. This Agreement shall be governed by, construed and enforced in accordance with the laws of the State of Delaware, without regard to conflicts of law principles. Any and all disputes arising under, out of, or in relation to this Agreement or its performance ("Disputes") shall first be resolved by the Parties attempting mediation in Delaware. If the Dispute is not resolved within sixty (60) days of the commencement of the mediation, it shall be litigated in the state or federal courts located in the State of Delaware. TO THE MAXIMUM EXTENT PERMITTED BY LAW, THE PARTIES AGREE TO A BENCH TRIAL AND THAT THERE SHALL BE NO JURY IN ANY DISPUTES.

20. **COMPLIANCE WITH LAWS, INCLUDING ANTI-CORRUPTION LAWS**. Customer shall comply with all applicable laws and regulations, as set forth at the time of acceptance and as may be amended, changed, or supplemented. Customer shall not take any action, or permit the taking of any action by a third party, which may render Sensus liable for a violation of applicable laws. (a) *EXPORT CONTROL LAWS*. Customer shall; (i) comply with all applicable U.S., state, and local laws and regulations governing the use, export, import, re-export, and transfer of products, technology, and services; and (ii) obtain all required authorizations, permits, and licenses. Customer shall immediately notify Sensus, and immediately cease all activities with regards to the applicable transaction, if the Customer knows or has a reasonable suspicion that the Deliverables may be directed to countries in violation of any export control laws. By ordering Deliverables, Customer certifies that it is not on any U.S., or other applicable, government export exclusion list. (b) *ANTI-CORRUPTION LAWS*. Customer shall comply with the United States Foreign Corrupt Practices Act (FCPA), 15 U.S.C. §§ 78dd-1, et seq.; laws and regulations implementing the OECD's Convention on Combating Bribery of Foreign Public Officials in International Business Transactions; the U.N. Convention Against Corruption; the Inter-American Convention Against Corruption; and any other applicable laws and regulations relating to anti-corruption in the Customer's county or any country where performance of this Agreement, or delivery or use of Deliverables will occur.

21. **SEVERABILITY**. In the event any provision of this Agreement is held to be void, unlawful or otherwise unenforceable, that provision will be severed from the remainder of the Agreement and replaced automatically by a provision containing terms as nearly like the void, unlawful, or unenforceable provision as possible; and the Agreement, as so modified, will continue to be in full force and effect.

22. **NON-WAIVER**. Failure or delay of Sensus to exercise a right or power under this Agreement shall not operate as a waiver thereof, nor shall any single or partial exercise of a right or power preclude any other future exercise thereof.

639 Davis Drive
Morrisville, NC 27560
1-800-638-3748

sensus
a xylem brand

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xylem

SENSUS G-500 LIMITED WARRANTY

REVISED: JUNE 2024

1. **General Product Coverage**. Unless otherwise provided herein, Sensus USA Inc. ("Sensus") warrants its products and parts to be free from defects in material and workmanship for one (1) year from the date of Sensus shipment and as set forth below. All products are sold to customer ("Customer") pursuant to Sensus' Terms of Sale, available at xylem.com.

2. **SR II® and accuSTREAM™ 5/8", 3/4" & 1" Meters** are warranted to perform to new meter accuracy level set forth in the SR II and accuSTREAM Data Sheets available at sensus.com for five (5) years from the date of Sensus shipment or until the registration shown below, whichever occurs first. Sensus further warrants that the SR II and accuSTREAM meters will perform to at least AWWA Repaired Meter Accuracy Standards for fifteen (15) years from the date of Sensus shipment or until the registration shown below, whichever occurs first:

	New Meter Accuracy	Repair Meter Accuracy
5/8" SR II Meter and accuSTREAM Meter	500,000 gallons	1,500,000 gallons
3/4" SR II Meter and accuSTREAM Meter	750,000 gallons	2,250,000 gallons
1" SR II Meter and accuSTREAM Meter	1,000,000 gallons	3,000,000 gallons

3. **SR II maincases** are warranted to be free from defects in material and work-manship for twenty-five (25) years from the date of Sensus shipment. accuSTREAM maincases will be free from defects in material and workmanship for fifteen (15) years from the date of Sensus shipment.

4. **ally® Meters** that register water flow are warranted to perform to the accuracy level set forth in the ally data sheet available at sensus.com for fifteen (15) years from the Date of Installation, but no longer than sixteen (16) years from date of manufacture, not including the meter's sensors, valve, and gear motor, which are warranted under different terms described below. As used herein, "Date of Installation" means the date after which the ally Meter has been out of empty pipe for seven (7) consecutive days, as those days are measured by the ally Meter and stored in the meter's nonvolatile memory.

5. **ally® Meter Batteries and Components**, including SmartPoint 510M/520M Modules are warranted to be free from defects in material and workmanship from the Date of Installation, as defined in Section 4, for the period stated below:

Batteries	15 years[1]
Sensors	5 years
Valve & Gear Motor	5 years[2]
SmartPoint 510M/520M modules and batteries in service w/ally	15 years[1]

6. **iPERL® Meters** that register water flow are warranted to perform to the accuracy levels set forth in the iPERL data sheet available at sensus.com for twenty (20) years from the date of Sensus shipment. The iPERL System Component warranty does not include the external housing.

7. **iPERL, ally, OMNI+, and Cordonel Connectors and Cables** are warranted to be free from defects in materials and workmanship, under normal use and service, for ten (10) years from the date of Sensus shipment. Nicor or Itron connectors included with a Sensus product are warranted according to the terms for Third-Party Devices in Section 16.

8. **Sensus OMNI™, OMNI+ Meters and Propeller Meters** are warranted to perform to as set forth in OMNI and Propeller data sheets for eighteen (18) months from the date of Sensus shipment.

9. **Sensus Cordonel Meters** are warranted to perform to the accuracy levels as set forth in the Cordonel data sheet available at sensus.com for twenty (20) years from the date of Sensus shipment. The Cordonel System Component warranty does not include the external housing.

10. **Sensus Cordonel maincases** are warranted to maintain their structural integrity for a period of twenty (20) years from the date of Sensus shipment.

1. If applicable, any SmartPoint 510M/520M Modules ever paired with an ally meter or Cordonel with pressure meter are warranted with the following limitations:
   - When configured to the default installation setting of six transmissions of metrology and pressure per day and one update of temperature per day, the SmartPoint module is warranted to perform up to five (5) firmware upgrades for the SmartPoint module and up to five (5) firmware upgrades for the ally meter or Cordonel (with pressure) meter;
   - 2500 Operational Commands, where "Operational Commands" include on demand reads (such as consumption, pressure, temperature), an ally meter valve command, or a configuration command; and
   - 15 Diagnostic Commands, which includes two-way communications tests and installations

   for the first ten (10) years from Date of Installation at no cost. For the remaining five (5) years, Customer will pay the reduced Replacement Price of the then-current list price in effect at the time the product is accepted for return in accordance with the following schedule:

Years	Replacement Price	Years	Replacement Price	Years	Replacement Price
1-10	0%	13	55%	15	75%
11	35%	14	65%	>15	100%
12	45%				

2. Notwithstanding the foregoing, valve and gear motor components of ally meters are not warranted beyond two thousand (2000) Valve State Operations, even if the warranty period provided herein has not yet expired. As used herein, "Valve State Operations" means adjustments of the Meter to open, close, or reduce flow.

11. **Cordonel Meter Batteries and Components** are warranted to be free from defects in material and workmanship from the Date of Installation, as defined in Section 9, for the period stated below:

Batteries	20 years[3]
Sensors	5 years
SmartPoint 510M/520M modules and batteries in service w/ Cordonel models with pressure	15 years[3]

12. **Sensus accuMAG™ and Hydroverse™ Meters** are warranted to be free from defects in material and workmanship, under normal use and service, for 18 months from the date of Sensus shipment or 12 months from startup, whichever occurs first.

13. **Sensus Registers** are warranted to be free from defects in material and workmanship from the date of Sensus shipment for the periods stated below or until the applicable registration for AWWA Repaired Meter Accuracy Standards, as set forth above, are surpassed, whichever occurs first:

5/8" thru 2" SR II, accuSTREAM Standard Registers	25 years
5/8" thru 2" SR II, accuSTREAM Encoder Registers	10 years
All HSPU, IMP Contactor, R/E/R, Elec. ROP	1 year
OMNI and OMNI+ Registers with Battery	10 years
Standard and Encoder Registers for Propeller Meters	1 year

14. **Sensus Electric and Gas Meters** are warranted pursuant to the General Limited Warranty available at sensus.com/TC.

15. **Batteries, iPERL System Components, AMR and FlexNet® Communication Network AMI Interface Devices** are warranted to be free from defects in material and workmanship from the date of Sensus shipment for the period stated below:

7500 series Hand-Held Device	2 years
Act-Pak® Remote Monitoring Instruments	1 year
CPTP100	20 years[4]
EasyLink Reader	1 year
Electronic TouchPad	10 years
FlexNet Base Station (including the R100NA and M400 products)	1 year
Gas SmartPoint® Modules and Batteries	20 years[5]
iPERL System Battery and iPERL System Components	20 years[3]
RM4160	1 year

3. Sensus will repair or replace non-performing:
   - iPERL System Batteries; and/or the iPERL System flowtube, the flow sensing and data processing assemblies, and the register ("iPERL System Components") with hourly reads manufactured after April 2018
   - Cordonel System Batteries; the flow sensing and data processing assemblies; and the register ("Cordonel System Components")
   - SmartPoint 510M/520M/515M/512M-PLS/522M Modules manufactured after April 2018 (configured to the factory setting of six transmissions per day under normal system operation of up to one demand read to each SmartPoint Module per month and up to five firmware downloads during the life of the product) and batteries, unless the SmartPoint 510M/520M/522M Module is ever paired with an ally Meter, which immediately amends the warranty terms to those described in Section 1S at no cost for the first fifteen (15) years from the date of Sensus shipment, and for the remaining five (5) years at a prorated percentage, applied towards the published list price in effect for the year the product is accepted by Sensus under the warranty conditions according to the following schedule:

Years	Replacement Price	Years	Replacement Price	Years	Replacement Price
1-15	0%	18	50%	20	70%
16	30%	19	60%	>20	100%
17	40%				

4. Sensus will repair or replace non-performing CPTP100 modules (configured at factory setting of four transmissions per day under normal system operations of up to one demand read per month and up to five firmware downloads during the life of the product) and batteries.

5. Sensus will repair or replace non-performing Gas SmartPoint Modules (configured to the factory setting of six transmissions per day under normal system operation of up to one demand read to each SmartPoint Module per month and up to five firmware downloads during the life of the product) and batteries, for the first ten (10) years from the date of Sensus shipment, and for the remaining ten (10) years, at a prorated percentage, applied towards the published list prices in effect for the year product is accepted by Sensus under warranty conditions according to the following schedule:

Years	Replacement Price	Years	Replacement Price	Years	Replacement Price
1-10	0%	14	45%	18	65%
11	30%	15	50%	19	70%
12	35%	16	55%	20	75%
13	40%	17	60%	>20	100%

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Sensus® Electronic Register+™[6]	20 years[6]
Sensus® Smart Gateway Sensor Interface	1 year[7]
SmartPoint® 510M/520M/519M/512M Modules and Batteries	20 years
Vehicle Gateway Base Station (VGB) and other AMR Equipment	1 year

16. **Third-Party Devices** are warranted to be free from defects in materials and workmanship, under normal use and service, for one (1) year from the date of Sensus shipment. As used in this Sensus Limited Warranty, "Third Party Devices" means any product, device, or component part used with a Sensus product that is manufactured or sold by any party that is not Sensus. Failure of a Third-Party Device which subsequently causes failure to a Sensus device shall be the responsibility of the manufacturer of the Third-Party Device.

17. **Software**. Software supplied and/or licensed by Sensus is supported according to the terms of the applicable software license or usage agreement. Sensus warrants that any network and monitoring services shall be performed in a professional and workmanlike manner.

18. **Return**. Sensus' obligation, and Customer's exclusive remedy, under this Sensus Limited Warranty is, at Sensus' option, to either (i) repair or replace the product, provided the Customer (a) returns the product to the location designated by Sensus within the warranty period; and (b) prepays the freight costs both to and from such location; or (ii) deliver replacement components to the Customer, provided the Customer installs, at its cost, such components in or on the product (as instructed by Sensus), provided, that if Sensus requests, the Customer (a) returns the product to the location designated by Sensus within the warranty period; and (b) prepays the freight costs both to and from such location. In all cases, if Customer does not return the product within the time period designated by Sensus, Sensus will invoice, and Customer will pay within thirty days of the invoice date, for the cost of the replacement product and/or components.

    The return of products for warranty claims must follow Sensus' Returned Materials Authorization (RMA) procedures. Water meter returns must include documentation of the Customer's test results. Test results must be obtained according to AWWA standards and must specify the meter serial number. The test results will not be valid if the meter is found to contain foreign materials. If Customer chooses not to test a Sensus water meter prior to returning it to Sen-sus, Sensus will repair or replace the meter, at Sensus' option, after the meter has been tested by Sensus. The Customer will be charged Sensus' then current testing fee. All products must be returned in accordance with the RMA process. For all returns, Sensus reserves the right to request meter reading records by serial number to validate warranty claims.

    For products that have become discontinued or obsolete ("Obsolete Product"), Sensus may, at its discretion, replace such Obsolete Product with a different product model ("New Product"), provided that the New Product has substantially similar features as the Obsolete Product. The New Product shall be warranted as set forth in this Sensus Limited Warranty.

    THIS SECTION 18 SETS FORTH CUSTOMER'S SOLE REMEDY FOR THE FAILURE OF THE PRODUCTS, SERVICES OR LICENSED SOFTWARE TO CONFORM TO THEIR RESPECTIVE WARRANTIES.

19. **Warranty Exceptions and No Implied Warranties**. This Sensus G-500 Limited Warranty does not include costs for removal or installation of products, or costs for replacement labor or materials, which are the responsibility of the Customer. The warranties in this Sensus G-500 Limited Warranty do not apply to and Sensus has no liability for goods that have been: installed improperly or in non-recommended installations; installed to a socket that is not functional, or is not in safe operating condition, or is damaged, or is in need of repair; tampered with; modified or repaired with parts or assemblies not certified in writing by Sensus, including without limitation, communication parts and assemblies; improperly modified or repaired (including as a result of modifications required by Sensus); converted; altered; damaged; read by equipment not approved by Sensus; for water meters, used with substances other than water, used with non-potable water, or used with water that contains dirt, debris, deposits, or other impurities; subjected to misuse, improper storage, improper care, improper maintenance, or improper periodic testing (collectively, "Exceptions."). If Sensus identifies any Exceptions during examination, troubleshooting or performing any type of support on behalf of Customer, then Customer shall pay for and/or reimburse Sensus for all expenses incurred by Sensus in examining, troubleshooting, performing support activities, repairing, or replacing any Equipment that satisfies any of the Exceptions defined above. The above warranties do not apply in the event of Force Majeure, as defined in the Terms of Sale.

    THE WARRANTIES SET FORTH IN THIS SENSUS G-500 LIMITED WARRANTY ARE THE ONLY WARRANTIES GIVEN WITH RESPECT TO THE GOODS, SOFTWARE, SOFTWARE LICENSES AND SERVICES SOLD OR OTHERWISE PROVIDED BY SENSUS. SENSUS EXPRESSLY DISCLAIMS ANY AND ALL OTHER REPRESENTATIONS, WARRANTIES, CONDITIONS, EXPRESSED, IMPLIED, STATUTORY OR OTHERWISE, REGARDING ANY MATTER IN CONNECTION WITH THIS SENSUS G-500 LIMITED WARRANTY OR WITH THE TERMS OF SALE, INCLUDING WITHOUT LIMITATION, WARRANTIES AS TO FITNESS FOR A PARTICULAR PURPOSE, MERCHANTABILITY, NON-INFRINGEMENT AND TITLE.

    SENSUS ASSUMES NO LIABILITY FOR COSTS OR EXPENSES ASSOCIATED WITH LOST REVENUE OR WITH THE REMOVAL OR INSTALLATION OF EQUIPMENT. THE FOREGOING REMEDIES ARE CUSTOMER'S SOLE AND EXCLUSIVE REMEDIES FOR THE FAILURE OF EQUIPMENT, LICENSED SOFTWARE OR SOFTWARE SERVICES, AND OTHER SERVICES TO CONFORM TO THEIR RESPECTIVE WARRANTIES.

20. **Limitation of Liability**

    a. SENSUS' AGGREGATE LIABILITY IN ANY AND ALL CAUSES OF ACTION ARISING UNDER, OUT OF OR IN RELATION TO THIS AGREEMENT, ITS NEGOTIATION, PERFORMANCE, BREACH OR TERMINATION (COLLECTIVELY "CAUSES OF ACTION") SHALL NOT EXCEED THE TOTAL AMOUNT PAID BY CUSTOMER TO SENSUS UNDER THIS AGREEMENT. THIS IS SO WHETHER THE CAUSES OF ACTION ARE IN TORT, INCLUDING, WITHOUT LIMITATION, NEGLIGENCE OR STRICT LIABILITY, IN CONTRACT, UNDER STATUTE OR OTHERWISE.

    b. AS A SEPARATE AND INDEPENDENT LIMITATION ON LIABILITY, SENSUS' LIABILITY SHALL BE LIMITED TO DIRECT DAMAGES. SENSUS SHALL NOT BE LIABLE FOR: (I) ANY INDIRECT, INCIDENTAL, SPECIAL OR CONSEQUENTIAL DAMAGES; NOR (II) ANY REVENUE OR PROFITS LOST BY CUSTOMER OR ITS AFFILIATES FROM ANY END USER(S), IRRESPECTIVE OF WHETHER SUCH LOST REVENUE OR PROFITS IS CATEGORIZED AS DIRECT DAMAGES OR OTHERWISE; NOR (III) ANY IN/OUT COSTS; NOR (IV) MANUAL METER READ COSTS AND EXPENSES.

    c. The limitations on liability set forth in this Agreement are fundamental inducements to Sensus entering into this Agreement. They apply unconditionally and in all respects. They are to be interpreted broadly so as to give Sensus the maximum protection permitted under law.

    d. To the maximum extent permitted by law, no Cause of Action may be instituted by Customer against Sensus more than TWELVE (12) MONTHS after the Cause of Action first arose. In the calculation of any damages in any Cause of Action, no damages incurred more than TWELVE (12) MONTHS prior to the filing of the Cause of Action shall be recoverable.

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6 Sensus will repair or replace non-performing Sensus Electronic Register+with hourly reads for the first ten (10) years from the date of Sensus shipment, and for the remaining ten (10) years, at a prorated percentage, applied towards the published list prices in effect for the year product is accepted by Sensus under warranty conditions according to the following schedule:

Years	Replacement Price	Years	Replacement Price	Years	Replacement Price
1-10	0%	14	45%	18	65%
11	30%	15	50%	19	70%
12	35%	16	55%	20	75%
13	40%	17	60%	>20	100%

7 Sensus® Smart Gateway Sensor Interface warranty valid only for analog Meter Sample Rates of four times per hour with a Standard Transmit Rate of hourly or greater for the analog channel(s).

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xylem

SENSUS GENERAL LIMITED WARRANTY

REVISED JUNE 2024

1. **Terms of Sale**. Sensus USA Inc. ("Sensus") warrants its products and parts as set forth below. All products are sold to customer ("Customer") pursuant to Sensus' Terms of Sale, available at xylem.com.

2. **Electric Meters and Electric SmartPoint™ Modules.** Sensus warrants electric meters provided by Sensus, as well as the embedded Sensus electric SmartPoint Modules, to be in compliance with their respective specifications under normal use and service, and to be free from material defects in materials and workmanship for a warranty period of twelve (12) months from the date of the installation or eighteen (18) months from the date of shipment, whichever occurs first. The warranty period for new spare parts and components sold by Sensus is twelve (12) months from the date of shipment. The warranty period for repaired or refurbished parts repaired by Sensus is ninety (90) days from the date of shipment, unless repaired pursuant to a warranty, in which case the repair is warranted for the time remaining of the original warranty period.

3. **Gas Products and Gas SmartPoint Modules.**

   a. Except for the Sonix line of meters, Sensus warrants the Sensus gas products to be in compliance with their respective specifications under normal use and service, and to be free from material defects in materials and workmanship for a warranty period of twelve (12) months from the date of the installation or eighteen (18) months from the date of shipment, whichever occurs first.

   b. Sensus warrants the Sensus Sonix and SonixIQ meters to be in compliance with their respective specifications under normal use and service, and to be free from material defects in materials and workmanship for a warranty period of fifteen (15) years from the date of shipment. Sensus warrants the batteries in the Sensus Sonix meters to be free from material defects in materials and workmanship for a warranty period of ten (10) years from the date of shipment. For the SonixIQ meter only, Sensus warrants the battery for an additional 10 years on a prorated basis, subject to the replacement fees below for years 11 – 20.

Years	Discounted Replacement Price	Years	Discounted Replacement Price
1-10	100%	16	40%
11	90%	17	30%
12	80%	18	20%
13	70%	19	10%
14	60%	20	0%
15	50%	>20	0%

   c. For all gas products, the warranty period for new spare parts and components sold by Sensus is twelve (12) months from the date of shipment. The warranty period for repaired or refurbished parts repaired by Sensus is ninety (90) days from the date of shipment, unless repaired pursuant to a warranty, in which case the repair is warranted for the time remaining of the original warranty period.

   d. Sensus warrants the standalone Sensus gas SmartPoint Modules as set forth in the "G500" warranty, as set forth at xylem.com, or available at 1-800-638-3748.

4. **Water Meters and Water SmartPoint Modules.** Sensus warrants the Sensus water meters and Sensus water SmartPoint Modules as set forth in the "G500" warranty, as set forth at xylem.com, or available at 1-800-638-3748.

5. **VantagePoint® Lighting Control Module.** Sensus warrants the Sensus VantagePoint® Lighting Control Module to be in compliance with their respective specifications under normal use and service, and to be free from material defects in materials and workmanship for a warranty period of ten (10) years from the date of shipment. The warranty period for new spare parts and components sold by Sensus is twelve (12) months from the date of shipment. The warranty period for repaired or refurbished parts repaired by Sensus is ninety (90) days from the date of shipment, unless repaired pursuant to a warranty, in which case the repair is warranted for the time remaining of the original warranty period.

6. **DA Devices and HAN Devices.** Sensus warrants the Sensus DA Devices and Sensus HAN Devices to be in compliance with their respective specifications under normal use and service, and to be free from material defects in materials and workmanship for a warranty period of twelve (12) months from the date of shipment. The warranty period for new spare parts and components sold by Sensus is twelve (12) months from the date of shipment. The warranty period for repaired or refurbished parts repaired by Sensus is ninety (90) days from the date of shipment, unless repaired pursuant to a warranty, in which case the repair is warranted for the time remaining of the original warranty period.

7. **RF Field Equipment.** Sensus warrants the Sensus RF Field Equipment to be in compliance with their respective specifications under normal use and service, and to be free from material defects in materials and workmanship for a warranty period of twelve (12) months from the date of shipment.

8. **Server Hardware.** Sensus provides no warranty on the Server Hardware.

9. **Third Party Goods.** Notwithstanding anything to the contrary herein, Sensus does not warrant any goods manufactured or software supplied by third parties. For example, if Customer elects to buy meters from a third party, the Sensus SmartPoint Modules installed in such third party meters shall, subject to Section 11, below, be covered by the warranty above, but any warranty on the meter itself shall be a matter directly between Customer and such third party meter supplier.

10. **Services.** Sensus warrants that its services shall, at the time of performance, materially conform to the contract requirements, and shall be performed in a professional and workmanlike manner, free from material defects in workmanship.

11. **Remedy.**

   a. If any Field Device or RF Field Equipment fails during the applicable warranty period (a "Failed Good"), Sensus' obligation, and Customer's exclusive remedy, is, at Sensus' option, to either (i) repair or replace the Failed Good, provided the Customer (a) returns the product to the location designated by Sensus within the warranty period, and (b) prepays the freight costs both to and from such location, or (ii) deliver replacement components to the Customer, provided the Customer installs, at its cost, such components in or on the Failed Good (as instructed by Sensus). In all cases, Customer shall be responsible for returning the Failed Good to Sensus, including all costs associated with the return of the Failed Good, and Sensus shall be responsible for shipping the repaired or replaced good back to Customer's warehouse. Customer shall, in all cases, be responsible for the In/Out Costs. If Sensus determines that the returned good is not defective, Customer shall pay and/or reimburse Sensus for all expenses incurred by Sensus in the examination of the returned good.

   b. Customer's remedy under the warranty for services shall be, at Sensus' sole cost and expense, to correct or re-perform any defective or non-conforming services to assure compliance with the contract requirements.

   c. THIS SECTION 11 SETS FORTH CUSTOMER'S SOLE REMEDY WITH RESPECT TO A FAILED GOOD OR ANY DEFECTIVE OR NON-CONFORMING SERVICE.

12. **Warranty Exceptions and No Implied Warranties**. This Sensus General Limited Warranty does not include costs for removal or installation of products, or costs for replacement labor or materials, which are the responsibility of the Customer. The warranties in this Sensus General Limited Warranty do not apply to, and Sensus has no liability for, goods that have been: installed improperly or in non-recommended installations; installed to a socket that is not functional, or is not in safe operating condition, or is damaged, or is in need of repair; tampered with; modified or repaired with parts or assemblies not certified in writing by Sensus, including without limitation, communication parts and assemblies; improperly modified or repaired (including as a result of modifications required by Sensus); converted; altered; damaged; read by equipment not approved by Sensus; for water meters, used with substances other than water, used with non-potable water, or used with water that contains dirt, debris, deposits, or other impurities; subjected to misuse, improper storage, improper care, improper maintenance, or improper periodic testing (collectively, "Exceptions."). If Sensus identifies any Exceptions during examination, troubleshooting or performing any type of support on behalf of Customer, then Customer shall pay for and/or reimburse Sensus for all expenses incurred by Sensus in examining, troubleshooting, performing support activities, repairing or replacing any Equipment that satisfies any of the Exceptions defined above. The above warranties do not apply in the event of Force Majeure, as defined in the Terms of Sale.

THE WARRANTIES SET FORTH IN THIS SENSUS GENERAL LIMITED WARRANTY ARE THE ONLY WARRANTIES GIVEN WITH RESPECT TO THE GOODS, SOFTWARE, SOFTWARE LICENSES AND SERVICES SOLD OR OTHERWISE PROVIDED BY SENSUS. SENSUS EXPRESSLY DISCLAIMS ANY AND ALL OTHER REPRESENTATIONS, WARRANTIES, CONDITIONS, EXPRESSED, IMPLIED, STATUTORY OR OTHERWISE, REGARDING ANY MATTER IN CONNECTION WITH THIS SENSUS GENERAL LIMITED WARRANTY OR WITH THE TERMS OF SALE, INCLUDING WITHOUT LIMITATION, WARRANTIES AS TO FITNESS FOR A PARTICULAR PURPOSE, MERCHANTABILITY, NON-INFRINGEMENT AND TITLE.

SENSUS ASSUMES NO LIABILITY FOR COSTS OR EXPENSES ASSOCIATED WITH LOST REVENUE OR WITH THE REMOVAL OR INSTALLATION OF EQUIPMENT. THE FOREGOING REMEDIES ARE CUSTOMER'S SOLE AND EXCLUSIVE REMEDIES FOR THE FAILURE OF EQUIPMENT, LICENSED SOFTWARE OR SOFTWARE SERVICES, AND OTHER SERVICES TO CONFORM TO THEIR RESPECTIVE WARRANTIES.

13. **Limitation of Liability**

   a. SENSUS' AGGREGATE LIABILITY IN ANY AND ALL CAUSES OF ACTION ARISING UNDER, OUT OF OR IN RELATION TO THIS AGREEMENT, ITS NEGOTIATION, PERFORMANCE, BREACH OR TERMINATION (COLLECTIVELY "CAUSES OF ACTION") SHALL NOT EXCEED THE TOTAL AMOUNT PAID BY CUSTOMER TO SENSUS UNDER THIS AGREEMENT. THIS IS SO WHETHER THE CAUSES OF ACTION ARE IN TORT, INCLUDING, WITHOUT LIMITATION, NEGLIGENCE OR STRICT LIABILITY, IN CONTRACT, UNDER STATUTE OR OTHERWISE.

   b. AS A SEPARATE AND INDEPENDENT LIMITATION ON LIABILITY, SENSUS' LIABILITY SHALL BE LIMITED TO DIRECT DAMAGES. SENSUS SHALL NOT BE LIABLE FOR: (I) ANY INDIRECT, INCIDENTAL, SPECIAL OR CONSEQUENTIAL DAMAGES; NOR (II) ANY REVENUE OR PROFITS LOST BY CUSTOMER OR ITS AFFILIATES FROM ANY END USER(S), IRRESPECTIVE OF WHETHER SUCH LOST REVENUE OR PROFITS IS CATEGORIZED AS DIRECT DAMAGES OR OTHERWISE; NOR (III) ANY IN/OUT COSTS; NOR (IV) MANUAL METER READ COSTS AND EXPENSES.

   c. The limitations on liability set forth in this Agreement are fundamental inducements to Sensus entering into this Agreement. They apply unconditionally and in all respects. They are to be interpreted broadly so as to give Sensus the maximum protection permitted under law.

   d. To the maximum extent permitted by law, no Cause of Action may be instituted by Customer against Sensus more than TWELVE (12) MONTHS after the Cause of Action first arose. In the calculation of any damages in any Cause of Action, no damages incurred more than TWELVE (12) MONTHS prior to the filing of the Cause of Action shall be recoverable.

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14. **Definitions**. Any terms used in this General Limited Warranty as defined terms, and which are not defined herein, shall have the meanings given to those terms in the Terms of Sale.

a. "Agreement" means this General Limited Warranty, Customer's purchase order (except any Additional Terms), Sensus' Acknowledgement Form (if any), Sensus' invoice and the Terms of Sale.

b. "DA Devices" means RTMs and RTUs.

c. "Echo Transceiver" (formerly "FlexNet Network Portal" and "FNP") identifies the Sensus standalone, mounted relay device that takes the radio frequency readings from the SmartPoint Modules and relays them by radio frequency to the relevant FlexNet Base Station.

d. "End User" means any end user of electricity/water/gas that pays Customer for the consumption of electricity/water/gas, as applicable.

e. "Equipment" means the Field Devices, RF Field Equipment, Server Hardware, and any other goods sold hereunder.

f. "FlexNet Base Station" (formerly "Tower Gateway Base Station" and "TGB") identifies the Sensus manufactured device consisting of one transceiver, to be located on a tower that receives readings from the SmartPoint Modules (either directly or via an Echo Transceiver) by radio frequency and passes those readings to the RNI by TCP/IP backhaul communication.

g. "Field Devices" means the meters, SmartPoint Modules, DA Devices and HAN Devices.

h. "Force Majeure" shall have the meaning set forth in the Terms of Sale.

i. "HAN Devices" means the PCTs, IHDs and LCMs.

j. "IHDs" means the in-home displays.

k. "In/Out Costs" means any costs and expenses incurred by Customer in transporting goods between its warehouse and its End User's premises and any costs and expenses incurred by Customer in installing, uninstalling and removing goods.

l. "LCMs" means the load control modules.

m. "PCTs" means the programmable controllable thermostats.

n. "Remote Transceiver" (formerly "FlexNet Remote Portal" and "FRP") identifies the Sensus standalone, mounted relay device that takes the radio frequency readings from the SmartPoint Modules and relays them directly to the RNI by TCP/IP backhaul communication.

o. "RNI" identifies the regional network interfaces consisting of hardware and software used to gather, store, and report data collected by the FlexNet Base Stations from the SmartPoint Modules.

p. "RF Field Equipment" means, collectively, FlexNet Base Stations, Echo Transceivers and Remote Transceivers.

q. "RTMs" means the telemetric remote telemetry modules.

r. "RTUs" means telemetric MicroRTU (T866).

s. "Server Hardware" means the RNI hardware and the FlexServer hardware.

t. SmartPoint™ Modules" identifies the Sensus transmission devices installed on devices such as meters, distribution automation equipment, lighting fixtures, and demand/response devices located at Customer's End Users' premises that take the readings of the devices and transmit those readings by radio frequency to the relevant FlexNet Base Station, Remote Transceiver or Echo Transceiver.

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PRODUCT SHEETS:

STRATUS IQ

xylem

DATA SHEET
EDS-10009-04

Stratus IQ™ Electricity Meter

Taking the Grid to Next-level Smart

Building upon the best-in-class Stratus® metering platform, the Stratus IQ combines grid edge intelligence with precise energy measurement into one powerful package. This meter provides utilities with the data visibility and control needed to quickly adapt to a rapidly evolving smart grid.

FEATURES

- Six energies and six demands
- Four quadrant metering
- By-phase energy reporting (12S/25S)
- Thirty-two load profile channels in four data sets
- Theft, tilt, and tamper detection
- Arc and loss of neutral detection
- Sag and swell logging
- Harmonics reporting (THD & TDD)
- Enhanced outage recording
- Persistent real-time clock maintains time for 24 hours following outage
- Optional optical port

BENEFITS

- C&I power in a residential meter
- Software defined metrology for future flexibility
- Flexible two-way communication via the FlexNet® Communication Network
- FCC approved communication over unshared, primary use licensed spectrum

Software-defined metrology

With the ability to make metrology adjustments over-the-air, utilities are prepared for whatever the future holds.

C&I power in a residential meter

Four-quadrant metering is just the beginning. By simultaneously measuring real, apparent and reactive energy, the Stratus IQ gives utilities the competitive knowledge necessary to be more efficient in the generation and distribution of power.

Data is the name of the game

The Stratus IQ has 32 channels of load profile data in four data sets along with line-side and load-side voltage reporting. This insight gives utilities the concrete data needed to make educated decisions. No other meter on the market has this type of system visibility.

Details

- kWh, kVAh, kVARh energy measurements
- Demand and load profile with load limiting (current or demand)
- AES 256-bit encryption security
- C12.19 utility industry end device ANSI Tables
- Full net metering and primary metering
- 20-year Time-of-Use calendar
- Patented temperature detection
- Best-in-class power outage and restoration notification
- Voltage measurement and configurable alarm reporting
- Remote ZigBee, radio and metrology firmware download
- 1 Wh internal and display resolution

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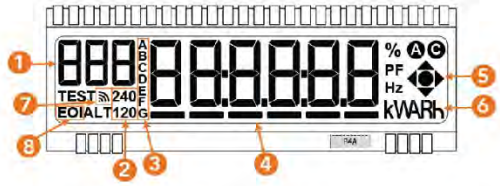
Stratus IQ™

Electricity Meter

LCD display

The data display is composed of LCD segments arranged to display letters and digits. Typically, the total kilowatt-hours are displayed in whole numbers; the resolution may be selected at the time of order. You can control the number of digits displayed, the justification of the digits within the display, and the location of the decimal point.



Key: 1 = source list number, 2 = voltage, 3 = TOU indicators,
4 = data display and disk simulator,
5 = energy quadrant indicator, 6 = energy type,
7 = signal indicator, 8 = end of interval indicator

SPECIFICATIONS

Forms	1S, 2S, 3S, 4S, 12S, 25S, 1SRD, 2SRD, 12SRD, 25SRD, 2SCL320
Power Requirements	Voltage Rating: 120VAC and 240VAC Frequency: 60 Hz
Accuracy	Exceeds Accuracy Class 0.2 (ANSI C12.20-2015)
Burden	Power Supply 1.2W / 6.7VA @240VAC; 1.1W / 3.0VA @120VAC Current circuit per phase <0.01W
Device Type	FlexNet Device Type 96; Metrology Device Type 97, ZigBee Device Type 98
Model	Stratus IQ with FlexNet only: IDTB005, FCC ID: SDBIDTB005, IC: 2220A-IDTB005 Stratus IQ with FlexNet & Zigbee: IDTB006, FCC ID: SDBIDTB006, IC: 2220A-IDTB006
Remote Disconnect	Rating: 200A, 240 VAC, 60Hz, PF 0.75 lagging Endurance: Greater than 6000 cycles, 200A, 240 VAC, 60 Hz, PF 0.75 lagging Endurance: Greater than 30000 cycles at no load Overload: 50 OPS, 300A, 240 VAC, 60 Hz, PF 0.75 Current Withstand: Per ANSI C12.1: 7,000 A Peak (5,000 Amps rms) 240 VAC, 60 Hz, for 6 cycles with normal operation after exposure; 12,000 Amps rms for 4 cycles with fail safe conditions after exposure
Dimensions	6.95 in (17.65 cm) diameter; 5.06 in (12.86 cm) depth
Industry Standards	UL 2735 listed, ANSI C12.20 - 2015 (Class 0.2), ANSI C12.1 - 2014, ANSI C12.10 - 2011, ANSI C37.90.1 - 2002, FCC Part 15, Transient/Surge Suppression IEC 61000-4-4 - 2012 and IEEE C62.41.2 - 20002, Category B, Temperature Rise Specifications meets ANSI C12.1 Section 4.7.2.9, ANSI C12.18-R2006 (R2016).
Operating Environment	Temperature -40° to +85° C under the cover Humidity 0% to 95% non-condensing
Characteristic Data	Starting Current: 20mA (for CL200); 9mA (for CL20)
Hardware Options	ZigBee, Remote disconnect

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DATA SHEET
EDS-10004-03

Aclara kV2c Electric Meter

Commercial & Industrial Meter with FlexNet® SmartPoint® Module

Aclara's premier commercial and industrial kV2c meter family has become even more powerful. The Gen 5 kV2c meter is now internally equipped with a Sensus SmartPoint module, giving utilities the power and performance of the FlexNet Communications Network coupled with revenue grade metering functionality and advanced power quality monitoring.

FEATURES

- Full meter programming and firmware updates over the air
- Customize advanced metering options including kWh, kVArh & kVAh
- 4-quadrant measurements
- Voltage and Current THD per phase, TDD (Total Demand Distortion), Distortion Power Factor, Distortion kVA, and Distortion kVAh
- Per phase AC instrumentation (amps, volts, and frequency)
- Programmable diagnostics for voltage imbalance, distortion, current imbalance, reversed polarity, high neutral current.
- Tamper detection tools and installation verification capabilities to automatically catch errors, wiring changes, tampering, and billing issues
- Voltage sag and swell log

BENEFITS

- Flexible two-way communication via FlexNet network
- FlexNet communications network supports multiple applications
- FlexNet communications network is FCC approved for operation on an unshared primary-use licensed spectrum

Overview

The kV2c meter moves beyond revenue metering to real time instrumentation, true power quality monitoring and real cost of service measurements. Whether you are metering the simplest energy rate or collecting critical quality of service and load analysis information on a polyphase or a single phase circuit, there is a kV2c meter configuration to meet your needs.

The Aclara kV2c meter family is one of the most widely accepted ANSI® commercial and industrial meters with over two million units deployed in the field since its introduction. The robust revenue-grade meter design is based on Aclara's cutting edge technology that provides high accuracy and reliability.

Metrology

- kWh, kVARh and kVAh energy measurements with associated demand values
- ANSI C12.20 Accuracy Class 0.2% with typical accuracy better than 0.2%
- Programmable sag and swell monitor that logs voltage sag and swell duration down to one cycle
- Time and date stamped meter event log
- Robust revenue-grade watt-hour and demand meter with advanced recording options.
- Versatile programming softswitches allowing the selection of advanced functionality such as expanded recording features, time of use, load profile and power quality measures.
- Powerful functional upgrades provide 8-channel 64 kb, 20-channel 192 kB, or 20-channel 384 kB recording for voltage, current, real and reactive energy, apparent energy, distortion kVAh, THD and TDD.

