

**LOS ALAMOS COUNTY  
PROCUREMENT DIVISION**

101 Camino Entrada, Building 3, Los Alamos, New Mexico 87544

(505) 709-5503

Step 1 Advertised: **July 8, 2024**

Step 1 Closing Date: **August 6, 2024**

Non-Mandatory Virtual Pre-Proposal Conference: **July 16, 2024, 10:00 – 11:00 a.m. Mountain Time**

**Request for Proposals (“RFP”)**

**Step 1**

**RFP Number: 25-07**

**RFP Name: Utility Billing and Work Order Software**

**SPECIAL INFORMATION RELATED TO THIS RFP:**

1. **This is a Multi-Step RFP.** This RFP document comprises Step 1. A description of the process for this Multi-Step RFP is as follows:

1.1. **Step 1** - After Proposals are received in response to Step 1 of the RFP, the evaluation committee will conduct an evaluation of the responses, using the evaluation criteria set forth in this Step 1. During Step 1, County may, at County’s sole option, request clarification from any Offerors for the purpose of ensuring full understanding and conformation with the solicitation requirements and adjusting initial Step 1 scoring.

1.2. **Step 2** – Step 2 of the RFP will then be issued, limited to the finalist(s) Offeror(s) whose Proposals have been determined by the evaluation committee to be qualified under the criteria set forth in Step 1 and who may be determined to be reasonably likely to be selected for award. Step 2 is a discussion with those finalist(s) Offeror(s) for the purpose of clarification to ensure full understanding and conformation with the solicitation requirements, may be used to obtain best and final offers, and shall include demonstrations of Offeror(s) software. Step 2 discussions and demos will be scheduled at dates and times to be determined by County. Discussions and demos will be held via a virtual meeting format. County may prepare in advance and submit to Offerors questions for Offerors to answer at the time of the discussion or inform Offerors of specific software functionality on which they should focus during demos. After discussions and demos, the evaluation committee will evaluate finalist Offerors using the evaluation criteria set forth in Step 2 of the RFP. County reserves the right to modify Step 2 evaluation criteria prior to issuance of Step 2. More details about demonstration requirements are provided herein under the “Virtual Software Demonstrations” section.

2. **The following terms may be used interchangeably throughout the RFP:**

- “Offeror,” “Contractor,” and “Vendor”
- “Proposal,” “Response,” and “Submittal”
- “Software,” “Solution,” “System,”
- “Feature” and “Functionality”

**GENERAL INFORMATION**

1. Proposals in response to this RFP may be submitted either in paper form, in a sealed envelope, or electronically by email. Only one of the following submission methods is required:
2. **ELECTRONIC SUBMISSION:** Emails should be addressed to: [lacbid@lacnm.us](mailto:lacbid@lacnm.us). Subject line **must** contain the following information: **RESPONSE – RFP25-07 Utility Billing and Work Order Software.**

It is strongly recommended that a second, follow up email (without the proposal included or attached) be sent to Jaime Kephart, Contract Manager at [jaime.kephart@lacnm.us](mailto:jaime.kephart@lacnm.us) to confirm the Proposal was received.





The body of the email must contain enough information for the identity of the Proposer to be clear, including company name, name of person sending the email, and contact information including email address and phone number.

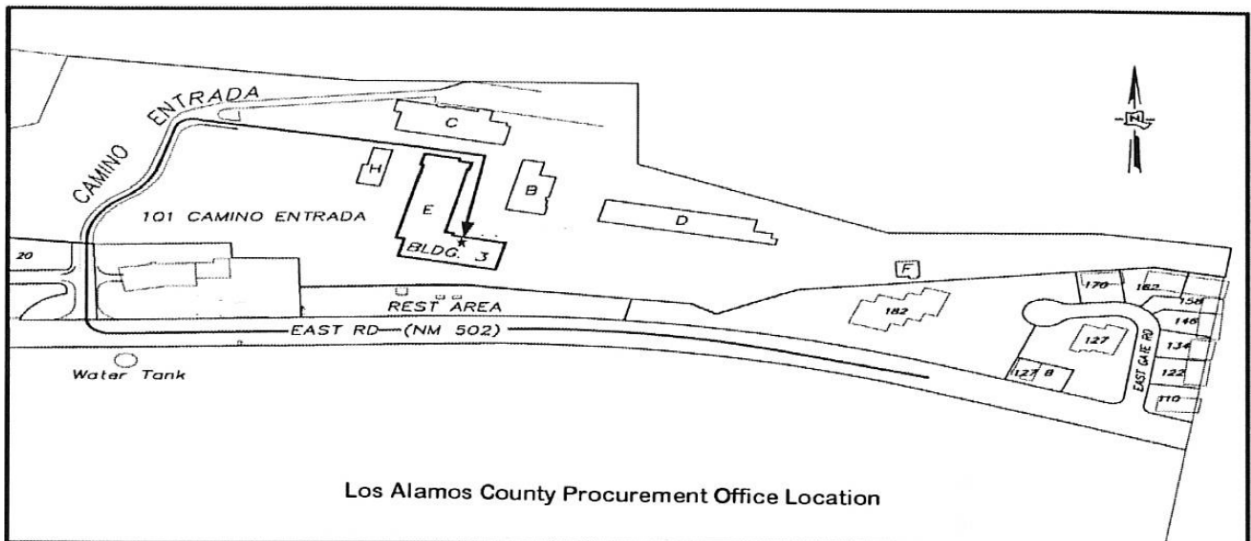
Only emails with proposals received in the [lacbid@lacnm.us](mailto:lacbid@lacnm.us) email box prior to **2:00 p.m. Mountain Time, August 6, 2024**, will be reviewed.