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Aclara kV2c Electric Meter

Commercial & Industrial Meter with FlexNet® SmartPoint®

OPTIONS

Service	1ϕ, 2 wire	1ϕ, 3 wire	1ϕ, 2 wire	1ϕ, 3 wire	3ϕ, 4 wire, Wye or Δ	Network or 3ϕ, 3 wire Δ	3ϕ, 4 wire, Wye or Δ	3ϕ, 4 wire, Wye	Network or 3ϕ, 3 wire Δ
Class	200	200 & 320	20	20	20	200 & 320	200 & 320	20	20
Form	1S	2S	3S	4S	9S	12S	16S	36S	45S

An optional form 16S, class 100, 120 volt meter with 3ϕ RCDC switch is available.
Form 36S replaces form 6S; form 45S replaces form 5S and form 35S meters.
Form 9S and 16S meters support Aclara's Fitzall™ feature.

SPECIFICATIONS

Power Requirements	Voltage Rating: 120 to 480 volts Voltage Range: ±20% of voltage rating Frequency: 50 or 60 Hz
Operating Environment	Temperature: -40°C to +85°C (-40°F to 185°F) Humidity: 0% to 95% non-condensing
Dimensions	Diameter: 17.63 cm (6.94 inches) Depth: 15.24 cm (6 inches)
Model	FLEXKV2C
FCC ID	SDBFLEXKV2C
ID	2220A-FLEXKV2C
Mechanical Design	Durable one piece Lexan™ cover Rugged single action reset lever Magnetic switch activates alternates Alternate and Site Genie displays
Accuracy	Meets ANSI C12.20 for accuracy class 0.2 Typical accuracy better than ±0.2%
Tamper Detection Options	Received kWh detection (optional) Demand reset counter FlexNet on-board vibration sensor
Load Profile	Up to 20 channels of ANSI C12.19 load profile data. Up to 15 snapshots
Connect/Disconnect Switch	Available on Form 16S, Class 100, 120 – 240, 50/60 Hz meter only Three pole, single throw, magnetically-latching Endurance: 5000 cycles @ 100A, 240Vac, 50/60 Hz, 30,000 mechanical operations
Characteristic Data	Starting current: Typically less than 0.1 amps for SC meters; 0.05 amps for TR meters Typical Watts Loss: < 0.8W @ 120V, Phase A; < 0.1W @ 120V, Phase B & C
LCD Display	Six digit liquid crystal display User-definable scroll list; 75 items total Power flow and mechanical disk emulator kWh display with segment check option

METER FUNCTIONALITY

Meter Features	Bi-directional real and reactive energy and demands Q-hour meter Real time pricing (CPP) TOU Meter Up to 20 channel load profile recorder Power quality meter (THD, TDD and distortion power) Current and Voltage recorder Transformer/Line loss and accuracy compensation Real time multifunction instrument Four quadrant meter Individual phase metering
Logging	Security Log Voltage sag and swell log Meter events log

Some functionality may require additional soft switches.

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DATA SHEET
ADS-10017-01

CommandLink® II

Wireless Interface

Seamless Communication

The CommandLink® II wireless interface provides access to a complete suite of functional controls within a gas, water or electric SmartPoint® transceiver. This Bluetooth® enabled device, coupled with a handheld, performs activations, deactivation, meter reads, on demand reads and can also readily audit the water, gas, or electric SmartPoint module.

CommandLink II provides instant access to any SmartPoint module's programmed and stored information. You can retrieve setup information, validate readings, and verify or reprogram settings for optimal performance.

The CommandLink II is a compact tool that is compatible with Sensus approved WIN mobile, WIN 10, Android and iOS programming devices.

FEATURES

- Compact size
- Rechargeable batteries included
- Bluetooth enabled
- Built-in antenna

BENEFITS

- Interacts with SmartPoint water, gas, and electric modules
- Performs on-demand interrogation
- Retrieves and reprograms settings

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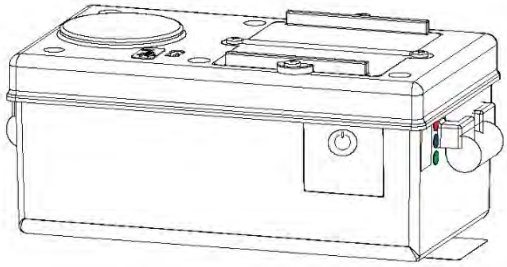
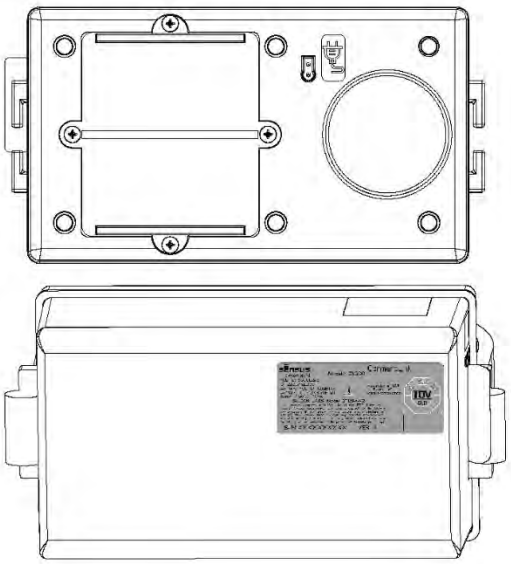
CommandLink® II

Wireless Interface





Specifications

Case	High-impact, injection-molded plastic
Dimensions	4.7" L x 2.37" H x 2.41" W
Weight	16 oz.
Operating Temp.	32°F to 122°F
Shock Temp.	-20°F to 103°F
Charging Temp.	-32°F to 104°F
Relative Humidity	65 +/- 20%y
Dust	Meets procedures IP5X (MIL-STD 810F), Method 510.4
Warranty	One year
Compliance	Complies with FCC Part 15, 24, and 101. Complies with Industry Canada ICES-003.
Safety Certification	CAN/CSA C22.2 No. 62368-1:2014 UL 62368-1:2014 EN 62368-1:2014/A11:2017

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SOLUTION BRIEF

Read it all. Bill it all. Link it all.

Link your utility to a better tomorrow with FlexNet EasyLink™ mobile communication solution.

Moving away from ERT technology to a future-proof AMR solution is easier than you think. Ideal for gas, water and electricity providers, FlexNet EasyLink™ reads both ERTs and Sensus SmartPoint® modules for an efficient conversion.

With the power of the FlexNet® communication network, every utility can easily migrate to a more resilient and faster network for better results. And when you're ready to make the move to AMI, only EasyLink enables you to seamlessly transition at your pace.

EasyLink is the simple, cost-effective way to transition from ERT meter-reading technology to the FlexNet communication network. One EasyLink device reads both ERTs and Sensus SmartPoint® modules at the same time. When the route is complete, simply upload readings via Wi-Fi or cellular to get real-time data transfer and route updates. EasyLink also allows you to combine application, mapping and route management, as well as optional Field Force Management integration.

EasyLink Components

FlexNet EasyLink Reader

Collect data in a drive-by application from either ERTs or Sensus SmartPoint modules with this portable radio-based device.

Easylink Workbook application

Manage and operate drive-by readings for both Sensus SmartPoint modules and ERTs. When your route is complete, upload the readings back to your office.

EasyLink Workspace application

Manage the back-end of your AMR process with this app that covers everything from routes to billing reports.

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ASB-10009-01

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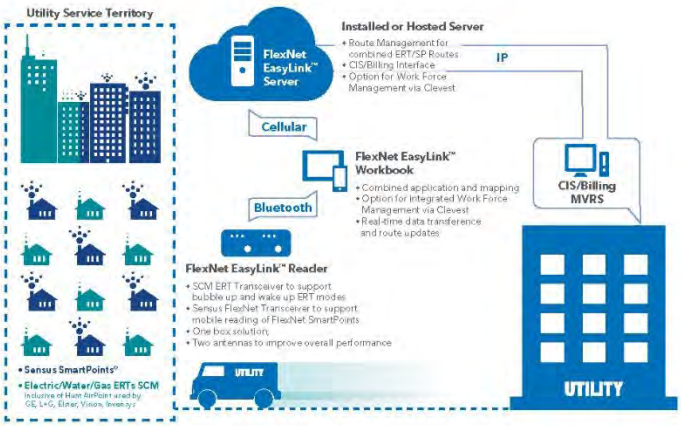
Migrate at your own pace.

With EasyLink, you can keep your existing assets while transitioning to the FlexNet AMI solution, ensuring the most efficient and cost-effective migration for your utility.



Do more. And do it better. It's EasyLink. Learn more at sensus.com/easylink

Features

- Compatible with water, gas and electricity meters.
- Reads Sensus SmartPoint modules and ERTs (GE, L+G, Elster, Vision, Invensys, Itron, Hunt AirPoints).
- Ideal for both bubble-up and wake-up ERTs.
- Enables real-time data transfer and route updates.
- Provides three years of data storage.
- Generates helpful meter management reports.

Benefits

- Improved route efficiency.
- Significantly better read rates.
- Reliable, robust, and timely data.
- Little to no integration costs.
- No stranded assets.
- Easy installation.
- Faster and stronger network connections.
- Interoperable with existing billing and accounting systems.

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DATA SHEET

BENEFITS

- Browser-based application
- Intuitive and customizable UI to help define routes and reading tasks
- Integrated maps

FlexNet EasyLink WorkSpace

The FlexNet EasyLink™ WorkSpace application is a comprehensive software program that offers flexibility for managing Automatic Meter Reading (AMR) processes. The application increases operating efficiency, provides a variety of management reports and summaries, and reduces time for sending reading data to the billing software. A flexible menu-driven system includes a wide selection of user specifications, options and configurations. These features make WorkSpace highly adaptable in meeting your specific requirements.

Complete AMR Software Integration

The modular design of WorkSpace lets your utility integrate Sensus SmartPoint® modules and Itron ERT meter-reading solutions into one specially designed software package. This flexibility enables operation of a single-meter reading system. Utilities can begin with one system and migrate to another by simply adding modules to their existing AMR solution. The migration path provides the opportunity for increased operational efficiency while minimizing training needs.

Flexibility

WorkSpace is completely customizable for your utility operation. The software can be interfaced with other PC-based automated billing and accounting systems or existing mainframe billing and accounting systems. Integration with billing software platforms can be completed with minimal interruption.

Route Information Transfer

Easily prepare route information for the meter reader to successfully complete readings. New or inexperienced meter readers are guided through an entire route by following information on screen. Meter readers can be alerted to abnormally high or low readings and misreads by setting parameters in the application. When using the Wi-Fi or cellular option, the application can provide real-time updates to the meter reader in the field. In addition, this application also allows up-to-the-minute data transfer from the

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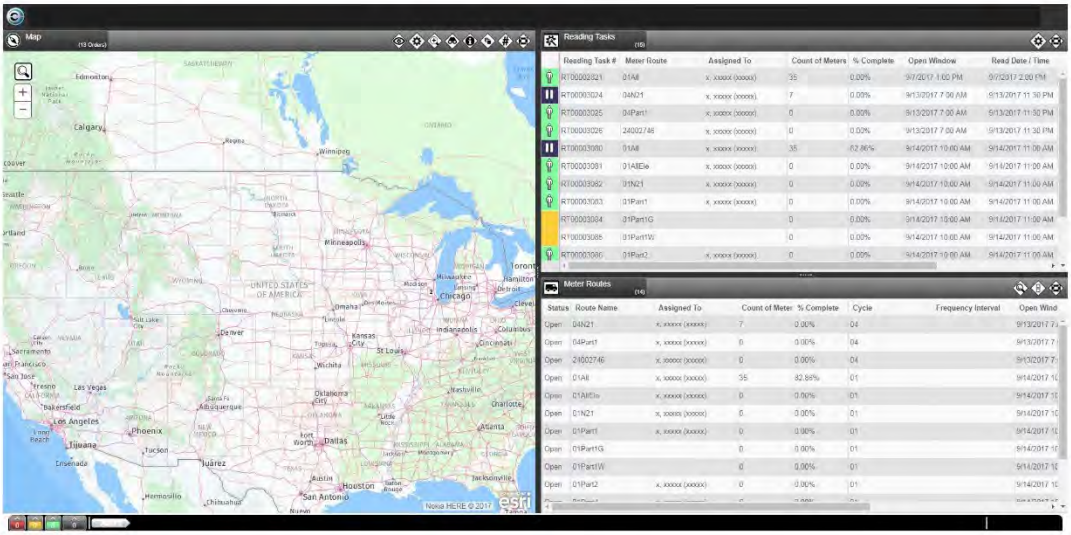
FlexNet EasyLink WorkSpace



FlexNet EasyLink™ Reader to the FlexNet EasyLink™ WorkBook Application.

Meter Reading Data Transfers

Manually moving meter reading data is accomplished by electronically transferring the data captured during the meter reading process. Once the data is transferred from WorkBook, WorkSpace processes the data and prepares it for upload to the billing software. WorkSpace can be used with a utility's existing billing software platform or as part of a new standalone system.

Server Application

Your utility is provided with three years of stored data. This gives easy access to data for reporting and any billing disputes. The server application also allows for automatic back-up of data.

Management Reporting

WorkSpace is a valuable management tool for increasing meter reader capabilities. It enables the utility to generate a variety of helpful management reports, which provide a documented overview of meter reading activities, manpower efficiency and service problems. Time-stamped meter reads produce both statistical and specific reports on time elapsed between reads as well as the date and time of the read. This information allows more flexibility in comparing meter-reading efficiency, establishing or reorganizing routes and assigning meter readers to routes matched to their performance levels.

Additional management reports include:

- High / Low Exception
- Zero Consumption
- Unread Meters by Cycle

Report information can be organized by:

- Account Number
- Meter ID Number
- Sequentially (in the order of other meters)
- Other options as desired by the utility

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DATA SHEET

FlexNet EasyLink Reader

The FlexNet EasyLink™ Reader is a portable, radio-based device used to acquire data from utility meters that utilize Sensus SmartPoint® modules and/or Itron ERT radios. The Reader is compact and portable, allowing it to be used in any vehicle providing 12-volt DC power.

FEATURES

- Use in any vehicle providing 12-volt DC power
- Reads Sensus FlexNet water, gas and electric SmartPoints
- Reads SCM, SCM+ and SmartPoints
- Operators can input information including route notes manually via PC keyboard

BENEFITS

- Sensus user-focused hardware and software provides utilities with tremendous meter reading efficiency
- Dual reading capability allows for easy transition to a fixed-based platform
- Upgradable to Work Order Management Suite

FlexNet and Itron Compatibility

The Reader provides the ability to read SmartPoint modules for water, gas and electricity meters along with Itron (SCM) Standard Consumption Messages and SCM+ technology used by ERTs. By combining these two technologies, the utility can utilize their existing ERTs while transitioning to FlexNet.

Keep your ERTs and upgrade to SmartPoint modules as necessary–it's the best of both worlds.

Ease of Operation

To operate the Reader, simply place the unit in a vehicle and drive the assigned route. Data is collected automatically.

Multiple read modes are available depending on the type of devices in operation. The Reader is capable of capturing data in either bubble-up or interrogation mode and also offers configurable alarms.

Portability

Advanced design results in a portable enclosure about the size of a small briefcase. With the addition of the portable computer, connecting cable and antennas, the complete FlexNet EasyLink Mobile Communications solution can be set up within minutes. Any vehicle can become a meter-reading machine.

System Reliability

The FlexNet® communications network utilizes primary-use radio frequencies to communicate with SmartPoint modules. The combination of FCC-protected frequencies and a full two watts transmission power of the SmartPoint modules ensure reliable meter communication and longer range. In addition, the SmartPoint and ERT modules provide infrastructure detail by monitoring operating conditions and reporting meter tamper, continuous flow and low battery alarms.

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ADS-10006-04

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FlexNet EasyLink Reader

User-Friendly Software

The Reader utilizes the FlexNet EasyLink™ Workbook Application which provides a convenient, user-friendly, pull-down menu system for meter reading. The mapping feature enables further efficiency by customizing the meter reader view for relevant process information.

Specifications

Service	Radio-based mobile utility meter reading system
Physical Characteristics	EasyLink Reader in case 8"W x 12"D x 4"H (20.32 cm x 30.48 cm x 10.16 cm) (includes magnetic-mount antennas and hard shell carrying case)
Weight	18 lbs (8.16 kg)
Temperature	Operating: -4°F to +122°F (-20°C to +50°C) Storage: -40°F to +185°F (-40°C to 85°C)
Power	12-volt DC adapter through EasyLink Reader 7 watts
Frequency Range	FlexNet RX: 901-932Mhz FlexNet TX: 940-960Mhz ERT RX: 908-924MHz ERT TX: 952-956MHz
Receiver Sensitivity	Sensitivity depends on modulation and channel BW. For 7FSK in a 25Khz channel, sensitivity spec is -120dBm.
Memory	Non-volatile
Approvals	Licensed operation US: FCC CFR 47, Part 24D, Part 101C, Part 15: Canada: Industry Canada (IC) RSS-134, RSS-210
Software	EasyLink WorkBook Application and EasyLink WorkSpace Application

EasyLink Unit

FlexNet antenna

Power Cord

ERT Antenna

USB cable

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ARCHER 2

archer²™

The Archer 2 is specially designed to boost productivity and speed, wherever your job takes you. Whether you need an extra-bright screen that's easy to view, battery life that lasts long into overtime, or GPS technology that performs well in the thickest of tree canopies, the following specifications, plus an unyielding standard of quality, are what make it all possible.

PROCESSOR
- 1.0GHz ARM Cortex A8 i.MX53 processor

OPERATING SYSTEM AND SOFTWARE
- Microsoft® Windows Embedded Handheld 6.5.3
- Microsoft Office Mobile 2010® (Word Mobile, Excel Mobile, PowerPoint Mobile, Outlook Mobile)
- Multiple languages (English, French, Spanish, German, Portuguese)
- Adobe Reader® LE

MEMORY AND DATA STORAGE
- 512MB RAM
- 8GB flash storage
- User-accessible micro SD/SDHC slot

DISPLAY
- Active viewing area: 4.3" (109 mm) WVGA LCD TFT (800x480)
- High-visibility backlit LCD
- Portrait or landscape orientation

TOUCHSCREEN
- Projected capacitive touch interface "optically bonded" to display for increased visibility
- Chemically-strengthened glass
- Scratch-resistant screen

KEYBOARD
- Adjustable LED backlit keys
- Numeric keypad (6 user-reassignable)
- OEM configurable/customizable

PORTS
- COM1, RS-232C 9-pin D connector with 5VDC power output on pin 9 software-enabled
- USB host (Full A), USB client (Micro B)
- 12, 24VDC input. 10-36V unregulated
- 3.5 mm audio jack, supports speaker/microphone or stereo output (pin detect)
- I/O module OEM configurable/customizable

BATTERY
- Intelligent Li-Ion battery 3.7VDC @ 10600mAh, 38.7Whr
- Operates for up to 20 hours on one charge
- Charges in 2 to 4 hours
- Battery easily changeable in field
- Optimized for excellent performance in cold temperatures

PHYSICAL
- Size, Standard models: 3.6" w x 7.25"l x 1.5" d (91 mm x 184 mm x 38 mm)
- Weight: 1.3 lbs (590 g), with battery
- Durable hardened plastic in a shear-proof and shock-resistant design
- Strong chemical resistance
- Comfortable, wide hand strap
- Easy-to-grip, impact-absorbing bumpers

JUNIPER RUGGED™
- IP68 waterproof and dustproof
- Operating temperature: -22F to 140F (-30C to 60C)
- Storage temperature: -22F to 158F (-30C to 70C) Note: Bluetooth® wireless technology is rated to -4F (-20C)
- Shockproof: multiple drops from 5' (1.5 m) onto concrete
- MIL-STD-810G test procedures: Method 500.5 Low Pressure (Altitude); Method 501.5 High Temperature; Method 502.5 Low Temperature; Method 503.5 Temperature Shock; Method 506.5 Rain; Method 507.5 Humidity; Method 510.5 Sand and Dust; Method 512.5 Immersion; Method 514.6 Vibration; Method 516.6 Shock

WIRELESS CONNECTIVITY OPTIONS
- Bluetooth® wireless technology, 2.1 +EDR, Class 1.5, range greater than 100 feet (30m)
- Wi-Fi® 802.11b/g/n with extended range
- 3.75G modem - Pentaband WorldWide (Geo 3G model only)
- Frequencies: HSPA+/UMTS: 800/850/900/1800/1900/2100MHz (Supports micro-SIM card only)
- Data communication interface: SMS

CAMERA (GEO MODELS)
- 5MP resolution with autofocus and LED illuminator + video capture
- Juniper Geotagging™: embed and emboss photo with date, time, and GPS position

GPS/GNSS (GEO MODELS)
- High-sensitivity GPS/GLONASS/SBAS receiver
- User settings for enhanced performance under canopy
- Accuracy: SBAS 2 meters; autonomous 5 meters
- NMEA-0183 ver. 4.0 out
- 72-channel u-blox M8 engine

BARCODE 1D/2D IMAGER (BC MODELS)
- Built-in barcode imager and decoder
- Symbologies: all common 1D and 2D (PDF417, MicroPDF417, Composite, RSS, TLC-39, Data matrix, QR code, Micro QR code, Aztec, MaxiCode, Postal codes, etc.)
- Programmable trigger buttons
- Visible aiming crosshair with low-light illumination
- Barcode Connector™ Utility, wedge and configuration, SDK support available

CERTIFICATIONS AND STANDARDS
- FCC Class B
- CE Marking (applicable EMC, R&TTE, and LVD directives)
- Industry Canada
- EN60950 Safety
- Optional Class I, II, III, Division 2 for hazardous locations

STANDARD ACCESSORIES
- 10600mAh battery
- AC wall charger with international plug kit
- Micro USB client sync cable
- Quick Start Guide
- Ultra-wide hand strap
- Shipping box
- Screwdriver
- Stylus with tether
- 2-year warranty

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*Not included on OEM programs

JUNIPER® systems

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Bermex, Inc.
Submits the following information to:

Electric Cooperative

Meter Exchange for AMI Project

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PART ONE. GENERAL OVERVIEW

Bermex Inc. will provide the following Services for the Project which are categorized and described as follows:

(a). Project Planning Services and Data Support Deliverables;

(b). Meter Box Exchange and Site Remediation Services and Deliverables

(c). Service and Customer Line Inspection Services and Deliverables

(d). Customer Notifications Services and Deliverables

(e). Meter Change Services and Deliverables

(f). Exceptions and Customer Complaints Services and Deliverables

(g). Meter Handling Services and Deliverables;

(h). General Responsibilities; and

(i). Project Schedules and Resources.

1. *PROJECT PLANNING SERVICES AND DATA DELIVERABLES*

Bermex Inc. Project management and data Services will include:

A. Project Management and Logistics

(i). **Project Management** - Bermex Inc. will provide all Project management functions necessary to provide detailed Project timelines, manage and schedule field Personnel and routes, manage equipment inventory, and investigate any discrepancies associated with the meter change data.

(ii). **Manage all Scheduling and Routing of Meter Change Services** - Bermex Inc is responsible for the scheduling and routing of all field Services activities and weekly schedules. Bermex Inc will provide access to a customer facing web portal that provides real time views of work performed, inventory, and current work schedules by technician.

(iii). **Ensure that all Change Services are Performed Off-Cycle** - Bermex Inc will ensure that all meter change field Services are completed 'Off-Cycle' and that all change-out data is received by Utility personnel two days prior to the opening of the Cycle Billing Window.

(iv). **Validation**- Bermex will have a full-time validator who will review all work orders (in real time) ensuring they have been completed according to the SOP. This validation includes but not limited to reviewing customer information, meter information, ensuring last reading was captured, photos are clear, all required information requested by the city has been obtained. Installation and Service Crews will not leave field until validation has been completed.

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B. Data Services

Bermex Inc. will provide all electronic collection devices and software necessary to properly document the meter change-out Services. At a minimum, each handheld device will include or provide the following functions:

- Barcode Scanners – All bar-coded meters, both old and new, will be scanned to minimize data collection errors.
- Integrated GPS Receivers – Have a GPS receiver that is directly read by the collection software to ensure proper collection of GPS coordinates.
- Provisions for Collecting GPS Coordinates at Indoor Locations – Have provisions to allow GPS coordinates including X/Y and floor number in the event a multi-story building's meter points are indoors.
- Redundant Data Storage – A redundant data storage method to ensure that the loss of data is minimized should a handheld device fail to operate or is damaged. Data is process back to the web systems after each order completion.
- User Tracking – Track each user with a unique sign-on.
- Validation of Meter Readings – Perform advanced validations of collected data to ensure theaccuracy of the data on-site.
- Inventory Control – Perform inventory control functions to identify where each new meter is located and to prevent the same meter from being listed at multiple locations.
- Detailed Electronic Comments Capabilities – Be capable of allowing detailed comments to bereported with each meter change-out record.
- Date and Time Stamp Each Change – Each change-out record will be time-stamped with thedate and time that the service was started and completed.
- Provision of Data – Have the ability to provide data for all form type meters.
- Radio Verification – Have the ability to accommodate the technology of choice radio verification device via Bluetooth connectivity.

C. Data Support Services

Bermex Inc will provide the IT staffing necessary to provide the turnkey data processing functions listed below:

- Remote Electronic Method to Transfer Data (Preferred Method) – Meter change-out data willbe transferred electronically from the individual handheld devices in the field to the back office as the meter change occurs.
- Validation Processes to Ensure Accuracy of Collected Data – Advanced validation processes will be employed to ensure the accuracy of the meter change-out data.
- Ability to Accept and Process Data in any Format – Bermex Inc will accept and process data in the format provided by Utility.
- Provide Meter Change-out Data in Approved Formats the Next Day – All meter change-out data will be validated and posted, in the required format, to the secure Utility access location by12:00 noon the day after the change-out Service was performed.
- Provide Project Summary Status and Exceptions Reports on a Daily Basis – Bermex Inc will provide Project Summary Reports regarding status and exceptions on a daily basis to Utility, tracking the status of what has been completed and what is remaining and locations where the meter change-outs were unable to be performed (and the reason).

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- Provide Inventory Summary Status Reports on a Daily Basis - Bermex Inc will furnish, maintain, and up-date on a daily basis while meter changes are being performed a website providing Inventory Summary Reports to Utility on a daily basis. This site will track the status of the meters used and the number remaining in inventory and allow read-only access by Utility 24/7.

D. Data Confidentiality

Bermex Inc acknowledges that it will have access to confidential information regarding Utility and Utility customers in order to perform the Services. Bermex Inc will emphasize this requirement to all Personnel when they start performing the Services and will periodically remind all Personnel.

2. *General Information Regarding Project*

Bermex Inc. meter change and removal Services will be performed by Bermex Inc. field personnel (collectively referenced here as **"Representatives,"** regardless of the individual's job title as described in Appendix A) and will include:

A. Representatives and Vehicles

(i). **Change All Form Type Meters** - Bermex Inc' Representatives will be qualified to perform meter change-out and field-testing Services for all forms of meters used by Utility during the term of this Project.

(ii). **Professional Appearance** – Representatives will wear a company shirt and pants. Companyshirts will have Bermex Inc' name or logo. All Representatives will be well groomed and present themselves professionally to Utility customers.

(iii). **Identification Badge -** Utility will provide a badge (with name and photo) for each Representative, which badge will be worn and clearly visible at all times when performing the Services. If a badge is lost, the Representative will immediately notify Bermex Inc and Bermex Inc will contact Utility to have the badge voided. Bermex Inc will be responsible for facilitating the Representative's procurement of a replacement badge. No Representative may perform field Services without the Representative's Utility Bermex Inc badge (regardless of the reason). Bermex Inc will emphasize to all Representatives the importance of maintaining possession of the badge at all times.

(iv). **PPE in Good Condition** – All Representatives will wear the appropriate Personal Protective Equipment (PPE) necessary to perform safely the meter change-out and repair Services. All PPE will be in a clean and safe condition. PPE may include the following: Hard Hat, Overshoes or dielectric, Gloves, Chaps, Eye Protection, Respirators. Any PPE will meet applicable O.S.H.A. requirements.

(v). **Company Vehicles Permanently Marked** – All Bermex Inc vehicles will be permanently marked with the Company name and/or logo and will also bear *"Bermex Metering Services"* permanently marked on the vehicle. All vehicles will be marked with specific lettering or numbering that uniquely identifies each vehicle. Bermex Inc will provide Utility with a list of the vehicles that will be used in performing the Services and provide quarterly updates regarding any changes. All vehicles used to perform these Services will be Bermex Inc owned/leased vehicles.

B. Services and Tasks at Customer Premises

(i). **Customer Relations -** Bermex Inc acknowledges that Utility's relations with Utility's customers and with the public are of utmost importance. All Representatives will be courteous in all communications and interaction with Utility's customers and the public encountered during performance of Services for this Project.

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(ii). **Pre Work Notification Procedure-** 28 days prior to the beginning work a representative will send out an approved postcard to the affected customers. This postcard approved by the Utility will provide details of the services and how to properly identify our representatives or make contact with us if necessary.

(iii). **One Week Prior to Work Procedures-** Bermex will provide door to door notifications to citizens who will be see work being performed in their neighborhood. We will also provide the appropriate notice to the Oklahoma One Call System.

(iv). **48 Notifications-** All customers who are noted as special needs will receive a phone call and message 48 hours prior to the scheduled work date. If contact is not made on this attempt Bermex will make a personal notification to the customer residence 24 hours prior to scheduled work date and leave a door hanger with instructions on who to contact if the customer wishes to schedule and appointment. If all contacts fail, the customer will be provided to the Utility for further communication.

(v). **Day of Customer Notification Procedure** – When a Representative arrives at a customer's premises, and before performing any meter change or other Services, the Representative will notify the customer/occupant and give the customer/occupant time to stop using the water. Bermex Inc' Representatives will follow the following **"Customer Notification Procedure"** at each customer's premises:

(a). Immediately upon arrival at the premises, attempt to alert the customer/occupant of Representative's presence by knocking or ringing at the front door;

(b). Wait for approximately one minute;

(c). If no one answers, proceed to perform the Services at the premises;

(d). If someone answers, Representative will:

- Identify himself/herself using the Utility-issued identification;
- Identify the Services to be performed;
- Indicate there will be a temporary interruption of their water service;
- If customer/occupant does not object to performance of the Services, Representativewill:

  (a). Allow the customer/occupant adequate time to shut off equipment;

  (b). Explain that he/she will wait at the door until given approval to proceed;

  (c). Wait for verbal agreement from customer/occupant before proceeding; and

  (d). Perform Services at the premises.

- If customer/occupant denies permission for the Services, Representative will note theexception in the handheld device and proceed to next Work Site.

(e). This Customer Notification Procedure will be followed each and every time a Representative or other member of Bermex Inc Personnel visits a customer premises. All Bermex Inc Representatives and Personnel are to be reminded periodically that they are working on private property and will always treat customers and their property with respect.

(vi). **Meter Change Confirmation** – When the new meter is installed, Representative will verify that there is data display and will scan the new meter information into the handheld device. Representative will also record the as-left condition of the meter before leaving the premises.

(vii). **Cleanup** – Upon conclusion of Services at each customer's premises, Representative will

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gather and remove all equipment, materials, and debris resulting from the Services. Representative will box all used meters. All equipment, materials, and debris will be disposed of in accordance with disposal process outlined in the RFP.

(viii). Door Hanger Notice for Meter Change in Customer's Absence - If no one answered the door when Representative arrived and Representative was able to complete the meter change, Representative will leave a door hanger (provided by Utility) on the front door notifying the customer that the meter was changed.

(ix). Door Hanger Notice for Rework/Exceptions - If Representative cannot change out the meter, Representative will leave a door hanger (provided by Utility) requesting customer to contact Bermex Inc for a return visit.

3. *EXCEPTION AND CUSTOMER COMPLAINT SERVICES AND DELIVERABLES*

Bermex Inc' exception and customer complaint Services will include:

A. Call Center Operations, Exceptions Rework and Customer Complaints

(i). Rework Exceptions Handling - Bermex Inc will provide all Call Center functions necessary to provide re-scheduling of meter change-out exception locations that require appointments for reasons such as Unable to Locate (incorrect address data, obstruction, no meter found, no meter available), Bad Dog, Locked Gate, Customer Unable to Take Unscheduled Water Outage, Customer/Occupant Withholds Permission, Unsafe Condition, Damage (e.g., requiring work by customer or Meter Can Replacement), etc.

(ii). Call Center Staffing - Bermex Inc will provide the Call Center staffing necessary to provide adequate customer service to field customer calls during and after business hours. Utility will require detailed reporting from Bermex Inc on the number of exceptions that were cleared by the Call Center.

(iii). Remote Electronic Method to Schedule – Bermex Inc will utilize web-based Internet scheduling systems to allow customers an automated method to schedule the re-visit to their premises.

(iv). Service Timeliness – Exception Services will be scheduled by Bermex Inc in a timely manner to ensure that they are completed within five business days from the date that the customer contacts the Call Center. Exceptions to the five-business day window will be made for premises that are within a Utility Billing Window, which premises will be serviced within fivebusiness days after the Utility Billing Window opens.

(v). Unable to Locate/Bad Address – Utility will provide Bermex Inc with detailed location directions and/or valid street addresses for all "Unable to Locate" exceptions. Bermex Inc will complete these in a timely manner to ensure that they are completed within five business days from the date that the updated information is provided to Bermex Inc. Exceptions to the five-business day window will be made for premises that are within a Utility Billing Window, which premises will be serviced within five business days after the Utility Billing Window opens.

(vi). Customer Complaint Issue Resolution – Bermex Inc will notify Utility promptly of any communication or coordination issue with a customer. Bermex Inc will investigate any Utility customer complaint arising out of Bermex Inc' Services (whether the complaint deals with an electrical service issue at the premises, customer dissatisfaction with the meter change Services, property damage, Utility refers to Bermex Inc after determining that the complaint may result from Bermex Inc' Services. Bermex Inc will promptly investigate and resolve each complaint within a period of five business days after receipt. Bermex Inc will keep Utility

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informed regarding these complaints and will provide to designated Utility personnel, in a timely manner, a written report detailing the nature of each complaint and the actions taken to resolve the matter. If the investigation shows that the problem arose from an act of nature or something other than an action or inaction of Bermex Inc, the matter will be reported to Utility for resolution.

4. *METER HANDLING SERVICES AND DELIVERABLES*

Bermex Inc' Services in connection with the meters will include:

A. Warehousing

(i). **Secure Storage- City will be providing secure storage and office space for this project**.

(ii). **Insurance for Property of Others** – Bermex Inc will maintain throughout the term of the Project "Property of Others" insurance to safeguard the meters and other equipment, or property owned by Utility or any third party that is in Bermex Inc' care, custody, or control, wherever located. The certificate of insurance will be provided to Utility before commencing the Services and updates will be provided annually during the term of the Project. Bermex Inc is responsible for maintaining sufficient coverage to replace fully any meters or other goods belonging to Utility that are in Bermex Inc' care, custody, orcontrol and that are lost, destroyed, or damaged. Any coverage cost increases above the minimum limit stated in Part Two below will be billed to Utility, by Bermex Inc, in a separate and itemized invoice.

(iii). **Local Storage – City will be providing secure storage and office space for this project**

(iv). **Electronic Inventory System** – Bermex Inc will provide electronic methods to collect and track the location and movement of meters (both the new ones to be installed and the old ones removed).

(v). **Shipping and Receiving** – Bermex Inc will provide all functions necessary to ship Utility meters to any destination designated by Utility and to receive Utility meters from any source. Utility material handling and reporting procedures will be followed.

(vi). **Inventory**: Bermex is requesting that we keep and inventory at our local storage facility equal to 7 days of production. Bermex will once ever 5 days deliver old meters and pick up new meters on a one-to-one basis but always equal to the amount needed for the following weeks deployment. Bermex will be responsible for all transportation necessary to return or receive inventory.

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Proposed Project Deployment Schedule:

Service Requirements.

1 Project Manager
1 Call Center Representative
5- Meter Installers

Work Plan: 5-6 Days Weekly/8-10 hour Days
Avg Production: 16-20 Installations Per Tech
Term: 16-20 Week Project
Timeframe:

Bermex will provide our services with experienced trained staff from our existing team or hire local talent where necessary to build a team that meets or exceeds project standards Employees will be sourced from the local area and trained by our experience managers and installers.

- See Quality Assurance SOP for our planned Quality Control for this project
- AMI Field Technician Training Course Outline

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Standard Operating Procedure – Quality Control

May 26, 2021

Bermex must utilize a rigorous field Quality Control "QC" program to ensure data integrity and installer capabilities. The quality control program utilizes the current handheld system so each Field Supervisor canaudit their teams.

The field requirements are as follows:

Supervisors will inspect one hundred percent (100%) of all work orders completed by new hires for a periodof ten (5) working days from the date the installer begins field work (the "Training Period"). "New Hire"
installation audits should occur within five (5) days of the installation. If an installer's installation errors arefound to be in excess of one percent (1%), the installer shall be removed from the field and retrained.

After the training period, a five percent (5%) random sample of each installer's work orders will be audited ona monthly basis.

If, after the training period, an installer's critical installation errors are found to be in excess of one percent (1%) over a period of six weeks, the installer shall be removed from the field and retrained. All work performed by that installer during the two (2) days prior to the six week period shall be audited. If the audit results for those two days show a critical installation error of two percent (2%) or greater, all work performed by the installer in the last 30 days will be reviewed. A site visit audit will be attempted for each. Bermex andthe utility will review the audit results and discuss further action as required.

Office procedures are as follows:

Data Analyst will record and report all errors discovered during data cleansing procedures. If a technician's error rate goes over one percent (1%) then the technician will be removed from the field and retrained on thearea where the errors are being made.

Data Analyst will inspect one hundred percent (100%) of all pictures taken by new hires for a period of ten (10) working days from the date the installer begins field work (the "Training Period"). The As Found Meter picture will be inspected for clarity, and to make sure the meter read and meter number are visible and readable. "New Hire" picture inspections should occur within five (5) days of the installation. If an installer'sinstallation errors are found to be in excess of one percent (1%), the installer shall be removed from the fieldand retrained.
After the training period, a five percent (5%) random sample of each installer's pictures will be audited on amonthly basis.

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AMI Field Technician Course Outline - Version 7.0

Course Overview and Approach

Courseware consists of an Instructor Presentation, Student Workbooks and Handout Exercises with a heavy emphasis on Safety and Quality. Written testing is performed after each Module. Classroom and Hands-on Lab time changing out meters is split 50/50. Attendees must pass a closed book Final Certification Written Exam and Hands-on Practical Exam before transitioning to the field. Classroom/Lab Course length is five (5) days or longer depending on number of attendees. Following formal training, AMI Techs are paired up with a Field Mentor for one to two weeks before receiving management sign-off to work alone. Portions of the course are customized to meet Utility specific requirements.

Course Purpose and Objectives

Purpose: To train personnel to become qualified AMI Field Technicians.