Proposals submitted by email will be opened only after the closing date and time stated in the solicitation document.

3. **PAPER FORM SUBMISSION:** Sealed proposals in one (1) clearly labeled unbound original, three (3) bound copies and one (1) USB flash drive or CD, will be accepted at the Office of the Chief Purchasing Officer, Procurement Division - 101 Camino Entrada, Building 3, Los Alamos, NM 87544, until **2:00 p.m. Mountain Time, August 6, 2024**, for this solicitation. **Clearly mark the RFP Number and Name and Offeror on the outside of the sealed proposal, including outer envelope and/or shipping label.** The USB flash drive or CD should be clearly identified. It is the responsibility of the Offeror to assure that the information submitted in both its written response and the electronic version are consistent and accurate. If there is a discrepancy between what is provided on the paper document and the USB flash drive or CD, the written paper response shall govern.

4. Directions to Procurement office:

-  1. Drive WEST on NM-502 to Los Alamos.
  - Camino Entrada (formerly known as Airport Basin) is 0.4 miles past East Gate Drive, just past East Entrance Park Rest Area.
-  2. Turn RIGHT on Camino Entrada.
  - Road slopes downhill and curves to the right.
-  3. Take second RIGHT into driveway through gated fence (before the stone sign "Pajarito Cliffs Site").
  - Follow the signs to Building 3, the L-shaped building in the center of the complex.
  - If you pass the Holiday Inn Express and the Airport, you've gone too far.
-  4. Enter glass door marked "PROCUREMENT." See map below.



5. The Incorporated County of Los Alamos (“County”) invites Proposals from all qualified respondents. No Proposal may be withdrawn after the scheduled closing time. Proposals will not be accepted after the scheduled closing time. **Please make note of the submittal requirements outlined in this solicitation.** Read and follow the instructions carefully. **Include the required documents provided in this RFP as part of your submittal packet.** Any misinterpretation or failure to comply with the submittal requirements could result in rejection of the proposal. Proposal preparation is at the Offeror’s expense.
6. Any change(s) to the solicitation will be conveyed through the written addenda process. Read carefully and follow all instructions provided on any addendum, as well as the instructions provided in the original solicitation.
7. Any questions must be received in writing at least five (5) days prior to the date fixed for when proposals are due.
8. County reserves the right, at its sole discretion, to accept or reject any proposals; to waive any and all irregularities in any or all statements or proposals; to request additional information from any or all respondents; and to award a contract to the responsible Offeror whose proposal is most beneficial to County. While County intends to execute a contract for the services listed herein, nothing in this document shall be interpreted as binding County to enter into a contract with any Offeror or Proposer.
9. Bids and Proposals are Public Records. Pursuant to the New Mexico Inspection of Public Records Act, NMSA 1978, Chapter 14, Article 2, all materials submitted under this RFP/IFB shall be presumed and considered public records. Except to the extent any information may be protected by state or federal law, proposals shall be considered public documents and available for review and copying by the public.
10. The County contemplates a multi-term contract as a result of this RFP. The term of the contract may be for a period of up to fifteen (15) years. This is the written determination of the Chief Purchasing Officer that: such a contract will serve the best interests of the County by promoting economies in County procurement.
11. Proposers are notified that they must propose pricing for each potential year of the contract.
12. Proposers/Offerors are informed that State law requires that all foreign corporations (NMSA 1978 §53-17-5) and limited liability corporations (NMSA 1978 §53-19-48) procure a certificate of authority to transact business in the state prior to transacting business in the state of New Mexico.
13. The Chief Purchasing Officer has determined a preference is applicable to this offer. A bidder or offeror must submit a written request for preference, with a copy of the state-issued preference certificate, with its proposal to qualify for this preference. Ref. County Code Section. 31-261(b) and Section 13-1-21 NMSA 1978 et al.
14. **A non-mandatory virtual Pre-Proposal Meeting will be held on July 16, 2024, 10:00 – 11:00 a.m. Mountain Time via a virtual meeting platform. Interested parties may attend the Pre-Proposal using the log-in information below.**

<https://tinyurl.com/rfp2507preproposal>

Meeting ID: 236 811 123 926

Passcode: nTqDTX

## CONTACT INFORMATION

To request documents or procurement process or project specific information, contact the following and include all contacts listed on all correspondence sent via e-mail:

1. Jaime Kephart, Contract Manager, at [jaime.kephart@lacnm.us](mailto:jaime.kephart@lacnm.us) or (505)709-5503
2. Karen Kendall, Project Manager/Deputy Utility Manager – Finance and Administration, at [karen.kendall@lacnm.us](mailto:karen.kendall@lacnm.us) .
3. Joann Gentry, Utilities Business Operations Manager, at [joann.gentry@lacnm.us](mailto:joann.gentry@lacnm.us) .

4. As an additional courtesy to interested parties, this RFP and related documents may also be downloaded from the County's website at <https://lacnm.com/bids>.

## NEED STATEMENT

The Incorporated County of Los Alamos ("County") Department of Public Utilities ("DPU") is seeking proposals from qualified service providers who provide utility billing and work order software solutions. Desired services and software functionality may include, but is not limited to, a fully hosted solution; utility billing for electric, gas, water, sewer, and refuse services; work order system for DPU field crew related to outages, meter change outs, meter testing, temporary service disconnections, meter reading validation, leak determination; refuse dumpster and trash bin inventory and billing; utility meter inventory; utility bill generation; and cashing functions.

## BACKGROUND AND INFORMATION RELATED TO THE SCOPE OF WORK

1. **General County Background Information.** The County is situated at the foot of the Jemez Mountains on the Pajarito Plateau with an elevation ranging from 6,200 feet to 9,200 feet. Two distinct communities, Los Alamos Town site and White Rock, each with its own visitor center, are home to ~18,000 people. Los Alamos is mostly known for the historic accomplishments of its largest employer, Los Alamos National Laboratory, and continues to gain notice for its vast scenic assets and recreational opportunities. Visit the Los Alamos County website ([www.losalamosnm.us](http://www.losalamosnm.us)) and the tourism website ([www.visit.losalamos.com](http://www.visit.losalamos.com)) for more information.
2. **About the DPU and Current Billing and Work Order Processes.**
  - 2.1. DPU is a department within the County providing citizens with electric, gas, water and sewer services. The County processes approximately 9,000 utility bills (an approximate average of 8,100 printed bills and 900 electronic bills) monthly on a four (4) cycle billing schedule for electric, gas, water, sewer, and refuse services. All services are included on one (1) monthly billing statement. The County currently utilizes the Tyler Munis Enterprise Resource Planning ("ERP") system for its utility billing, uses the Master's Touch for utility bill printing and mailing, and uses Paymentus for credit card or electronic bill payments received from customers in person or via the web. Customers can also mail or drop off payments to Enterprise Bank.
  - 2.2. Work orders are used to communicate with DPU's Electric Distribution, Gas/Water/Sewer field crews, and Meter Readers about meters, outages, disconnections, reconnections, meter change outs, new and old customer (move in/move out) locations and re-reads for billing or customer questions. Environmental Services uses the work order system to communicate delivery or pickup of refuse dumpster and trash bins.
  - 2.3. DPU has approximately 108 total employees, 9 customer Care Center Employees and expects that approximately 80 – 90 DPU employees will be utilizing the new software solution.

(This section intentionally left blank)

## SCOPE OF SERVICES (or WORK)

The successful Offeror (“Contractor”) will provide some or all the following services. All items necessary for the successful delivery of Services may not be included in the proposed Scope of Services herein. Offerors are expected to identify and highlight in their Proposal any deviations or modifications to the proposed Scope of Services that may be deemed necessary or might aid in successfully implementing and delivering Services.

### 1. Software Requirements.

- 1.1. **Licensing and/or Subscription.** Selected Offeror will provide for County a Software-as-a-Service (“SaaS”) Solution, or other XaaS type Solution such as a Platform as a Solution (“PaaS”) that is a cloud based and hosted Software program, developed, owned, and operated by Contractor (“System,” “Software,” or “Solution”) that complies with all federal, state, and local laws, rules, and regulations to provide utility billing and work order services. County’s preference is to implement a fully hosted Solution but may consider other types of Solutions. Offerors are asked to describe in their RFP response all related licensing or subscription information County will be asked to consider prior to utilizing the Services.
- 1.2. **Maintenance and Support Services and Service Level Agreement.**
  - 1.2.1. Contractor will use commercially reasonable efforts to make sure the Software is available with the uptime percentage proposed in Contractor’s RFP response. Offerors are asked to describe in their RFP response their Service Level Agreement (“SLA”), guaranteed uptime for their Software, describe any remedy or rebates should Offeror not meet the service commitment, and describe how such a remedy or rebate would be applied throughout the term of an agreement. Offerors may attach their SLA and reference said document here in lieu of describing it again here.
  - 1.2.2. Contractor will provide product maintenance and customer support throughout the term of an Agreement. Offerors are asked to describe in their RFP response all offered Software maintenance and support services and tools, including Software patches and updates, access to any available online libraries, issue reporting tools, toll-free numbers, hours of service, process for requesting after-hours support in case of emergencies, and the process for issue resolution and/or escalation. Descriptions of offered support should be separated between the support offered to different types of Users so that the level of support and methods for requesting support for each different type of User is clear and all support costs must be provided in Offeror’s cost Proposal in Exhibit H.
  - 1.2.3. Contractor will provide and adhere to a communication plan for communicating System upgrades and all other maintenance and service interruptions. Offerors are asked to describe this communication plan in their Proposals, which should include, but is not limited to the following:
    - 1.2.3.1. The methodology for testing and certifying upgrades and patches to ensure that they work properly and the mechanism of versioning rollback in case of issues;
    - 1.2.3.2. The process of applying upgrades and patches including if there are County responsibilities and a responsibility matrix for the tasks involved;
    - 1.2.3.3. A brief history of product upgrades and interim patches or fixes released in the last eighteen (18) months; and

1.2.3.4. Identification of the most current stable release and patch level, certified for support, for all Software and firmware and acknowledge that all Software and firmware will be installed to those levels.

1.3. **Warranty.** Contractor will, at a minimum, warrant that the Software will be without material defects for the term of an Agreement. If Software does not perform as warranted, Contractor will use reasonable efforts, consistent with industry standards to cure the material defects or provide County with a functional equivalent at no additional cost. Offerors are asked to describe in their RFP response their warranty for Software performance.

1.4. **Data Security and Ownership.** Offerors are asked to describe in detail in their RFP response how they provide data security and are asked to note any deviations or exceptions to the data security and ownership stated here in the Scope of Services.

1.4.1. At a minimum, Contractor will maintain adequate security and disaster recovery protocols. Contractor's Cloud Service Provider ("CSP") and data center, preferably in Government Cloud ("GCC"), will be located within the United States. Offerors are asked to describe the following in their Proposal:

1.4.1.1. How the Solution meets any applicable statutory requirements for data;

1.4.1.2. Security measures in place to protect the System and its data, including disaster recovery and continuity plans;

1.4.1.3. Information on hosted or cloud service provider's data center, including location and internet connectivity, and information security compliance;

1.4.1.4. Identify any encryption algorithms used; and

1.4.1.5. The policies that apply to and notification measures to be used in the event of a security breach;

1.4.2. All data that: (i) is owned by County; and (ii) uploaded into the Software will remain owned by County. County is responsible for the accuracy and legality of all such data and will represent and warrant the right to use and manage all data in connection with its use of the Software. Use of Contractor's Software confers no ownership rights to the Contractor and County materials and data may be used by the Contractor only as necessary to provide contracted Services.