At the end of this course attendees will be able to:

- State Bermex Services Mission and Values and describe how to apply them in the field
- Describe safety procedures, explain why they are important and demonstrate proper use of Personal Protective Equipment (PPE)
- List Field Work-Flow Processes and Procedures
- Describe Power Grid components, electronic circuit components, and Calculate power usage
- Identify different kinds of Meters and list Form Types, Classes and Base Voltage requirements for each
- Demonstrate ability to change out meters while following safety procedures and entering required information into the Hand-held Computer
- Pass tests relating to Vehicle Safety
- List Techniques for creating Positive Customer Perceptions
- Demonstrate ability to perform Meter Base Inspections
- Demonstrate ability to do Level One Meter Base Repairs
- Pass Final Written and Practical Certification Examinations before transitioning to the field

Course Outline by Module

- **Module One – Safety, Company Introduction and Job Role**

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- **Module Two – Meter Reading**
- **Module Three – Power Transmission Grid and Electricity Basics**
- **Module Four – Using the Handheld Computer**
- **Module Five – Safety**
- **Module Six – Working with Self Enclosed Meters**
  - Hands on Lab Exercise – Removing and Installing Self Enclosed Meters
- **Module Seven - Working with Commercial Meters – Demand Meter Readings**
  - Hands on Lab Exercise – Removing and Installing Commercial Meters
- **Module Eight – Utility Specific Procedures**
- **Module Nine – Handling Workflow Exceptions**
- **Module Ten – Customer Relationships**
  - Hands On Practice Changing Out Meters
- **Module Eleven – Working Smart in the Field**
  - Site Inspections – Working Efficiently - Ensuring Safety
- **Module Twelve – Performing Repairs**
  - Hands on Lab Exercise
- **Module Thirteen – Handling Inventory and Ensuring Quality**
  - Hands On Practice Changing Out Meters
- **Final Testing and Certification – Written, and Practical Application Test**
- **In-Field Training Working with Field Mentor**
  - One to Two Weeks

Module One - Safety, Company Introduction and Job Role

- Company introduction
- Bermex Services Mission, and Values
- Applying Company Values at Work

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- AMI Field Technician Role and Workflow
- Introduction – Styles of Old and New Meters
- Post Module Exercise and Test

Module Two - Meter Reading

- Meter Reading Basics
- Reading Rules and Guidelines
- Meter Reading Practice
- Post Module Exercise – Meter Reading Test

Module Three - Power Transmission Grid and Electricity Basics

- Power and Distribution Grids
- Smart Grid
- Electronic Components
- Basics of Electricity – Voltage, Current, Resistance
- Power Formulas
- Single and Polyphase Service and Wiring
- Calculating Voltage, Current and Power Usage
- Safety Basics – Working with Electricity
- Using the Volt-Ohm Meter
- Post Module Exercise and Test

Module Four – Using the Handheld Computer

- Menus, Screens and Buttons
- Image Manager Screen
- GPS Device connections
- Initializing
- Capturing Meter GPS Locations
- Syncing and accessing work orders
- Uploading work and photos
- Post Module Exercise and Test

Module Five – Vehicle and Site Safety

- Requirements for using PPE

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- Testing Safety Gloves for Leaks
- Rules for Operating Company Vehicles
- Safe Driving Presentation and Testing
- Safety Bulletin Review
- Safety Presentation
- ARC FLASH Definition and Causes
- Post Module Exercise and Test

Module Six - Working with Self Enclosed Meters

- Meter Enclosure Types
- Decoding Meter Nameplates - Form Types, Voltage Rating, Class, Wires, Kh
- Self-Contained Meter Definition
- Safety – Working on Training Meter Boards
- Meter Base Inspection Requirements
- Surge Suppressors, Locking Rings, Meter Rings and Seals
- Process for Changing Out Meters – Hand-held Screen Sequence Demo
- Taking Voltage Measurements - Voltage Tolerances
- Post Module Exercise and Test

Module Seven - Working with Commercial Meters – Demand Meter Readings

- Transformer Rated (CT) Meter Definition
- 5, 6, 7 and 13 Jaw Meter Bases
- 12S, 16S Delta and Wye Meter Forms and Voltage Comparisons
- Demand Meter Readings
- Delta and Wye Transformer Basics
- Self-Enclosed Commercial Meters
- Transformer Rated (CT) Meter Introduction – 3S, 4S,5S, 6S, 9S, 45S
- CT Testing Introduction
- Procedures for Changing Out Commercial self-enclosed and CT Meters
- Socket Adapters, Surge Suppressors, Extenders and Pullers
- Safety Tips when Working with Commercial Meters
- Post Module Exercise and Test

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Module Eight - Utility Specific Procedures

- Customer Requirements – Notification and Contact Procedures
- Inventory Stocking Locations and Processes
- Expected Meter Types
- Seal Colors, AS FOUND Seal Statuses, As LEFT Seal Statuses
- Unable to Service/ Strike Process - Door Hangers
- Utility Specific Service Bulletins
- Repair Procedures
- Reporting
- Post Module Exercise and Test

Module Nine – Handling Workflow Exceptions

- Knowing when to contact your supervisor
- Finding Out What Is Left to do on your Route/Cycle
- Unable to Service Points/Strikes in the Workflow Process
- Unable to Service/Strike Categories
- Selecting Codes and documenting Comments
- Post Module Exercise and Test

Module Ten - Customer Relationships

- Who is the Customer?
- Creating Positive Customer Perceptions
- Customer Notification Procedures
- What to Say and What Not to Say
- Leaving the Work Site in Better Condition than you found it
- Post Module Exercise and Test

Module Eleven – Working Smart in the Field

- Safety – Working at Customer Sites – Being mindful of surroundings
- Driving and Parking on Customer Property
- Performing Site Inspections – Identifying dangerous situations
- Meter Base Inspections and Identifying Theft
- Having Integrity when something goes wrong – Telling the Homeowner- Leaving a Note

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- Improving Efficiency - Being Safe, Achieving High Quality and Productivity
- Loading and Unloading Vehicles - Working the Cycle/Route
- Effective Communication between Field Techs and Supervisor
- Reporting Unsafe Conditions and Accidents
- Post Module Exercise and Test

Module Twelve - Performing Repairs

- Importance of Standardizing Terminology
- Meter Socket Nomenclature
- Field Techs and Repair Tech Repair Roles
- Field Repairs
- AMI Project Meter Base Repair Process (if applicable)
- Post Module Exercise and Test

Module Thirteen - Handling Inventory - Ensuring Quality in the Field

- Proper Handling of Old and New Inventory
- Rotating inventory in Vehicle – Loading and Off Loading
- Packing boxes
- Field Tracking Reports and Systems
- Ensuring Quality of Data – Data entry, Comments and Photos
- Working on Gangs of Meters – Apartments
- Post Module Exercise and Test

Final Written Certification Test

Field Mentor Assignments and Reporting Locations

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SPRYPOINT ATTACHMENT

INVOICE CLOUD REFERENCE LETTER

InvoiceCloud"

October 16, 2024

City of Mount Dora
51O N Baker Street
Mount Dora, Florida 32757

Dear City of Mount Dora,

We are pleased to offer this letter of support of SpryPoint, a valued InvoiceCloud.

SpryPoint has extensive experience serving the utility sector and has developed a comprehensive customer engagement portal. Like InvoiceCloud, SpryPoint has led with cloud-based offerings which allow them to continuously enhance their solution to adapt to evolving customer expectations.

Given our experience in working with and integrating to SpryPoints's platform, we are confident that SpryPoint will deliver a best-in-class solution. InvoiceCloud will work cooperatively with SpryPoint for any integration requirements.

We are pleased to be collaborating with SpryPoint and we fully support their efforts on this bid with this letter of support.

If you have any questions, please feel free to contact me.

Sincerely,

Paul Applegate
Vice President, Alliances
papplegate@invoicecloud.com
734-474-3214

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SpryPoint | Mount Dora

Increase e-adoption and lower costs by integrating InvoiceCloud's proven customer engagement experience with SpryPoint and the SpryEngage portal.

InvoiceCloud's cloud-native SaaS EBPP platform integrates with more than 150 customer information systems (CIS) and self-service portals, like SpryPoint and the SpryEngage portal, to improve utility companies' customer engagement in billing and payments (**Figure 1**). We worked directly with SpryPoint to co-develop our integration, delivering the most interactivity possible with CIS data for utility staff and customers, and all in real-time with no manual reconciliation or updates required by Mount Dora. Together, InvoiceCloud and SpryPoint perform more than 80% of the implementation effort and leverage our established integration to deploy in only 90 – 120 days. And we meet monthly to review all changes to our platforms to ensure compliance and 99.9%+ uptime.

InvoiceCloud integrates via secure single sign-on (SSO) with the SpryEngage portal through embedded iframes, providing our EBPP system at registered customers' convenience in one seamless experience. By clicking on an action tab, like AutoPay, Paperless, or Account History, InvoiceCloud simply opens within the SpryEngage portal. This means no more second tab experiences and, from the customer's perspective, simply part of the SpryEngage portal—not a separate product. We can edit our iframes and APIs to provide a seamless look and feel, match Mount Dora's branding, and make the payment process for customers very easy.

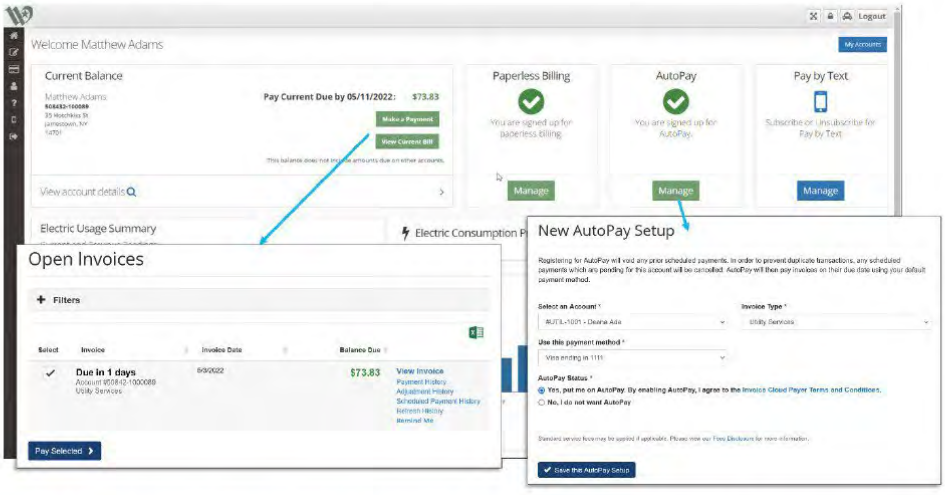

Figure 1. InvoiceCloud's Embedded SSO iframe in the SpryEngage portal. *SSO automatically logs customers into both the SpryEngage portal and InvoiceCloud as one completely seamless and secure payment experience.*

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We provide a full suite of omnichannel billing and payment options to maximize impact of the most consistent engagement point with customers – when they need to pay their bill (**Figure 2**). Our omnichannel payment options leverage a single, jointly developed real-time integration with the SpryPoint platform to reduce friction, including our SSO embedded iframe interface within the SpryEngage portal, one-time payment portal, IVR system, Pay by Text, and more.

Omnichannel means that all payment options access the same payment methods interface, allowing customers to pay their bills with all major credit and debit card brands (Visa, MasterCard, Discover, and American Express), eChecks, and digital wallets like Apple Pay, Google Pay, Paypal, and Venmo, no matter how they access InvoiceCloud. Paypal, Venmo, and soon Apple Pay all also provide cryptocurrency payment options, including BitCoin, LiteCoin, and more, converting these bleeding edge currencies into dollars at real-time exchange rates for Mount Dora payments and reconciliation.

InvoiceCloud has helped more than 1,600 utilities improve digital engagement and customer experience through our cloud-native billing and payment solution. In addition to removing friction from the billing and payment process, which leads to fewer service shut-offs, lower cost to serve, and more satisfied customers, our solution drives Utility customers to take the next

Figure 2. InvoiceCloud's Communications Engine and Diverse Payment Options Reaches More Payers. *Save time and money by engaging customers to pay bills without calling, walking into, or mailing physical checks to offices.*

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best action to become more digitally engaged. We always ask our colleagues in the utility industry, "What would it mean to your organization if you could double e-adoption and triple paperless enrollment?"

E-adoption is the only metric that can demonstrate which solution customers prefer, and InvoiceCloud provides the industry's highest average e-adoption increase of 119% and 2.8x more paperless enrollments in the first year of service alone. This e-adoption only grows year-over-year as we improve our true SaaS solution on your behalf. Higher e-adoption means our system is easier to use, has the most comprehensive set of features for flexibility, and has the best interface and marketing techniques to drive usage (**Figure 3**).

Projected based on average year 1 results of InvoiceCloud customers

Figure 3. Your Year One E-Adoption Growth on InvoiceCloud. *Our clients typically see their e-payment adoption and paperless enrollments double in only one year after switching to InvoiceCloud.*

As more of your customers use our platform and switch to paperless billing, AutoPay, and other features of our solution, Mount Dora saves time and money, having more of both to pursue other business ventures. There is a significant cost to handling paper bills and physical payment instruments (i.e., cash and checks). But you also save operational costs when more customers automatically pay their bills on time every month, spending less on collection efforts, extra communication, and shutoffs.

Our cloud-native, SaaS platform enables our customers to always have the latest and greatest technology without costly and timely upgrades. Updates are free and easy to implement, and they provide immediate value to your business and your customers while increasing system uptime and reliability and futureproofing your payment engagement experience.

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Native SaaS means that, when we update our platform, 100% of our users access the latest, greatest, and most secure version of InvoiceCloud—the only version that ever exists at any given moment. Our platform has been online for 13 years, but we keep it perpetually one month old. Mount Dora is never "frozen in time," waiting for an update that might never come from non-native SaaS solutions because they have too many versions to maintain at any given time.

InvoiceCloud consistently delivers the highest adopting/conversion rates over the competition. We have replaced all of our major competitors in the EBPP space and achieve 78 - 150% increases in electronic payments over the former platforms. We take into account the psychology of your payers by capitalizing on existing engagement points (e.g., paying a bill, talking to a CSR, signing up for services) and presenting new ways to encourage and easily achieve enrollment. For example: we provide the ability to enroll in proven utility timesaving services, like Pay by Text, AutoPay, and paperless billing not just to registered payers, but also in one-time payment channels, like in our payment process and email notifications.

We also provide tools to CSRs in our Biller Portal that help retrain customer behavior towards self-service, like sending direct links to their payment via text message (**Figure 4**). As more of your customers use InvoiceCloud to manage paperless billing, AutoPay, text, and more, you save money and can spend time on more important tasks than manual collections.

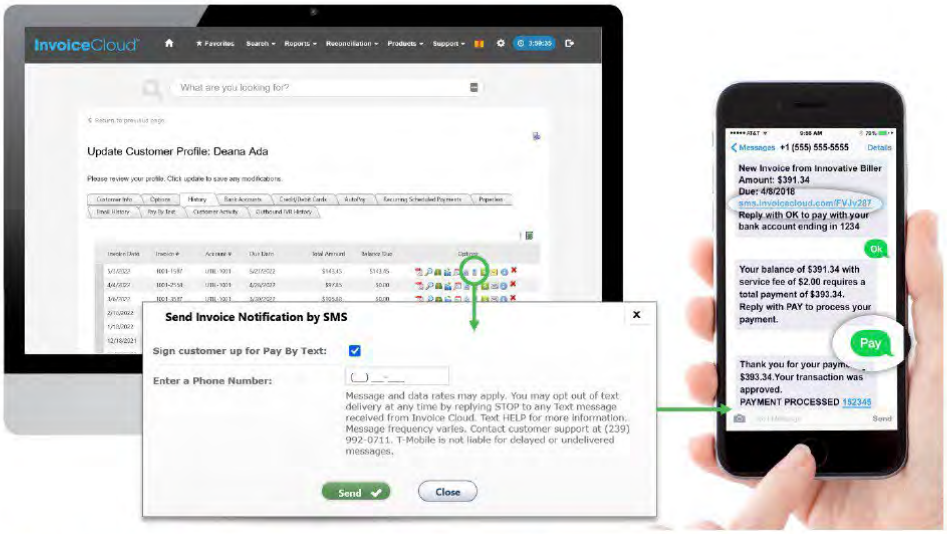

Figure 4. Send a Text Message with a Direct Link to a Customer's Payment from the Biller Portal. *CSRs can help mobile-using customers more easily find their bill and enroll in Pay by Text.*

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1 Key Personnel

InvoiceCloud provides our proven Implementation Team to support SpryPoint's team with planning, testing, integrating, and deploying Mount Dora's InvoiceCloud EBPP system (**Table 1**). Please note that the personnel presented are examples of our qualifications. The final team to perform work may vary depending on availability and project time. Once assigned, we strive to keep these personnel in place for the duration of the project.

Table 1. InvoiceCloud's Implementation Team and Project Organization. Mount Dora *receives dedicated project leadership, as well as reach back to senior SMEs and corporate leadership, to ensure a smooth implementation.*

Team Member	Role	Qualifications
Ms. Charla Hawthorne, PMP Implementation Project Manager (PM)	• Leads the project in entirety, including project plan updates, communication plan execution, resources coordination, testing coordination, and milestones and task tracking.	• 21 years of experience as an Implementation PM for IC and previously in various PM roles for FIS Global, Ceridian, FIMC, and more. • Specializes in project management, process improvement, change management, product development, and more.
Ms. Kinga Dobriban, PMP, ITIL Director of Implementations	• Ensures resources for implementations and client services throughout the life of the project. • Ensures transition of client from Implementation Team to Client Services Team without impediments or impacts to service quality. • Removes impediments to either implementation or client support. • Serves as an escalation point for the client.	• 14 years of experience as Director of Implementations for IC and previously as Head of PMO, Implementation Team Manager, and Project Manager for Paytronix, NEXCON, and more. • PMP Certified • Specializes in implementation, localization, and roll-out projects in the finance, marketing technology, human resources, and hospitality sectors.
Mr. Kane Lee Solution Engineer	• As an IC systems expert, advises the client and Implementation Team	• 6 years of experience as a Solutions Engineer for IC and previously as a

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	regarding functionality, best solutions for the client, product recommendations, testing best practices, and pre-production checklists.	Software Engineer/Developer for SKIDATA, athenahealth, and more. • Provides advanced knowledge and experience with web services, APIs, and batch integrations, as well as bill presentment and data mapping. • Specializes in architecting and implementing full-stack integrations and applications.

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INTERFACES & API'S

SpryPoint's management & staff have decades of experience building and deploying system integrations. We pride ourselves on being flexible in working with new & existing systems. SpryPoint's approach is to build the required integration endpoints with cooperation from resources from the integrating application whenever possible. SpryPoint manages the building, testing, sandboxing, and signoff for production deployment and configuration. In many cases, existing integration endpoints can be reused for multiple integrations, reducing cost and enhancing reliability.

SpryPoint solutions are designed with REST Application Programming Interfaces (APIs) to enable real-time integration. When we need to integrate solutions that do not have APIs available, SpryPoint also has experience doing database-level integrations with other enterprise applications. We will supply information on methodologies, authentication, and authorization mechanisms.

Below is a list of completed or in-progress integrations:

- Badger – Metering
- Tantalus – Metering
- Honeywell – Metering
- Landis & Gyr – Metering
- Itron – Metering
- Sensus – Metering
- Mueller – Metering
- Neptune – Metering
- Zenner – Metering
- ESRI – GIS
- Microsoft Dynamics GP – ERP
- SAP – ERP
- Tyler MUNIS – ERP
- Oracle Cloud – ERP
- Dynamics 365 – ERP
- Workday – ERP
- CentralSquare H.T.E – ERP
- Azure Active Directory – SSO
- Okta – Authentication
- Duo – Authentication
- Oracle CC&B – CIS
- Cogsdale – CIS
- Northstar – CIS
- Advanced – CIS
- CentralSquare H.T.E – CIS
- Ensight+ – MWM
- Watersmart – CSS
- Simply Accounting – ERP
- Quickbooks – ERP
- Kronos – Time Entry
- Easton – OMS
- Survalent – OMS
- File Nexus – ECM
- Open Street Maps – Mapping
- Mapquest – Mapping
- Google Maps – Mapping
- Online Utility Exchange
- ETI CableBridge – Provisioning
- Paymentus – Payments
- Stripe – Payments
- Moneris – Payments
- ACI – Payments
- FiServ – Payments
- Moneris – Payments
- Invoice Cloud – Payments
- PayNearMe – Payments
- Catalis – Payments
- NJB Soft – Backflow
- Tokay – Backflow
- Utilismart – MDM

- Cayenta – WAMS
- CityWorks – WAMS
- KloudGin – WAMS
- Laserfiche – ECM
- OnBase – ECM
- LinxUp – AVL
- GPS Insight – AVL
- Metersense – MDM
- Level One – Bill Print
- Doxim – Bill Print
- Cisco – CTI
- Zultys – CTI
- Selectron – IVR

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SPRYPOINT TEAM

Project Manager – Bob Campbell

SpryPoint Solutions Inc.
45 Queen Street, Charlottetown, PE,
C1A 4A4, Canada

SmartPoint
SMART SOLUTIONS FOR SMART UTILITIES

Bob Campbell
Sr. Project Manager

Contact

Phone:
855-879-7779 ex.868

Email:
bcampbell@sprypoint.com

Bob has been in the Utility space for well over 30 years with over 20 implementing Utility Software solutions across North America and the Caribbean. Effectively managing projects of all sizes. With a keen eye for detail and a disciplined approach to execution he excels at driving projects through to completion.

Employment History

October 2022 - Present - SpryPoint Solutions, Inc., Charlottetown, PE
Sr. Project Manager

- Project schedule creation and development
- Resource allocation throughout project lifetime
- Clear and concise project status updates to all project stakeholders

September 2017 - October 2022 – Systems & Software, Burlington, VT
Sr. Project Manager

- Responsible for managing complex projects from Sales handoff, go-live and transition to the Customer Success team
- Relied on to explain intricacies of project timeline and technical aspects to stakeholders
- Collaboration with the technical team throughout project timelines, removing impediments and ensuring they work efficiently to meet client and project objectives
- Provide project tracking through clear and concise status reports and time management reports

October 2012 – September 2017 – SmartWorks , Ottawa, ON
Manager, Professional Services

- Responsible for all aspects of the Meter Data Management System (MDMS) deployment, including discovery sessions, system configuration, training and post-live support

August 2001 - October 2012 – Advanced Utility Systems, Toronto, ON
Manager, Implementation Services

- Managed direct reports providing mentorship and training through yearly in-house training sessions
- Completed mid year and year end performance reviews
- Ran client discovery sessions
- Provided first line of support to in-house PS team for technical and business process questions

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SpryPoint Solutions Inc.
45 Queen Street, Charlottetown, PE,
C1A 4A4, Canada

SmartPoint
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Project References

Company Name:

James City Service Authority
119 Tewning Road, Williamsburg, VA
Mike Youshock
Chief Civil Engineer - Water

Project Description

JCSA has engaged SpryPoint to implement five Enterprise applications to improve both customer service and operations as part of their effort to bring CIS billing back in house. The solution will include the ability to receive meter readings from third parties for billing as well as provide additional third party systems with billing information.

Project Role

Bob is the project manager for this implementation responsible for project schedule as well as resource allocation across all products and integrations.

Company Name

Providence Water
125 Dupont Drive, Providence, RI
Bill Nebus
Engineering Project Coordinator

Project Description

Providence Water has engaged SpryPoint to implement three enterprise solutions with the goal to improve customer service, reduce internal manual processes and more accurate billing.

Project Role

Bob serves as the Project Manager for the entire implementation of the three enterprise products: SpryCIS, SpryMobile and SpryEngage.

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Implementation Specialist - Wylie Tanton

SpryPoint Solutions Inc.
45 Queen Street, Charlottetown, PE,
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Wylie Tanton
SpryEngage &
SpryBackflow
Implementation Specialist

Contact

Phone:
902-213-5791

Email:
wtanton@sprypoint.com

Wylie has a variety of experience in leading and executing software implementations of CMMS, CRM, and data historian platforms. His previous experience has provided him a well-rounded background of the project lifecycle from the initial design phase to client training and support. Wylie has developed a strong knowledge of methodologies around corrective, preventive and predictive maintenance programs and principles. This insight will help ensure that clients receive a solution that aligns with not only their business requirements, but industry best practices.

Employment History

August 2021 - Present - SpryPoint Solutions, Inc., Charlottetown, PE
Implementation Specialist

- Maintaining Stakeholder Communications throughout the project.
- Work with clients to determine their business requirements and processes.
- Configure SpryPoint applications to fit client needs.
- Identify opportunities for clients to streamline workflows

May 2018 - August 2021 - Sekisui Diagnostics, Charlottetown, PE
Associate Facilities Engineer

- Led a project to implement a multi-departmental CMMS
- Developed new operating procedures and documentation
- Operated as SME for Data Historian Kaizen project to reduce operator downtime efficiencies
- Designed real-time visual dashboards for tracking equipment output and efficiency rates

September 2017 – December 2017 – Bruce and Monahan Chartered Accountants, Halifax, NS

Education & Designation

2018 – Saint Mary's University - Bachelor of Commerce in Computing and Information Systems

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SpryPoint Solutions Inc.
45 Queen Street, Charlottetown, PE,
C1A 4A4, Canada

SpryPoint
SMART SOLUTIONS FOR SMART UTILITIES

Project References

Company Name:
City of Charlottetown
199 Queen Street, Charlottetown, PE C1A 4B7

Project Description
The City of Charlottetown provides customers with water and sewer services. They decided to expand their suite of SpryPoint products with SpryCIS and SpryMobile in addition to the previously implemented SpryEngage.

Project Role
Wylie led both the SpryMobile implementation and transition of SpryEngage from their legacy CIS to the integration with SpryCIS. The SpryMobile implementation included designing workflows, configuration and user training.

Company Name:
Aurora Water
15151 E. Alameda Pkwy, Aurora, CO 80012

Project Description
Aurora Water provides customers with water and sewer services. They selected SpryPoint to be their billing software provider. This also included both SpryMobile and SpryEngage platforms.

Project Role
Wylie led the transition from their payment portal to the SpryEngage platform. This included the building of workflow, configuration, and training of the Aurora staff.

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APPENDIX C – INITIAL PROJECT SCHEDULE

Contractor, City, and Consultant will develop a mutually agreeable project schedule within 2 weeks post the project kickoff.

A preliminary milestone schedule is provided below:

Task Name	Duration	Resource Names
Mt Dora AMI Deployment Project	501 days	
Phase 1 Project Initiation	**31 days**	
Notice to proceed delivered	1 day	Sales Team
PO submitted	1 day	OSR/Branch
Stakeholders identified	3 days	City/PM
Project Charter delivered	2 days	PM
Project Kickoff	1 day	PM
Subcontractor mobilization and team identified	30 days	Initiative Manager
Phase 2 Project Planning	**228 days**	
Workshops(To be part of weekly meeting)	41 days	PM/Product Specialis
Meter Configuration and Data Channel Workshop	1 day	Product Specialist
Data Integration Workshop	1 day	Product Specialist
AMI Infrastructure Workshop	1 day	Product Specialist
Public Outreach Collateral Workshop	1 day	Product Specialist
Meter Configuration and Data Channel Validation Workshop	1 day	Product Specialist
Existing Field Configurations/ Installation SOP	1 day	Product Specialist
QA/ QC Workshop	1 day	Product Specialist
Pilot Install Workshop	1 day	Product Specialist
Meter Reading Black-out Schedule Workshop	1 day	Product Specialist
AMI Network Infrastructure	61 days	
Sites Identified	0 days	Product Specialist
SOW (per Site)	1 day	Product Specialist
City Sign-off SOWs	5 days	Product Specialist
Equipment Ordered	53 days	Product Specialist
Cell modems ordered(If needed)	30 days	OSR/Branch
Permits issued	45 days	PM/Sub
Pilot Installation	60 days	
Pilot Installation Accounts Identified	1 day	PM
Initial Installation Training(To Include Utility Water Dept Training)	14 days	Product Specialist
Acceptance Testing	5 days	Product Specialist
Pilot Installation Customer Sign-off	3 days	PM
Phase 3 Project Execution	**454 days**	
Limited Deployment	443 days	
IT and Software Integration	443 days	
Sensus Analytics/ RNI Built	15 days	Sensus
Data Flow: City to Installer	60 days	City

Data Flow: Completed Install to City Billing	60 days	Subcontractor
VPIE Work Order Management System Integration	60 days	Subcontractor
Customer Acceptance Testing	30 days	Product Specialist
IT and Software Integration Complete	1 day	Product Specialist
Customer Sign-off	1 day	Product Specialist
AMI Network Infrastructure Installed	19 days	
Sites Installed	5 days	Subcontractor
Sites Commissioned	10 days	Subcontractor
City Sign-off Acceptance of Commissioned Sites	4 days	Subcontractor
AMI Network Infrastructure Complete	0 days	Subcontractor
Pilot Meters/Endpoints	17 days	
Pilot Meters Installed	14 days	Subcontractor
QA/QC Audits	14 days	PM
Acceptance Testing	14 days	Product Specialist
Pilot Installation Customer Sign-off	3 days	PM
Pilot Complete	0 days	
Full Deployment	347 days	
Mass Meter/ Endpoint Installations	347 days	Subcontractor
Contractor Mobilization	24 days	
500 Meters installed	30 days	Subcontractor
500 Meters Installed	30 days	Subcontractor
1000 Meters Installed	45 days	Subcontractor
1000 Meters Installed	45 days	Subcontractor
1000 Meters Installed	45 days	Subcontractor
1000 Meters Installed	45 days	Subcontractor
1000 Meters Installed	45 days	Subcontractor
1000 Meters Installed	45 days	Subcontractor
Phase 4 Monitoring	**347 days**	
QA/ QC Audits	347 days	PM
Mass Meter/ Register Installation Complete	1 day	PM
Phase 5 Closeout	**6 days**	
System Acceptance	1 day	PM/City
Remaining Inventory Placed as Agreed Upon	1 day	PM
Phase II/ Project Customer Sign-off	1 day	Sales/PM
Lessons-Learned Workshop	1 day	PM

APPENDIX D - ADVANCED METERING INFRASTRUCTURE (AMI) SYSTEM PRICING SHEET

b) PRICING

Meter counts shown in this Appendix and in the final Pricing Sheet attached hereto and incorporated by reference are estimates. The City may purchase additional meters and installation services during the project at the prices shown in this Appendix and the attached final Pricing Sheet.

c) PAYMENT TERMS

The following payment terms apply:

Item	Payment Description	Time Frame for Proposed Invoice
1	Field devices (handhelds etc.)	Upon delivery & setup validation
2	Meter Demonstration Boards (electric, water)	Upon delivery & setup validation
3	Electric Meters, intelligent edge devices	Monthly following successful installation. Any electric meters ordered but unable to be installed will be invoiced prior to Substantial Completion.
4	Water meters, intelligent edge devices, and communication endpoints (Hardware)	Upon delivery
5	Installation services for electric meters, intelligent edge devices	Monthly following successful installation
6	Bill inserts/Postcards/Door Hangers	Monthly following successful installation
7	Field Remediation Services	Monthly following successful installation
8	Non-metering edge devices	Upon FSAT acceptance
9	Program & Project Management	Per milestone schedule: 33% completion of system integrations (FSAT acceptance) 33% start of mass deployment 34% upon project completion (SAT acceptance)
10	AMI Software Integrations	Upon FSAT acceptance
11	Training	Upon completion
12	NaaS Mobilization	Upon completion of RNI/SA training.
13	Customer Portal Setup	Upon FSAT acceptance
14	NaaS/SaaS Services (Year 1)	Upon FSAT acceptance (yearly fee pro-rated)
15	NaaS/SaaS Services (ongoing)	Paid annually in advance prior to coverage anniversary

Electric AMI Deployment (One-Time Pricing Summary)	
Category	**Subtotal**
AMI Software Integration	$61,857.14
Training	$14,722.22
Electric Meters	$1,594,298.25
Network Devices	$0.00
Meter & Network Installation	$384,278.00
Miscellaneous AMI Equipment	$14,600.00
Miscellaneous One-Time Charges	$177,000.00
Total Electric (One-Time)	**$2,246,755.61**

Water AMI Pilot (One-Time Pricing Summary)	
Category	**Subtotal**
Water Meters & Modules	$1,782.90
Water Miscellaneous Charges	$15,976.36
Total Water Pilot (One-Time)	**$17,759.26**

Recurring Pricing Sumary (10 years)	
Category	**Subtotal**
NaaS/SaaS Services	$728,987.85
Customer Portal	$393,227.60
Total Recurring	**$1,122,215.45**

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RFP #24-UT-001
ADVANCED METERING INFRASTRUCTURE (AMI) SYSTEM
FINAL PRICING SHEET

AMI SOFTWARE INTEGRATION							Notes to C&M
Item	Area	Description	Quantity Anticipated	Unit Price	Total	Comments	
1	Software Integration Base	Base Software integrations for electric and water: - Sensus Analytics (SA) to BS&A billing integration - Sensus Analystics On-demands and Remote Disc/Conn - Data Sync BS&A to RNI - Installer WOMS integration - Inventory file delivery for BS&A, WOMS, RNI	1	$37,857.14	$37,857.14	FEE INCLUDES ALL: 1. BS&A CIS – Sensus Analytics (SA) DataSync and Billing integrations 2. On-demand reads and Remote Connect/ Disconnect will be from SA 3. Installer WOMS integration 4. Export of GIS data to ArcGIS and compatibility of GIS data with WindMil 5. No OMS integration required. AMM/NCS to be used for alerts/visualization	
2	Customer Portal	Customer Portal Integration:	1	$24,000.00	$24,000.00	Fee Includes: - Meter interval data to customer portal for both electric and water - Active indications via Multispeak for Outage/Restoration - Single Sign ON (SSO) support to/from existing Mt Dora portal	
3	Other (specify)				$0.00		
4	Other (specify)				$0.00		
					$61,857.14		

TRAINING							Notes to C&M
Item	Area	Description	Quantity Anticipated	Unit Price	Total	Comments	
5	Training	AMI system and application training	1	$14,722.22	$ 14,722.22	FEE INCLUDES ALL: - AMI Core Education provided by Sensus - Sensus Analytics Training Onsite provided by Sensus - Training will include: RNI, SA, XDL, AMM, NCS, Field Tools & Devices, and Service Disconnect. Customer portal training will be done by SpryEngage as part of the standard fees.	
6	Training	Field Training/Devices			$ -		
7	Training	Proposer Define			$ -		
					$14,722.22		

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RFP #24-UT-001
ADVANCED METERING INFRASTRUCTURE (AMI) SYSTEM
FINAL PRICING SHEET

ELECTRIC METERS							Notes to C&M
Item	Area	Description	Quantity Anticipated	Unit Price	Total	Comments	**All Sensus electric meters are Stratus IQ+**
8	AMI Electric Meter	Form 1S	150	$207.15	$31,072.50	ELEC MTR, 1S, CL200, 120V, STRATUS IQ+	
9	AMI Electric Meter	Form 2 S - 200 amp Self Contained with Remote Disconnect	5502	$204.36	$1,124,388.72	ELEC MTR, 2S, CL200, 240V, STRATUS IQ+, REMOTE DISCONNECT	
10	AMI Electric Meter	Form 2S CL320 - 400 amp Self Contained	300	$195.63	$58,690.00	ELEC MTR, 2S, CL320, 480V, STRATUS IQ+	
11	AMI Electric Meter	Form 12S with Remote Disconnect	200	$222.33	$44,465.71	ELEC MTR, 12S, CL200, 120V, STRATUS IQ+, REMOTE DISCONNECT	
12	AMI Electric Meter	Form 9S with Reactive	123	$612.56	$75,344.53	ELEC MTR, 9S, CL20, 480V, ACLARA KV2C, REACTIVE	
13	AMI Electric Meter	Form 16 S with Reactive	400	$612.56	$245,022.86	ELEC MTR, 16S, CL200, 480V, ACLARA KV2C, REACTIVE	
14	AMI Electric Meter	Form 45 S with Reactive	25	$612.56	$15,313.93	ELEC MTR, 45S, CL20, 480V, ACLARA KV2C, REACTIVE	
					ELECTRIC METERS - SUB-TOTAL	**$1,594,298.25**	

WATER METERS & MODULES (PILOT)							Notes to C&M
Item	Area	Description	Quantity Anticipated	Unit Price	Total	Comments	
15	AMI Water Meter	iPERL 5/8 x 3/4	2	$147.19	$0.00	Meter Only Price	C&M/Sensus to provide at no charge
16	AMI Water Meter	Metal iPERL 5/8 x 3/4	14	$173.81	$0.00	Meter Only Price	C&M/Sensus to provide at no charge
17	AMI Water Meter	iPERL 3/4" (9" laylength)	8	$165.02	$0.00	Meter Only Price	C&M/Sensus to provide at no charge
18	AMI Water Meter	Metal iPERL 3/4 (9" laylength)		$183.47	$0.00	Meter Only Price	
19	AMI Water Meter	iPERL 1"	2	$228.40	$0.00	Meter Only Price	C&M/Sensus to provide at no charge
20	AMI Water Meter	Metal iPERL 1"	6	$235.29	$0.00	Meter Only Price	C&M/Sensus to provide at no charge

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RFP #24-UT-001
ADVANCED METERING INFRASTRUCTURE (AMI) SYSTEM
FINAL PRICING SHEET

21	AMI Water Meter	Ally 5/8 x 3/4			4	$422.38	$0.00	Meter Only Price	C&M/Sensus to provide at no charge
22	AMI Water Meter	Ally 1"				$486.83	$0.00	Meter Only Price	
23	AMI Water Meter	Omni 1.5" (compound)			1	$1,270.32	$0.00	Meter Only Price	C&M/Sensus to provide at no charge
24	AMI Water Meter	Omni 2" (compound)			1	$1,465.75	$0.00	Meter Only Price	C&M/Sensus to provide at no charge
25	AMI Water Meter	Omni 3" (compound)			1	$1,856.61	$0.00	Meter Only Price	C&M/Sensus to provide at no charge
26	AMI Water Meter	Cordonel 1.5"			2	$1,821.17	$0.00	Meter Only Price	C&M/Sensus to provide at no charge
27	AMI Water Meter	Cordonel 2"			2	$2,052.47	$0.00	Meter Only Price	C&M/Sensus to provide at no charge
28	AMI Water Meter	Cordonel 3"			1	$2,451.02	$0.00	Meter Only Price	C&M/Sensus to provide at no charge
29	AMI Water Meter	520M Single Port			44	$157.89	$0.00	520M Single Port Only Price	C&M/Sensus to provide at no charge
30	AMI Water Meter	520M Dual Port			2	$230.72	$0.00	520M Dual Port Only Price	C&M/Sensus to provide at no charge
31	AMI Water Meter	SmartPoint 522M module (retrofits)			10	$178.29	$1,782.90	522M for retrofits	
				WATER METERS & MODULES - SUB-TOTAL			**$1,782.90**		

WATER MISCELLANEOUS CHARGES (PILOT)									**Notes to C&M**
Item	Area	Description			Quantity Anticipated	Unit Price	Total	Comments	
32	Training	Water training			1	$1,500.00	$1,500.00		
33	Meter Demonstration Board	Water test fixture			1	$10,000.00	$10,000.00		
34	Devices	Smart Gateway			2	$331.33	$662.66		
35	Devices	Intelligent water level sensor			1	$0.00	$0.00	0-3 ft level sensor	C&M to provide at no charge
36	Devices	Command Link			2	$882.99	$1,765.98		
37	Devices	Sensus UniPro Communicator			2	$273.86	$547.72		
38	Devices	Handheld tablet			2	$750.00	$1,500.00		

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						WATER MISCELLANEOUS CHARGES (PILOT) - SUB-TOTAL		**$15,976.36**		
						NETWORK DEVICE PRICING				**Notes to C&M**
Item	Area	Description			Quantity Anticipated	Unit Price	Total	Comments		
39	Network	Repeaters			2	$0.00	$0.00	All network devices are provided through NaaS.		
						NETWORK DEVICES - SUB-TOTAL		**$0.00**		
						METER AND NETWORK INSTALLATION - (INCLUDES PROGRAMING)				**Notes to C&M**
Item	Area	Description			Quantity Anticipated	Unit Price	Total	Comments		
40	Meter Install	Residential self contained meter forms: 1S, 2S, 2S CL320, 12S			6152	$57.75	$355,278.00	Like for like install.		City will install: 1. All CL20 transformer rated meters 2. All water meters
41	Meter Install	Commercial - Self contained forms: 16S			400	$72.50	$29,000.00	Like for like install.		
42	Installation	Network Collector						Included in NaaS		
43	Installation	Network Repeater						Included in NaaS		
						METER AND NETWORK INSTALLATION - SUB-TOTAL		**$384,278.00**		
						MISCELLANEOUS AMI EQUIPMENT				**Notes to C&M**
Item	Area	Description			Quantity Anticipated	Unit Price	Total	Comments		
44	Programing	Handheld Unit to Read / Trouble shoot / meters locally			2	$800.00	$1,600.00	Android Tablet loaded with Sensus FieldLogic Tools software.		
45	Meter Demonstration Board	Electric Meter			1	$13,000.00	$13,000.00			
						MISCELLANEOUS AMI EQUIPMENT - SUB-TOTAL		**$14,600.00**		

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MISCELLANEOUS ONE-TIME CHARGES							Notes to C&M
Item	Area	Description	Quantity Anticipated	Unit Price	Total	Comments	
46	Services	Project Management	1	$72,000.00	$72,000.00		
47	Miscellaneous	Customer Portal (Setup up)	1	$55,000.00	$55,000.00		
48	Miscellaneous	NaaS Mobilization	1	$50,000.00	$50,000.00		
		MISCELLANEOUS ONE-TIME CHARGES - SUB-TOTAL			**$177,000.00**		

MANAGED SERVICES						Notes to C&M
These services represent recurring pricing for annual service fees, any and all costs to the City for the managed service including any annual license fees, etc. Proposers are encouraged to provide supportive comments or clarifications on pricing structure in the spaces provided						
Item	Hosting	NaaS/SaaS (Elec + Water Pilot)	Customer Portal	NaaS/SaaS (Full Water Deploy) -	Comments	
49	Year 1	$63,318.75	$32,500.00	$51,668.10	Assuming full installation of electric for Year 1.	Please provide separate pricing for hosting services as follows: 1. NaaS/SaaS for the project scope covering full electric deployment and a water pilot 2. Customer Portal yearly charges 3. NaaS/SaaS for a full water deployment (13,000 meters). This pricing is for budgetary purposes and is not included in the project scope. 4. Mobilization fees should not be included in this section (provide above) 5. List all applications covered under Comments. Note: SpryPoint Customer Portal Prices based on (Elec + Water Pilot)
371 49	Year 2	$65,277.06	$33,854.17	$103,275.00	Assuming 13,500 endpoints for Year 2 (Full Water Deploy)	
49	Year 3	$67,295.94	$35,264.76	$154,500.00	Assuming 20,000 endpoints for Year 3 (Full Water Deploy)	
49	Year 4	$69,377.26	$36,734.12	$167,242.27	Assuming 21,000 endpoints for Year 4 (Full Water Deploy)	
49	Year 5	$71,522.95	$38,264.71	$172,414.71	Assuming 21,000 endpoints for Year 5 (Full Water Deploy)	
49	Year 6	$73,735.00	$39,859.07	$177,747.12	Assuming 21,000 endpoints for Year 6 (Full Water Deploy)	
49	Year 7	$76,015.46	$41,519.87	$183,244.46	Assuming 21,000 endpoints for Year 7 (Full Water Deploy)	
49	Year 8	$78,366.45	$43,249.86	$188,911.81	Assuming 21,000 endpoints for Year 8 (Full Water Deploy)	
49	Year 9	$80,790.16	$45,051.94	$194,754.44	Assuming 21,000 endpoints for Year 9 (Full Water Deploy)	
49	Year 10	$83,288.82	$46,929.10	$200,777.78	Assuming 21,000 endpoints for Year 10 (Full Water Deploy)	
49	Category Sub-total	$728,987.85	$393,227.60	$1,594,535.69		
	MANAGED SERVICES (TOTAL FOR 10 YEARS)		SUB-TOTAL	**$1,122,215.45**		Does not include full water

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	MISCELLANEOUS AND HOURLY RATES											
Pricing for ad hoc or consulting services that may be requested by the City that are out of scope of the AMI project.												
Item	Description							Price				
50	Managed Field Communication Device, (Totalizer / Recorder							$				
51	List Title	Professional Services						$ 470 per hour				
	EXTENDED WARRANTY											
Pricing for extended warranty of individual items (per meter/year)												Warranty Cost Per Year
52	AMI Electric Meter	Form 1S CL200 (Stratus IQ+)						$7.70				$1,155.00
53	AMI Electric Meter	Form 2S CL200 (Stratus IQ+)						$8.17				$44,959.20
54	AMI Electric Meter	Form 2S CL320 (Stratus IQ+)						$6.71				$2,013.00
55	AMI Electric Meter	Form 12S CL200 CL200 (Stratus IQ+)						$8.90				$1,780.00
56	AMI Electric Meter	Form 9S CL20 (Aclara KV2C)						$30.63				$3,767.49
57	AMI Electric Meter	Form 16 S CL200 (Aclara KV2C)						$30.63				$12,251.43
58	AMI Electric Meter	Form 45 S CL20 (Aclara KV2C)						$30.63				$765.71
	MISCELLANEOUS ADDITIONAL PROPOSER ITEMS											
Item	Description										Price	

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APPENDIX E – NETWORK AS A SERVICE, SOFTWARE AS A SERVICE AND SPECTRUM LEASE AGREEMENT

The Contractor's NaaS/SaaS Agreements and supporting documents (Spectrum lease agreement, Technical Support Process) are attached hereto and incorporated by reference.