1.4.3. Upon County's request Contractor will provide a data extract at any time in various formats including, but not limited to, comma separated value ("CSV") or Microsoft SQL Server ("MSSQL"). Offerors are asked to describe access to the County's data via Open Database Connectivity ("ODBC") or alternative method, and any limitations to that access. Affirm the ability to provide data to County within a forty-eight (48) hour window or describe Offeror's proposed timeframe.

1.4.4. Contractor will timely provide any other records requested by the County for response to Public Records Inspection requests under NMSA 1978, Chapter 14, Article 2. Offerors are asked to describe support provided for performing legal discovery on the System.

1.4.5. Upon termination of an Agreement, Contractor will provide all data to County in CSV or MSSQL format, or a different format agreed to by County. Contractor will then ensure destruction of any remaining County data in their System. Offerors are asked to describe the method(s) of turning over County data and providing a reader for that data upon termination of Services and describing how County's data

would be recovered should Contractor cease operations.

## **2. Software Functional Descriptions, Technical Specifications, and Integration with County Systems.**

### **2.1. Software Functional Descriptions and Technical Specifications.**

- 2.1.1. Contractor's Software will substantially conform to the functional descriptions and technical specifications proposed in Offeror's RFP response and agreed to by County.
- 2.1.2. Exhibit G describes County's Software functionality and technical specifications requested. County requests a complete and comprehensive list and description of all Software features and functionality currently offered that may be considered by County for inclusion in an Agreement with the selected Offeror, whether they are included as a standard part of the base Software subscription or offered optionally for free or optionally for purchase for an additional fee.
  - 2.1.2.1. Offerors are asked to describe in their RFP response, using Exhibit G additional and optional tools, features, and functionality *that are included* by Offeror as part of the base Software subscription pricing, which may not already be described in Exhibit G, and include the pricing in their cost proposal.
  - 2.1.2.2. Offerors are asked to describe in their RFP response, using Exhibit G any additional and optional, tools, features, and functionality offered *that are not included* by Offeror as part of the base Software subscription pricing, but may be purchased and included in an Agreement upon County request, and include pricing in their cost proposal.

### **2.2. System Users and Use.**

- 2.2.1. Authorized County users should, at a minimum, be able to access the Software via local personal computer (PC)-based internet browsers and the internet through secure internet connections and protocols. Software should have the ability to keep and maintain account usernames and passwords in a secure manner using industry standard encryption algorithms.
- 2.2.2. Offerors are asked to describe in their RFP response, using Exhibit G where requested how different types of users would be granted access to the Software and how many County users would be given access.

### **2.3. Integration with County Systems.** Offerors are asked to describe in detail in their RFP response, using Exhibit G, if and how their proposed Software can share data with all of the County Systems described therein and the integration process for any of the data requirements defined therein. Those systems are summarized below again for the convenience of Offerors. The exact manner in which systems integrate or data is shared between systems is to be determined based on methods proposed.

- 2.3.1. Tyler Munis
- 2.3.2. Sensus Analytics
- 2.3.3. Route Star
- 2.3.4. Paymentus
- 2.3.5. Enterprise Bank Lock Box
- 2.3.6. Single Sign On ("SSO") to County's MS Azure Active Directory

3. **County Technical Standards.** Software will conform to the applicable County requirements for Solutions as defined in the Los Alamos County Technology Standards provided in Exhibit E. Offerors are asked to affirm in their RFP response, using Exhibit E, that their proposed Software Solution is in conformance with the applicable requirements and to briefly describe how they meet the requirements, or describe alternate methods for how they meet applicable requirements. County may, at County's sole option, consider proposed Software Solutions that offer an alternate method for meeting applicable requirements.
4. **Compliance with Laws, Regulations, and Industry Standards and Audit Reports.** Contractor and Software will, throughout the term of an Agreement, comply with any and all applicable provisions of local, state, or federal law regulating such Software. Offerors are asked to describe in their RFP response their compliance with applicable laws, regulations, and industry standards and to describe any regulatory compliance related assistance Offeror may provide to County and any associated costs. **It is expected that Offerors have knowledge of all applicable industry standards, laws, and regulations and are able to fully describe how they comply.**
5. **Project Initiation Meeting.** Contractor will, within ten (10) business days from the Effective Date of an Agreement, or within a timeframe proposed in Offerors RFP response and agreed to by the County, schedule a Project Initiation Meeting with the County's Project Manager and designated County staff ("Project Team") at a date, time, and format to be agreed upon by both Parties. Offerors are asked to propose in their RFP response their process for scheduling and conducting a virtual Project Initiation Meeting, the length of the meeting, the materials Offeror would provide, any deliverables to be prepared in advance, and any additional topics to be addressed during the Project Initiation Meeting. As part of the Project Initiation Meeting, the Parties will, at a minimum, unless otherwise proposed by Offeror in their RFP response and agreed to by County:
  - 5.1. Establish a mutually agreed upon Project Schedule to accomplish key tasks with durations for each task conforming substantially to the Offeror's Proposed Project Plan and Schedule. The Project Plan and Schedule will include, at a minimum, due dates for deliverables, Project phases, and milestones.
  - 5.2. Review the scope of work and identify any Project issues to be addressed in the course of the Project.
  - 5.3. Establish communication protocols, meeting frequency, and meeting format, with meetings occurring online in a virtual format.
  - 5.4. Identify document format and data transfer methods between Contractor and Project Team related to the performance of the Agreement.
  - 5.5. Contractor will provide detailed and complete written documentation of this meeting and a Project Plan and Schedule to the County within ten (10) business days of the meeting. The Project Plan and Schedule will be subject to the County Project Manager review and approval and Project Implementation will commence only after the County approval of the Project Plan and Schedule, which may be adjusted throughout Project implementation upon mutual written agreement of both parties.

## 6. Project Management

- 6.1. Contractor will provide experienced, competent, and knowledgeable staff to provide Project management services for the successful implementation of the Software, which may include, but may not be limited to Project planning in coordination with the County's Project Manager; data transfer from County's current records, Project monitoring, control, and reporting; Project development and execution of tasks; scope management; risk management; and Project scheduling.



- 6.2. County and Contractor will designate in writing a primary contact (the "Project Manager") to represent each party to serve as a primary point of contact, to manage the overall implementation, and help coordinate personnel during the design, development, installation, training, and maintenance of the System.
- 6.3. County will not be liable for, and will not provide insurance for, any loss or damage incurred by Contractor or its employees, agents, contractors, or subcontractors or to equipment or property owned by Contractor, regardless of whether such losses are insured by Contractor.
- 6.4. Contractor will provide experienced, competent, and knowledgeable staff to successfully complete the implementation and any mutually agreeable Project Implementation Management Plan and Project Plan. In the event that any Contractor employee is found to be unacceptable to County, in County's reasonable discretion, Contractor will be given an opportunity to cure the deficiency upon notice thereof from County. In the event the deficiency persists, County may require removal of the employee. Contractor will provide a suitable replacement, acceptable to County in its reasonable discretion, as soon as reasonably possible. To the extent County delays in confirming Contractor's proposed replacement, Contractor will not be held liable for project delays that arise because of County's delay.
- 6.5. County acknowledges that Contractor assigned personnel may leave the project for reasons outside Contractor's control, such as resignation, medical leave, or similar absences. Contractor will use its best efforts to ensure the continuity of Contractor employees assigned to the County's implementation. Should Contractor remove or reassign its employees assigned to perform Services, Contractor will, a) provide reasonable advance notice to County, and b) assign alternate employees with equivalent or greater competence, knowledge, and experience to perform Services hereunder within a commercially reasonable timeframe. Contractor's failure to provide the continuity of Contractor employees will result in Contractor's sole responsibility for any delay and/or cost for such failure and may result in breach of an agreement.
- 6.6. Contractor's personnel and subcontractors, if any, will observe all applicable laws, rules and policies of County, while providing Services to County, working on County's premises, including working remotely on County systems.
- 6.7. Contractor will represent and warrant to County, with respect to the Services to be performed, that each of its employees assigned to perform those Services will have the proper skill, training, and background to be able to perform his or her assigned Service(s) in a competent and professional manner, and that all Services will be performed in accordance with the resulting Agreement.
- 6.8. County acknowledges that the implementation is a cooperative process requiring the time and resources of County personnel. County will, and will cause County personnel to, use all reasonable efforts to cooperate with and assist Contractor as may be reasonably required to timely implement the Products as mutually agreed Contractor will not be liable for County's failure(s) to comply with the foregoing commitment.

## **7. Project Implementation.**

- 7.1. The County's preference is to conduct all project implementation and training tasks remotely with Contractor.
- 7.2. The County's preference is that Offerors use a table or spreadsheet format or a critical path schedule generated from a project management software to provide this information in summarized form with a more detailed narrative provided separately to explain Offeror's

approach and methodology.

- 7.3. Project phases proposed should include, but should not be limited to, a phase for initial set-up, implementation, and training of a smaller group comprised of the County's Project Implementation Team, and a separate later phase to include user account set-up, rollout, and training to a larger group of County-wide system users and administrators, including users, and administrative staff. All training should be described in more detail as described in section 8 below.
- 7.4. Offerors are asked to state the estimated length of complete implementation for the County. Rather than using a specific start date, Offerors are asked to use "Upon the Effective Date of an Agreement" as their starting date and conclude with the conclusion of System testing and acceptance and a minimum "30-day System Reliability Testing Post Go Live" period to define the estimated length of time project phases or tasks may take to complete.
- 7.5. **Offerors should include in the proposed schedule a phase or task that includes coordination with the County's Project Manager, and Information Management staff, if necessary to perform any system integration or described herein, and specifically identified in Exhibit G.**
- 7.6. Offerors are asked to describe their methodology for developing Test Plans during implementation to ensure proper setup and functionality of all features prior to the County acceptance of each deliverable and prior to the County's overall System acceptance prior to Go Live. Describe the methodology for User Acceptance and Final Acceptance and describe any other processes that are employed for quality assurance. Include these phases or tasks in the proposed implementation strategy and schedule.
- 7.7. The proposed strategy, schedule, and naming conventions used in the narrative and proposed schedule should align clearly with the Project Management and Implementation costs and deliverables proposed in Exhibit H and clearly demonstrate costs associated with each task or phase of implementation.
- 7.8. Offerors are asked to describe their project change order process and controls during the implementation.
- 7.9. If proposing progress payments throughout Project implementation, Offerors should affirm their understanding that the County will only pay for services successfully provided and accepted as complete by the Project Manager, should describe their process for obtaining acceptance of completion by the Project Manager, and should describe at which stages or phases in the implementation payments would be requested by Offeror after deliverables or milestones are accepted by the County.
- 7.10. Offerors are asked to disclose if any national and regional user groups exist or if Offeror provides online forum access for users to meet and discuss the different ways in which the System can be implemented.