The Contractor's NaaS/SaaS Agreements shall cover all supplied software including the head end system and any other current or future head-end applications and current software integrations.

Network as a Service, Software as a Service, and Spectrum Lease Agreement

between

CITY OF MOUNT DORA
("Customer")

and
Sensus USA Inc.
("Sensus")

IN WITNESS WHEREOF, the parties have caused this Software as a Service and Spectrum Lease ("Agreement") to be executed by their duly authorized representatives as of the day and year written below. The date of the last party to sign is the "Effective Date."

This Agreement shall commence on the Effective Date and continue for/until: 10 Years ("Initial Term"). At the end of the Initial Term, this Agreement shall automatically renew for an additional term of 10 years ("Renewal Term"). The "Term" shall refer to both the Initial Term and the Renewal Term.

This Agreement contains two parts:

Part (1) is The FCC Notification for Spectrum Manager Lease, to be filed with the FCC by Sensus on behalf of the Customer and Part (2) is a Network as a Service, Software as a Service, and a Spectrum Lease between Sensus and Customer

Together, these two parts create the Agreement.

Sensus USA Inc.		**Customer: CITY OF MOUNT DORA**	
By:	DocuSigned by: F4E3CE44E43A4A6...	By:	
Name:	**Mark Newton**	Name:	
Title:	**Vice President**	Title:	
Date:	6/18/2025	Date:	

Contents of this Agreement:

Part 1: Notification for Spectrum Manager Lease
Part 2: Agreement
Exhibit A Software
Exhibit B Technical Support
Exhibit C Network as a Service
Exhibit D Insurance Requirements

Part 1: Notification for Spectrum Manager Lease

In order for Sensus to apply to the FCC on the Customer's behalf for a spectrum manager lease, Customer must complete the information below in boxes one (1) through ten (10) and certify via authorized signature. Customer's signature will indicate that Customer authorizes Sensus to file the spectrum manager lease notification on FCC Form 608 with the Customer as spectrum Lessee, and if Customer does not already have one, ownership disclosure information on FCC Form 602.

1.

Customer/Lessee Name: City of Mount Dora		
Attention To: Vince Sandersfeld	Name of Real Party in Interest:	
Street Address: 510 Baker Street		City: Mount Dora
State: FL	Zip: 32757	Phone: 352.735.7100
Fax:	Email: SandersfeldV@mountdora.gov	

Is Customer contact information same as above? ☒Yes ☐No (If No, complete box 2 below)

2.

Additional Customer/Lessee Contact Information

Company Name:		
Attention To:		
Street Address:		City:
State:	Zip:	Phone:
Fax:	Email:	

3.

Customer/Lessee is a(n) (Select one): ☐Individual | ☐ Unincorporated Association | ☐Trust
☒Government Entity | ☐Corporation | ☐ Limited Liability Company | ☐General Partnership
☐Limited Partnership | ☐Limited Liability Partnership | ☐Consortium | ☐ Other _____

4.

FCC Form 602: FCC File Number of Customer's Form 602 Ownership Information: _____. If Customer has not filed a Form 602, Sensus will file one for Customer. Please complete questions 5, 6, and 7 below if Customer does not have a Form 602 on file.
Customer must complete items 8, 9 and 10 irrespective of whether Customer has an ownership report on file.

5.

Customer Tax ID: 59-6000580

6.

Individual Contact For FCC Matters

Please designate one individual (the Director of Public Works or similar person) who is responsible to the FCC for the operation of the FlexNet radio system.	
Name Steven G. Langley	
Title: Assistant City Manager/Electric Utility Director	
Email: langleys@mountdora.gov	Phone: 352.735.7100 ext. 1815

7.

Ownership Disclosure Information

If Customer/Lessee is a government entity, list the names of the Mayor and all Council Members below, as well as verify citizenship and ownership interests in any entity regulated by the FCC. Such ownership must be disclosed where a mayor/council member owns 10% or more, directly or indirectly, or has operating control of any entity subject to FCC regulation. If any answer to Ownership question is Yes, or any answer to Citizenship question is No, provide an attachment with further explanation.

	US Citizen?	Ownership Disclosure?
Mayor: . James Homich	☒Yes ☐No	☐Yes ☒No
Council Member: John Cataldo	☒Yes ☐No	☐Yes ☒No
Council Member: Cal Rolfson	☒Yes ☐No	☐Yes ☒No
Council Member Dennis Dawson	☒Yes ☐No	☐Yes ☒No

Council Member: Marc Crail	☒Yes ☐No	☐Yes ☒No
Council Member: Nate Walker	☒Yes ☐No	☐Yes ☒No
Council Member Doug Bryant	☒Yes ☐No	☐Yes ☒No
Council Member:	☐Yes ☐No	☐Yes ☐No
Council Member:	☐Yes ☐No	☐Yes ☐No
Council Member:	☐Yes ☐No	☐Yes ☐No

8.

Alien Ownership Questions (if the answer is Yes, provide an attachment explaining the circumstances)

1) Is the Customer/Lessee a foreign government or the representative of any foreign government?	☐Yes ☒No

9.

Basic Qualification Information

1) Has the Customer or any party to this application had any FCC station authorization, license, or construction permit revoked or had any application for an initial, modification or renewal of FCC station authorization, license or construction permit denied by the Commission?	☐Yes ☒No
2) Has the Customer or any party to this filing, or any party directly or indirectly controlling the Customer or any party to this filing ever been convicted of a felony by any state or federal court?	☐Yes ☒No
3) Has any court finally adjudged the Customer or any party directly or indirectly controlling the Customer guilty of unlawfully monopolizing or attempting to unlawfully monopolize radio communication, directly or indirectly, through control of manufacture or sale of radio apparatus, exclusive traffic arrangement, or any other means or unfair methods of competition?	☐Yes ☒No

10.

Customer/Lessee Certification Statements

1) The Customer/Lessee agrees that the Lease is not a sale or transfer of the license itself.	☒Yes
2) The Customer/Lessee acknowledges that it is required to comply with the Commission's Rules and Regulations and other applicable law at all times, and if the Customer/Lessee fails to so comply, the Lease may be revoked, cancelled, or terminated by either the Licensee or the Commission.	☒Yes
3) The Customer/Lessee certifies that neither it nor any other party to the Application/Notification is subject to a denial of Federal benefits pursuant to Section 5301 of the Anti-Drug Abuse Act of 1988, 21 U.S.C § 862, because of a conviction for possession or distribution of a controlled substance (*See* Section 1.2002(b) of the rules, 47 CFR § 1.2002(b), for the definition of "party to the application" as used in this certification.)	☒Yes
4) The Customer/Lessee hereby accepts Commission oversight and enforcement consistent with the license and lease authorization. The Lessee acknowledges that it must cooperate fully with any investigation or inquiry conducted either by the Commission or the Licensee, allow the Commission or the Licensee to conduct on-site inspections of transmission facilities, and suspend operations at the direction of the Commission or the Licensee and to the extent that such suspension of operation would be consistent with applicable Commission policies.	☒Yes
5) The Customer/Lessee acknowledges that in the event an authorization held by a Licensee that has associated with it a spectrum leasing arrangement that is the subject of this filing is revoked, cancelled, terminated, or otherwise ceases to be in effect, the Customer/Lessee will have no continuing authority to use the leased spectrum and will be required to terminate its operations no later than the date on which the Licensee ceases to have any authority to operate under the license, unless otherwise authorized by the Commission.	☒Yes
6) The Customer/Lessee agrees the Lease shall not be assigned to any entity that is not eligible or qualified to enter into a spectrum leasing arrangement under the Commission's Rules and Regulations.	☒Yes
7)The Customer/Lessee waives any claim to the use of any particular frequency or of the electromagnetic spectrum as against the regulatory power of the United States because of the previous use of the same, whether by spectrum lease or otherwise.	☒Yes
8) The Customer/Lessee certifies that it is not in default on any payment for Commission licenses and that it is not delinquent on any non-tax debt owed to any federal agency.	☒Yes

The Customer/Lessee certifies that all of its statements made in this Application/Notification and in the schedules, exhibits, attachments, or documents incorporated by reference are material, are part of this Application/Notification, and are true, complete, correct, and made in good faith. The Customer/Lessee shall notify Sensus in writing in the event any information supplied on this form changes.

CITY OF MOUNT DORA			
By:		Title: Mayor	
Name:	James Homich	Date:	
FAILURE TO SIGN THIS APPLICATION MAY RESULT IN DISMISSAL OF THE APPLICATION AND FORFEITURE OF ANY FEES PAID.			
WILLFUL FALSE STATEMENTS MADE ON THIS FORM OR ANY ATTACHMENTS ARE PUNISHABLE BY FINE AND/OR IMPRISONMENT (U.S. Code, Title 18, Section 1001) AND/OR REVOCATION OF ANY STATION LICENSE OR CONSTRUCTION PERMIT (U.S. Code, Title 47, Section 312(a)(1)) AND/OR FORFEITURE (U.S. Code Title 47, Section 503).			

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1. General
   A. Agreement Generally. The scope of this Agreement includes Sensus providing the specified services, usage terms for Sensus' Network as a Service, hosted Software as a Service, leased spectrum, technical support, and supporting terms and conditions for an advanced metering infrastructure ("AMI") solution in consideration of Customer's purchase and payment to Sensus' authorized distributor, Core & Main LP ("C&M"), under a separate agreement by and between Customer and C&M (the "C&M Contract"), for all such goods and services.
2. Software.
   A. **Software as a Service ("SaaS")**
      i Sensus shall provide Customer with SaaS, as defined in Exhibit A, and Technical Support during the Term and only so long as Customer is current in its payments for such services under the C&M Contract. Upon the expiration or termination of this Agreement, Sensus will have no obligation to provide any further Services or Technical Support.
      ii Sensus will provide Technical Support for any given Release in accordance with Exhibit B for four (4) years from the date Sensus issues the Release. Sensus will provide Engineering Support of any given release for two (2) years from the date Sensus issues the Release. Notwithstanding the foregoing, in the event of a critical security vulnerability (in Sensus' reasonable discretion), Customer acknowledges (i) that in order to receive particular vulnerability or defect corrections (whether by Patch, Update or Upgrade), Customer may need to move to a more recent supported Release of the Software, and (ii) Sensus reserves the right to discontinue supporting Releases of the Software, including in the event such Software has been identified by Sensus as end of life. Sensus may declare Software "end of life" upon either (i) the relevant window of Technical Support or Engineering Support ending or (ii) becoming aware of a security incident or vulnerability.
   B. UCITA. To the maximum extent permitted by law, the Parties agree that the Uniform Computer Information Transaction Act as enacted by any state shall not apply, in whole or in part, to this Agreement.
3. Spectrum
   A. Definitions in this Section. In this Section only, "Sensus" shall mean Sensus USA Inc. and its wholly owned subsidiary, Sensus Spectrum LLC.
   B. Spectrum Lease. Sensus hereby grants to Customer, and Customer accepts, a spectrum manager lease ("Spectrum Lease") over the frequencies of certain FCC license(s) ("FCC License") solely within Customer's Service Territory. (The frequencies of the FCC License within Customer's geographic Service Territory are called the "Leased Spectrum"). Customer shall pay the Ongoing Fees for use of the Leased Spectrum.

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C. FCC Forms. At the Federal Communications Commission ("FCC"), Sensus will; (1) obtain an FCC Registration Number ("FRN")) for Customer; (2) submit on behalf of Customer the FCC Form 602 Ownership Disclosure Information if Customer has not already done so; and (3) file a FCC Form 608, notification/application for long-term spectrum manager lease. This Lease becomes effective when the FCC accepts the FCC Form 608.

D. Lease Application. In order to complete the FCC lease application, Customer will promptly:
   i. Complete and sign the representations in Part 1 of this Agreement such that Customer demonstrates it qualifies for a spectrum lease under FCC rules. Customer's signature will indicate that Customer authorizes Sensus to; (1) obtain an FRN on behalf of Customer; (2) submit the FCC Form 602 Ownership Disclosure Information on behalf of Customer if Customer has not already done so; and (3) file the spectrum manager lease notification on FCC Form 608 with the Customer as spectrum lessee.
   ii. Give Sensus the coordinates of the boundaries of Customer's Service Territory or, alternatively, approve Sensus' estimation of the same.
   iii. If Customer has not already done so; Customer hereby authorizes Sensus to apply on Customer's behalf and obtain for Customer a Federal Registration Number (FRN, the FCC's unique identifier for each licensee) and shall supply Sensus with Customer's Taxpayer Identification Number ("TIN").
   iv. Provide any other information or other cooperation reasonably necessary for the Parties to perform as set forth herein.

E. Permitted Use of Spectrum Lease and Equipment. Customer may transmit or receive over the Leased Spectrum only in the Service Territory and only using FlexNet equipment manufactured by Sensus and used in accordance with Sensus' specifications. Customer may use the Leased Spectrum only to read and direct Field Devices or any other operation approved by Sensus in writing. Without limiting the foregoing, Customer is prohibited from reselling, subleasing or sublicensing the FlexNet Equipment and Leased Spectrum, and from transmitting voice communications over the Leased Spectrum. For each piece of RF Field Equipment used by Customer, Customer shall affix a Sensus-supplied label to the exterior of the RF Field Equipment cabinet or other appropriate visible place to indicate that RF operation is conducted under authority of FCC License(s) issued to Sensus.

F. Term of Spectrum Lease. Unless terminated earlier (because, for example, Customer stops using the FlexNet equipment or because this Agreement terminates or expires for any reason), this Spectrum Lease will have the same term as the FCC license. If Customer is operating in compliance with this Agreement and is current on any payments owed to Sensus, when the FCC License renews, the Parties will apply to the FCC to renew this Spectrum Lease.

G. Termination of Spectrum Lease. The Spectrum Lease will terminate: (a) two months after Customer stops transmitting with FlexNet equipment manufactured by Sensus; (b) upon termination, revocation or expiration of the FCC License; (c) upon Customer's breach of this Agreement; or (d) upon termination or expiration of this Agreement for any reason.

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H. FCC Compliance. The following FCC requirements apply

i. Pursuant to 47 CFR 1.9040(a);

a. Customer must comply at all times with applicable FCC rules. This Agreement may be revoked by Sensus or the FCC if Customer fails to so comply;

b. If the FCC License is terminated, Customer has no continuing right to use the Leased Spectrum unless otherwise authorized by the FCC;

c. This Agreement is not an assignment, sale or other transfer of the FCC License;

d. This Agreement may not be assigned except upon written consent of Sensus, which consent may be withheld in its discretion; and

e. In any event, Sensus will not consent to an assignment that does not satisfy FCC rules.

ii. Referencing 47 CFR 1.9010, Sensus retains *de jure* and *de facto* control over the applicable radio facilities, including that,

a. Sensus will be responsible for Customer's compliance with FCC policies and rules. Sensus is responsible for engineering the FlexNet equipment and accompanying software and other programs to comply with FCC rules. Customer will operate the FlexNet equipment subject to Sensus' supervision and control and solely in accordance with Sensus' specifications. Sensus retains the right to inspect Customer's radio operations hereunder and to terminate this Agreement or take any other necessary steps to resolve a violation of FCC rules, including to order Customer to cease transmission. Sensus will act as spectrum manager in assigning spectrum under the FCC License so as to avoid any harmful interference or other violation of FCC rules. Sensus will be responsible for resolving any interference complaints or other FCC rule violations that may arise; and

b. Sensus will file any necessary FCC forms or applications and Customer agrees to reasonably assist Sensus with such filing by providing any necessary information or other cooperation. Sensus will otherwise interact with the FCC with respect to this Agreement, the FCC License or FlexNet equipment.

iii. Customer must continue operations on the spectrum during the Term of this Agreement. If Customer stops operations for any period of time, Customer must notify Sensus by sending an email to legal@xyleminc.com. Customer may not pause or discontinue operations for more than 180 days.

I. Interference. Customer agrees to report to Sensus promptly, and in no event later than 72 hours afterward, any incident related to the Leased Spectrum, including where Customer experiences harmful interference, receives a complaint or other notice of having caused harmful interference, or receives any type of communication from the FCC or other government agency regarding radio transmission.

4. Network as a Service.

A. Generally. Sensus or C&M shall provide Customer with Network as a Service ("NaaS"), as defined in Exhibit C, but only so long as Customer is current in its payments to C&M.

B. RF Field Equipment. Sensus owns and will continue to own all RF Field Equipment and may use same for its own benefit.
   i. Maintenance of RF Field Equipment. As a part of NaaS, Sensus shall be responsible for the ongoing maintenance of the RF Field Equipment.
      a. For RF Field Equipment not located on Customer's site(s), Sensus shall be responsible for the ongoing monthly operations and expenses related to the RF Field Equipment, including any leasing costs, construction costs, taxes, electricity, WAN Backhaul, and WAN Backhaul communication costs.
      b. For RF Field Equipment located on Customer's site(s), and for good and valuable consideration stated in this Agreement, Customer agrees to lease and hereby does lease to Sensus adequate space on each relevant site where Sensus will install and operate Sensus-owned RF Field Equipment. Sensus shall obtain any required permits. Customer will supply electric power to the RF Field Equipment. During any Network Continuation Term, as defined below, Sensus shall pay for electric power to the RF Field Equipment. In the event that electric power is not present at a certain Customer site(s), Sensus shall cover the reasonable costs associated with connecting the Customer's site(s) to the Customer's power supply for operation of the RF Field Equipment.
   ii. Site Access. Customer shall provide Sensus and/or Sensus' authorized representative with access to all Customer site(s) necessary for Sensus to perform the NaaS, as defined in Exhibit C.

C. Termination of NaaS.
   i. Customer may terminate NaaS and migrate to a Customer owned and operated solution prior to the end of the Term by giving Sensus one hundred twenty (120) days' prior written notice. Should Customer elect to terminate NaaS, Customer acknowledges that; (a) Customer shall pay all applicable third-party fees, including any unpaid NaaS fees up to the effective date of termination; and (b) Sensus' provision of NaaS to Customer shall cease as of the effective date of termination.
   ii. Following termination of NaaS or this Agreement for any reason, Sensus may, at its option, either:
      a. continue to mount, install, operate, maintain, use and replace the Network and the RF Field Equipment for use by other Sensus customers ("Network Continuation Rights") for the remaining portion of the Term had this Agreement or NaaS not been terminated (that period of time, the "Network Continuation Term"), according to the standard terms and conditions of the tower antennae lease(s), which Customer agrees to negotiate in good faith and make best efforts to renew or extend the tower antennae lease(s) for the complete Network Continuation Term. Within six (6) months following the end of the Network Continuation Term, Sensus will un-install and remove all RF Field Equipment at its cost; or
      b. permit Customer to purchase the existing installed RF Field Equipment at a price equal to the then-current replacement value (including labor costs) of that RF Field

Equipment. If Sensus permits Customer to purchase the RF Field Equipment, Customer acknowledges that it will be responsible for all ongoing maintenance and operation of the purchased RF Field Equipment and all associated expenses.

c. If Customer purchases the RF Field Equipment as outlined directly above, Sensus will work with Customer to seamlessly transfer WAN Backhaul usage agreements to Customer to avoid interruption of service.

iii. Customer acknowledges that, if Sensus does not permit Customer to purchase the existing installed RF Field Equipment pursuant to Section 4(C)(ii)(b), Customer's Equipment will no longer have network connectivity and will not be able to remotely transmit Customer Data to SaaS. Customer will be responsible for all costs associated with conducting a new Certified Propagation Study and purchasing and installing new RF Field Equipment to maintain FlexNet System functionality and network connectivity with SaaS.

D. Insurance. Sensus will maintain insurance coverage in the amounts and in the manner set forth in the attached Exhibit D during the Term of the Agreement.

5. Equipment.

A. Purchase of Equipment. Customer shall purchase all Field Devices, and other goods (collectively, "Equipment") from C&M pursuant to the terms and conditions (including any warranties on such Equipment) agreed by Customer and C&M. This Agreement shall not affect any terms and conditions, including any warranty terms, agreed by Customer and C&M. If Customer elects to purchase any equipment or services directly from Sensus, or if Customer pays any fees or other costs to Sensus, then Sensus' Terms of Sale shall apply.

B. EXCEPT FOR THE SERVICES WARRANTY OUTLINED IN SECTION 6 BELOW, THERE ARE NO OTHER WARRANTIES IN THIS AGREEMENT, EXPRESS OR IMPLIED. SENSUS EXPRESSLY DISCLAIMS ANY AND ALL REPRESENTATIONS, WARRANTIES AND/OR CONDITIONS, EXPRESSED, IMPLIED, STATUTORY OR OTHERWISE, REGARDING ANY MATTER IN CONNECTION WITH THIS AGREEMENT, INCLUDING WITHOUT LIMITATION, WARRANTIES AS TO FITNESS FOR A PARTICULAR PURPOSE, MERCHANTABILITY, NON-INFRINGEMENT AND TITLE. WITHOUT LIMITING THE FOREGOING, SENSUS MAKES NO WARRANTIES OR PROMISE (I) THAT ITS SOFTWARE AS A SERVICE, SOFTWARE OR OTHER SERVICES WILL OPERATE IN CONJUNCTION WITH ANY SOFTWARE, SERVICES OR PRODUCTS PROVIDED BY THIRD PARTIES, (II) THAT THE OPERATION OF THE SOFTWARE AS A SERVICE OR ANY SENSUS SOFTWARE WILL BE UNINTERRUPTED OR ERROR OR VULNERABILITY FREE, OR (III) THAT ALL DEFECTS, BUGS, ERRORS OR VULNERABILITIES CAN OR WILL BE FIXED OR REMEDIATED. CUSTOMER ACKNOWLEDGES THAT SENSUS DOES NOT CONTROL THE TRANSFER OF DATA OVER THE INTERNET OR ACROSS OTHER NETWORKS, AND THE SOFTWARE AS A SERVICE MAY BE SUBJECT TO LIMITATIONS, DELAYS, AND OTHER PROBLEMS INHERENT IN THE USE OR OPERATION OF SUCH INTERNET OR NETWORKS. SENSUS IS NOT RESPONSIBLE FOR ANY DAMAGES, INCIDENTS, DELAYS,

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DELIVERY PROBLEMS, OR OTHER PROBLEMS RESULTING FROM SUCH INTERNET OR NETWORK PROBLEMS. IN NO EVENT IS SENSUS RESPONSIBLE OR LIABLE FOR ANY ISSUES RELATED TO THE PERFORMANCE, OPERATION OR SECURITY OF THE SOFTWARE AS A SERVICE OR ANY SENSUS SOFTWARE THAT ARISE **FROM CUSTOMER'S OR ITS THIRD PARTIES' ENVIRONMENT; FAILURE TO** IMPLEMENT PATCHES, UPDATES OR UPGRADES; SYSTEMS; CONTENT; NETWORKS; OR DEVICES. EXCEPT AS OTHERWISE EXPRESSLY STATED IN THIS AGREEMENT, CUSTOMER ASSUMES ALL RESPONSIBILITY AND RISK FOR ITS USE OF THE SOFTWARE AS A SERVICE, SENSUS SOFTWARE AND OTHER SERVICES PROVIDED UNDER THIS AGREEMENT.

6. Services.
   A. Installation of Equipment. Installation services for Field Devices, other goods, and RF Field Equipment will be as agreed between the Customer and C&M Sensus will not provide installation services pursuant to this Agreement. Sensus is not responsible for any problems that arise from the installation services (e.g., faulty configuration).
   B. Technical Support. Sensus shall provide Customer the technical support set forth in Exhibit B.
   C. Project Management. C&M will provide project management services to Customer.
   D. Training. C&M will provide Customer with training on the use of the FlexNet System.
   E. IT Systems Integration Services. Except as may otherwise be provided herein, integration of the Software into Customer's new or existing internal IT systems is not included in this Agreement. Any integration work shall be subject to a separate agreement which describes the scope and pricing for such work.
   F. Services Warranty. Sensus represents and warrants that Sensus will perform all Services in a timely, professional, and workmanlike manner in compliance with this Agreement and with a level of care, skill, practice and judgment consistent with generally recognized industry standards and practices for similar Services, using personnel with the requisite skill, experience and qualifications, will devote adequate resources, and be responsible for its own means and methods to meet its obligations under this Agreement. Customer's sole and exclusive remedy shall be for Sensus to repair (or cure the defect) for any breach of the foregoing warranties.
7. General Terms and Conditions.
   A. Infringement Indemnity. Sensus shall defend, indemnify, and hold harmless Customer from and against any action filed, judgment entered by a court of competent jurisdiction, or settlement reached by Sensus from any litigation instituted against Customer in the United States by a third party to the extent alleging that the FlexNet System as provided hereunder infringes upon the patents or copyrights of such third party, provided that Sensus shall have the right to select counsel in such proceedings and control such proceedings and any settlement. Notwithstanding the foregoing, Sensus shall have no obligation or liability under this indemnity unless Customer cooperates fully with and assists Sensus in any such

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proceedings and gives Sensus written notice of any claim hereunder within fourteen (14) days of receiving it. Further, Sensus shall have no obligation or liability hereunder if such claim is related to; (i) any change, modification or alteration made to the FlexNet System by Customer or a third party, (ii) use of the FlexNet System in combination with any goods or services not provided by Sensus hereunder, (iii) Customer's failure to use the most recent version of the Software or to otherwise take any corrective action as reasonably directed by Sensus, (iv) compliance by Sensus with any designs, specifications or instructions provided by Customer or compliance by Sensus with an industry standard, or (v) any use of the FlexNet System other than for the Permitted Use or in a manner that exceeds the licenses and rights provided herein. In the event the FlexNet System is adjudicated to infringe a patent or copyright of a third party and its use is enjoined, or, if in the reasonable opinion of Sensus, the FlexNet System is likely to become the subject of an infringement claim, Sensus, at its sole discretion and expense, may at its option; (i) procure for Customer the right to continue using the FlexNet System or (ii) modify or replace the FlexNet System so that it becomes non-infringing. THIS SECTION STATES CUSTOMER'S SOLE AND EXCLUSIVE REMEDY AND SENSUS' ENTIRE LIABILITY AND OBLIGATION FOR ANY CLAIM OF INFRINGEMENT.

B. Limitation of Liability. Sensus' aggregate liability in any and all causes of action arising under, out of or in relation to this Agreement, its negotiation, performance, breach or termination (collectively "Causes of Action") shall not exceed the total amount paid by Customer directly to Sensus or C&M under this Agreement. This is so whether the Causes of Action are in tort, including, without limitation, negligence or strict liability, in contract, under statute or otherwise. As separate and independent limitations on liability, Sensus' liability shall be limited to direct damages. Sensus shall not be liable for; (i) any indirect, incidental, special or consequential damages; nor (ii) any revenue or profits lost by Customer or its Affiliates, including from any End User(s), irrespective whether such lost revenue or profits is categorized as direct damages or otherwise; nor (iii) any In/Out Costs; nor (v) damages arising from maincase or bottom plate breakage caused by freezing temperatures, water hammer conditions, or excessive water pressure. The limitations on liability set forth in this Agreement are fundamental inducements to Sensus entering into this Agreement. They apply unconditionally and in all respects. They are to be interpreted broadly so as to give Sensus the maximum protection permitted under law.

C. Termination. Either party may terminate this Agreement earlier if the other party commits a material breach of this Agreement and such material breach is not cured within forty-five (45) days of written notice by the other party. Upon any expiration or termination of this Agreement, Sensus' and Customer's obligations hereunder shall cease and the software as

a service and Spectrum Lease shall immediately cease.

D. Force Majeure. If Sensus becomes unable, either wholly or in part, by an event of Force Majeure, to fulfill its obligations under this Agreement, the obligations affected by the event of Force Majeure will be suspended during the continuance of that inability. The party affected by the force majeure will take reasonable steps to mitigate the Force Majeure. Notwithstanding anything herein to the contrary, in no event will Sensus be liable for the consequences or impact of any Force Majeure event.

E. Temporary Service Suspension. Sensus may suspend the Services without liability if: (i) Customer fails to pay Sensus or C&M when payment is due; (ii) Sensus reasonably believes that the Services are being used in violation of the Agreement; (iii) Sensus is required by applicable law or by a regulatory or government body to suspend Customer's access to the Services; (iv) a Force Majeure event requires Sensus to suspend Customer's access; or (v) there is another event for which Sensus reasonably believes that the suspension of Services is necessary to protect the Services. Sensus will give Customer advance notice of a suspension where reasonably possible under the circumstances. If a suspension is based on Customer's breach of Customer's obligations under the Agreement, Sensus may continue to charge Customer the fees for the Services during suspension.

F. Intellectual Property Rights.

i. Software and Materials. No Intellectual Property is assigned to Customer hereunder. Excluding Customer Data, Sensus shall own or continue to own all right, title, and interest in and to the Intellectual Property associated with the Software and related documentation, including any derivations and/or derivative works (the "Sensus IP"). To the extent, if any, that any ownership interest in and to such Sensus IP does not automatically vest in Sensus by virtue of this Agreement or otherwise, and instead vests in Customer, Customer agrees to grant and assign and hereby does grant and assign to Sensus all right, title, and interest that Customer may have in and to such Sensus IP. Customer agrees not to reverse engineer any Sensus Products purchased or provided hereunder.

ii. Customer Data. Notwithstanding the prior paragraph, as between Customer and Sensus, Customer remains the owner of all right, title or interest in or to any Customer Data. "Customer Data" means solely usage data collected by the Field Devices. To avoid doubt, Customer Data does not include (i) non-End User usage data collected by the Field Devices, Software, or FlexNet System, such as network and equipment status information or the like, or (ii) personally identifiable information of End-Users. Customer represents to Sensus that Customer (i) has sufficient rights in all Customer Data, to hold the Customer Data and deliver it to Sensus as required for the Services to be performed as contemplated in the Agreement, and (ii) has obtained (and is responsible for maintaining) from all individuals, persons and third parties whose personal information is contained in the Customer Data all required consents and authorizations, and has provided to all individuals, persons, and third parties the notices with respect to the

collection, retention, disclosure and use of the Customer Data as contemplated for the purposes of this Agreement that are required under applicable foreign, federal and state laws and regulations, including but not limited to relevant privacy laws and regulations.

iii. Consent to Use of Customer Data. Customer hereby irrevocably grants to Sensus a world-wide royalty-free, non-exclusive, irrevocable right and license to access, store, and use such Customer Data and any other data or information provided to Sensus provided it is anonymized and aggregated to (1) provide the Service; (2) analyze and improve the Service; (3) analyze and improve any Sensus equipment, software, or service; or (4) for any other internal use. As used herein, "Service" means Sensus' obligations under this Agreement, such as the Software as a Service.

iv. Access to Customer Data. Within 45 days of Customer's written request, Sensus will provide Customer a copy of the previous 24 months of data collected by the FlexNet System in a format of Sensus' discretion and deliver the file to a drop location specified by Customer.

G. Right to use Feedback. Customer grants Sensus a royalty-free, worldwide, irrevocable, perpetual license to use, aggregate, alter or incorporate into the Services any suggestions, enhancement requests, recommendations or other feedback provided by Customer or its employees and agents.

H. Trade Secrets, Proprietary, Confidential Information, and Public Records.

i. Trade Secrets. Documents submitted by Sensus which it contends constitute trade secrets as defined in Sections 812.081 and 688.002, Florida Statutes, or confidential and propriety business information when held by the Customer as a utility owner, consistent with Section 119.0713(5), Florida Statutes, or information related to cybersecurity that is exempt and confidential under Section 119.0725, Florida Statutes, and which are clearly marked or stamped as confidential by Sensus at the time of submission to the Customer, will not be subject to public access. Except as may be required under applicable law, court order, or regulation, or to the extent required to perform and enforce this Agreement, both parties shall (and shall cause their employees and contractors to) keep all Confidential Information strictly confidential and shall not disclose it to any third party. The Confidential Information may be transmitted orally, in writing, electronically or otherwise observed by either party. However, should a requestor of public records challenge Sensus' claim of trade secret or confidential and proprietary business information, within five (5) calendar days of such challenge, Sensus must provide a separate written affidavit and a separate indemnification and release guarantee, as approved by the Customer's Attorney or designee, to the Customer to support its claim that the alleged trade secrets or proprietary and confidential business information actually constitutes same as defined by applicable law. Sensus must demonstrate the need for confidentiality of the documentation by showing a business advantage or opportunity to obtain an advantage would be gained if the documentation were released. Otherwise, Sensus is required to timely seek a protective order in the Circuit Court of Lake County to prevent the Customer's release of the requested records.

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ii. Confidential Information Defined. "Confidential Information" means all non-public information of either party, all technical information about either party's products or services, pricing information, marketing and marketing plans, Customer's End Users' personally identifiable information, FlexNet System performance, FlexNet System architecture and design, FlexNet System software, other business and financial information of either party and all trade secrets of either party. Notwithstanding the foregoing, "Confidential Information" shall not include (i) any information that is in the public domain other than due to Recipient's breach of this Contract; (ii) any information in the possession of the Recipient without restriction prior to disclosure by the Discloser; or (iii) any information independently developed by the Recipient without reliance on the information disclosed hereunder by the Discloser. "Discloser" means either party that discloses Confidential Information, and "Recipient" means either party that receives it.

iii. Public Records Requirements. The parties acknowledge and agree that the Customer is a public agency subject to Chapter 119, Florida Statutes. All documents, including but not limited to, letters, memos, e-mails, computer files, photographs, drawings, tracings, plans, specifications, maps, evaluations, reports and other records and data of any type relating to the Agreement received, or prepared and developed by Sensus and provided to the Customer under this Agreement are public records subject to Florida Statutes, Chapter 119 and shall not be destroyed. Accordingly, pursuant to Section 119.0701, Florida Statutes, Sensus must comply with all public records laws in accordance with Chapter 119, Florida Statutes. In accordance with Chapter 119, Florida Statutes, Sensus agrees to: (1) Keep and maintain all records that ordinarily and necessarily would be required by the Customer to perform the services under this Agreement; (2) Upon request from the Customer, provide the Customer with a copy of the requested records or allow the records to be inspected or copied within a reasonable time at a cost that does not exceed the costs provided in Chapter 119, Florida Statutes, or as otherwise provided by law; (3) Ensure that public records that are exempt, or confidential and exempt, from public records disclosures are not disclosed except as authorized by law during the Term of the Agreement and following termination or expiration of the Agreement, if Sensus does not transfer the records to the Customer; (4) Upon completion of the services under this Agreement, at no cost to the Customer, either transfer to the Customer all public records in Sensus's possession that were not previously provided or keep and maintain public records required by the Customer to perform the services. If Sensus transfers all public records to the Customer upon completion of the services, Sensus must destroy any duplicate public records that are exempt, or confidential and exempt, from public records disclosure requirements. If Sensus keeps and maintains public records upon completion of the services under this Agreement, its obligations shall survive the termination or expiration of the Agreement, and Sensus must meet all applicable requirements for retaining public records, including abiding by all State of Florida records retention schedules. All records stored electronically must be provided to the Customer, upon request from the Customer, in a format that is compatible with the information technology systems of the Customer;(5)IF

SENSUS HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO ITS DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS AGREEMENT, CONTACT THE CITY'S CUSTODIAN OF PUBLIC RECORDS AT: clerk@mountdora.gov

iv. If Sensus does not comply with the provisions of this section, the Customer will enforce the Agreement provisions in accordance herewith and may unilaterally cancel this Agreement in accordance with Florida law.