## 8. Training and Consulting.

- 8.1. Contractor will provide, upon County's request, training or consulting to County staff for the use of the Software. County's preference, though not a requirement, is that all costs for Offeror to provide any training is rolled into the license or subscription fees proposed and that Offeror's provide training as needed and requested by County at no additional cost to County. County may consider, but is under no obligation to accept, pricing for training and consulting that is charged separately from license or subscription fees. Offerors are asked to describe in detail in their RFP response, using Exhibit H Tab 05, all training and consulting Offeror may provide throughout the term of an Agreement, the length of the training, the format of the training (e.g., virtual or in-person), the cost per session, the total

number of attendees allowed, and specifically which training and consulting is included in Year 1 Project Management and Implementation Services and which training is available after conclusion of Project Implementation.

8.1.1. Year 1 Training during Project implementation should include, at a minimum:

8.1.1.1. Training sessions for the Project Team, and users, estimated to be approximately ninety (90) trainees, which County may, at County's sole discretion increase or decrease; and

8.1.1.2. Ongoing on demand training as needed for users and administrators.

8.1.2. Training after Project implementation, throughout the term of an agreement should include, at a minimum:

8.1.2.1. Contractor will provide training for major changes in functionality of the Software.

**9. Additional, Optional, and Future Functionality and Services.** For award of an agreement, County requires a not to-exceed ("NTE") amount for total compensation for the entire term of an agreement. In order to estimate the total NTE amount of a potential agreement, the County requests proposed pricing, a proposed pricing mechanism or pricing escalation mechanism, and process for additional, optional, and future functionality and services, which may include, but is not limited to tools, modules, apps, add-ons, or professional services not specifically named or requested herein. County's desire is for Offerors to propose all potential additional, optional, and future functionality and services and all associated fees for County's consideration.

9.1. Contractor may continually develop, alter, deliver, and provide to the County ongoing innovation to the Services in the form of new features, functionality, and efficiencies as long as the functionality of the Services and Licensed Software does not fall below the functionality requirements proposed and agreed to by County. Upon County request, and at County's sole discretion, Contractor will provide additional, optional, managed, and professional services as proposed and in accordance with fees proposed and agreed to by County.

9.2. **No-Cost Offerings.** Contractor, as part of the Service, throughout the term of an Agreement may offer *at no additional cost to the County*, additional, optional, and future functionality and services not specifically named herein or in the RFP response and may provide such free services upon County request.

9.2.1. For such free offerings and enhancements, Offerors are asked to describe in their RFP response their migration, customization, upgrade process, and change order process and controls for the addition of these additional, optional, and future functionality and services after completion of Project Implementation and initial System acceptance and how they would be made available to County.

9.3. **Offerings for a Fee.** Contractor, as part of the Service, throughout the term of an Agreement may offer additional, optional, and future functionality and services, not specifically named herein, *at an additional cost to the County*, provided sufficient information about the process for implementation, customization, upgrades, costs and pricing details are provided in the Offeror's RFP response and included in the awarded Agreement.

9.3.1. Offerors are asked to describe in their RFP response their migration, customization, upgrade process, and change order process and controls for the addition of additional, optional, and future functionality and services after completion of Project Implementation and initial System acceptance; how they

would be made available to County; and describe how they would be priced as they become available (e.g., on a per quote/per project basis).

- 9.3.2. Offerors should propose in their RFP response, using Exhibit H, their fees and hourly rates, for all applicable personnel types, that would be charged throughout the term of an Agreement to provide any future implementation or professional services County may require and request.

10. **Possible Future Replacement or Implementation of Integrated Systems.** If the County replaces or updates any of its systems named herein, throughout the term of an Agreement with the selected Offeror or implements other new software that must integrate with the Contractor's Software, Contractor will work with County to ensure integration between County's updated or new systems and Contractor's Software, if integration is possible, and will provide other implementation and project management services that may be necessary for integration. Offerors are asked to propose hourly rates, or some other type of fee structure, to provide such professional services throughout the term of an agreement, describe in detail their process for County to request such integration and project management services in the future, and describe in detail Offeror's process to provide such integration and project management services.

(This section intentionally left blank)

## ESTIMATED RFP PROCESS DATES

The estimated dates of the RFP process are strictly for informational purposes only, are tentatively planned as follows, and at County's discretion, may be subject to change without prior notification:

RFP Process	Estimated Dates
Advertise RFP	July 8, 2024
Non-Mandatory Pre-Proposal Meeting	July 16, 2024
Step 1 Date Proposals are Due	August 6, 2024
Step 1 Evaluation and Finalists Selected	August 6 – 27, 2024
Step 2 Issued	August 28, 2024
Step 2 Closes	September 12, 2024
Step 2 Demos, Evaluation, and Selection	September 13 – October 4, 2024
Contract Preparation and Review Period	October 4, 2024 – January 3, 2025
Board of Public Utilities Approval (required for agreements of \$100,000.00 or greater)	January 15, 2025
Award Contract/Council Approval (Council Approval required for agreements of \$300,000.00 or greater.)	January 28, 2025

## PROPOSAL REVIEW AND EVALUATION

Proposals shall be handled so as to prevent disclosure of the identity of any Offeror or the contents of any proposal to competing Offerors during the process of negotiation.

After the RFP has closed, Procurement Division staff prepares a register of proposals containing the name of each Offeror, the number of modifications received, if any, and a description sufficient to identify the item offered. The register of proposals is open to public inspection only after contract award. Procurement Division staff delivers the RFP submittals to the Evaluation Committee Chairperson. The Evaluation Committee reviews and evaluates the submittals. Interviews are only for the purpose of clarification, and may be used for adjusting the final score. Discussions may be conducted with responsible offerors who submit proposals determined to be reasonably likely to be selected for award for the purpose of clarification to ensure full understanding and conformation with solicitation requirements for the purpose of obtaining best and final offers.

For proposals that qualify for Preference, the following procedure will apply; the total evaluation score with or without the cost factor of each proposal received from a qualifying offeror shall be multiplied by 1.05. After application of the factor, the contract shall be awarded to the highest score. If one or more scores are equal, the same procedure shall be followed with respect to the next category of offerors listed, and the next, until an offer qualifies for award. The priority of categories of offers is as follows:(1) Local business; (2) Resident business.

The Evaluation Committee Chairperson forwards the final evaluation results to the Procurement Division. Award shall be made to the responsible Offeror whose proposal is determined in writing by the Evaluation Committee to be the most advantageous to the County, taking into consideration the evaluation criteria set forth in the solicitation.

## AWARD OF SOLICITATION

Following award of the solicitation by County Council, the successful Offeror will be required to execute a contract with County in accordance with the terms and conditions set forth in the Services Agreement, a sample of which is attached as Exhibit A. Offeror may identify any exception or other requirements to the terms and provisions in the Services Agreement, along with proposed alternative language addressing the exception; County, as a governmental entity is subject to certain laws and prohibitions and may, but is not required to, negotiate changes in contract terms and provisions, but will not agree to language that is in

violation of the law. The Services Agreement as finally agreed upon must be in form and content acceptable to County.

**OBLIGATIONS OF FEDERAL CONTRACTORS AND SUBCONTRACTORS; EQUAL OPPORTUNITY CLAUSES**

Contractors and Subcontractor shall abide by the requirements of 41 CFR §§ 60-1.4, 60- 300.5 and 60-741. These regulations prohibit discrimination against qualified individuals based on their status as protected veterans or individuals with disabilities, and prohibit discrimination against all individuals based on their race, color, religion, sex, sexual orientation, gender identity, or national origin. Moreover, these regulations require that covered prime contractors and subcontractors take affirmative action to employ and advance in employment individuals without regard to race, color, religion, sex, sexual orientation, gender identity, national origin, protected veteran status or disability.

Contractors and subcontractors agree to comply with all the provisions set forth in 29 CFR Part 471, Appendix A to Subpart A.

**ILLEGAL ACTS**

The Los Alamos County Procurement Code, Article 9, imposes remedies and penalties for its violation. In addition, New Mexico criminal statutes impose felony penalties for illegal bribes, gratuities, and kickbacks.

**CERTIFICATION FORM REGARDING DEBARMENT, SUSPENSION, AND OTHER RESPONSIBILITY MATTERS**

An Offeror is requested to complete the Certification Regarding Debarment, Suspension, and Other Responsibility Matters Form, attached as Exhibit B and submit with the proposal; if this exhibit is not included with the proposal, it must be provided prior to the evaluations of the received proposals, otherwise the Offeror's proposal will not be considered. This Form serves as a warrant of the Offeror's responsibility, and may not necessarily preclude the Offeror from consideration for award.

**CAMPAIGN CONTRIBUTION DISCLOSURE FORM**

A Campaign Contribution Disclosure Form is attached as Exhibit C. The Offeror is requested to complete and submit with the proposal. If Form is not submitted with the proposal, upon award, Contractor must submit this form, in accordance with Chapter 81 of the laws of 2006 of the State of New Mexico prior to County's obligation to pay for the Services.

**VERIFICATION OF AUTHORIZED OFFEROR**

A Verification of Authorized Offeror Form is attached as Exhibit D. The Offeror is requested to complete and submit with the proposal. This Form provides County with the name and information of the authorized Officer who can obligate the selected firm in providing the services to Los Alamos County.

(This section intentionally left blank)

## PROPOSAL FORMAT

1. Offerors should submit a Proposal to the County in the format described below. Information provided in the Proposal may be used in the contract between the successful Offeror and the County.
2. To facilitate the review process, County's preference, though not a requirement, is that Proposals be in 8.5X11 inch format, not including Exhibits or attachments; and general marketing materials should not exceed ten (10) pages of materials.
3. Unless otherwise specified herein, if submitted electronically, Proposal documents should be submitted in PDF format. Exhibit H – Cost Proposal should be submitted in MS Excel format.
4. Proposals should include, but need not be limited to, the Proposal Response Components (in addition to the Exhibits and attachments) as identified in the table below. For uniformity in the Proposal review process, please sequence Proposals as shown below using the same header names as below. Additional information may be included by Offerors in attachments, provided that Proposals include and address, in the sequence requested, the elements requested in the Proposal Format and Scope of Services.
5. **RFP responses should restate each section from the RFP Scope of Services**, as requested in the applicable Proposal Response Components below, to facilitate review and Evaluation and to affirm Offeror's understanding of County's expectations and the information requested in each section of the Scope of Services.
6. Proposal Response Components used to evaluate Proposals in the awarding of this contract are shown below under Proposal Evaluation Criteria. Per Section 9, General Information of this RFP, proposals are public records. Pursuant to the New Mexico Inspection of Public Records Act, NMSA 1978, Chapter 14, Article 2, all materials submitted under the RFP shall be presumed and are considered public records. **County declines to sign any non-disclosure agreements or confidentiality agreements submitted by potential Offerors prior to those Offerors submitting a response to this RFP or any part of the RFP.** Where Proposal Response Components requested below are also included in Evaluation Criteria, evaluation scores may reflect Offeror's inability to provide requested information and the County reserves the right to find any Offeror non-responsive or non-responsible based on the information provided in or excluded from Offeror's response.
7. Offerors are encouraged to attend the scheduled virtual pre-proposal meeting, instructions for which are described herein, and are expected to submit in writing, **PRIOR TO THE RFP CLOSING DATE**, any questions or requested clarification necessary for Offerors to provide a complete response with all Proposal Response Components and pricing included. Except when describing future unknown services, as requested in Section 9 of the Scope of Services, Offerors are asked to refrain from including in Proposals statements such as "more information available upon request," "pricing to be determined based on statement of work," "pricing to be determined based on County need," or other similar statements. If more information or clarification is needed from County for Offerors to provide all the Proposal Response Components requested and all pricing, Offerors may request such information **PRIOR TO RFP CLOSING** so that County can provide answers and clarification via Addenda to all potential Offerors. **If Offerors utilize new customer intake questionnaires or checklists to collect information necessary for successful Software implementation, they are encouraged to submit those to the County PRIOR TO RFP CLOSING, and the County will attempt to provide as much detail and information as possible via Addendum.** This should in no way be construed to conflict with County's right to hold interviews and discussions for clarification with Offerors as described herein under Proposal Review and Evaluation.