I. Compliance with Laws. Customer shall comply with all applicable federal, state, and local laws and regulations, as set forth at the time of acceptance and as may be amended, changed, or supplemented. Customer shall not take any action or permit the taking of any action by a third party, which may render Sensus liable for a violation of applicable laws.

i. Export Control Laws. Customer shall; (i) comply with all applicable U.S. and local laws and regulations governing the use, export, import, re-export, and transfer of products, technology, and services; and (ii) obtain all required authorizations, permits, and licenses. Customer shall immediately notify Sensus and immediately cease all activities with regards to the applicable transaction, if the Customer knows or has a reasonable suspicion that the equipment, software, or services provided hereunder may be directed to countries in violation of any export control laws. By ordering equipment, software or services, Customer certifies that it is not on any U.S. government export exclusion list.

ii. Anti-Corruption Laws. Customer shall comply with the United States Foreign Corrupt Practices Act (FCPA), 15 U.S.C. §§ 78dd-1, et seq.; laws and regulations implementing the OECD's Convention on Combating Bribery of Foreign Public Officials in International Business Transactions; the U.N. Convention Against Corruption; the Inter-American Convention Against Corruption; and any other applicable laws and regulations relating to anti-corruption in the Customer's county or any country where performance of this Agreement, or delivery or use of equipment, software or services will occur.

iii. E-Verify Requirements. Effective January 1, 2021, public and private employers, contractors, and subcontractors must require registration with, and use of the E-Verify system in order to verify the work authorization status of all newly hired employees. Sensus acknowledges and agrees to utilize the U.S. Department of Homeland Security's E-Verify System to verify the employment eligibility of: (1) All persons employed by Sensus to perform employment duties within the State of Florida during the term of the Agreement; and (2) All persons (including subcontractors/sub-vendors/sub-consultants) assigned by Sensus to perform work pursuant to this Agreement with the Customer. Sensus acknowledges and agrees that the use of the U.S. Department of Homeland Security's E-Verify System during the term of this Agreement is a condition of the Agreement with the Customer. By entering this Agreement with the Customer, Sensus becomes obligated to comply with the provisions of Section 448.095, Florida Statutes, "Employment Eligibility." This includes, but is not limited to, use of the E-Verify System to verify the work authorization status of all newly hired employees and requiring all

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subcontractors to provide an affidavit to Sensus attesting that the subcontractor does not employ, contract with, or subcontract with, an unauthorized alien. Sensus agrees to maintain a copy of such affidavit for the duration of this Agreement. Failure to comply with this section will result in the termination of this Agreement as provided in Section 448.095, Florida Statutes, and Sensus may not be awarded a public contract for at least one (1) year after the date on which the Agreement was terminated. Sensus will also be liable for any additional costs to the Customer incurred as a result of the termination of this Agreement in accordance with this section.

J. Non-Waiver of Rights. A waiver by either party of any breach of this Agreement or the failure or delay of either party to enforce any of the articles or other provisions of this Agreement will not in any way affect, limit or waive that party's right to enforce and compel strict compliance with the same or other articles or provisions.

K. Assignment and Sub-contracting. Either party may assign, transfer or delegate this Agreement without requiring the other party's consent; (i) to an Affiliate; (ii) as part of a merger; or (iii) to a purchaser of all or substantially all of its assets. Apart from the foregoing, neither party may assign, transfer or delegate this Agreement without the prior written consent of the other, which consent shall not be unreasonably withheld. Furthermore, Customer acknowledges Sensus may use subcontractors to perform RF Field Equipment installation, the systems integration work (if applicable), or project management (if applicable), without requiring Customer's consent.

L. Amendments. No alteration, amendment, or other modification shall be binding unless in writing and signed by both Customer and by a vice president (or higher) of Sensus.

M. Governing Law and Dispute Resolution. This Agreement shall be governed by, construed and enforced in accordance with the laws of the State of Florida. Any and all disputes arising under, out of, or in relation to this Agreement, its negotiation, performance or termination ("Disputes") shall first be resolved by mediation between the parties. If the parties are unable to resolve their disputes through mediation, the parties agree to submit to the jurisdiction of the courts of Lake County, Florida, and further agree that the venue for any legal action brought by or filed against Customer for any matter arising out of or related to this Agreement, shall be exclusively in the state or federal court for Lake County, Florida, that has jurisdiction over such legal actions. TO THE MAXIMUM EXTENT PERMITTED BY LAW, THE PARTIES AGREE TO A BENCH TRIAL AND THAT THERE SHALL BE NO JURY IN ANY DISPUTES.

N. Survival. The provisions of this Agreement that are applicable to circumstances arising after its termination or expiration shall survive such termination or expiration.

O. Severability. In the event any provision of this Agreement is held to be void, unlawful or otherwise unenforceable, that provision will be severed from the remainder of the Agreement and replaced automatically by a provision containing terms as nearly like the void, unlawful, or unenforceable provision as possible; and the Agreement, as so modified, will continue to be in full force and effect.

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P. Four Corners. This written Agreement, including all of its exhibits, represents the entire understanding between and obligations of the Customer and Sensus and supersedes all other prior understandings, agreements, negotiations, and proposals, whether written or oral, formal or informal between the Customer and Sensus. Any additional writings shall not modify any limitations or remedies provided in the Agreement, there are no other terms or conditions, oral, written, electronic or otherwise between the Customer and Sensus. There are no implied obligations between the Customer and Sensus. All obligations between the Customer and Sensus are specifically set forth in this Agreement. Further, there are no representations between the Customer and Sensus that are not included in this Agreement. The ONLY operative provisions are set forth in writing in this Agreement. Without limiting the generality of the foregoing, no purchase order placed by or on behalf of Customer to Sensus shall alter any of the terms of this Agreement. The parties agree that such documents are for administrative purposes only, even if they have terms and conditions printed on them and even if and when they are accepted and/or processed by Sensus. Any goods, software or services delivered or provided directly by Sensus to the Customer in anticipation of this Agreement under purchase orders placed prior to the execution of this Agreement are governed by this Agreement upon its execution and it replaces and supersedes any such purchase orders. This Agreement shall not affect any terms and conditions, including any warranty terms, agreed to by Customer and C&M.

Q. Counterparts. This Agreement may be executed in any number of counterparts, each of which shall be deemed an original, but all of which together shall constitute one and the same instrument. Additionally, this Agreement may be executed by facsimile or electronic copies, all of which shall be considered an original for all purposes.

8. Definitions. As used in this Agreement, the following terms shall have the following meanings:

A. **"***Affiliate***"** of a party means any other entity controlling, controlled by, or under common control with such party, where "control" of an entity means the ownership, directly or indirectly, of 50% or more of either; (i) the shares or other equity in such entity; or (ii) the voting rights in such entity.

B. ***"Distribution Automation Devices"*** identifies RTMs and RTUs.

C. ***"Distribution Automation Devices Software"*** identifies the Sensus proprietary software used with Distribution Automation Devices and any Patches, Updates, Upgrades that are provided to Customer pursuant to the terms of this Agreement, all only to the extent Customer; (i) has been provided pricing for that specific item of Distribution Automation Devices Software; and (ii) is current in its payments for that specific item of Distribution Automation Devices Software.

D. **"***End User"* means any end user of electricity and/or water, who consumes electricity and/or water, provided by Customer as applicable.

E. ***"Engineering Support"*** means providing Patches and Updates to Software.

F. "*Field Devices*" means the SmartPoint Modules, and Distribution Automation Devices.

G. "*FlexNet Base Station*" identifies the Sensus manufactured device consisting of one

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transceiver, to be located on a tower that receives readings from the SmartPoint Modules (either directly or via an R100 unit) by radio frequency and passes those readings to the RNI by TCP/IP backhaul communication. For clarity, FlexNet Base Stations include Metro Base Stations.

H. **"***FlexNet System***"** is comprised of the SmartPoint Modules, RF Field Equipment, Server Hardware, software licenses, Spectrum Lease, and other equipment provided to Customer hereunder. The FlexNet System only includes the foregoing, as provided by Sensus. The FlexNet System does not include goods, equipment, software, licenses or rights provided by a third party or parties to this Agreement.

I. "*Force Majeure*" means an event beyond a party's reasonable control, including, without limitation, acts of God, hurricane, flood, volcano, tsunami, tornado, storm, tempest, mudslide, vandalism, pandemic, illegal misconduct, sabotage, interruptions in power, communications or Internet service, acts of governments or government-backed actors, illegal or unauthorized radio frequency interference, strikes, lockouts, or other industrial disturbances, unavailability of component parts of any goods provided hereunder, acts of public enemies, wars, blockades, embargoes, insurrections, riots, epidemics, earthquakes, fires, restraints or prohibitions by any court, board, department, commission or agency of the United States or any States, any arrests and restraints, civil disturbances and explosion.

J. ***"Hosted Software"*** means those items listed as an Application in Exhibit A.

K. "*In/Out Costs*" means any costs and expenses incurred by Customer in transporting goods between its warehouse and its End User's premises and any costs and expenses incurred by Customer in installing, uninstalling and removing goods

L. "*Intellectual Property*" means patents and patent applications, inventions (whether patentable or not), trademarks, service marks, trade dress, copyrights, trade secrets, know-how, data rights, specifications, drawings, designs, maskwork rights, moral rights, author's rights, and other intellectual property rights, including any derivations and/or derivative works, as may exist now or hereafter come into existence, and all renewals and extensions thereof, regardless of whether any of such rights arise under the laws of the United States or of any other state, country or jurisdiction, any registrations or applications thereof, and all goodwill pertinent thereto.

M. "*LCM*" identifies the load control modules.

N. ***"Licensed Software"*** means the Software licensed hereunder pursuant to the terms of the Agreement.

O. **"***Ongoing Fee***"** means the annual or monthly fees, as applicable, to be paid by Customer to C&M during the Term of this Agreement.

P. "*Patches*" means patches or other maintenance releases of the Software that correct processing errors and other faults, vulnerabilities and defects found in the Software. For clarity, Patches are not Updates or Upgrades.

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Q. "***Permitted Use"*** means only for reading and analyzing data from Customer's Field Devices in the Service Territory. The Permitted Use does not include reading third devices not provided by Sensus or reading Field Devices outside the Service Territory.

R. ***"R100 Unit"*** identifies the Sensus standalone, mounted transceiver that takes the radio frequency readings from the SmartPoint Modules and relays them by radio frequency to the relevant FlexNet Base Station or directly to the RNI by TCP/IP backhaul communication, as the case may be.

S. **"***Release***"** means both Updates and Upgrades.

T. **"***Remote Transceiver***"** identifies the Sensus standalone, mounted relay device that takes the radio frequency readings from the SmartPoint Modules and relays them directly to the RNI by TCP/IP backhaul communication.

U. **"RF"** means Radio Frequency.

V. **"***RF Field Equipment***"** means, collectively, FlexNet Base Stations, R100 units (if any) and Remote Transceivers (if any).

W. **"***RNI***"** identifies the regional network interfaces consisting of hardware and software used to gather, store, and report data collected by the FlexNet Base Stations from the SmartPoint Modules. The RNI hardware specifications will be provided by Sensus upon written request from Customer.

X. **"***RNI Software***"** identifies the Sensus proprietary software used in the RNI and any Patches, Updates, and Upgrades that are provided to Customer pursuant to the terms of this Agreement.

Y. **"*Security Breach"*** means a cybersecurity incident whereby an unauthorized third party intentionally compromises the security of Customer's tenant environment in Sensus' Software as a Service solution and gains access to Customer's tenant environment and data.

Z. **"RTMs"** identifies the remote telemetry modules.

AA. **"RTUs"** identifies remote telemetry unit.

BB. ***"Service Territory"*** identifies the geographic area where Customer utilizes Sensus equipment to provide services to End Users as of the Effective Date. This area will be described on the propagation study in the parties' Spectrum Lease filing with the FCC.

CC. **"***Server Hardware***"** means the RNI hardware.

DD. ***"SmartPoint™ Modules"*** identifies the Sensus transmission devices installed on devices such as meters, distribution automation equipment and demand/response devices located at Customer's End Users' premises that communicate with the relevant devices and transmit those communications by radio frequency to the relevant piece of RF Field Equipment.

EE. **"***Software***"** means all the Sensus proprietary software provided as a service

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pursuant to this Agreement, and any Patches, Updates, and Upgrades that are provided to Customer pursuant to the terms of this Agreement. The Software does not include any third party software.

FF. ***"Technical Support"*** means the services set forth on Exhibit B.

GG. **"***Updates***"** means releases of the Software that constitute a minor improvement in functionality.

HH. **"***Upgrades***"** means releases of the Software which constitute a significant improvement in functionality or architecture of the Software.

II. **"***WAN Backhaul***"** means the communication link between FlexNet Base Stations and Remote Transceivers and RNI.

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Exhibit A

Software

Software as a Service

1. **Description of Services.**

This exhibit contains the details of the SaaS that Sensus shall provide to Customer if both; (i) pricing for the application of Software as a Service has been provided to the Customer; and (ii) the Customer is current in its payments to C&M for such application of Software as a Service.

A. **Software as a Service Generally.**

SaaS is a managed service in which Sensus will be responsible for the day-to-day monitoring, maintenance, management, and supporting of Customer's Software tenant in Sensus' (or its subcontractor's) data centers. In a Software as a Service solution, Sensus owns (or has third parties operate or provide on its behalf) all components of the solution (server hardware, storage, data center, network equipment, Sensus software, and all third-party software) required to run and operate the Applications listed below. These software applications consist of the following (each an "Application"):

- Regional Network Interface (RNI) Software
- Sensus Analytics Software
  - Xylem Data Lake
  - Alerts and Message Manager
  - Service Management Application

The managed application systems consist of the hardware, Sensus Software, and other third-party software that is required to operate the Applications. Each Application will have a production and disaster recovery (as described below) environment Test environments are not provided unless otherwise specifically agreed by Sensus in writing. Sensus will manage the Applications by providing 24 x 7 x 365 monitoring of the availability and performance of the Applications.

B. **Use of Software as a Service.** Subject to the terms of this Agreement, Sensus shall make Software as a Service available to Customer to access and use solely for the Permitted Use and solely for so long as Customer is current in its payments to Sensus or C&M for Software as a Service. The Software as a Service term commences on the date that Sensus first makes Software as a Service available to Customer for use and ends upon the earlier of: (i) the expiration or termination of the Agreement; (ii) breach by Customer of this exhibit or the Agreement; or (iii) Customer's termination of Software as a Service as set forth in paragraph (C) below.

C. **Termination of an Application.** Customer shall have the option at any time before the end of the Term to terminate any Application by giving Sensus one hundred twenty (120) days

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prior written notice. Such notice, once delivered to Sensus, is irrevocable. Should Customer elect to terminate any Application, Customer acknowledges that; (a) Customer shall pay all applicable fees, including any unpaid Software as a Service fees due in the current calendar year plus a ten percent (10%) early termination fee, where such fee is calculated based on the annual Software as a Service fee due in the current calendar year; and (b) Software as a Service for such Application shall immediately cease. If Customer elects to terminate the RNI Application in the Software as a Service environment but the Agreement has not expired or terminated, then upon delivery of the notice to Sensus, Customer shall purchase the necessary (a) RNI hardware from a third party and (b) RNI software license at Sensus' then-current pricing. No portion of the Software as a Service fees shall be applied to the purchase of the RNI hardware or software license.

D. Software as a Service means only the following services:
   i. Sensus will provide the use of required hardware and or virtual environments, located at Sensus' or a third-party's data center facility (as determined by Sensus), that is necessary to operate the Application.
   ii. Sensus will provide production and disaster recovery environments for Applications.
   iii. Sensus will provide Patches, Updates, and Upgrades to latest Sensus Hosted Software release.
   iv. Sensus will configure and manage the equipment (server hardware, routers, switches, firewalls, etc.) in the data centers:
      a. Network addresses and virtual private networks (VPN)
      b. Standard time source (NTP or GPS)
      c. Security access points
      d. Respond to relevant alarms and notifications.
   v. Capacity and performance management. Sensus will:
      a. Monitor capacity and performance of the Application server and software applications 24x7x365 using KPI metrics, thresholds, and alerts to proactively identify any potential issues related to system capacity and/or performance (i.e., database, backspool, logs, message broker storage, etc.)
      b. If an issue is identified to have a potential impact to the system, Sensus will open an incident ticket and manage the ticket through resolution per Exhibit B, Technical Support.
      c. Manage and maintain the performance of the server and perform any change or configuration to the server, in accordance to standard configuration and change management policies and procedures.
      d. Manage and maintain the server storage capacity and performance of the Storage Area Network ("SAN"), in accordance to standard configuration and change management policies and procedures.
      e. Exceptions may occur to the system that require Sensus to take immediate action to maintain the system capacity and performance levels, and Sensus has authority to make changes without Customer approval as needed, in accordance to standard

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configuration and change management policies and procedures.

vi. Database management. Sensus will:
   a. Implement the data retention plan and policy and will provide the policy upon request.
   b. Monitor space and capacity requirements.
   c. Respond to database alarms and notifications.
   d. Install database software Upgrades and Patches.
   e. Perform routine database maintenance and cleanup of database to improve capacity and performance, such as rebuilding indexes, updating indexes, consistency checks, run SQL query/agent jobs, etc.

vii. Incident and Problem Management. Sensus will:
   a. Proactively monitor managed systems (24x7x365) for key events and thresholds to detect and identify incidents.
   b. Respond to incidents and problems that may occur to the Application(s).
   c. Maintain policies and procedures for responding to incidents and performing root cause analysis for ongoing problems.
   d. Correlate incidents and problems where applicable.
   e. Sensus personnel will use the self-service portal to document and track incidents.
   f. In the event that Sensus personnel is unable to resolve an issue, the issue will be escalated to the appropriate Subject Matter Expert (SME).
   g. Maintain responsibility for managing incident and problems through resolution (which may include workarounds) and will coordinate with Customer's personnel and/or any required third-party vendor to resolve the issue.
   h. Provide telephone support consistent with Exhibit B, Technical Support in the case of undetected events.

viii. Security Management. Sensus will:
   a. Monitor the physical and cyber security of the server and Application(s) 24x7x365 to ensure system is secure, consistent with NIST security standards.
   b. Perform intrusion prevention and detection of the data center network and firewalls and monitor logs and alerts.
   c. Conduct periodic penetration testing of the network and data center facilities.
   d. Conduct monthly vulnerability scanning by both internal staff and external vendors.
   e. Perform anti-virus and Malware patch management on systems.
   f. Install updates to virus protection software and related files (including virus signature files and similar files) on all servers from the update being generally available from the anti-virus software provider.
   g. Respond to threats found on the system and work to eliminate any virus or malware found and provide notice to Customer within forty-eight (48) hours after a threat is confirmed.
   h. Adhere to and submit certification to NERC/CIP Cyber Security standards.
   i. Monitors industry regulations/standards regarding security – NERC, FERC, NIST,

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OpenSG, etc. through the Sensus security team.

j. Provide secure web portal access (SSL) to the Application(s).

ix. Backup and Disaster Recovery Management. Sensus will:

a. Perform daily backups of data providing one (1) year of history for auditing and restoration purposes.

b. Back-up and store data (on tapes or other storage media as appropriate) off-site to provide protection against disasters and to meet file recovery needs.

c. Conduct incremental and full back-ups to capture data, and changes to data, on the Application(s).

d. Replicate the Application(s) environments to a geographically separated data center location to provide a full disaster recovery environment for the Application production system.

e. Generate a report following each and any disaster measuring performance against the disaster recovery plan and identification of problem areas and plans for resolution.

f. Maintain a disaster recovery plan. In the event of a disaster, Sensus shall provide the services in accordance with the disaster recovery plan.

g. In the case of a disaster and loss of access to or use of the Application, Sensus would use commercially reasonable efforts per the Recovery Time Objectives ("RTO") and Recovery Point Objectives ("RPO") specified herein to restore operations at the same location or at a backup location within forty-eight (48) hours.

h. The Application shall have a "RTO" of forty-eight (48) hours.

i. The RPO shall be a full recovery of the Application(s), with an RPO of one (1) hour, using no more than a twenty-four (24) hour old backup. All meter-related data shall be pushed from each Base Station/TGB restoring the database to real-time minus external interfaced systems from the day prior.

j. Data from external interfaced systems shall be recreated within a forty-eight (48) hour period with the assistance of Customer personnel and staff, as needed.

E. Customer Responsibilities:

i. Coordinate and schedule any changes submitted by Sensus to the system in accordance with standard configuration and change management procedures.

ii. Participate in all required configuration and change management procedures.

iii. Customer will log incidents related to the managed Application with Sensus personnel via email, web portal ticket entry, or phone call.

iv. Responsible for periodic processing of accounts or readings (i.e., billing files) for Customer's billing system for billing or other analysis purposes.

v. Responsible for any field labor to troubleshoot any SmartPoint modules or smart meters in the field in populations that have been previously deployed and accepted.

vi. If NaaS services are terminated, first response labor to troubleshoot FlexNet Base Station, R100s, Remote Transceivers or other field network equipment.

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vii. Responsible for local area network security, configuration, management, and support.
viii. If NaaS services are terminated identify and research problems with meter reads and meter read performance.
ix. Create and manage user accounts and periodically change and update account credentials with strong passwords in accordance with security best practices.
x. Customize application configurations.
xi. Support application users.
xii. Investigate application operational issues (e.g., meter reads, reports, alarms, etc.).
xiii. Respond to alarms and notifications.
xiv. If NaaS services are terminated, perform requested firmware upgrades over-the-air, or delegate and monitor field personnel for on-site upgrades.
xv. Maintain industry standard cybersecurity controls, standards, and best practices.
xvi. If NaaS services are terminated, monitor for and promptly implement Patches, Updates, and Upgrades, both as provided by Sensus and other third-party software and hardware providers.

F. Software as a Service does not include any of the following services:
i. Parts or labor required to repair damage to any field network equipment that is the result of a Force Majeure event.
ii. Any integration between applications, such as Harris MeterSense, would require a Professional Services contract agreement to be scoped, submitted, and agreed in a signed writing between Sensus and all the applicable parties.

If an item is not listed in subparagraphs in item (D) above, such item is excluded from the Software as a Service and is subject to additional pricing.

2. Further Agreements

A. System Uptime Rate.

i. Sensus (or its contractor) shall manage and maintain the Application(s) on computers owned or controlled by Sensus (or its contractors) and shall provide Customer access to the managed Application(s) via internet or point to point connection (i.e., Managed-Access use), according to the terms below. Sensus endeavors to maintain an average System Uptime Rate equal to ninety-nine (99.0) per Month (as defined below). The System Uptime Rate, cumulative across all Applications, shall be calculated as follows:

System Uptime Rate = 100 x (TMO – Total Non-Scheduled Downtime minutes in the Month) / TMO

ii. Calculations

a. *Targeted Minutes of Operation* or *TMO* means total minutes cumulative across all Applications in the applicable month minus the Scheduled Downtime in the Month.
b. *Scheduled Downtime* means the number of minutes during the Month, as measured by Sensus, in which access to any Application is scheduled to be unavailable for use by Customer due to planned system maintenance. Sensus shall provide Customer

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notice (via email or otherwise) at least seven (7) days in advance of commencement of the Scheduled Downtime.

c. *Non-Scheduled Downtime* means the number of minutes during the Month, as measured by Sensus, in which access to any Application is unavailable for use by Customer due to reasons other than Scheduled Downtime or the Exceptions, as defined below (e.g., due to a need for unplanned maintenance or repair).

iii. Exceptions. Exceptions mean the following events:

- Force Majeure;
- Emergency Work, as defined below; and
- Lack of Internet Availability, as described below.

a. Emergency Work. In the event that Force Majeure, emergencies, security incidents, dangerous conditions or other exceptional circumstances arise or continue during TMO, Sensus shall be entitled to take any actions that Sensus, in good faith, determines is necessary or advisable to prevent, remedy, mitigate, or otherwise address actual or potential harm, interruption, loss, threat, security or like concern to any of the Application(s) ("Emergency Work"). Such Emergency Work may include, but is not limited to: analysis, testing, repair, maintenance, re-setting and other servicing of the hardware, cabling, networks, software and other devices, materials and systems through which access to and/or use of the Application(s) by the Customer is made available (the "Managed Systems"). Sensus shall endeavor to provide advance notice of such Emergency Work to Customer when practicable and possible.

b. Lack of Internet Availability. Sensus shall not be responsible for any deterioration of performance attributable to latencies in the public internet or point-to-point network connection operated by a third party. Customer expressly acknowledges and agrees that Sensus does not and cannot control the flow of data to or from Sensus' networks and other portions of the Internet, and that such flow depends in part on the performance of Internet services provided or controlled by third parties, and that at times, actions or inactions of such third parties can impair or disrupt data transmitted through, and/or Customer's connections to, the Internet or point-to-point data connection (or portions thereof). Although Sensus will use commercially reasonable efforts to take actions Sensus may deem appropriate to mitigate the effects of any such events, Sensus cannot guarantee that such events will not occur. Accordingly, Sensus disclaims any and all liability resulting from or relating to such events.

iv. System Availability. For each month that the System Uptime Rates for the production RNI falls below 99.0%, Sensus will issue Customer the following Service Level Credits:

System Uptime Rate per calendar month	Service Level Credit
Less than 99.0% but at least 97.5%	5% of the monthly RNI SaaS Fees in which the service level default occurred (Note: SaaS fees are pre-paid annually and for purposes of Service Level Credits are computed on a monthly basis.)
Less than 97.5% but at least 95.0%	10% of the monthly RNI SaaS Fees in which the service level default occurred
Less than 95.0%	20% of the monthly RNI SaaS Fees in which the service level default occurred

Service Level Credits for any single month shall not exceed 20% of the RNI SaaS Fee associated with the month in which the service level default occurred. Sensus records and data will be the sole basis for all Service Level Credit calculations and determinations, provided that such records and data must be made available to Customer for review and agreement by Customer. To receive a Service Level Credit, Customer must issue a written request no later than ten (10) days after the Service Level Credit accrues. Sensus will apply each valid Service Level Credit to the Customer's C&M account as a refund after Sensus' receipt of Customer's request and confirmation of the failure to meet the applicable Service Level Credit. Service Level Credits will not be payable for failures to meet the System Uptime Rate caused by any Exceptions. No Service Level Credit will apply if Customer is not current in its undisputed payment obligations under the Agreement. Service Level Credits are exclusive of any applicable taxes charged to Customer or collected by Sensus. Sensus shall not refund any unused Service Level Credits or pay cash to Customer for any unused Service Level Credits. Any unused Service Level Credits at the time the Agreement terminates will be forever forfeited. THE SERVICE LEVEL CREDITS DESCRIBED IN THIS SECTION ARE THE SOLE AND EXCLUSIVE REMEDY FOR SENSUS' FAILURE TO MEET THE SYSTEM UPTIME REQUIREMENT OR ANY DEFECTIVE SAAS PERFORMANCE. IN NO EVENT SHALL THE AGGREGATE AMOUNT OF SERVICE LEVEL CREDITS IN ANY ANNUAL PERIOD EXCEED 20% OF THE ANNUAL RNI SAAS FEE.

B. Data Center Site-Security. Although Sensus may modify such security arrangements without consent or notice to Customer, Customer acknowledges the following are the current arrangements regarding physical access to and support of the primary hardware components of the Managed Systems:

i. The computer room(s) in which the hardware is installed is accessible only to authorized

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individuals.

ii. Power infrastructure includes one or more uninterruptible power supply (UPS) devices and diesel generators or other alternative power for back-up electrical power.

iii. Air-conditioning facilities (for humidity and temperature controls) are provided in or for such computer room(s) and can be monitored and adjusted for humidity and temperature settings and control. Such air systems are supported by redundant, back-up and/or switch-over environmental units.

iv. Such electrical and A/C systems are monitored on an ongoing basis and personnel are available to respond to system emergencies (if any) in real time.

v. Dry pipe pre-action fire detection and suppression systems are provided.

vi. Data circuits are available via multiple providers and diverse paths, giving access redundancy.

C. Responsibilities of Customer.

i. Customer shall promptly pay all Software as a Service fees.

ii. Customer may not (i) carelessly, knowingly, intentionally or maliciously threaten, disrupt, harm, abuse or interfere with the Application(s), Managed Systems or any of their functionality, performance, security or integrity, nor attempt to do so; (ii) impersonate any person or entity, including, but not limited to, Sensus, a Sensus employee or another user; or (iii) forge, falsify, disguise or otherwise manipulate any identification information associated with Customer's access to or use of the Application(s).

iii. The provisioning, compatibility, operation, security, support, and maintenance of Customer's hardware and software ("Customer's Systems") is exclusively the responsibility of Customer. Customer is also responsible, in particular, for correctly configuring and maintaining (i) the desktop environment used by Customer to access the Application(s) managed by Sensus; and (ii) Customer's network router and firewall, if applicable, to allow data to flow between the Customer's Systems and Sensus' Managed Systems in a secure manner via the public Internet.

iv. Upon receiving the system administrator account from Sensus, Customer shall create strong username and passwords for each of Customer's authorized users and complete the applicable Sensus registration process (Authorized Users). Such usernames, and passwords will allow Authorized Users to access the Application(s). Customer shall be solely responsible for maintaining the security and confidentiality of each user ID and password pair associated with Customer's account, and Sensus will not be liable for any loss, damage or liability arising from Customer's account or any user ID and password pairs associated with Customer. Customer is fully responsible for all acts and omissions that occur through the use of Customer's account and any user ID and password pairs. Customer agrees (i) not to allow anyone other than the Authorized Users to have any access to, or use of Customer's account or any user ID and password pairs at any time; (ii) to notify Sensus immediately of any actual or suspected unauthorized use of Customer's account or any of such user ID and password pairs, or any other breach or suspected breach of security, restricted use or confidentiality; and (iii) to take the Sensus-

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recommended steps to log out from and otherwise exit the Application(s) and Managed Systems at the end of each session. Customer agrees that Sensus shall be entitled to rely, without inquiry, on the validity of the user accessing the Application(s) application through Customer's account, account ID, usernames, or passwords. Customer will ensure that its user ID and passwords are regularly (at least monthly) changed, and that only strong user ID and password pairs are used.

v. Customer shall be responsible for the day-to-day operations of the Application(s) and FlexNet System. This includes, without limitation, (i) researching problems with meter reads, (ii) creating and managing user accounts, (iii) customizing application configurations, (iv) supporting application users, (v) investigating application operational issues, (vi) responding to alarms and notifications, and (vii) approving necessary over-the-air commands (such as firmware updates or configuration changes).

D. Software Solution Components.

i. Description of Software Solutions. Sensus software consists of a core communication module and a set of applications. Some applications are required to perform basic solution capabilities, other applications are optional and add additional capabilities and function to the overall solution. As Customer's business process expands and/or new Sensus offerings are made available, additional applications and functionality can dynamically be added to the solution, provided Customer purchases such additional applications.

ii. Regional Network Interface. The Regional Network Interface (RNI) or Sensus head-end is the centralized intelligence of the FlexNet network; the RNI's primary objective is to transfer endpoint (such as meters) data to the Customer and the advanced feature applications. The RNI is adaptable to Customer configurations by simultaneously supporting a wide range of FlexNet enabled endpoints; including but not limited to meters (electric, water, gas) and other sensing devices.

iii. Xylem Data Lake. Subject to the terms of this Agreement, Sensus will make the Xylem Data Lake ("XDL") available to Customer to access and use solely for the Permitted Use and solely for so long as Customer is current in its payments to Sensus or C&M for Software as a Service. Sensus shall provide up to three (3) years of FlexNet System data and scan up to five hundred (500) GB per month of FlexNet System data. If Customer exceeds the allotment of five hundred (500) GB per month of scanned data (regardless of the access method) an overage charge will be assessed to Customer and be payable according to the terms outlined by C&M. Sensus will also provide Customer XDL training, which includes up to eight (8) hours of professional services consulting time.

3. Sensus Analytics

Sensus Analytics is a cloud-based solution and data platform that allows storage and retrieval of raw reads and data from other sources for analysis, exportation, and inquiry or reporting. The platform provides applications and reporting capabilities.

i. Data Import. The Sensus Analytics Application contains adapters for the import of data

from; (a) Customer's FlexNet System; and/or (b) AutoRead application for handheld and drive by systems, as applicable.

ii. Customer Acknowledgements.

a. Customer acknowledges that the Sensus Analytics Application provides up to fifty (50) user logins for Customer's use.

b. Customer acknowledges and agrees the Sensus Analytics Application is based upon the actual number of End Users within Customer's Service Territory. Pricing may increase if Customer's Service Territory or actual number of End Users expands.

c. Customer acknowledges that all data related to the Sensus Analytics Applications is geographically hosted within the United States of America. Customer accepts the geographic location of such hosting and indemnifies Sensus for any claims resulting therefrom.

d. Customer acknowledges and agrees that the Intellectual Property provisions of this Agreement apply in all respects to Customer's access to and use of the Sensus Analytics Applications.

e. Customer is responsible for validating the data analyzed by the Sensus Analytics Applications. Sensus makes no promises of improving Customer's operations or saving Customer money, nor is Sensus liable for any damages resulting from decisions made by Customer related to Customer's use of Sensus Analytics.

f. Customer acknowledges that data will be stored for five (5) years from upload and Sensus may delete the data after this time or upon termination of the Agreement.

4. Third-Party Software.

A. Sensus incorporates various third-party software in its Software, and such third-party software may change from time to time. Sensus takes reasonable efforts to implement patches or other fixes as they become available in accordance with a particular version's Engineering Support policy. Upon written request by Customer. Sensus shall provide a software bill of materials ("SBOM") in a file format of Sensus' discretion which lists the third-party software applications and versions incorporated in the Sensus Software. To the extent required by a third-party software provider. Customer hereby agrees to abide by a third-party's end-user license agreement ("EULA").

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Exhibit B
Technical Support

1. Introduction

Sensus Technical Services provides utility customers with a single point of contact for Tier 1 support of technical issues as well as any coordination of additional resources required to resolve the issue. Requests that require specialized skills are to be forwarded to a senior support engineer or Technical Advisor within the team for further analysis. If Technical Services has exhausted all troubleshooting efforts for the product type, the issue will escalate to the Engineering Support Team. Occasionally, on-site troubleshooting/analysis may be required. The preferred order of on-site support is:

a. The Customer (for assistance with the easiest and lowest time-consuming activities such as power on/power off).

b. The local distributor.

c. Sensus employees or contracted personnel, if required to fulfill a contract commitment.

2. Support Categories

2.1. General questions regarding functionality, use of product, how-to, and requests for assistance on any purchased product including but not limited to Sensus AMR, AMI, RF Network Equipment, Metering Products, Sensus Lighting Control, and Demand Response Management System (FlexNet Home).

2.2. Proactive reporting and resolution of problems.

2.3. Reactive reporting to isolate, document, and solve reported hardware/software defects.

2.4. Responding to service requests and product changes.

2.5. Addressing customer inquiries with printed or electronic documentation, examples, or additional explanation/clarification.

3. Support Hours

3.1. Standard Support Hours: Toll-free telephone support (1-800-638-3748 option #2) is available Monday thru Friday from 8:00 a.m. EST to 8:00 p.m. EST. After-hours, holiday and weekend support for Severity 1 and Severity 2 issues is available by calling 1-800-638-3748, option #8.

4. Support Procedures

4.1. Customer identifies an issue or potential problem and calls Technical Services at 1-800-638-3748 Option #2. The Customer Service Associate or Technical Support Engineer will submit a SalesForce ticket. The Customer may also create its own online support request using the My Sensus Connection.

4.2. The Customer Service Associate or Technical Support Engineer will identify the caller name and utility by the assigned software serial number, city, and state based on where the call originated. The Customer Service Associate or Technical Support Engineer will require a brief description of the problem symptoms, or error messages depending on nature of the

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incident. The nature of the problem and severity levels will be mutually agreed upon by both parties (either at the time the issue is entered or prior to upgrading or downgrading an existing issue) using the severity definitions below as a guideline. The severity level is then captured into SalesForce for ticket creation and resolution processing. Any time during the processing of this ticket, if the severity level is changed by Sensus, the customer will be updated.

a. Severity Levels Description:

   Sev1 Customer's production system is down. The system is unusable resulting in total disruption of work. No workaround is available and requires immediate attention.

   Example: Network mass outage, all reading collection devices inoperable, inoperable head end software (e.g., FlexWare, Sensus MDM). Not able to generate billing files.

   Sev2 Major system feature/function failure. Operations are severely restricted; there is a major disruption of work, no acceptable work-around is available, and failure requires immediate attention.

   Examples: Examples: Network equipment failure (e.g., FlexNet Echo, FlexNet Remote, Base Station transceiver, or VGB); inoperable reading devices (e.g., AR5500, VXU, VGB, or CommandLink); head end software application has important functionality not working and cannot create export file for billing system operations.

   Sev3 The system is usable and the issue doesn't affect critical overall operation.

   Example: Minor network equipment failure (e.g., Echo/Remote false alarms or Base Station transceiver false alarms); head end software application operable but reports are not running properly, modification of view or some non-critical function of the software is not running.

4.3. The Customer Service Associate or Technical Support Engineer identifies whether or not the customer is on support. If the customer is not on support, the customer is advised of the service options as well as any applicable charges that may be billed.

4.4. Calls are placed in a queue from which they are accessible to Technical Support Engineers on a first-come-first-served basis. A 1st level Customer Service Associate may assist the customer, depending on the difficulty of the call and the representative's technical knowledge. Technical Support Engineers (Tier 1 support) typically respond/resolve the majority of calls based on their product knowledge and experience. A call history for the particular account is researched to note any existing pattern or if the call is a new report. This research provides the representative a basis and understanding of the account as well as any associated problems and/or resolutions that have been communicated.

a. Technical Services confirms that there is an issue or problem that needs further analysis to determine its cause. The following information must be collected: a detailed description of the issue's symptoms, details on the software/hardware product and version, a description of the environment in which the issue arises, and a list of any corrective action already taken.

b. Technical Services will check the internal database and product defect tracking system,

to see if reports of a similar problem exist, and if any working solutions were provided. If an existing resolution is found that will address the reported issue, it shall be communicated to the customer. Once it is confirmed that the issue has been resolved, the ticket is closed.

c. If there is no known defect or support that defines the behavior, Technical Services will work with the customer to reproduce the issue. If the issue can be reproduced, either at the customer site or within support center test lab, Technical Services will escalate the ticket for further investigation / resolution.

If the issue involves units that are considered to be defective with no known reason, the representative will open a Special Investigation RMA through the SalesForce system. If it is determined that a sample is required for further analysis, the customer will be provided with instructions that detail where to send the product sample(s) for a root cause analysis. Once it is determined that the issue cannot be resolved by Tier 1 resources, the ticket will be escalated to Tier 2 support for confirmation/workarounds to resolve immediate issue. Technical Services will immediately contact the customer to advise of the escalation. The response and escalation times are listed in Section 5. At this time, screen shots, log files, configuration files, and database backups will be created and attached to the ticket.

5. Response and Resolution Targets.

Sensus Technical Support will make every reasonable effort to meet the following response and resolution targets:

Severity	Standard Target Response	Standard Target Resolution	Resolution (one or more of the following)
1	30 Minutes	Immediately assign trained and qualified Services Staff to correct the error on an expedited basis. Provide ongoing communication on the status of a correction (24 hours).	• Satisfactory workaround is provided. • Program patch is provided. • Fix incorporated into future release. • Fix or workaround incorporated into SalesForce Knowledge Base.
2	4 hours	Assign trained and qualified Services Staff to correct the error. Provide communication as	• Satisfactory workaround is provided. • Program patch is provided. • Fix incorporated into

		updates occur (48 hours).	future release. • Fix or workaround incorporated into SalesForce Knowledge Base.
3	1 Business Day	30 business days	• Answer to question is provided. • Satisfactory workaround is provided. • Fix or workaround incorporated into SalesForce Knowledge Base. • Fix incorporated into future release.

6. Problem Escalation Process.

6.1. If the normal support process does not produce the desired results, or if the severity has changed, the issue may be escalated as follows to a higher level of authority.

6.1.1.1. Severity 1 issues are escalated by Sales or Technical Services to a Supervisor if not resolved within 2 hours; to the Manager level if not resolved within 4 hours; to the Director level if not resolved within the same business day; and to the VP level if not resolved within 24 hours.

6.1.1.2. A customer may escalate an issue by calling 1-800-638-3748, Option 2. Please specify the SalesForce ticket number and the reason why the issue is being escalated.

6.1.1.3. In the event that a customer is not satisfied with the level of support or continual problem with their products, they may escalate a given SalesForce ticket to Manager of Technical Services (1-800-638-3748, Option 2).

7. General Support Provisions and Exclusions.

7.1. Sensus provides online documentation for Sensus products, and all Sensus customers are provided access to this online database, which includes operation, configuration and technical manuals. The customer shall provide names and email accounts to Sensus so Sensus may provide access to the product documentation.

7.2. Specialized support from Sensus is available on a fee basis to address support issues outside the scope of this support plan, the scope of the C&M Contract, or if not covered under another specific contract or statement of work. For example: specialized systems integration services or out of warranty network equipment repair.

7.3. In the event customer submits a ticket for a version of the Software outside of the

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Engineering Support window and is not able to resolve the problem without engineering resources. Sensus shall have no obligation to provide Engineering Support and Customer shall upgrade to the most current version of the Software.

7.4. Customer acknowledges that not all problems and bugs with the Software may or can be fixed. The Software and Software as a Service (including third party software used in connection with the Software as a Service) may have security vulnerabilities. Sensus may address vulnerabilities with its Software through Patches, Updates or Upgrades that it makes available from time-to-time. If SaaS services are terminated, Customer has the obligation to timely implement Patches, Updates and Upgrades.

Exhibit C
Network as a Service

Defined. Network as a Service (NaaS), as provided by Sensus or C&M to Customer under this Agreement, means only the items in Section I below. If an item is not included in Section I below, it is specifically excluded from NaaS and subject to additional pricing.

1. **NaaS Responsibilities.** Sensus and C&M shall be responsible for providing the following services to the Customer for so long as Customer is current in its payments for NaaS. The RACI table below designates the party responsible for the applicable NaaS obligation. In the event that the Customer elects to terminate the NaaS and retain SaaS, the RACI table will be updated based on the revised scope.

   NaaS RACI

   The below RACI Matrix represents the responsibilities of each party with NaaS. In the event that the Customer elects to terminate the NaaS service and retain SaaS service, Customer and Sensus shall update the RACI table based on revised scope at the time such NaaS service is terminated.

   RACI INDICATORS: R = Responsible (i.e., the responsible party for the obligations listed below.), F = Flexible (i.e., obligations that must be assigned with an "R" prior to contract execution.)

   A. RF Network Design and Architecture.

Ongoing NaaS Operations RACI	Sensus	Distributor	Customer
Gather Customer defined requirements and features for design of the FlexNet Network (defined below		R	
Design the FlexNet Network based on identified vertical asset locations and determine site specifications for the final engineered network.	R		
Perform preliminary site visits.		R	

Propagation study of record is created and will be used in the FlexNet Network design per Customer defined requirements.	R		
Create statement of work for the installation of the RF Field Equipment.		R	
Build a schedule and project plan for the construction of the FlexNet Network.		R	
Redesign the FlexNet Network if Customer defined requirements change (pricing may be adjusted to reflect changes)	R		

B. RF Field Equipment Installation.

Ongoing NaaS Operations RACI	Sensus	Distributor	Customer
Order and deliver RF Field Equipment materials (cables, antennas, etc.) as required by the FlexNet Network design.		R	
Acquire any necessary sites and leases for identified vertical assets.		R	
Installation and construction to support deployment of RF Field Equipment as required by the FlexNet Network.		R	
Manage third-party subcontractors as needed.		R	
Perform RF / Noise analysis and resolution as required.	R		
Certify installed RF Field Equipment.	R		

C. Ongoing Operations Management.

i. Day-to-day operations, management, maintenance, and monitoring of the RF Field Equipment at a level described in this statement of work.

ii. Monitor, via Sensus' Network Operation Center ("NOC"), RF Field Equipment, FlexNet communications infrastructure, and WAN Backhaul communications hardware (collectively, the "FlexNet Network") to ensure the early identification and resolution of anomalies within the FlexNet Network on a 24 x 7 x 365 basis.

iii. Monitor and manage FlexNet Network Software using standard key performance

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indicators for performance & capacity management.

iv. Monitor and respond to FlexNet Network outages, Technical Support ticket generation, and other alerts regarding the FlexNet Network
v. Perform remote initial triage and troubleshooting of reported issues.
vi. Dispatch resources for any issues identified by Sensus that cannot be resolved remotely for onsite resolution.
vii. Provide remote Software maintenance, which includes Patches, Updates, and Upgrades for the FlexNet Network.
viii. Participate and support standard change management controls and root cause investigation analysis in accordance with Customer's change management practices, policies, and procedures.
ix. Dispatch personnel and RF engineer technicians to identify and troubleshoot RF interference and perform necessary tasks to mitigate the RF interference.
x. File any necessary complaints with the FCC to stop any unlawful or harmful interference with the Spectrum.
xi. Cybersecurity of FlexNet Network will be managed, monitored and maintained by Sensus Security team.
xii. Perform network tuning to maximize FlexNet Network
    a. Network tuning includes looking at stale meters, Read Interval Success ("RIS"), RF channels, and overall network, capacity, and performance. Meter configuration and channel configuration changes will be made to ensure optimal performance is achieved on each channel and frequency.

D. Ongoing Maintenance of the FlexNet Network.
    i. Perform routine field preventative maintenance (physical maintenance and RF analysis) in accordance with FlexNet Network preventative maintenance instructions, to include but not limited to:
        a. Visit each piece of RF Field Equipment once every twelve (12) months.
        b. Create and complete checklist reports of visits plus maintenance logs (with photos) to be stored in the ticketing system. Reports will be available to the Customer upon request.
        c. Conduct tests of the Voltage Standing Wave Ratio ("VSWR") and Distance To Fault ("DTF") of the antenna system.
        d. Inspection of antenna system.
        e. Inspection of exterior and interior of cabinet including GPS system.
        f. Power monitor and measurement.
        g. Software inspection and confirmation.
        h. Perform RF Interference and noise mitigation checks.

2. Customer Responsibilities.
    A. Generally.
        i. Provide adequate internal IT network infrastructure necessary for Sensus to meet performance metrics and Service Level Objectives defined below.
        ii. If NaaS services are terminated, Customer shall provide the support,

maintenance, and monitoring of the Customer's dedicated WAN Backhaul. Sensus shall not be responsible for performance and availability of the WAN Backhaul network due to issues outside of Sensus' control.

iii. Provide and maintain the RF Field Equipment utilities, such as electric power, lighting, security fencing, drainage, vegetation management, etc. as required at each site. Provide required maintenance for RF Base Station/modem battery backup functionality.

3. Service Level Objective(s) ("SLO(s)"). All SLOs are measured by the calendar month and apply only to the Field Devices covered by the Certified Propagation Study. Sensus or C&M will provide a report to Customer on the SLOs defined below within ten (10) business days of the end of each month. Unless otherwise agreed to in writing, these SLOs will only take effect once the FlexNet System is fully deployed and accepted by Customer.

A. FlexNet Network Availability. Sensus endeavors to maintain an average availability of the FlexNet Network equal to the SLO Target defined below. The availability, cumulative across the entire FlexNet Network, is intended to measure the percentage of time during each calendar Month that the FlexNet Network was actually available to Customer for normal use. The FlexNet Network Availability shall be calculated as follows:

FlexNet Network Availability = 100 x (TMO – total Non-Scheduled Downtime minutes in the Month) / TMO

i. Definitions.

a. "Targeted Minutes of Operation" or "TMO" means total minutes in the applicable calendar month ("Month") minus the Scheduled Downtime in the Month.

b. "Scheduled Downtime" means the number of minutes during the Month, as measured by Sensus, in which access to or use of the FlexNet Network is scheduled to be unavailable for use by Customer due to planned system or FlexNet Network maintenance. Sensus shall provide Customer notice (via email or otherwise) at least seven (7) days in advance of commencement of the Scheduled Downtime.

c. "Non-Scheduled Downtime" means the number of minutes during the Month, as measured by Sensus, in which access to or use of the FlexNet Network is unavailable for use by Customer due to reasons other than Scheduled Downtime or the Exceptions, as defined below (e.g., due to a need for unplanned maintenance or repair).

d. **"Exceptions"** is defined in Exhibit A (Software as a Service).

ii. SLO Target: FlexNet Network availability of 99.0%.*

*Loss of any RF Field Equipment not impacting Sensus' ability to read Available Meters will be excluded from this SLO Target.

iii. NaaS Credits. For each Month that the FlexNet Network Availability falls below

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the SLO Target, Customer will accrue NaaS service level credits ("NaaS Credits") in accordance with the table below:

FlexNet Network Availability per Month	NaaS Credit
Less than 99.0% but at least 97.5%	3% of the monthly NaaS fees in which the SLO default occurred (Note: NaaS fees are prepaid annually but for purposes of NaaS Credits are computed on a monthly basis.)
Less than 97.5% but at least 95.0%	5% of the monthly NaaS fees in which the SLO default occurred
Less than 95.0%	7% of the monthly NaaS fees in which the SLO default occurred

iv. Complete NaaS OutageCredits. Withstanding the Exceptions defined in Exhibit A (Software as a Service), if the FlexNet Network Availability equals zero percent (0%) for forty-eight (48) consecutive hours during the Term of this Agreement ("Complete NaaS Outage"), Customer will accrue NaaS Credit equal to the amount of the full monthly NaaS fees attributable to the month in which the Complete NaaS Outage occurred.

v. Process. With the exception of Complete NaaS Outage credits outlined above, NaaS Credits for any single month may not exceed seven percent (7%) of the NaaS fee associated with the month in which the SLO default occurred. Sensus records and data will be the sole basis for all NaaS Credit calculations and determinations, provided, however, that Sensus will make such records and data available to Customer for review upon request. To receive a NaaS Credit, Customer must issue a written request no later than ten (10) days after the NaaS Credit has accrued. Sensus will apply each valid accrued NaaS Credit to the Customer's C&M account as a refund after Sensus' receipt of Customer's request and confirmation of the failure to meet the FlexNet Network Availability. NaaS Credits will not be payable for failures to meet the monthly FlexNet Network Availability Rate caused by any of the Exceptions. No NaaS Credit will apply if Customer is not current in its payment obligations under this Agreement. NaaS Credits are exclusive of any applicable taxes charged to Customer or collected by Sensus. THE SERVICE LEVEL CREDITS DESCRIBED IN THIS SECTION ARE THE SOLE AND EXCLUSIVE REMEDY FOR SENSUS AND ITS AUTHORIZED **DISTRIBUTOR'S FAILURE TO MEET THE SLO TARGET DESCRIBED** ABOVE. IN NO EVENT SHALL THE AGGREGATE AMOUNT OF SERVICE LEVEL CREDITS IN ANY ANNUAL PERIOD EXCEED TWENTY PERCENT (20%) OF THE ANNUAL NAAS FEES.

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Exhibit D
Insurance Requirements

TYPE OF INSURANCE COVERAGE	COMMERCIAL GENERAL LIABILITY (CGL)	UMBRELLA	AUTO LIABILITY	**WORKERS'S** COMPENSATION	PROFESSIONAL LIABILITY (Errors and Omissions)
REQUIRED BY CONTRACT?	YES	YES	YES	YES	YES, For Professional Services
MINIMUM LIMITS OF COVERAGE	$1,000,000 per occurrence of claim, $2,000,000 aggregate	$5,000,000 per occurrence	$1,000,000 per occurrence	Workers Compensation to Statutory Limits; $1,000,000 Employers' Liability limit	$1,000,000 per occurrence or claim, $2,000,000 aggregate with a reporting period of no less than 2 years
MINIMUM **BEST'S GUIDE** RATING/OTHER REQUIREMENTS	A /AVII; insurer shall be licensed to do business in the State of Florida	A /AVII; insurer shall be licensed to do business in the State of Florida	A /AVII; insurer shall be licensed to do business in the State of Florida	Insurer shall be licensed to do business in the State of Florida	A /AVII; insurer shall be licensed to do business in the State of Florida
ADDITIONAL INSURED? Minimum language if **required: "C**ity of Wauchula, its elected officials, directors, officers, agents,	YES (see comment 1 below)	YES (see comment 1 below)	YES (see comment 1 below)	NO	NO

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employees, and volunteers are additional **insureds"**					
WAIVER OF SUBROGATION?	NO	NO	NO	YES	NO

COMMENTS:

1)Sensus shall provide the Customer with a Certificate of Insurance. The Certificate of Insurance must name as an additional insured the Customed, its elected officials, directors, officers, agents, employees, and volunteers; must provide that such insurance is primary to any other insurance available to the additional insureds with respect to claims covered under the policy; and must provide that such insurance coverage applies separately to each insured against whom claims are made or suit is brought; but the inclusion of more than one insured shall not operate to increase the insurer's limit of liability. Certificates of Insurance shall be mailed to the Customer at City of Wauchula, 126 South 7th Avenue, Wauchula, Florida 33873.
2) All policies required under this Exhibit shall be "Occurrence" policies. Policies shall contain a waiver of subrogation in favor of the Customer.
3) If there is any failure by Sensus to comply with the provisions of this section, the Customer may, at its option, on notice to the Sensus, suspend the work for cause until there is full compliance.
4) If Sensus fails to provide Customer satisfactory proof that it has obtained the requisite insurance policies or if Sensus allows a policy to lapse during the Term of the Agreement, the Customer may, at its sole discretion, purchase such insurance at Sensus's expense, provided that the Customer shall have no obligation to do so and if the Customer shall do so, it shall not relieve Sensus of its obligation to obtain insurance.
5) If applicable, any subcontractors of Sensus shall procure and maintain the insurance required of Sensus hereunder during the term of the subcontract. Subcontractors' insurance may be either by separate coverage or by endorsement under insurance provided by Sensus.

APPENDIX F –WARRANTIES

A summary of key warranty provisions are summarized below and are subject to stated warranty limitations documented in “City of Mount Dora Warranty” and “Sensus Limited Warranty-g500”. Below terms are covered under standard warranty and not reflective of any extended coverage provision.

Supplier shall be responsible for electric meter device failures that exceed 3% of any given category of installed devices in a rolling 12-month period during the three-year period after final system acceptance. Remedy shall be complete replacement of all potentially affected devices including $25 payment to the City to cover field in/out costs for the affected population.

If the City chooses to purchase extended warranties for the electric meters, the extended warranties must be purchased at the time of order and must include all electric meters in the system. Extended warranties for electric meters cannot be purchased after the order has been placed and cannot be purchased for only a portion of the electric meters.

Product	Warranty Period
Electric Meters (Stratus IQ+)	1 year
Electric Meters (Aclara KV2C)	1 year
Water Meters (iPERL+)	20 years (15-year full warranty and 5-year pro-rated). Warranty is resetting upon return of non-working product.
Water Meters (ally)	15 years and 2500 valve actuations. Warranty is resetting upon return of non-working product.
Water Meters (OMNI+)	Register with Battery – 10 years Meter – 18 months from shipment
Water Meters (Cordonel)	20 years (15-year full warranty and 5-year pro-rated). Warranty is resetting upon return of non-working product.
Smart Point Communication Modules (520M, 522M)	20 years (15-year full warranty and 5-year pro-rated). Warranty is resetting upon return of non-working product.
Installation Warranty	One year from the date the work is performed.

CITY OF MOUNT DORA WARRANTY

The warranties on meters included in Project Materials and Supplies, and on Work, and Services shall be as follows:

1. Project Materials and Supplies.

(a) General. Meters and equipment included in Project Materials and Supplies that Owner purchases from Core & Main LP ("Core & Main") are warranted by the manufacturer to be free from Manufacturers' Defects for the period specified in the manufacturer's warranty. A copy of the present warranty of each manufacturer that will supply meters and equipment as part of the Project Materials and Supplies is attached hereto. The term of such manufacturer's warranty shall be as set forth in such attached manufacturer's warranty (as the same may be changed from time to time during the course of the performance of the Agreement, but with changes to apply only to purchases of meters or equipment occurring after the change becomes effective), but generally the start date for warranties is the date of the manufacturer's shipment of such meters or equipment as noted in the applicable Acceptance Certificate ("Manufacturer's Warranty Period"). PROJECT MATERIALS AND SUPPLIES OTHER THAN METERS AND EQUIPMENT ARE NOT WARRANTED. CORE & MAIN DOES NOT PROVIDE ANY SEPARATE WARRANTY FOR PROJECT MATERIALS AND SUPPLIES.

(b) Core & Main's Responsibility. Upon any breach of the manufacturer's warranty on meters or equipment noticed to Core & Main during the applicable Manufacturer's Warranty Period, Core & Main's sole responsibility shall be to cooperate with Owner in arranging for the manufacturer to repair or replace any defective meters or equipment.

2. Installation Work and Services.

(a) General. Core & Main warrants that all installation Work and Services provided by Core & Main shall be performed by Core & Main in a workmanlike manner and in compliance with any specifications set forth in this Agreement, with such warranty to expire one year from the date when such installation Work was performed or such Services were provided (the "Warranty Period").

(b) Exclusive Remedy. Upon any breach of Core & Main's warranty as to installation Work or Services during the applicable Warranty Period, Core & Main's sole responsibility shall be to perform any corrective installation Work or Services necessary to bring Core & Main's installation Work and Services into compliance with such requirements.

3. DISCLAIMER OF FURTHER LIABILITIES. EXCEPT FOR THE FOREGOING EXPRESS WARRANTY, CORE & MAIN DISCLAIMS ALL EXPRESS AND IMPLIED WARRANTIES INCLUDING ALL IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE. IN NO EVENT, WHETHER ARISING OUT OF WARRANTY, INDEMNITY, TORT, CONTRACT OR OTHERWISE, SHALL CORE & MAIN BE LIABLE FOR ANY INDIRECT, INCIDENTAL, SPECIAL, EXEMPLARY OR CONSEQUENTIAL DAMAGES OF ANY KIND. IN NO EVENT WILL THE LIABILITY OF CORE & MAIN UNDER THIS AGREEMENT EXCEED THE AMOUNTS PAID TO CORE & MAIN BY OWNER HEREUNDER.

1. **General Product Coverage.** Unless otherwise provided herein, Sensus USA Inc. ("Sensus") warrants its products and parts to be free from defects in material and workmanship for one (1) year from the date of Sensus shipment and as set forth below. All products are sold to customer ("Customer") pursuant to Sensus' Terms of Sale, available at xylem.com.

2. **SR II® and accuSTREAM™ 5/8", 3/4" & 1" Meters** are warranted to perform to new meter accuracy level set forth in the SR II and accuSTREAM Data Sheets available at sensus.com for five (5) years from the date of Sensus shipment or until the regis¬tration shown below, whichever occurs first. Sensus further warrants that the SR II and accuSTREAM meters will perform to at least AWWA Repaired Meter Accuracy Standards for fifteen (15) years from the date of Sensus shipment or until the registration shown below, whichever occurs first:

	New Meter Accuracy	Repair Meter Accuracy
5/8" SR II Meter and accuSTREAM Meter	500,000 gallons	1,500,000 gallons
3/4" SR II Meter and accuSTREAM Meter	750,000 gallons	2,250,000 gallons
1" SR II Meter and accuSTREAM Meter	1,000,000 gallons	3,000,000 gallons

3. **SR II maincases** are warranted to be free from defects in material and work-manship for twenty-five (25) years from the date of Sensus shipment. accuSTREAM maincases will be free from defects in mate¬rial and workmanship for fifteen (15) years from the date of Sensus shipment.

4. **ally® Meters** that register water flow are warranted to perform to the accuracy level set forth in the ally data sheet available at sensus.com for fifteen (15) years from the Date of Installation, but no longer than sixteen (16) years from date of manufacture, not including the meter's sensors, valve, and gear motor, which are warranted under different terms described below. As used herein, "Date of Installation" means the date after which the ally Meter has been out of empty pipe for seven (7) consecutive days, as those days are measured by the ally Meter and stored in the meter's nonvolatile memory.

5. **ally® Meter Batteries and Components**, including SmartPoint 510M/520M Modules are warranted to be free from defects in material and workmanship from the Date of Installation, as defined in Section 4, for the period stated below:

Batteries	15 years[1]
Sensors	5 years
Valve & Gear Motor	5 years[2]
SmartPoint 510M/520M modules and batteries in service w/ally	15 years[1]

6. **iPERL® Meters** that register water flow are warranted to perform to the accuracy levels set forth in the iPERL data sheet available at sensus.com for twenty (20) years from the date of Sensus shipment. The iPERL System Component warranty does not include the external housing.

7. **iPERL, ally, OMNI+, and Cordonel Connectors and Cables** are warranted to be free from defects in materials and workmanship, under normal use and service, for ten (10) years from the date of Sensus shipment. Nicor or Itron connectors included with a Sensus product are warranted according to the terms for Third-Party Devices in Section 16.

8. **Sensus OMNI™, OMNI+ Meters and Propeller Meters** are warranted to perform to as set forth in OMNI and Propeller data sheets for eighteen (18) months from the date of Sensus shipment.

9. **Sensus Cordonel Meters** are warranted to perform to the accuracy levels as set forth in the Cordonel data sheet available at sensus.com for twenty (20) years from the date of Sensus shipment. The Cordonel System Component warranty does not include the external housing.

10. **Sensus Cordonel maincases** are warranted to maintain their structural integrity for a period of twenty (20) years from the date of Sensus shipment.

11. **Cordonel Meter Batteries and Components** are warranted to be free from defects in material and workmanship from the Date of Installation, as defined in Section 9, for the period stated below:

Batteries	20 years[3]
Sensors	5 years
SmartPoint 510M/520M modules and batteries in service w/ Cordonel models with pressure	15 years[1]

12. **Sensus accuMAG™ and Hydroverse™ Meters** are warranted to be free from defects in material and workmanship, under normal use and service, for 18 months from the date of Sensus shipment or 12 months from startup, whichever occurs first.

13. **Sensus Registers** are warranted to be free from defects in material and workmanship from the date of Sensus shipment for the periods stated below or until the applicable registration for AWWA Repaired Meter Accuracy Standards, as set forth above, are surpassed, whichever occurs first:

5/8" thru 2" SR II, accuSTREAM Standard Registers	25 years
5/8" thru 2" SR II, accuSTREAM Encoder Registers	10 years
All HSPU, IMP Contactor, R.E.R. Elec. ROFI	1 year
OMNI and OMNI+ Registers with Battery	10 years
Standard and Encoder Registers for Propeller Meters	1 year

14. **Sensus Electric and Gas Meters** are warranted pursuant to the General Limited Warranty available at sensus.com/TC.

15. **Batteries, iPERL System Components, AMR and FlexNet® Communication Network AMI Interface Devices** are warranted to be free from defects in material and workmanship from the date of Sensus shipment for the period stated below:

7500 series Hand-Held Device	2 years
Act-Pak® Remote Monitoring Instruments	1 year
CPTP100	20 years[4]
EasyLink Reader	1 year
Electronic TouchPad	10 years
FlexNet Base Station (including the R100NA and M400 products)	1 year
Gas SmartPoint® Modules and Batteries	20 years[5]
iPERL System Battery and iPERL System Components	20 years[3]
RM4160	1 year

1 If applicable, any SmartPoint 510M/520M Modules ever paired with an ally meter or Cordonel with pressure meter are warranted with the following limitations:

- When configured to the default installation setting of six transmissions of metrology and pressure per day and one update of temperature per day, the SmartPoint module is warranted to perform up to five (5) firmware upgrades for the SmartPoint module and up to five (5) firmware upgrades for the ally meter or Cordonel (with pressure) meter;
- 2500 Operational Commands, where "Operational Commands" include on demand reads (such as consumption, pressure, temperature), an ally meter valve command, or a configuration command; and
- 15 Diagnostic Commands, which includes two-way communications tests and installations

for the first ten (10) years from Date of Installation at no cost. For the remaining five (5) years, Customer will pay the reduced Replacement Price of the then-current list price in effect at the time the product is accepted for return in accordance with the following schedule:

Years	Replacement Price	Years	Replacement Price	Years	Replacement Price
1-10	0%	13	55%	15	75%
11	35%	14	65%	>15	100%
12	45%				

2 Notwithstanding the foregoing, valve and gear motor components of ally meters are not warranted beyond two thousand (2000) Valve State Operations, even if the warranty period provided herein has not yet expired. As used herein, "Valve State Operations" means adjustments of the Meter to open, close, or reduce flow.

3 Sensus will repair or replace non-performing:

- iPERL System Batteries, and/or the iPERL System flowtube, the flow sensing and data processing assemblies, and the register ("iPERL System Components") with hourly reads manufactured after April 2018
- Cordonel System Batteries, the flow sensing and data processing assemblies, and the register ("Cordonel System Components")
- SmartPoint 510M/520M/515M//512M-PLS/522M Modules manufactured after April 2018 (configured to the factory setting of six transmissions per day under normal system operation of up to one demand read to each SmartPoint Module per month and up to five firmware downloads during the life of the product) and batteries, unless the SmartPoint 510M/520M/522M Module is ever paired with an ally Meter, which immediately amends the warranty terms to those described in Section 13 at no cost for the first fifteen (15) years from the date of Sensus shipment, and for the remaining five (5) years at a prorated percentage, applied towards the published list price in effect for the year the product is accepted by Sensus under the warranty conditions according to the following schedule:

Years	Replacement Price	Years	Replacement Price	Years	Replacement Price
1-15	0%	18	50%	20	70%
16	30%	19	60%	>20	100%
17	40%				

4 Sensus will repair or replace non-performing CPTP100 modules (configured at factory setting of four transmissions per day under normal system operations of up to one demand read per month and up to five firmware downloads during the life of the product) and batteries.

5 Sensus will repair or replace non-performing Gas SmartPoint Modules (configured to the factory setting of six transmissions per day under normal system operation of up to one demand read to each SmartPoint Module per month and up to five firmware downloads during the life of the product) and batteries, for the first ten (10) years from the date of Sensus shipment, and for the remaining ten (10) years, at a prorated percentage, applied towards the published list prices in effect for the year product is accepted by Sensus under warranty conditions according to the following schedule:

Years	Replacement Price	Years	Replacement Price	Years	Replacement Price
1-10	0%	14	45%	18	65%
11	30%	15	50%	19	70%
12	35%	16	55%	20	75%
13	40%	17	60%	>20	100%

Sensus® Electronic Register+™	20 years[6]
Sensus® Smart Gateway Sensor Interface	1 year[7]
SmartPoint® 510M/520M/515M/512M Modules and Batteries	20 years[3]
Vehicle Gateway Base Station (VGB) and other AMR Equipment	1 year

16. Third-Party Devices are warranted to be free from defects in materials and workmanship, under normal use and service, for one (1) year from the date of Sensus shipment. As used in this Sensus Limited Warranty, "Third Party Devices" means any product, device, or component part used with a Sensus product that is manufactured or sold by any party that is not Sensus. Failure of a Third-Party Device which subsequently causes failure to a Sensus device shall be the responsibility of the manufacturer of the Third-Party Device.

17. Software. Software supplied and/or licensed by Sensus is supported accord¬ing to the terms of the applicable software license or usage agreement. Sensus warrants that any network and monitoring services shall be performed in a professional and workmanlike manner.

18. Return. Sensus' obligation, and Customer's exclusive remedy, under this Sensus Limited Warranty is, at Sensus' option, to either (i) repair or replace the product, provided the Customer (a) returns the product to the location designated by Sensus within the warranty period; and (b) prepays the freight costs both to and from such location; or (ii) deliver replacement components to the Customer, provided the Customer installs, at its cost, such components in or on the product (as instructed by Sensus), provided, that if Sensus requests, the Customer (a) returns the product to the location designated by Sensus within the warranty period; and (b) prepays the freight costs both to and from such location. In all cases, if Customer does not return the product within the time period designated by Sensus, Sensus will invoice, and Customer will pay within thirty days of the invoice date, for the cost of the replacement product and/or components.

    The return of products for warranty claims must follow Sensus' Returned Materials Authorization (RMA) procedures. Water meter returns must include documentation of the Customer's test results. Test results must be obtained according to AWWA standards and must specify the meter serial number. The test results will not be valid if the meter is found to contain foreign materials. If Customer chooses not to test a Sensus water meter prior to returning it to Sen-sus, Sensus will repair or replace the meter, at Sensus' option, after the meter has been tested by Sensus. The Customer will be charged Sensus' then current testing fee. All products must be returned in accordance with the RMA process. For all returns, Sensus reserves the right to request meter read¬ing records by serial number to validate warranty claims.

    For products that have become discontinued or obsolete ("Obsolete Product"), Sensus may, at its discretion, replace such Obsolete Product with a different product model ("New Product"), provided that the New Product has substantially similar features as the Obsolete Product. The New Product shall be warranted as set forth in this Sensus Limited Warranty.

    THIS SECTION 18 SETS FORTH CUSTOMER'S SOLE REMEDY FOR THE FAILURE OF THE PRODUCTS, SERVICES OR LICENSED SOFT¬WARE TO CONFORM TO THEIR RESPECTIVE WAR¬RANTIES.

19. Warranty Exceptions and No Implied Warranties. This Sensus G-500 Limited Warranty does not include costs for removal or installation of products, or costs for replacement labor or materials, which are the responsibility of the Customer. The warranties in this Sensus G-500 Limited Warranty do not apply to and Sensus has no liability for goods that have been: installed improperly or in non-recommended installations; installed to a socket that is not functional, or is not in safe operating condition, or is damaged, or is in need of repair; tampered with; modified or repaired with parts or assemblies not certified in writing by Sensus, including without limitation, communication parts and assemblies; improperly modified or repaired (including as a result of modifications required by Sensus); converted; altered; damaged; read by equipment not approved by Sensus; for water meters, used with substances other than water, used with non-potable water, or used with water that contains dirt, debris, deposits, or other impurities; subjected to misuse, improper storage, improper care, improper maintenance, or improper periodic testing (collectively, "Exceptions."). If Sensus identifies any Exceptions during examination, troubleshooting or performing any type of support on behalf of Customer, then Customer shall pay for and/or reimburse Sensus for all expenses incurred by Sensus in examining, troubleshooting, performing support activities, repairing, or replacing any Equipment that satisfies any of the Exceptions defined above. The above warranties do not apply in the event of Force Majeure, as defined in the Terms of Sale.

    THE WARRANTIES SET FORTH IN THIS SENSUS G-500 LIMITED WARRANTY ARE THE ONLY WARRANTIES GIVEN WITH RESPECT TO THE GOODS, SOFTWARE, SOFTWARE LICENSES AND SERVICES SOLD OR OTHERWISE PROVIDED BY SENSUS. SENSUS EXPRESSLY DISCLAIMS ANY AND ALL OTHER REPRESENTATIONS, WARRANTIES, CONDITIONS, EXPRESSED, IMPLIED, STATUTORY OR OTHERWISE, REGARDING ANY MATTER IN CONNECTION WITH THIS SENSUS G-500 LIMITED WARRANTY OR WITH THE TERMS OF SALE, INCLUDING WITHOUT LIMITATION, WARRANTIES AS TO FITNESS FOR A PARTICULAR PURPOSE, MERCHANTABILITY, NON-INFRINGEMENT AND TITLE.

    SENSUS ASSUMES NO LIABILITY FOR COSTS OR EXPENSES ASSOCIATED WITH LOST REVENUE OR WITH THE REMOVAL OR INSTALLATION OF EQUIPMENT. THE FOREGOING REMEDIES ARE CUSTOMER'S SOLE AND EXCLUSIVE REMEDIES FOR THE FAILURE OF EQUIPMENT, LICENSED SOFTWARE OR SOFTWARE SERVICES, AND OTHER SERVICES TO CONFORM TO THEIR RESPECTIVE WARRANTIES.

20. Limitation of Liability.

    a. SENSUS' AGGREGATE LIABILITY IN ANY AND ALL CAUSES OF ACTION ARISING UNDER, OUT OF OR IN RELATION TO THIS AGREEMENT, ITS NEGOTIATION, PERFORMANCE, BREACH OR TERMINATION (COLLECTIVELY "CAUSES OF ACTION") SHALL NOT EXCEED THE TOTAL AMOUNT PAID BY CUSTOMER TO SENSUS UNDER THIS AGREEMENT. THIS IS SO WHETHER THE CAUSES OF ACTION ARE IN TORT, INCLUDING, WITHOUT LIMITATION, NEGLIGENCE OR STRICT LIABILITY, IN CONTRACT, UNDER STATUTE OR OTHERWISE.

    b. AS A SEPARATE AND INDEPENDENT LIMITATION ON LIABILITY, SENSUS' LIABILITY SHALL BE LIMITED TO DIRECT DAMAGES. SENSUS SHALL NOT BE LIABLE FOR: (I) ANY INDIRECT, INCIDENTAL, SPECIAL OR CONSEQUENTIAL DAMAGES; NOR (II) ANY REVENUE OR PROFITS LOST BY CUSTOMER OR ITS AFFILIATES FROM ANY END USER(S), IRRESPECTIVE OF WHETHER SUCH LOST REVENUE OR PROFITS IS CATEGORIZED AS DIRECT DAMAGES OR OTHERWISE; NOR (III) ANY IN/OUT COSTS; NOR (IV) MANUAL METER READ COSTS AND EXPENSES.

    c. The limitations on liability set forth in this Agreement are fundamental inducements to Sensus entering into this Agreement. They apply unconditionally and in all respects. They are to be interpreted broadly so as to give Sensus the maximum protection permitted under law.

    d. To the maximum extent permitted by law, no Cause of Action may be instituted by Customer against Sensus more than TWELVE (12) MONTHS after the Cause of Action first arose. In the calculation of any damages in any Cause of Action, no damages incurred more than TWELVE (12) MONTHS prior to the filing of the Cause of Action shall be recoverable.

6 Sensus will repair or replace non-performing Sensus Electronic Register+ with hourly reads for the first ten (10) years from the date of Sensus ship¬ment, and for the remaining ten (10) years, at a prorated percentage, applied towards the published list prices in effect for the year product is accepted by Sensus under warranty conditions according to the following schedule:

Years	Replacement Price	Years	Replacement Price	Years	Replacement Price
1-10	0%	14	45%	18	65%
11	30%	15	50%	19	70%
12	35%	16	55%	20	75%
13	40%	17	60%	>20	100%

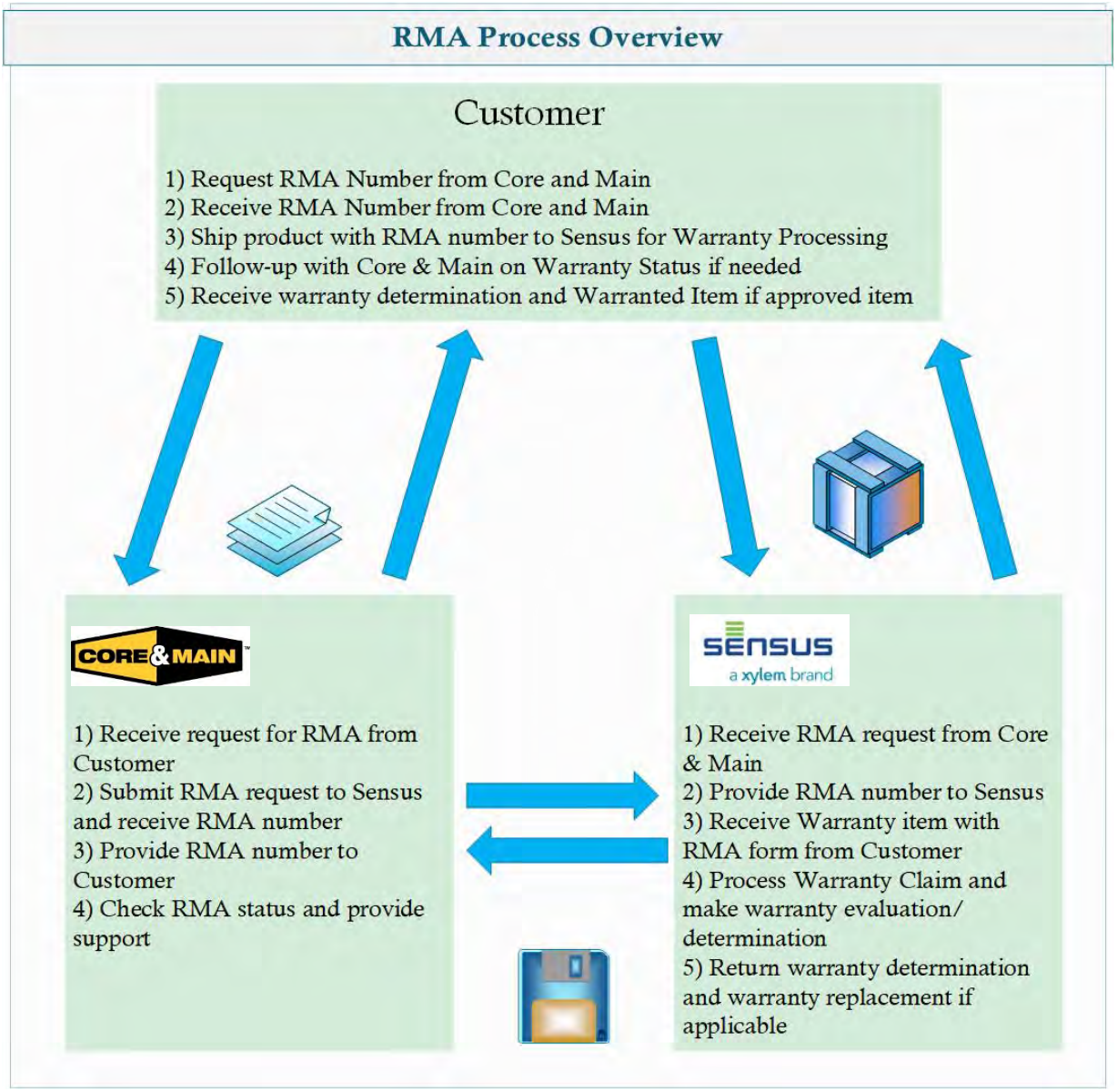
7 Sensus® Smart Gateway Sensor Interface warranty valid only for analog Meter Sample Rates of four times per hour with a Standard Transmit Rate of hourly or greater for the analog channel(s).

© 2024 Xylem Inc. Sensus G-500 Limited Warranty Revised June 2024

APPENDIX G – RMA PROCESS

RMA Process
City of Mount DoraCustomer) and
Core & Main (Contractor) as Authorized Sensus Distributor

Contractor is responsible for the administration of the RMA process working with Sensus. The following is an outline of the RMA process for warranty returns for Sensus equipment purchased through Core & Main.



The following are the responsibilities of each party within the RMA process:

Responsibilities of Customer (City):

a) Upon discovery of items which the Customer feels are covered under warranty the Customer shall contact the Core & Main Lakeland office for an RMA number. Items to be supplied by Customer to Core & Main shall include

i. Item Description
ii. Serial Number
iii. Description of the Problem (in as much detail as possible)
iv. Part Number if Available

b) Upon receipt of the RMA number, Customer will ship the warranty items to the manufacturer (Sensus) at Customer's expense. Customers are asked to make a reasonable effort to ship routine RMA failure material within 5 to 7 days (or per contract terms) of field removal.

i. The material should be clearly tagged with the reason for removal and the removal date. The customer is responsible for creating and printing reject tickets at the customer's expense.

ii. The Customer's meter shop groups the respective meters based on category, where applicable.

iii. The removed material should be handled with care. Physical damage due to handling can void the warranty coverage of a unit.

iv. If the failed material is clearly damaged such that performance testing cannot be reasonably conducted, such material shall not be returned to Sensus under the RMA program unless deemed a design defect.
- Examples of this type of damage include cracked meters, module bases, or covers; water intrusion due to damage caused by external sources; tampered meters; and meters damaged due to improper installation.

v. Material received at RMA with visible physical damage is identified as 'customer-induced damage.

vi. Shipments are not accepted in the Sensus RMA department without a unique RMA number.

vii. All failed material should be packaged properly to avoid damage during transport.

viii. The RMA number issued is valid for 30 days from the day of issuance. Material received after 30 days may not be received at the Sensus RMA dock without prior authorization.

c) Customer will receive warranty coverage information from Sensus and determine course of action for any items that are out of warranty. Customer will receive any in-warranty replacements (shipped at Sensus expense).

d) Customer will query or receive RMA status from Contractor throughout the process.

Responsibility of the Contractor (Core&Main):

a) During the project deployment and prior to successful installation of the meter, Contractor will handle all aspects of the RMA process including shipping, processing, and replacement products.

b) Post installation, Contractor, as the authorized Sensus Distributor, shall assist with the procurement of an RMA number from the equipment manufacturer (Sensus) and assist in tracking and follow-up on warranty return items.

In its role as RMA processor, Core & Main offers no assurance that items returned under warranty are in fact covered items and relies solely upon the manufacturer to provide coverage determination after examination.

c) Contractor shall provide shipping instructions that should be followed for routine RMA returns.

d) Contractor will handle all products associated with the project seamlessly including third-party OEM meters.

e) During the Warranty processing phase Core & Main will work with Customer to check the status and obtain follow-up information if required.

Responsibility of Sensus:

a) The Sensus RMA Services department is responsible for the evaluation, testing, and analysis report for all products, as well as the tracking, closure, and report consolidation of all RMAs.

b) Once Sensus makes a decision regarding warranty status this information will be relayed to Customer as required. Should item be under warranty claims will be processed according to standard manufacturer terms and conditions. Shipment for any replacement product will be sent directly from Sensus to Customer.

c) RMA Services is responsible for all product flow, test and repair, system data entry, and maintaining FIFO and deemed priority processing.

d) Sensus Product Engineering defines, and in some cases performs, non-standard RMA testing and analysis. Product Engineering also coordinates corrective action for repetitive product-related failure modes.

e) The Sensus RMA Services department and the Sensus Quality departments are responsible for monitoring system data and feedback, issuing corrective and preventative action, and tracking to complete these actions. The RMA Services department is also responsible for tracking and ensuring completeness of any special investigations, and reports, including recommendations for the customer to consider regarding product installation, use, or diagnostics.

f) Sensus evaluates the returned material and, if needed, will target completing repairs or replacement of the materials within 60 days of the receipt date.

g) Root causes are documented, when applicable.

h) Once meters and/or SmartPoints are received by Sensus, they are logged in the web-based RMA system. The receipt date is used as a reference to track and report RMA backlog information in the monthly RMA report.

i) The RMA process for network equipment is the same as the process for meters and SmartPoint communication modules. Turnaround times are based on priority and can be mitigated by stocking the recommended network spare parts. If a network component fails during the warranty period, Sensus determines whether it will repair the component or replace it with new equipment.

j) If material is damaged during transit, Sensus notifies the customer of the damage.

k) Sensus provides monthly RMA status reports to the customer upon request.

l) Unless requested to return to the customer, all material dispositioned as 'do not replace under warranty’ will be properly disposed of 60 days after the test report is issued. Material will be shipped back at the customer’s expense.

m) A sampling of all returns (4%) is taken for destructive testing and is automatically replaced.

n) Any product initially targeted for repair which is subsequently determined to be irreparable is replaced. Normally, any product that is found to be repairable is repaired.

EXHIBIT H – HUMAN TRAFFICKING AFFIDAVIT

HUMAN TRAFFICKING AFFIDAVIT

In compliance with § 787.06, *Florida Statutes*, this Affidavit must be completed by an officer or representative of a nongovernmental entity that is executing, renewing, or extending a contract with the City of Mount Dora (the "Governmental Entity").

The undersigned, on behalf of the entity listed below (the "Nongovernmental Entity"), hereby attests under penalty of perjury as follows:

1. I am over the age of 18 and I have personal knowledge of the matters set forth herein.
2. I am an officer or representative of Core & Main LP, a nongovernmental entity, and I am authorized to provide this affidavit on behalf of the Nongovernmental Entity.
3. Nongovernmental Entity, and any of its subsidiaries or affiliates, do not use coercion for labor or services, as those terms are defined in § 787.06, *Florida Statutes*, as may be amended from time to time.
4. If at any time in the future the Nongovernmental Entity does use coercion for labor or services, the Nongovernmental Entity will immediately notify the Governmental Entity and no contracts may be executed, renewed, or extended between the parties.
5. I have read the foregoing Affidavit and confirm that the facts stated in it are true and are made for the benefit of and reliance by the Governmental Entity.

Authorized Signature

Core & Main LP
Company

Joseph Holsten
Printed Name

Manager, Branch Operations
Title

STATE OF FLORIDA
COUNTY OF ORANGE

The foregoing instrument was acknowledged and sworn to before me by means of [ ] physical presence or [ ] online notarization of Joseph Holsten, as Manager, Branch Operations of Core & Main LP, who personally swore or affirmed that he/she is authorized to execute this Agreement and thereby bind the Nongovernmental Entity, and who is personally known to me or who produced _____ as identification, and who did/did not take an oath this 20th day of June, 2025.

(stamp)

NOTARY PUBLIC

BRENDA F. ECKROSE
Commission # HH 215403
Expires February 27, 2026

510 N. Baker St.
Mount Dora, FL 32757
352-735-7126

DATE: **July 15, 2025**

TO: **Honorable Mayor and City Council Members**

FROM: **Vince Sandersfeld, City Manager**

SUBJECT: Request Approval of Agreement Letter with Florida Municipal Power Agency (FMPA)

Introduction:
This is a request for the Council's approval of an Agreement Letter with the Florida Municipal Power Agency (FMPA), allowing Quanta Technology to provide AMI project management services to the City of Mount Dora utilizing FMPA's Service Agreement.

Discussion:
The City of Mount Dora is a member of the Florida Municipal Power Agency (FMPA), a nonprofit joint action agency that serves its 31 Florida municipal electric utility systems across the state. The City participates in FMPA joint purchasing projects, which include a Master Services Agreement between FMPA and Quanta Technology, LLC for Advanced Metering Infrastructure (AMI) support services. This agreement with Quanta Technology was awarded in accordance with FMPA's RFQ 2017-211 and section 287.055, Florida Statutes (Florida's Consultants' Competitive Negotiations Act). RFQ 2017-211 specifically requests services which could be utilized by FMPA members.

Quanta Technologies has implemented over 120 AMI projects worldwide, and has current projects with the City of Clewiston, and recently in the City of North Lauderdale, City of Newberry, and City of New Smyrna Beach. The Mount Dora Electric Department utilized Quanta Technology's advisement during contract negotiations (Phase 1) for the AMI project with Core and Main, resulting in $300K in savings.

Following City Council approval of Action Item # 1, for the contract with Core and Main LP for Advanced Metering Infrastructure, staff request approval of the Agreement Letter with FMPA for Phase 2 professional services from Quanta Technology, which includes Project Management Support.

The Consultant will provide Project Management support for the following activities using an experienced PMP-certified AMI project manager, serving as an independent stakeholder for the

City's interests. Key aspects include working with Core and Main's project manager in project planning, governance, risk management, action tracking, issue resolution, meter exchange data validation, and overseeing system acceptance tests. A more detailed scope of services and qualifications is provided in Attachment 1.

Budget Impact:

The project consultant services costs are $123,397.00, included in FY2024/25 and FY2025/26 CIP Budget.

Strategic Impact:

Strategic Initiative 4:Provide High-Quality Services
Goal 10: Ensure safe and reliable electric and water supply and protect the environment and public through proper wastewater and stormwater management.
Objective10.1: Install Advanced Metering Infrastructure system to enhance reliability and provide real-time data to the electric and water customer.

Recommendation:

City Council approve the proposed contract with Quanta Technology, providing Project Management Support for the Advanced Metering Infrastructure Implementation.

Attachment(s):

1. Attachment 1 - Quanta Technology-Mount Dora AMI Project Implementation & Meter Configuration Support 4-4-2025
2. Agreement Letter with FMPA for AMI Consulting Services

Prepared by:	Stephanie Gervais, Administrative Coordinator-Public Works	
Reviewed by:	Wayne Zimmerman, Deputy Electric Utility Director	Approved - 7/1/2025
	Steve Langley, Assistant City Manager-Electric Utility Director	Approved - 7/7/2025
	Matthew Dodson, Budget Officer	Approved - 7/7/2025
	Steven Weber, Finance Director	Approved - 7/7/2025
	City Attorney, City Attorney	Approved - 7/9/2025
	Jeanann Hand, City Clerk	Approved - 7/9/2025
	Vince Sandersfeld, City Manager	Final Approval - 7/9/2025

QUANTA TECHNOLOGY
A QUANTA SERVICES COMPANY

PROPOSAL

Advanced Metering Project Support

PREPARED FOR

City of Mount Dora

DATE

April 4, 2025

PREPARED BY

Jesus Gonzalez, PMP
JGonzalez@Quanta-Technology.com
919.428.9332

US25AG006

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4020 Westchase Boulevard, Suite 200
Raleigh, NC 27607

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CONFIDENTIAL/PROPRIETARY

This document contains trade secrets and/or proprietary, commercial, or financial information not generally available to the public. It is considered privileged and proprietary to the Offeror, and it is submitted by Quanta Technology, LLC, in confidence with the understanding that its contents are specifically exempted from disclosure under the Freedom of Information Act [5 USC Section 552 (b) (4)] and shall not be disclosed by the recipient (whether it be Government [local, state, federal, or foreign], private industry, or non-profit organization) except with the written permission of Quanta Technology and shall not be duplicated, used, or disclosed, in whole or in part, for any purpose except to the extent in which portions of the information contained in this document are required to permit evaluation of this document. If a contract is awarded to this Offeror as a result of, or in connection with, the submission of this data, the right to duplicate, use, or disclose the data is granted to the extent provided in the contract.

VERSION HISTORY

VERSION	DATE	DESCRIPTION
1.0	December 12, 2024	Initial Submission
2.0	April 4, 2025	Final Submission

Executive Summary

Quanta Technology welcomes the opportunity to work with Mount Dora to support the project's AMI Contracting and Implementation Phase. We thank Mount Dora for the opportunity to create a lasting partnership by serving as a trusted advisor to guide the City through its AMI implementation. We offer a comprehensive set of services that leverages our previous experience with other Florida AMI projects and aims to support Mount Dora throughout contracting and the entire system deployment. For instance, the proposed technical project management model is being used successfully at New Smyrna Beach Utilities (NSBU) to deploy an AMI solution. We encourage you to contact our NSBU reference for more information.

Quanta Technology brings a highly trained team of experienced professionals to support the effort, and we can become available immediately to serve the City's needs. In response to your request, we have organized this proposal according to the tasks in the table below and provided a few optional services by request. We propose contracting through FMPA on a T&M basis using our established discounted rates.

ITEM	DESCRIPTION
Contract Development / Negotiation Support	Under the primary direction of the Mount Dora team and leveraging existing strategies, objectives, and goals, we will initially develop a comprehensive strategic plan to develop and negotiate a contract with the selected vendor, ensuring the best interests of Mount Dora are prioritized. Our efforts will include the development of an initial draft contract and support for subsequent negotiation meetings and contract revisions. We will serve in a lead capacity, leveraging past experiences and work products while driving the effort forward efficiently, culminating in a fully executed contract.
Project Management Support	Our project management (PM) support provides a blended approach of PM and technical expertise to serve as Mount Dora's prime PM, supporting key activities such as the use of a system test fixture, system integration setup and FSAT acceptance testing, deployment readiness preparations, initial pilot deployment, oversight during mass deployment, and ongoing support for supplementary functions such as invoicing, and data transfers. Support for pre-pay (should the City elect) is also included.
Technical Advisement Services – Metering (Optional)	We can provide additional technical advisory services to support the review of meter programs and address any metering or AMI system issues.
Advanced Analytics Support (Optional)	Quanta Technology's expertise in meter data and meter data analytics can assist Mount Dora in deriving use cases, prioritizing efforts, implementing applications leveraging vendor analytics applications/data lake capabilities, and validating/tailoring results to derive business value, including GUI and graphical data presentations, heat maps, and other useful tools.
System Integration Additional Support (Optional)	Quanta Technology's Digital Transformation team can assist with integration services if the Mount Dora team needs support with any gaps within the integration process.
Travel	Travel is billed at cost with no markup. We will be available to you as much as needed. We are including a reasonable level of in-person trips to support the project and can add or remove trips as deemed appropriate.

Our team members are equipped and available to provide dedicated, ongoing technical support as required. We have structured our offering into two Phases that can be independently managed and approved.

Thank you again for the opportunity to respond to your request, and we hope you will find our proposal meets your requirements. We are available to answer any questions you may have.

Sincerely,

Jesus Gonzalez, PMP
Principal Advisor

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1 Proposed Scope of Work

1.1 Project Kickoff

The project kickoff will commence with information-gathering sessions, during which project members will discuss Mount Dora's strategy and goals. This process will involve the study of key documents, including the City's RFP and supporting documents, the selected vendor RFP responses and supporting materials, shortlist presentations, contracting requirements, and other relevant background information. We will work with the Mount Dora team to develop a work strategy to effectively meet the project's objectives. Information-gathering meetings can occur remotely or on-site as the Mount Dora team desires. Once Quanta Technology is oriented to Mt Dora's business and operational drivers, we will quickly transition contract development support and negotiation efforts.

1.2 Contract Development/Negotiation

Quanta Technology will provide technical advice during the contract negotiation period. This may include, but is not limited to, creating the initial draft contract and appropriate exhibits using the City's or vendor's initial contract template with commercial and legal requirements. To facilitate an expeditious start, we will leverage Quanta Technology's work product library and provide technical input to assist with creating the contract scope of work, supporting exhibits, and key contract provisions designed to protect the City's interest and reduce risk while maintaining collaboration with the vendor.

After the initial draft contract is created and reviewed by all Mount Dora stakeholders, Quanta Technology will lead negotiations and support contract negotiations, ensuring contracting tasks remain on track. These negotiations typically involve multiple rounds of redline edits between the parties. They will be supported by in-person working sessions and/or remote phone conferences with vendor contract and deployment personnel. Quanta Technology will lead a contracting process from a project management perspective, ensuring an efficient, expedient, and successful outcome.

Quanta Technology will also support the City during the approval process with the City Commission, including on-site representation and technical advice as required. Table 1-1 lists typical contractual topics covered during the contracting process.

Table 1-1. Important Contractual Topics

TERMS AND CONDITIONS	CUSTOMER ENGAGEMENT	AMI SYSTEM	METER INSTALLATION
• Bonds • Retainage • Damages (liquidated or actual) • Indemnity • Limitation of liability • Force majeure • Cancellation/default • Transfer of ownership • System acceptance • Warranty	• Ease of use • Customer communications • Call center • Customer portal	• System availability % • Scheduled maintenance • Disaster recovery • Recovery times • System security • Customer data protection • Licensing • Maintenance and support • Alternate meter supplier • System training	• Insurance • Background checks and drug testing • WOMS system • Safety and protective equipment requirements • Vehicle signage • Personnel dress code and behavior • Right to remove personnel • Temporary stand-down provisions

1.3 Project Management Support

Quanta Technology proposes using an experienced and PMP-certified AMI project manager with the technical ability to manage, support, and resolve technical-related and data-associated challenges that may arise. Quanta Technology will serve as Mount Dora's prime project management leadership. We assume the vendor will provide an overall deployment project manager responsible for implementing the solution. Our engagement will involve collaborating with Mount Dora's technical lead to coordinate project activities and support the vendor's project manager. Support effort in this phase depends on ensuring the vendor's project manager effectively executes and coordinates project activities with Mount Dora's support for internal process activities.

1.3.1 System Integration and FSAT Support

Quanta Technology will oversee and support this critical integration area with Mount Dora's existing IT systems. These integrations are the vendor's responsibility, with support from Mount Dora. Quanta Technology will monitor this integration activity and work with the vendor to ensure a successful implementation. Key areas of support include the following:

1. **System Integration Specification Document:**
   - The installation vendor will own the system integration effort. However, we oversee the development of SOW specifications with each system provider that will integrate their existing system with the AMI solution.
   - Typical integrations can involve Multi-speak, APIs, Web Services, or Flat File integrations. Our understanding of the primary integrations for this project includes CIS and Billing with BS&A, Outage Management with ENCO Utility Services, or readiness for full future OMS implementation. Also, the GIS coordinates transfers with ESRI ArcGIS, integration with the installation vendor's WOMS for meter exchanges, and integration with a customer portal.
   - Further discussion is required to understand the desired goals and scope of the Milsoft WindMil® distribution modeling software integration. Quanta Technology is collaborating with another FMPA utility on a WindMil® integration project, which provides an opportunity to share experiences and knowledge.
   - If additional system integration support is required, we can leverage the expertise of the Quanta Technology Digital Transformation team as an optional task.
2. **Meter Demonstration Board (System Test Fixture) Delivery:**
   - We will work with the implementation vendor to deliver the proposed Meter Demonstration Board and set it up as a System Test Fixture to support integration development and FSAT testing.
3. **Functional System Acceptance Test (FSAT) Creation:**
   - We will oversee the creation of an FSAT test specification that defines the tests to be executed to validate successful integrations.
   - The approach we have found most successful is to have the system vendor develop the initial draft of the test plan with a detailed review from the client and Quanta Technology to ensure that all functionality and systems integrations follow the specifications. FSAT will demonstrate acceptable performance of all system integrations via the System Test Fixture and includes the installation vendor's work order management system (WOMS) tool.

4. **FSAT Testing Support:**
   - We will provide oversight during the FSAT testing phase using the system test fixture and augment it with friendly field installations. This will provide some real field installations as the final step of FSAT before mass deployment.

Quanta Technology's experience is that using FSAT's successful completion as a gating factor to proceed with mass deployment is a best practice to avoid AMI solution issues in the field that cause customer service problems for the city's residents.

1.3.2 AMI Mass Deployment Readiness Assessment:

We will work with Mount Dora and the vendor's project manager to develop detailed implementation plans, including project schedules, communications plans, testing plans, and deliverables. As we approach the start of mass deployment, we will conduct a comprehensive deployment readiness assessment and work with Mount Dora, the solution vendor, and the installation contractor to ensure these items have been addressed to facilitate a successful start to mass deployment. Typical items covered include the following:

- Installer and customer safety considerations
- Work release and dispatching strategy
- Data exchange integrity and validation
- Customer communications
- Customer marketing (e.g., billing inserts, door hangers, web notices, AMI day, etc.)
- Call center and installer scripting for consistent messaging
- Billing blackout handling
- Special account handling (VIP, medical, etc.)
- Installation production targets and working hours
- Successful installation definition
- Handling of meter access issues and Cannot Locate accounts
- Handling of electric meter base and water plumbing issues
- Return to Utility (RTU) accounts/conditions
- Legacy meter disposal
- Meter exchange documentation (including GIS coordinates, installation photos, last read, etc.)
- Back-office last read validation
- RMA product return procedures
- Customer claims process
- Receipt of shipment procedures
- Inventory management
- New hire onboarding and training
- Field installation audits
- Supporting materials (access keys, tamper seals, etc.)

1.3.3 Initial Pilot Deployment

Quanta Technology will support the execution of an initial field pilot consisting of a small number of meters (e.g. 100) deployed and monitored for successful operation prior to commencing mass deployment. We will help with all associated activities including pilot definition, account selection, success metrics, monitoring, and acceptance.

1.3.4 Field Deployment/Implementation Support

Once the mass deployment commences, we will provide ongoing support for the meter exchange activities throughout the deployment, primarily led by the vendor project manager. This task typically includes the following activities during field rollout:

- Vendor meetings
- Schedule management support
- Data validation (meter exchanges, GIS coordinate accuracy, etc.)
- Invoice validation (PO/invoice reconciliation, supporting information audits, preventing double billing, etc.)
- Contract administration and change orders (if required)
- Weekly calls and periodic on-site meetings
- Field installation oversight, including tracking and reporting of:
  - Pre-deployment initial testing, including all system integrations
  - Return material authorization activities
  - Install progress (plan vs. actual)
  - Return to utility non-install resolutions
  - Customer complaint resolutions
  - Safety issues and reporting
  - Daily/weekly install plans
  - QA activities

1.3.5 Project Closure

After the project, Quanta Technology will assist Mount Dora staff with any project closure activities, typically involving final financials, lessons learned events, and other items required to complete the project.

1.3.6 Optional Project Services

The following optional services can be offered upon request. These services are designed to provide additional support as our clients deem necessary. We can provide budgetary estimates for these services if desired.

Table 1-2. Optional Project Services

#	SERVICE ITEM	DESCRIPTION
1	Technical Advice Services—Metering	Quanta Technology can provide additional technical advisory services to support the review of meter programs and address any metering or AMI system issues.
2	Advanced Analytics Support	Quanta Technology's expertise in meter data and meter data analytics can assist Mount Dora in crafting meaningful use cases that leverage the vendor's MDM or data lake capabilities. Quanta Technology's years of experience working with the intricacies of meter data allow our customers to navigate and extract valuable insights from your data lake. Quanta's knowledge ensures data quality, transformation, and advanced analytics that can uncover hidden patterns and trends within the data. This domain-specific expertise allows us to tailor use cases to address your unique business objectives, optimizing resource use and driving operational efficiency. Collaborate with the City to derive use cases, prioritize efforts, implement applications, and validate and tailor results to derive business value, including GUI and graphical data presentations, heat maps, and other useful tools.
3	System Integration Additional Support	Quanta Technology's Digital Transformation team can support integration services if the Mount Dora team needs support with any gaps within the integration process.

1.4 Meter Configuration Support

Quanta Technology will review and provide input to the meter configurations for both electric and water meters. The review will include all meter electric forms for both Sensus and Aclara meters as well as any reviews of water configurations associated with the SmartPoint or specific water meters (as applicable).

2 Project Personnel

Our assigned project team comprises experts who have previously worked together on similar projects. This section details their qualifications and who will work on the desired scope. Our core team is led by Jesus Gonzalez, PMP, who will be Mount Dora's primary contact and will serve as the project manager and work with Bob Dumas to provide technical consulting during contracting. They are supported by David Hart, the Vice President of Monitoring, Protection, Control, and Automation, and the team detailed below, which can provide additional support if desired.

The proposed core staff for this project and their roles and responsibilities are shown in Table 2-1.

Table 2-1. Proposed Core Staff Qualifications Summary

NAME	TITLE	RELEVANT EXPERIENCE	ROLE
Jesus Gonzalez, PMP	Principal Advisor	12+ yrs. Utility 24+ yrs. PM Elec./Water	Project Manager Contracting Advisor
Bob Dumas, PhD, PE	Executive Advisor	40+ yrs. Utility Elec./Water	Contracting Advisor

Depending on project needs, Quanta Technology has additional staff to contribute to select areas.

Table 2-2. Available Staff (if needed)

NAME	TITLE	RELEVANT EXPERIENCE	ROLE
Harris Glover	Executive Advisor	16+ yrs. Utility electric	Technical Advisor
David Uy, PE	Advisor	27+ yrs. utility electric	Engineering and Project Support
Rick Garvin, PMP	Senior Advisor	10+ yrs. Utility 15+ yrs. PM Elec./Water	Project Management Support

JESUS GONZALEZ, PMP

JESUS GONZALEZ, PRINCIPAL ADVISOR, has over 30 years of professional experience spanning the utility and telecommunications sectors and 24 years of project management experience. His utility experience includes over 12 years of advanced metering infrastructure (AMI) deployments with Honeywell (formerly Elster Solutions and ABB), where he led and managed numerous deployment projects across a broad customer base consisting of municipalities, cooperatives, and IOUs in North America and Mexico. He holds a master's degree in Information and Computer Science from the Georgia Institute of Technology in Atlanta and has been a certified Project Management Professional for 15 years.

PRINCIPAL ADVISOR

AREAS OF EXPERTISE

- Advanced metering infrastructure (AMI) electric, water, and gas system deployments
- Project Management planning and governance, risk analysis/management, cost control
- Project Management Office Portfolio Management, Clarity PPM

EXPERIENCE AND BACKGROUND

- Years of experience in the utility industry 2011–Present
- Principal Advisor, Quanta Technology 2022–Present
- Manager Customer Delivery, Honeywell/Elster Solutions 2015–2021
- Senior Project Manager, Customer Delivery, Elster Solutions 2011–2015
- Years of experience in the telecommunications industry 1987–2011
- Clarity Program Manager, PMO Office, Tekelec 2011–2007
- Senior Technical Manager, Lucent Technologies 1996–2003
- Member of Technical Staff, AT&T Bell Laboratories 1987–1996

RELEVANT FIELD DEPLOYMENT PROJECTS

- City of Newberry - Water 2.1K, Electric 1.9K, AMI deployment (Quanta Technology)
- City of Clewiston - Water 4K, Electric 4K, AMI deployment (Quanta Technology)
- New Smyrna Beach Utilities (NSBU) – Water 26K, Electric 30K, AMI deployment (Quanta Technology)
- City of Tallahassee - Water 87K, Electric 113K, Gas 24K, AMI deployment (Honeywell)
- City of Fort Collins - Water 31K, Electric 68K, AMI deployment (Honeywell)
- Lafayette Utilities System - Water 56K, Electric 65K, AMI deployment (Honeywell)

SELECT INDUSTRY ACCOMPLISHMENTS AND RECOGNITION

- Project Management Professional (PMP), 2007–Present
- Six Sigma Green Belt, Villanova University

EDUCATION

- MS, Information and Computer Science, Georgia Institute of Technology, 1988
- BS, Electrical and Computer Engineering, University of Miami, 1987

ROBERT DUMAS, PHD

ROBERT DUMAS, PHD, PRINCIPAL ADVISOR, AMI Manager, has over 40 years of experience with increasing levels of organizational responsibility in electrical, nuclear, mechanical, and environmental engineering positions associated with electric utility generation, transmission operations, and advanced metering infrastructure (AMI) smart-grid solutions for some of the largest utilities in the U.S. and internationally. This experience includes over 17 years with Virginia Power Nuclear Design Engineering and 17 years in the AMI industry with Elster Solutions (formerly ABB) and Itron Inc. With Quanta Technology, he has executed the multimillion-dollar Wide-Area Protection project for National Grid Saudi Arabia and ongoing AMI consulting projects.

EXECUTIVE ADVISOR

AREAS OF EXPERTISE

- Utility operations
- Resource planning
- Nuclear plant instrumentation and control
- Nuclear and EMS SCADA systems
- Project and program management
- AMI
- Smart metering
- Meter data management systems
- GIS system application

EXPERIENCE AND BACKGROUND

- Years of experience in the electric power industry 1977–Present
- Principal Advisor and AMI Manager, Quanta Technology 2016, 2018–Present
- Director, Solution Delivery, Itron Inc. 2017–2018
- Managing Partner, Smart Grid Consulting Associates, LLC 2015–2016
- Vice President, Program Implementation, Elster Solutions (formerly ABB) 1999–2014
- Senior Researcher and Doctoral Student, Environmental Engineering, NCSU 1995–1999
- Senior Staff Engineer, Nuclear Design and Power Supply, Virginia Power 1977–1994

RELEVANT FIELD DEPLOYMENT PROJECTS

- City of Newberry - Water 2.1K, Electric 1.9K, AMI deployment (Quanta Technology)
- City of Clewiston - Water 4K, Electric 4K, AMI deployment (Quanta Technology)
- City of Tallahassee - Water 87K, Electric 113K, Gas 24K, AMI deployment (Honeywell)
- City of Fort Collins - Water 31K, Electric 68K, AMI deployment (Honeywell)
- Kansas City BPU - Water 54K, Electric 67K, AMI deployment (Honeywell)
- Peterborough - Water 22K, Electric 37K, AMI deployment (Honeywell)

EDUCATION

- PhD, Environmental Engineering, North Carolina State University, 1999
- MS, Environmental Engineering, North Carolina State University, 1996
- BS, Nuclear Engineering, North Carolina State University, 1977

HARRIS GLOVER

HARRIS GLOVER, EXECUTIVE ADVISOR, Manager, has over 30 years of professional experience with increasing organizational responsibility in IT systems, metering systems associated with IT enterprises, and advanced metering infrastructure (AMI) smart-grid solutions for some of the largest U.S. and international utilities. This experience includes over 20 years of software development and 15 years in the AMI industry with Honeywell (formerly Elster Solutions and ABB), Itron Inc., and Landis+Gyr. With Quanta Technology, he is responsible for the project execution of AMI solutions in Puerto Rico and other ongoing AMI consulting projects.

EXECUTIVE ADVISOR

AREAS OF EXPERTISE

- Project and program management
- Advanced metering infrastructure
- Smart metering
- Meter data management systems
- GIS system application
- Utility operations
- Smart cities
- Industrial internet of things (IIoT)
- Software development and methodologies

EXPERIENCE AND BACKGROUND

- Years of experience in the electric power industry 1999–2000, 2008–Present
- Executive Advisor and Manager, Quanta Technology 2021–Present
- Program Director, Services Delivery, Northeast, Landis+Gyr 2018–2021
- Program Manager, Solution Delivery, Itron 2017–2018
- Director, Connected Home, and IOT, Honeywell Home and Bldg. Tech., Honeywell 2015–2017
- Vice President, Product Management, Americas, Elster Solutions 2008–2015

EDUCATION

- BBA, Management and Management Information Systems, Valdosta State University, GA, 1986

DAVID UY, PE

DAVID UY, PE, ADVISOR, is an accomplished engineer with expertise in designing and developing customer-focused solutions using customer requirements, system specifications, test and field data, and root cause analysis. He has expertise in developing, producing, and supporting power system protection, automation, energy measurement, and control products. David is also adept at managing projects and deploying efficient customer solutions.

ADVISOR

AREAS OF EXPERTISE

- Advanced metering infrastructure (AMI)
- Advanced meter reading (AMR)
- ANSI C12.18/21/22, DNP 3.0, Modbus, TCP/IP
- Power system protection
- Process management
- Data analysis
- Root cause analysis
- Project management
- Testing

EXPERIENCE AND BACKGROUND

- Years of experience in the electric power industry 1995–Present
- Senior Engineer (Associate), Quanta Technology 2020–Present
- Sr. Advanced Embedded Engineer, Honeywell International 2016–2019
- Principal Engineer, Elster Solutions 2001–2016
- Senior R&D Engineer, ABB Electric Systems Technology Institute 1997–2001
- R&D Engineer, ABB Transmission Technology Institute 1995–1997

SELECT INDUSTRY ACCOMPLISHMENTS AND RECOGNITION

- Licensed Professional Engineer, North Carolina (No. 027004)
- Member, IEEE, 1983¬Present
- Seven patents (four in AMI and three in distribution system protection and monitoring)

EDUCATION

- MS, Electrical Engineering (Power System Reliability), Missouri University of Science and Technology (University of Missouri-Rolla), 1991
- BS, Electrical Engineering, Michigan Technological University, 1988

RICK GARVIN, PMP

SENIOR ADVISOR

RICK GARVIN, SENIOR ADVISOR, has over 35 years of professional experience spanning the utility and telecommunications industries and over 15 years of project management experience. Rick has notable success with software, products, and integrated solutions directly supporting customer needs and business objectives. His utility experience includes over ten years of advanced metering infrastructure (AMI) deployments with Honeywell (formerly Elster Solutions and ABB), where he led and managed deployment projects across a broad customer base, including municipalities, cooperatives, and IOUs in North America. He holds a bachelor's degree in electrical engineering from Virginia Tech and has been a certified Project Management Professional for over ten years.

AREAS OF EXPERTISE

- AMI electric, water, and gas system deployments
- Project management planning, communications, governance, risk analysis/management, cost control
- Designing and implementing software, product, and integrated solutions

EXPERIENCE AND BACKGROUND

- Years of experience in the utility industry 2013–Present
- Senior Advisor, Quanta Technology 2023–Present
- Senior Program and Project Manager, Honeywell/Elster Solutions 2016–2023
- Senior Project Manager, Customer Delivery, Elster Solutions 2013–2016
- Years of experience in the telecommunications industry 1988–2013
- Hosted Solutions Planner & Systems Engineer, Nortel/Avaya 2008–2013
- Senior Software Designer, Architect and Lab Manager, Nortel 1996–2008
- Software Designer North America, Bell Northern Research 1993–1996
- Member of Scientific Staff, Northern Telecom 1988–1993

RELEVANT FIELD DEPLOYMENT PROJECTS

- Entergy - Electric 3M, Gas 200K, AMI deployment (Honeywell)
- Orlando Utilities Commission - Water 145K, Electric 230K, AMI, and AMR deployment (Honeywell)
- Ross County Water Company - Water 14K, AMR deployment (Honeywell)
- Brookings Municipal Utility - Water 7.8K, Electric 10K, AMR deployment (Honeywell)
- Barron Light and Water - Water 1.3K, Electric 1.8K, AMR deployment (Honeywell)

ACCOMPLISHMENTS AND INDUSTRY RECOGNITION

- Certified Project Management Professional (PMP), 2013–Present
- Commonwealth of Virginia Board Certified Engineering Intern, 1988

EDUCATION

- BS, Electrical Engineering, Virginia Polytechnic Institute and State University, 1988
- Pre-engineering, Electrical Engineering, and Computer Science, West Virginia University at Parkersburg

DAVID G. HART, PHD

EXECUTIVE ADVISOR

DAVID G. HART, PHD, EXECUTIVE ADVISOR, Senior Vice President, has over 30 years of experience in the power industry, including protection and control, power system automation, smart metering, and AMI systems. Before his work at Quanta Technology, he developed numerous protection and control products. David held senior management positions at ABB, where he developed AMI-related products and systems. At Elster, he was responsible for AMI engineering, product management, and quality organizations. At Quanta Technology, David and his team provide consulting support to utilities on AMI systems, feeder automation, coordination studies, IEC 61850, and advanced protection applications. As the direct head of Protection & Control, he guides the overall business strategy, client and program proposals, and project execution. David holds a doctorate in electrical engineering from Clemson University and is a senior member of IEEE/PES. His work has earned significant recognition throughout his career, including over 30 technical patents and numerous published articles.

AREAS OF EXPERTISE

- Protection and control
- Substation automation
- Feeder automation
- Advanced metering infrastructure/smart metering

EXPERIENCE AND BACKGROUND

- Years of experience in the electric power industry 1992–Present
- Senior Vice President and Executive Advisor, Quanta Technology 2015–Present
- Vice President, Automation Solutions, ABB 2014–2015
- Executive Director Solutions, ABB 2013–2014
- Senior Vice President Solutions (PM, Engineering, Quality, Support), Elster Electricity 2006–2013
- Vice President of Engineering and Quality, Elster Electricity 2001–2006
- Automation Program Manager, ABB 1999–2001
- Automation Technology Center Manager, ABB 1997–1999
- Technology Team Leader, ABB 1996–1997

SELECT INDUSTRY ACCOMPLISHMENTS AND RECOGNITION

- ABB Achievement Award
- Numerous technical disclosures in metering, power system protection, control, and automation
- Numerous patents issued
- Numerous industry publications
- Senior Member, IEEE PES

EDUCATION

- PhD, Electrical Engineering (Power Systems), Clemson University, 1991
- MS, Electrical Engineering (Power Systems), Clemson University, 1987
- BS, Mathematics and Physics, Wofford College, 1985

3 Proposed Pricing

Quanta Technology offers the scope of work and the project team described in this proposal on a T&M basis, contracted via FMPA with the total contract value being a not to exceed amount . All associated travel is billed separately on a cost basis with no markup. Travel estimates are detailed in Section 3.1.

The project price is calculated based on the scope of work and the assumptions outlined in this proposal. Services are offered on a T&M basis and are billed monthly along with travel as incurred all net 30 days. The quotation excludes taxes, which are the customer's sole responsibility.

Table 3-1. Proposed Services

PHASE	PROPOSED ITEM	EST. HOURS / TRIPS	AMOUNT
1	**Contract Development Support**: • Project startup and knowledge transfer • Draft contract development • Contract negotiation support • Leading and coordinating contracting effort	86	$28,162
	Travel (at Cost) Contract Development/Negotiation Travel	2 trips	$1,290
		Phase 1 Subtotal	**$29,452**
2	**Project Management Support:** • Project Management support functions (oversight over Vendor Program Prime, lead for Mount Dora team) • System Test Fixture Development support • System Integration and FSAT Support • Limited Deployment Support • Mass Deployment Preparation • Field Deployment/Commissioning Support • Support for invoicing and data transfers during deployment • Project Closure	367	$114,137
	Meter Configuration Support: • Review of all electric meter configuration files for Sensus and Aclara meters (all forms) • Review of water programming parameters	8	$2,960
	Travel (at Cost) Contract Development/Negotiation Travel	6 trips	$6,300
		Phase 2 Subtotal	**$123,397**
		Grand Total	**$152,849**

3.1 Labor Rates

This proposal is based upon the contracted FMPA rates shown below:

ROLE	FMPA RATE / HR
Executive Advisor	$370
Principal Advisor	$311
Senior Advisor	$265
Advisor	$222

3.2 Task Breakdown

The proposed scope of work is broken down by task as followed:

TASK	RESOURCE	HOURS
Contract Negotiation Support	Bob Dumas – Executive Advisor	24
	Jesus Gonzalez – Principal Advisor	62
Project Management Support	Jesus Gonzalez – Principal Advisor	367

3.3 Travel Breakdown

Travel, lodging, and materials will be billed at cost with no markup. Typical travel trips required to support the proposed services (Table 3-1) are shown below. All other travel tied to provided services will be rendered as the project requires and billable at cost.

Table 3-2. Proposed Travel Expense Cost Estimate

ITEM	TRIPS	DAYS	STAFF	COST ESTIMATE
Contract Negotiation	2	1	1	$1,290
Vendor Kickoff Meeting	1	2	1	$915
Integration FSAT Testing	1	3	1	$1,185
Start of Mass Deployment	1	4	1	$1,455
Additional Travel During Deployment	3	2	2	$2,745
			Total	**$7,590**

3.4 Assumptions

The following assumptions have been made in developing the cost and schedule for this proposal.

Table 3-3. Assumptions

ITEM	ASSUMPTIONS
General	
1	There is a fixed start date within 14 days of contract signing.
2	If the project scope or duration changes, we will work with the Mount Dora team to assess impacts and work through a documented change order process accordingly.
3	Additional travel beyond what is included must be mutually agreed upon and approved and is charged at cost with no markup.
4	Mount Dora will designate support personnel to address and approve routine inquiries that may arise during the project.
5	Contract development/negotiation hours depend highly on the responsiveness and effectiveness of the vendor's deployment and contracting teams. Quanta Technology has estimated 86 hours of advisement, which is typically deemed sufficient for comparable projects but estimated without knowledge of proposed vendor RFP responses. Should additional hours be required, we will work with the Mount Dora team to add hours to the project budget at our contracted FMPA rates.
6	The vendor will provide an overall deployment project manager responsible for implementing the solution.
7	Project management support hours are highly dependent on the effectiveness of the vendor's project manager, the oversight of the vendor's PM function, and schedule variances associated with the project. Quanta Technology has estimated a total of 367 hours of Project Management Support. This is based on a typical 12-month deployment interval for a project of similar scope (6 months integration/deployment prep, 5 months mass deployment, 1 month final acceptance/closure). Should additional hours be required, we will work with the Mount Dora team to add hours to the project budget at our contracted FMPA rates.

3.5 Terms and Conditions

Quanta Technology proposes to perform the work described in this proposal at agreed labor rates under the existing FMPA/Quanta Technology Master Services Agreement dated August 23, 2017. The work will be managed, and approved independently by proposed phase (Phase 1 Contract Negotiation, Phase 2 Project Management Support).

This offer is valid for 90 days from the date of issue. For information about offer extensions, contact Jesus Gonzalez at jgonzalez@Quanta-Technology.com or 919.428.9332.

4 References/Past Projects

4.1 City of Newberry, Florida—Phases 1 and 2: AMI Requirements And Business Readiness, Vendor Selection, and Phase 3: AMI System Implementation

Phases 1 and 2: 2019-2021; Phase 3: 2021-2023

Customer Name: Mike New, City Manager
Address: 25440 W. Newberry Rd, Newberry, FL 32669
Email: MNew@NewberryFL.gov
Phone Number: (352) 472-2161
Fax Number: (352) 472-7026

Project Value Drivers: Community involvement, improved customer service

Project Profile: 2.1K water endpoints, 1.9K electric endpoints, water-only areas, Sensus solution, ADG billing system

Project Costs, Change Orders, Amendments, and Final Costs: Confidential

Scope of Services: Phase 1—AMI Requirements and Business Readiness: Quanta Technology provided business readiness and gap analysis, assessment of AMI readiness, business process mappings, AMI priorities, cost-benefit analysis, system requirement definition, RFP development, vendor pre-qualification, and project stakeholder/City Council presentations.

Phase 2—Vendor Selection: Quanta Technology provided support for vendor selection and procurement, including RFP issuance, Vendor Q/A support, bidder response compliance reviews, vendor scoring/ranking, final vendor recommendation, contract development/negotiation support, and project stakeholder/City Council presentations.

Phase 3–AMI System Implementation: This is currently fully deployed. Quanta Technology provided the following services:

- System test fixture setup/oversight for system integration testing
- Oversight for SOW development with integrating systems
- Functional system acceptance test (FSAT) development and execution
- System Integration
- Community outreach, including the AMI Day event
- Field deployment readiness planning and preparation
- Final project closure

The project also measures system boundaries in preparation for conducting an AWWA water balance to categorize non-revenue water losses.

Testimonial: *Like most small cities that operate utilities, Newberry's elected officials are very much in tune with the sentiments of our customer base. Our staff presented the concept of automated metering infrastructure to our city commission as a means to address some deficiencies in meter reading. The city commission quickly realized the value in providing daily and hourly utility consumption data to our customers, and the opportunities it would provide in making decisions related to utility consumption. The commission directed staff to initiate a project to implement AMI technology in Newberry. Our team recognized the complexity of deploying AMI, and while all are experts in their area of operation, they wisely recommended that we partner with a third-party consultant to make sure we realized the benefit of a consultant's experience. We selected Quanta Technology after a thorough evaluation of several firms. Their expertise and experience in successful AMI deployment projects was key to their selection as our project partner.* **– Mike New, City Manager**

4.2 City of Clewiston, Florida—Phases 1 and 2: AMI Requirements, Business Readiness, and Vendor Selection; Phase 3: AMI System Implementation

Phases 1 and 2: 2019-2021; Phase 3: 2021-2024

Customer Name: Lynne Mila, Assistant Utilities Director
Address: 115 W Ventura Ave., Clewiston, FL 33440
Email: lynne.mila@clewiston-fl.gov
Phone Number: (863) 983-1454 Ext. 306

Project Value Drivers: Non-revenue water loss reduction, customer pre-pay

Project Profile: 4.1 K water endpoints, 4.5 K electric endpoints, water-only areas, Sensus solution, Tyler CIS billing

Project Costs, Change Orders, Amendments, and Final Costs: Confidential

Scope of Services: Phase 1—AMI Requirements and Business Readiness: Quanta Technology provided business readiness and gap analysis, assessment of AMI readiness, business process mappings, AMI priorities, cost-benefit analysis, system requirement definition, RFP development, vendor pre-qualification, and project stakeholder/City Council presentations.

Phase 2—Vendor Selection: Quanta Technology provided support for vendor selection and procurement, including RFP issuance, vendor Q/A support, bidder response compliance reviews, vendor scoring/ranking, final vendor recommendation, contract development/negotiation support, and project stakeholder/City Council presentations.

Phase 3—AMI System Implementation: The project is currently in mass deployment cleanup and is nearing completion. Quanta Technology provided the following services:

- System test fixture setup and oversight to support system integration testing
- Oversight for SOW development with integrating systems
- Technical advisement/support during mass deployment
- Functional system acceptance test development
- System integration
- Mass deployment support, support for invoicing, data transfers/integrity, installation progress, field issues, vendor management

- **Testimonial:** *The City of Clewiston had been interested in updating its utility metering with an AMI system for some time to modernize our utility operations. Through Florida Municipal Power Association (FMPA), we were introduced to Quanta Technology who has been a very valuable resource to help the City navigate the complexities and cost associated with a procurement of this nature. Quanta's expertise and their professionalism has been extremely valuable in assisting Clewiston in the process. I am glad they will continue to be working closely with our team on the deployment of the much-anticipated AMI system in our community.* **– Randy Martin, Former City Manager**

4.3 New Smyrna Beach Utilities— Grid Modernization Strategy/Roadmap and Phase 1: AMI Requirements and Business Readiness; Phase 2: AMI Vendor Selection

Phase 1: 2019-2021; Phase 2: AMI Vendor Selection 2022-2023; Phase 3: System Implementation 2024-present

Customer Name: Efren Chavez, GM/CEO
Address: 200 Canal St, PO Box 100,
New Smyrna Beach, FL 32168
Email: echavez@nsbufl.com
Phone Number: (386) 424-3000

Project Value Drivers: Grid modernization, system operation improvements

Project Profile: 24K water endpoints, 30K electric endpoints, Sensus AMI solution, Cogsdale CIS system

Project Costs, Change Orders, Amendments, and Final Costs: Confidential

Scope of Services: Quanta Technology was hired in March 2019 to develop a grid modernization strategy and roadmap for NSBU. NSBU had recently defined its vision, mission, and value statement, which was used as the basis for the roadmap development. The roadmap was aimed at modernizing their planning and operating capabilities to enhance and strengthen grid operations and to prioritize infrastructure capital investment plans.

After the roadmap creation, Quanta Technology was hired to implement its AMI program, specifically Phase 1—AMI Requirements and Business Readiness. As part of that effort, Quanta Technology provided business readiness and gap analysis, assessment of AMI readiness, business process mappings, AMI priorities, cost-benefit analysis, system requirement definition, RFP development, vendor pre-qualification, and project stakeholder/City Council presentations.

Quanta Technology supported NSBU through the vendor selection and procurement process and provided the following services:

- RFP bid packet preparation and commercial term incorporation
- RFP issuance
- Vendor response compliance analysis
- Vendor selection
- Contract Negotiations
- City Council/stakeholder presentations
- Response to vendor questions
- Vendor presentations
- Compliance analysis
- Vendor ranking, recommendations
- Contract development and negotiations
- Project stakeholder/City Council presentations

The project is currently in system implementation, performing system integrations, where Quanta Technology will serve as NSBU's prime project manager for the entire project phase. Quanta Technology will support integrations, deployment readiness, mass deployment, and supplemental functions such as validation of invoicing and data transfers. The project is deploying full electric and limited water for testing and validation.

Testimonial: *Our utility saw a strategic benefit in working with Quanta to develop a coordinated Modernization Roadmap as part of a long-term plan to modernize core operational systems and technology. It is critical to appropriately select an order of these investments to maximize operation benefits and improve customer experience at an effective cost and in a planned manner.* **– Joe Bunch, Former GM/CEO**

4.4 City of Wauchula AMI Implementation Phase 1: Requirements and Readiness, Phase 2: AMI Vendor Selection

Phase 1: 2023-2024, Phase 2: 2024 - current

Customer Name: John M. Eason, Deputy City Manager
Address: 126 S. 7th Ave, Wauchula, Florida 33873
Email: jeason@cityofwauchula.com
Phone Number: (863) 773-3131

Project Value Drivers: Automated meter reading, operational improvements, non-revenue water loss reduction

Project Profile: 3K water, 3K electric endpoints, AMI solution TBD, Tyler Munis CIS system

Project Costs, Change Orders, Amendments, and Final Costs: Confidential

Scope of Services: Quanta Technology was hired in December 2023 to provide consulting services in support of the adoption of an AMI solution. Quanta Technology provides full project support from requirements definition, business process support, strategic roadmap creation, RFP technical specification and bid package, vendor selection, contracting, and implementation. Quanta Technology completed Phase 1 of the project, which provided the following services:

- Business process readiness workshops
- Process workflow mapping
- Field audit and findings presentation
- RFP technical specification
- Costing analysis/indicative pricing
- Bid package creation

Following Phase 1, Quanta Technology is currently supporting the City through the vendor selection and procurement process and providing the following services:

- RFP issuance
- Vendor response compliance analysis
- Vendor selection
- Contract Negotiations
- City Council/stakeholder presentations
- Response to vendor questions
- Vendor presentations
- Compliance analysis
- Vendor ranking, recommendations
- Contract development and negotiations
- Project stakeholder/City Council presentations

The project is currently seeking approval to commence contract negotiations shortly.

Testimonial: *The Quanta Technology team has embodied unparalleled professionalism and we (the City) have been impressed by their level of service and responsiveness. Their dedication is evident in their meticulous attention to detail, clear communications, and willingness to adapt to our needs. We are excited to move our Advanced Metering Infrastructure project forward with Quanta Technology.* – **John Eason, Deputy City Manager**

Jacob A. Williams
General Manager and Chief Executive Officer (CEO)

June 3, 2025

Mr. Vince Sandersfeld
City Manager
City of Mount Dora
510 N Baker St.
Mount Dora, FL 32757

RE: Mount Dora AMI Support - Phase II

Dear Mr. Sandersfeld:

This letter will confirm the agreement between the Florida Municipal Power Agency ("FMPA") and the City of Mount Dora ("Mount Dora") regarding Mount Dora's AMI Support – Phase II project.

FMPA has made arrangements with Quanta Technology, LLC ("Consultant") to assist Mount Dora with project management support for AMI deployment. Consultant will provide project management support for the following activities:

i. Serve as Mount Dora's Project Manager working with the Vendor's project manager in project planning, governance, risk management, action tracking and issue resolution. Work with Mount Dora City staff coordinating any internal activities in support of the project deployment.

ii. Support Mount Dora with any stakeholder or City Commission presentations associated with the AMI implementation.

iii. Provide support for invoice tracking and validation, data validation of mass meter swap and data imports as required to improve data quality.

iv. Meter Demonstration Board Delivery: Work with the Vendor to accept, set up and utilize the test fixture in support of Functional System Acceptance Test (FSAT).

v. Overseeing Creation of System Design Specification, FSAT and System Acceptance Test (SAT) documents including reviews, and acceptance of the document.

vi. System Integration and FSAT Support: Oversee system integration design, development, testing, and acceptance.

vii. AMI Deployment Readiness: Lead and work with the Vendor in deployment readiness activities utilizing the Consultant's readiness checklist.

viii. Support the initial pilot deployment in definition, execution, and acceptance.

ix. Support the ongoing field deployment by attending weekly progress calls, addressing issues, and providing oversight including tracking and reporting of all related field activities.

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x. Support final System Testing (SAT), and system acceptance.

xi. Support administrative project closure.

Additionally, Consultant will review and provide input to the meter configurations for both electric and water meters.

This project has a total, not to exceed cost of **one hundred twenty-three thousand three hundred and ninety-seven dollars ($123,397)** which includes estimated expenses for the project. Consultant shall not be required to furnish additional services or incur additional expenses without written authorization and additional funding from FMPA.

In April 2022, the FMPA Board of Directors adopted "Amended Guidelines for Development of Member Services" ("Guidelines"), which provide for allocation of FMPA staff time costs to an individual member in the event that significant staff time is expected to be provided to such individual member. In accord with these guidelines, FMPA has estimated its staff time associated with the support required for the work, and the estimated level of support falls below the 80-hour mark established by the Guidelines. Therefore, FMPA does not propose any direct charges to Mount Dora for staff labor or expenses associated with FMPA's support role.

FMPA staff will assist in coordinating with Consultant, however, Mount Dora is responsible for directing and monitoring Consultant's work. FMPA will pay Consultant's invoice, with approval from Mount Dora, and issue an invoice to Mount Dora for Consultant's billed hours plus Consultant's expenses. Mount Dora hereby agrees to pay the invoice from FMPA within 30 days of receipt.

To acknowledge your agreement with the terms of this letter, please sign below as indicated in the signature block and return a fully executed letter to me.

Sincerely,

_____

Jacob Williams
General Manager & CEO

ACCEPTED AND AGREED:

_____ _____

James Homich
Mayor
City of Mount Dora

Date

Florida Municipal Power Agency
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ATTACHMENT A

REQUEST FOR SERVICES QS-2025-08
Mount Dora AMI Implementation &
Metering Support

Pursuant to the terms and conditions of the Master Services Agreement executed and made effective as of the 13th day of March, 2025, by and between Florida Municipal Power Agency ("FMPA") and Quanta Technology, LLC ("Consultant"), FMPA hereby requests Consultant to perform the following services:

A. Project Scope of Services:

The following scope of services will be covered as part of the Mount Dora AMI Implementation & Metering Support project. Additional details are provided in the attached AMI Advanced Metering Project Support Proposal dated April 4, 2025.

B. Project Scope Summary:

Project Management Support:

The Consultant will provide Project Management support for the following activities using an experienced PMP-certified AMI project manager:

i. Serve as Mount Dora's Project Manager working with the Vendor's project manager in project planning, governance, risk management, action tracking and issue resolution. Work with Mount Dora City staff coordinating any internal activities in support of the project deployment.

ii. Support Mount Dora with any stakeholder or City Commission presentations associated with the AMI implementation.

iii. Provide support for invoice tracking and validation, data validation of mass meter swap and data imports as required to improve data quality.

iv. Meter Demonstration Board Delivery: Work with the Vendor to accept, set up and utilize the test fixture in support of Functional System Acceptance Test (FSAT).

v. Overseeing Creation of System Design Specification, FSAT and System Acceptance Test (SAT) documents including reviews, and acceptance of the document.

vi. System Integration and FSAT support: Oversee system integration design, development, testing, and acceptance.

vii. AMI Deployment Readiness: Lead and work with the Vendor in deployment readiness activities utilizing the Consultant's readiness checklist.

viii. Support the initial pilot deployment in definition, execution, and acceptance.

ix. Support the ongoing field deployment by attending weekly progress calls, addressing issues, and providing oversight including tracking and reporting of all related field activities.

x. Support final System Testing (SAT), and system acceptance.

xi. Support administrative project closure.

Meter Configuration Support:

Consultant will review and provide input to the meter configurations for both electric and water meters. The review will include all meter electric forms for both Sensus and Aclara meters as well as any reviews of water configurations associated with the SmartPoint or specific water meters (as applicable).

C. Travel:

A total of $6,300 (representing six trips) has been established for the project and included in the project budget. All travel is billed at cost with no markup. Additional travel can be arranged as needed and approved by the City along with any required funding if required.

D. Project Compensation:

The total charges for services to be provided under this Agreement will not exceed one hundred twenty three thousand three hundred and ninety seven dollars (**$123,397**) without obtaining the prior written authorization of FMPA. The Consultant shall not be required to furnish additional services or incur additional expenses without written authorization and additional funding from FMPA.

E. Project Specific Insurance Requirements (if any): None

F. Is this a Major Project? No

This Request for Services and the above-referenced Master Services Agreement constitute the complete understanding of the Parties with respect to the Services specified herein. Terms and conditions contained in purchase orders, work orders, or other documents issued by either Party with respect to the Services shall be of no force and effect.

IN WITNESS WHEREOF, the Parties have executed this Request for Services effective as of the _____day of June 2025.

FLORIDA MUNICIPAL POWER AGENCY		QUANTA TECHNOLOGY, LLC	
By:	_____	By:	_____
Name:	Jacob Williams	Name:	David G. Hart
Title:	General Manager & CEO	Title	VP - Protection, Control & Automation

510 N. Baker St.
Mount Dora, FL 32757
352-735-7126

DATE: **July 15, 2025**

TO: **Honorable Mayor and City Council Members**

FROM: **Vince Sandersfeld, City Manager**

SUBJECT: Request Adoption of **Resolution No. 2025-16**, Approving Maximum Millage Rate for Fiscal Year 2025-2026 Budget

Introduction:
This is a request for the City Council to adopt Resolution No. 2025-16, Maximum Millage Rate for the Fiscal Year 2025-2026 Budget.

Discussion:
In conjunction with the Notice of Proposed Property Taxes (TRIM Notice) pursuant to Section 200.069, F.S., the City Council must authorize the advertisement for the maximum millage rate for the upcoming budget year and to establish budget hearing dates in September.

The proposed maximum millage rate becomes the "ceiling" millage rate that the City Council may consider during the budget adoption process. While the Council may subsequently adopt a lower rate, it may not adopt a higher rate without re-notification and an additional public hearing as required by law. Setting the proposed millage rate at 6.6000 mills (same as FY2024-25) provides the City with flexibility as we continue to evaluate budgetary needs and priorities. This action does not finalize the millage rate; the final rate will be established following public hearings in accordance with the TRIM timetable.

The current (FY2024-2025) operating millage rate is $6.3000 per $1,000 assessed taxable value. The FY2025-26 gross taxable value for operating purposes (inclusive of new construction and annexations) is $2,168,798,290 as certified by the Lake County Property Appraiser. The rolled-back millage rate is 6.0523 per $1,000 assessed value, as calculated on form DR-420. The rolled-back millage rate is that rate which produces the same amount of taxes as levied in the prior year when calculated against the current year's tax base, exclusive of new construction. The proposed maximum millage rate of 6.6000 mills is 9.05% more than the calculated rolled-back millage rate.

The public hearings for millage and budget considerations would be as follows:

1st Public Hearing: Wednesday, September 3, 2025 (Special Meeting)
2nd Public Hearing: Tuesday, September 16, 2025

All public hearings will take place at 6:00PM in the City Hall Council Chamber located at 510 N. Baker Street, Mount Dora. 32757.

Budget Impact:
This establishes Maximum Millage for Fiscal Year 2025-2026 which will be budgeted based on the rate that the Council adopts for the TRIM Notice.

Strategic Impact:
Fiscal Sustainability

AUTHORITY
Mount Dora Code of Ordinance Part I Charter, Article V, Section 23(e) - Powers and Duties City Manager - *To prepare, submit, and administer the annual budget*

Recommendation:
City Council to adopt Resolution No. 2025-16, Maximum Millage Rate for Fiscal Year 2025-2026 Budget and the Upcoming Public Hearing dates, time and location.

Attachment(s):
1. ATTACHMENT #1 Mount_Dora_Max_Millage Flyer
2. Resolution 2025-16 - Maximum Millage Rate 2025-2026

Prepared by:	Matthew Dodson, Budget Officer	
Reviewed by:	Matthew Dodson, Budget Officer	Approved - 7/2/2025
	Steven Weber, Finance Director	Approved - 7/2/2025
	City Attorney,	Approved - 7/9/2025
	Jeanann Hand, City Clerk	Approved - 7/9/2025
	Vince Sandersfeld, City Manager	Final Approval - 7/9/2025

ATTACHMENT #1

City of Mount Dora

Understanding the Maximum Millage Rate

What Is the Maximum Millage Rate?

The maximum millage rate is not the final tax rate. It is the highest possible property tax rate the City may consider during the annual budget process. This step is required by Florida law (TRIM) to notify the public and preserve flexibility while the budget is finalized.

Why Does the City Set It Now?

- State law requires cities to submit a maximum rate to the Property Appraiser early in the budget cycle.
- This ensures residents are notified of the highest possible rate.
- Setting a maximum rate does not mean it will be adopted.

Can the Final Tax Rate Be Lower?

Yes! The City Council can-and often does-adopt a lower millage rate after reviewing budget needs and hearing public input. Once the maximum rate is set, it cannot go up without costly re-noticing and public hearings.

Why Is This Important for Residents?

- The City is committed to balancing services with fiscal responsibility.
- Setting the maximum rate keeps budget options open.
- The final tax rate is only adopted after public hearings in September.

We Want Your Input!

Attend the upcoming Public Budget Hearings:

- Wednesday, September 3, 2025 - First Hearing on Budget & Tentative Millage
- Tuesday, September 16, 2025 - Final Hearing and Budget Adoption

Location: Mount Dora City Hall - Council Chambers Board Rooom

Time: 6:00 p.m.

Questions?

Contact us at:

- Phone: 352-735-7120
- Web: www.mountdora.gov
- Email: dodsonm@mountdora.gov

RESOLUTION NO. 2025-16

A RESOLUTION OF THE CITY OF MOUNT DORA, FLORIDA PERTAINING TO THE PROPOSED MILLAGE RATE OF 6.6000 MILLS FOR FISCAL YEAR 2025-26 FOR THE CITY OF MOUNT DORA, FLORIDA; PROVIDING FOR THE PROPOSED LEVY OF AD VALOREM TAXES AND PERCENTAGE INCREASES FOR THE FISCAL YEAR BEGINNING OCTOBER 1, 2025 AND ENDING SEPTEMBER 30, 2026; PROVIDING A PUBLIC HEARING SCHEDULE FOR BUDGET ADOPTION; PROVIDING FOR CERTIFIED COPIES; PROVIDING FOR LEGISLATIVE FINDINGS AND INTENT; PROVIDING FOR THE IMPLEMENTATION OF ADMINISTRATIVE ACTIONS; PROVIDING FOR SCRIVENER'S ERRORS; PROVIDING FOR CONFLICTS; PROVIDING FOR SEVERABILITY; AND PROVIDING FOR AN EFFECTIVE DATE.

WHEREAS, Florida Statutes, Section 200.065, requires that the City of Mount Dora, Florida, adopt a resolution establishing the proposed millage rate to be levied for taxing entities for which the City of Mount Dora, Florida is the taxing authority; and

WHEREAS, Florida Statutes, Section 200.065, further requires that said resolution state the percentage, if any, by which the proposed millage rate exceeds the rolled back millage rate; and

WHEREAS, the Lake County Property Appraiser has certified the gross taxable value of property within the City of Mount Dora as $2,168,798,290 and has certified a rolled-back rate of 6.0523 per $1,000 of taxable value for the City of Mount Dora; and

WHEREAS, the City of Mount Dora, Florida, conducted a public hearing on Tuesday, July 15, 2025, to consider adoption of the proposed millage rate for fiscal year 2025-26, as required by Florida Statutes, Section 200.065; and

WHEREAS, the proposed millage rate to be levied by the City of Mount Dora for fiscal year 2025-26, together with the percentage increase of the proposed millage rate over the rolled back rate, as set forth below in Section 2 have been publicly announced; and

WHEREAS, following a review of the proposed budget as submitted, the City of Mount Dora, Florida, has determined that a millage rate of 6.6000 mills is necessary to produce the revenue needed to fund the fiscal year 2025-26 budget.

NOW, THEREFORE, BE IT RESOLVED BY THE CITY OF MOUNT DORA, FLORIDA, AS FOLLOWS:

SECTION 1. Legislative Findings and Intent. The City of Mount Dora has complied with all requirements and procedures of Florida law in processing this Resolution. The above recitals are hereby adopted.

SECTION 2. Proposed Levy of Ad Valorem Taxes and Percentage Increase. The City of Mount Dora, Florida, hereby proposes to levy the millage rates specified below and does hereby state the percentage, if any, by which the proposed millage rate exceeds the rolled back millage rate, as follows:

Taxing Entity	Proposed Millage Rate	Rolled Back Millage Rate	Percentage Increase Over/ (Under) the Rolled Back Rate
General Fund	6.6000 Mills	6.0523 Mills	9.05%

SECTION 3. Public Hearing Schedule for Budget Adoption. The public hearing schedule for adoption of the fiscal year 2025-26 budget is hereby set as follows:

Wednesday, September 3rd at 6:00 p.m.

Tuesday, September 16th at 6:00 p.m.

The above public hearings, where interested parties may appear and participate in the budget adoption process, will be held in the City of Mount Dora Council Chambers, 510 N. Baker Street, Mount Dora, Florida 32757.

SECTION 4. Certified Copies. Certified Copies of this Resolution shall be filed with the Property Appraiser and the Tax Collector of Lake County, Florida.

SECTION 5. Savings Clause. All prior actions of the City of Mount Dora pertaining to the adoption of the proposed millage rate for the fiscal year 2025-26 budget, as well as any and all matters relating thereto, are hereby ratified and affirmed consistent with the provisions of this Resolution.

SECTION 6. Scrivener's Errors. Typographical errors and other matters of a similar nature that do not affect the intent of this Resolution, as determined by the City Clerk and City Attorney, may be corrected.

SECTION 7. Conflicts. All Resolutions or parts of Resolutions in conflict with any of the provisions of this Resolution are hereby repealed.

SECTION 8. Severability. If any Section or portion of a Section of this Resolution proves to be invalid, unlawful, or unconstitutional, it shall not be held to invalidate or impair the validity, force, or effect of any other Section or part of this Resolution.

SECTION 9. Effective Date. This Resolution shall become effective immediately upon its passage and adoption.

PASSED AND ADOPTED this 15th day of July 2025.

_____

JAMES HOMICH
MAYOR of the City of Mount Dora, Florida

ATTEST:

_____

JEANANN HAND
CITY CLERK

For the use and reliance of City of Mount Dora only.
Approved as to form and legality.

_____

Patrick Brackins
City Attorney

510 N. Baker St.
Mount Dora, FL 32757
352-735-7126

DATE: **July 15, 2025**

TO: **Honorable Mayor and City Council Members**

FROM: **Vince Sandersfeld, City Manager**

SUBJECT: Request Adoption of **Resolution 2025-31,** Approving Budget Amendment

Introduction:
This is a request for the City Council to adopt Resolution No. 2025-31. This resolution amends the Water/Wastewater fund for the WWTP #2 Expansion project.

Discussion:
Budget amendments require City Council approval when revenue and/or expenditures are increased or decreased from the original approved budget. The City Manager and staff performed an extensive mid-year review of revenue and expenditure amounts for each fund and reviewed department operating needs.

The main items that are getting adjusted are:

Increasing budget amount for the WWTP #2 Expansion project by $1,384,970.

Budget Impact:
The FY 2024-25 budget will be increased by $2,769,940 and totals $220,537,064.

Strategic Impact:
Sustainability of Fiscal Resources is a priority of the City Council.

Recommendation:
City Council adopt Resolution No.2025-31, Approving a Budget Amendment for Fiscal Year 2024-25.

Attachment(s):
1. Reso No. 2025-31 Budget Adjustments FY 2024-25 - BA2

Prepared by:	Matthew Dodson, Budget Officer	
Reviewed by:	Matthew Dodson, Budget Officer	Approved - 6/30/2025
	Matthew Dodson, Budget Officer	Approved - 6/30/2025
	Jennifer Gates, Accounting Manager	Approved - 7/9/2025
	Steven Weber, Finance Director	Approved - 7/9/2025
	City Attorney, City Attorney	Approved - 7/9/2025
	Jeanann Hand, City Clerk	Approved - 7/9/2025
	Vince Sandersfeld, City Manager	Final Approval - 7/9/2025

RESOLUTION 2025-31

A RESOLUTION OF THE CITY OF MOUNT DORA, FLORIDA, PERTAINING TO BUDGET ADJUSTMENTS FOR FISCAL YEAR 2024-2025; PROVIDING FOR LEGISLATIVE FINDINGS AND INTENT; PROVIDING FOR APPROVAL OF 2024-2025 BUDGET ADJUSTMENTS; PROVIDING FOR RETROACTIVE AUTHORIZATION OF PROCUREMENT ACTIONS; PROVIDING FOR THE IMPLEMENTATION OF ADMINISTRATIVE ACTIONS; PROVIDING A SAVINGS CLAUSE; PROVIDING FOR SCRIVENER'S ERRORS; PROVIDING FOR CONFLICTS; PROVIDING FOR SEVERABILITY; AND PROVIDING AN EFFECTIVE DATE

WHEREAS, on September 17, 2024, the City of Mount Dora, adopted Resolution 2024-21, approving the City's total operating budget for Fiscal Year 2024-2025; and

WHEREAS, in order to recognize unanticipated revenues and expenditures, it is necessary to make further adjustments to the City's 2024-2025 operating budget.

NOW, THEREFORE, BE IT RESOLVED BY THE CITY OF MOUNT DORA, FLORIDA, AS FOLLOWS:

SECTION 1. Legislative Findings and Intent. The City of Mount Dora has complied with all requirements and procedures of Florida law in processing this Resolution. The above recitals are hereby adopted.

SECTION 2. Approval of 2024-2025 Budget Adjustments. The City's 2024-2025 Operating Budget is hereby adjusted as set forth in **Exhibit "A"** attached hereto. As applicable, the transfer of funds may be made from any legally acceptable source.

SECTION 3. Implementing Administrative Actions. The City Manager is hereby authorized and directed to take such action as may be deemed necessary and appropriate in order to implement the provisions of this Resolution. The City Manager may, as deemed appropriate, necessary and convenient, delegate the powers of implementation as herein set forth to such City employees as deemed effectual and prudent.

SECTION 4. Savings Clause. All prior actions of the City of Mount Dora pertaining to certain specified purchases and the mid-year amendment to the Fiscal Year 2024-2025 Budget, as well as any and all matters relating thereto, are hereby ratified and affirmed consistent with the provisions of this Resolution.

SECTION 5. Implementing Administrative Actions. The City Manager is hereby authorized and directed to take such action as may be deemed necessary and appropriate in order to implement the provisions of this Resolution. The City Manager may, as deemed appropriate,

necessary and convenient, delegate the powers of implementation as herein set forth to such City employees as deemed effectual and prudent.

SECTION 6. Scrivener's Errors. Typographical errors and other matters of a similar nature that do not affect the intent of this Resolution, as determined by the City Clerk and City Attorney, may be corrected.

SECTION 7. Conflicts. All Resolutions or parts of Resolutions in conflict with any of the provisions of this Resolution are hereby repealed.

SECTION 8. Severability. If any Section or portion of a Section of this Resolution proves to be invalid, unlawful, or unconstitutional, it shall not be held to invalidate or impair the validity, force, or effect of any other Section or part of this Resolution.

SECTION 9. Effective Date. This Resolution shall become effective immediately upon its passage and adoption.

PASSED AND ADOPTED this 15th day of July, 2025.

JAMES HOMICH
MAYOR of the City of Mount Dora, Florida

ATTEST:

JEANANN HAND
CITY CLERK

For the use and reliance of City of Mount Dora only.
Approved as to form and legal sufficiency.

Patrick Brackins
City Attorney

EXHIBIT "A"
Budget Adjustment Fiscal Year 2024-25

Exhibit "A" DETAIL FOR RES. 2025-31
STAFF RECOMMENDED ADJUSTMENTS

FUND	ACCOUNT DESCRIPTION	ADOPTED BUDGET	PROPOSED ADJUSTMENT	AMENDED BUDGET	Description
		422 - WASTE WATER IMPACT FEE FUND			
422-0000-389.10-01	ESTIMATED CARRYOVER	3,312,076	1,384,970	4,697,046	Increase PO for Design/Engineering
	REVENUE TOTAL		**1,384,970**		
422-5555-581.04-25	TRANSFER TO W/WW CONTRUCTION	9,612,076	1,384,970	10,997,046	Increase PO for Design/Engineering
	EXPENDITURES TOTAL		**1,384,970**		
		425 - WATER CONSTRUCTION FUND			
425-0000-381.04-22	TRANSFER FROM WASTE WATER IMPACT	9,612,076	1,384,970	10,997,046	Increase PO for Design/Engineering
	REVENUE TOTAL		**1,384,970**		
425-5555-580.63-01-WI2504	WWTP #2 NEW MIRROR PLANT - EXPANSION	6,300,000	1,384,970	7,684,970	Increase PO for Design/Engineering
	EXPENDITURES TOTAL		**1,384,970**		

TOTAL ADJUSTMENT	**REVENUES**	**EXPENDITURES**	**VARIANCE**
	2,769,940	**2,769,940**	**-**

EXHIBIT "B"
Final Proposed Budget Fiscal Year
2024-25

Exhibit "B"

FINAL PROPOSED BUDGET FISCAL YEAR 2024 - 2025				
FUND	**Final Adopted 2024-41**	**Mid-Year Amendment Reso. 2025-13**	**Mid-Year Amendment Reso. 2025-31**	**Final**
001 - General Fund	$ 33,029,932	$ 796,170		$ 33,826,102
111 - Discretionary Sales Tax	$ 5,989,904	$ -		$ 5,989,904
117 - Community Redevelopment Agency	$ 3,134,847	$ -		$ 3,134,847
118 - Northeast Community Redevelopment Agency	$ 17,740,036	$ -		$ 17,740,036
123 - Building Division	$ 2,631,507	$ 621,355		$ 3,252,862
124 - Police Impact Fee	$ 303,565	$ -		$ 303,565
125 - Fire Impact Fee	$ 415,513	$ -		$ 415,513
126 - Library Impact Fee	$ 1,359,085	$ -		$ 1,359,085
127 - Parks Impact Fee	$ 3,173,647	$ (60,000)		$ 3,113,647
131 - Fire Assessment Fee	$ 4,938,017	$ 78,222		$ 5,016,239
150 - Cemetery	$ 205,407	$ (40,717)		$ 164,690
200 - Debt Service	$ 1,244,363	$ -		$ 1,244,363
310 - Capital Construction	$ 29,256,637	$ 601,649		$ 29,858,286
410 - Electric	$ 16,180,004	$ 520,001		$ 16,700,005
415 - Electric Construction	$ 5,261,392	$ 431,775		$ 5,693,167
421 - Water / Wastewater Utility	$ 21,090,061	$ (161,727)		$ 20,928,334
422 - Wastewater Impact Fee	$ 12,915,928	$ -	$ 1,384,970	$ 14,300,898
423 - Water Impact Fee	$ 3,239,504	$ (175,271)		$ 3,064,233
425 - Water / Wastewater Construction	$ 15,585,962	$ (861,955)	$ 1,384,970	$ 16,108,977
430 - Sanitation Utility	$ 3,473,307	$ -		$ 3,473,307
440 - Stormwater Utility	$ 4,014,747	$ -		$ 4,014,747
445 - Stormwater Construction	$ 2,648,020	$ 377,555		$ 3,025,575
500 - Public Work Warehouse	$ 22,287,266	$ (1,443,868)		$ 20,843,398
501 - Vehicle Replacement	$ 340,000	$ (308,000)		$ 32,000
510 - Self Insured Health	$ 5,716,654	$ -		$ 5,716,654
515 - Property & Casualty & Workers Compensation	$ 1,216,630			$ 1,216,630
Total City Wide Budget	217,391,935	375,189	2,769,940	220,537,064

510 N. Baker St.
Mount Dora, FL 32757
352-735-7126

DATE: **July 15, 2025**

TO: **Honorable Mayor and City Council Members**

FROM: **Vince Sandersfeld, City Manager**

SUBJECT: City Manager's Upcoming Conference Training Session - Acting City Manager from August 12, 2025, to August 15, 2025

Introduction:
This is a request for the City Council to approve City Manager Vince Sandersfeld's designation of acting city manager.

Discussion:
At the May 21, 2024, the regularly scheduled City Council meeting, action was taken to approve and authorize Mr. Steve Langley for future assignments as Acting City Manager. This letter is on file with the City Clerk's office. There is a conference continuing education session from August 12, 2025 to August 15, 2025, that I will be attending. The attached letter is a request to designate Steve Langley, Assistant City Manager, as acting city manager during these dates. This is notification of a temporary leave request for a conference.

Budget Impact:
N/A

Strategic Impact:
Strategic Initiative 5: Human Resources

Recommendation:
Temporary designation of Mr. Steve Langley as acting city manager from August 12, 2025, to August 15, 2025.

Attachment(s):
1. Designation of Acting City Manager7-15-2025 (signed)

Prepared by:	Vince Sandersfeld, City Manager	
Reviewed by:	Steve Langley, Assistant City Manager-Electric Utility Director	Approved - 7/7/2025
	Jeanann Hand, City Clerk	Approved - 7/7/2025
	Vince Sandersfeld, City Manager	Final Approval - 7/7/2025

CITY OF MOUNT DORA
OFFICE OF THE CITY MANAGER

City Hall
510 N. Baker St.
Mount Dora, FL 32757

Office of the City Manager
352-735-7126
Fax: 352-383-4801

Customer Service
352-735-7105
Fax: 352-735-2892

Finance Department
352-735-7118
Fax: 352-735-1406

Human Resources
352-735-7106
Fax: 352-735-9457

Planning and Development
352-735-7112
Fax: 352-735-7191

City Hall Annex
900 N. Donnelly St.
Mount Dora, FL 32757

Parks and Recreation
352-735-7183
Fax: 352-735-3681

Public Safety Complex
1300 N. Donnelly St.
Mount Dora, FL 32757

Police Department
352-735-7130
Fax: 352-383-4623

Fire Department
352-735-7140
Fax: 352-383-0881

Public Works Complex
1501 Robie Ave.
Mount Dora, FL 32757
352-735-7151
Fax: 352-735-1539

W. T. Bland Public Library
1995 N. Donnelly St.
Mount Dora, FL 32757
352-735-7180
Fax: 352-735-0074

Website:
www.cityofmountdora.com

July 15, 2025

Honorable Mayor and City Councilmembers:

Article V, Section 24 of the City of Mount Dora Charter indicates that, "by letter of record filed with the city council, the city manager shall designate, subject to approval of the city council, a qualified city administrative officer or department head to exercise the powers and perform the duties of city manager during any temporary absence or disability of the city manager of not less than three (3), nor more than twenty-one (21), days duration."

At the May 21, 2024, regularly scheduled City Council meeting action was taken to approve and authorize Mr. Steve Langley for future assignments as Acting City Manager.

I hereby submit for your approval the designation of Mr. Steve Langley, Assistant City Manager, to exercise the powers and perform the duties of city manager from August 12, 2025 through August 15, 2025, as I'll be out of town for a conference training session these days.

Respectfully submitted,

Vince Sandersfeld
Vince Sandersfeld
City Manager

510 N. Baker St.
Mount Dora, FL 32757
352-735-7126

DATE: **July 15, 2025**

TO: **Honorable Mayor and City Council Members**

FROM: **Vince Sandersfeld, City Manager**

SUBJECT: Lobbyist Update

Introduction:
Gray Robinson, P.A. represents the City of Mount Dora during the 2025 Legislative process in Tallahassee, Florida. Their work includes identification of legislative priorities, formulation of strategy, research, communication with elected officials, and reporting the status of current work in progress.

Discussion:
Gray Robinson, P.A. supports the City of Mount Dora in respect to Legislative items and appropriations. Attached is the June 2025 Monthly Report.

Budget Impact:
Lobbyist Activities are funded in GL account 421-1910-536.31-11.

Strategic Impact:
The contract with Gray Robinson, P.A. allows for cooperation from State, County, and surrounding communities toward the Innovation District and future infrastructure through grants and legislative processes.

Recommendation:
Data provided is informational.

Attachment(s):
1. Mount Dora June 2025 Report

Prepared by: Jeanann Hand, City Clerk
Reviewed by: Vince Sandersfeld, City Manager Final Approval - 7/7/2025

June 30, 2025

City of Mount Dora
June Activity Report

Communications

- Legislative session and budget updates
- Correspondence with project sponsors regarding appropriations requests
- Correspondence with the Governor's Office of Policy & Budget regarding appropriations requests

Next Steps

- Continue providing Mount Dora with updates on relevant grant opportunities
- End of Legislative Session Report
- Begin planning for the 2026 Legislative Session
- Interim Committee Meetings start the week of October 6th

Ryan Matthews/Angela Drzewiecki