8. Responses to the RFP should include the following Proposal Response Components:

<b>Section Number</b>	<b>Section Title</b>	<b>Submission Information</b> (In addition to any other information requested in this RFP)
1	<b>Cover Sheet (One page only)</b>	<ol style="list-style-type: none"> <li>1. Provide the full legal name of the Contractor who will execute the contract, and the name, phone number, and e-mail address of the primary person responsible for responding to questions and communication related to the RFP.</li> <li>2. Reference the RFP number and name.</li> </ol>
2	<b>Cover Letter (One page only)</b>	<ol style="list-style-type: none"> <li>1. Size of company or organization.</li> <li>2. Length of time in business.</li> <li>3. Include qualifications and a narrative description of the characteristics that set the company apart such as unique examples of service or added value, and any recognition or endorsements received.</li> <li>4. Describe the company's financial growth history and viability.</li> </ol>
4	<b>Executive Summary (One page only)</b>	<ol style="list-style-type: none"> <li>1. Provide a clear, concise overview of the Proposal.</li> </ol>
5	<b>Proposed Staff Qualifications and Experience</b>	<ol style="list-style-type: none"> <li>1. Demonstrate knowledge, skills, and experience of all staff proposed to accomplish the work during Project Implementation and those required to adequately maintain the System after initial Project Implementation throughout the term of an agreement with the County.</li> <li>2. Detail background and experience of the individual to be assigned as the single point of contact for the Project.</li> <li>3. Provide a list of any subcontractors or third parties who will be used to provide any Services throughout the term of an agreement, describe Offeror's relationship with them, and briefly describe their qualifications and abilities to provide the Services.</li> <li>4. Provide the number of years Offeror has been providing the proposed Software.</li> </ol>
6	<b>Previous Client Implementation and References</b>	<ol style="list-style-type: none"> <li>1. Information provided in Proposals will be used for evaluation purposes. The County reserves the right to contact some or all the references to verify any information provided and to request that references provide additional information.</li> <li>2. If previous client reference information is confidential, you may state so, however, evaluation scores will reflect Offeror's inability to include requested reference information in the Proposal.</li> <li>3. Provide references for at least three projects completed in the last three years for similar work and implementation.</li> <li>4. References should include company name,</li> </ol>



Section Number	Section Title	<p style="text-align: center;"><b>Submission Information</b></p> (In addition to any other information requested in this RFP)
		<p>address, contact name, position, telephone number, and the period during which services were provided.</p> <p>5. Provide the start and end date of services and note if reference is still a current client.</p>
7	<p style="text-align: center;"><b>Software Requirements (Scope Section 1)</b></p>	<p>Demonstrated understanding of the requirements and ability to provide the requested services as described in the Scope of Services. Offerors should provide a clear narrative and provide any information specifically requested in the Scope of Services for each of the sections listed. <b>Restate the section from the Scope of Services when responding.</b></p> <ol style="list-style-type: none"> <li>1. Section 1.1. - Licensing and/or Subscription</li> <li>2. Section 1.2. – Maintenance and Support Services and SLA, including any additional governing documents referenced therein.</li> <li>3. Section 1.3 - Warranty</li> <li>4. Section 1.4. - Data Security and Ownership</li> </ol>
8	<p style="text-align: center;"><b>Software Functional Descriptions, Technical Specifications, and Integration with County Systems (Scope Section 2)</b></p>	<ol style="list-style-type: none"> <li>1. Demonstrated understanding of the technical requirements and ability to provide the requested services as described in the Scope of Services. Offerors should provide a brief summarized narrative to demonstrate their understanding of Section 2 of the Scope of Services. <b>Restate the section from the Scope of Services when responding.</b></li> <li>2. Describe in more detail, using Exhibit G, whether the proposed Software Solution provides the features and functionality requested. This document is also provided to Offerors as an MS Excel document to facilitate responses.</li> <li>3. If Offerors provide a demonstration or “sandbox” version of the proposed Software or offers an online demonstration or video library, describe how the County may obtain access during the evaluation period of this RFP. This is a preferred, but not a required component of the RFP response and is not a scored Evaluation Criteria. County declines to sign any non-disclosure agreements or confidentiality agreements prior to receiving access to a demonstration or “sandbox” version of proposed Software or online libraries to use during evaluation. County will provide names and e-mail addresses for all County Evaluation Committee members for the purpose of granting accounts and access.</li> </ol>

Section Number	Section Title	Submission Information  (In addition to any other information requested in this RFP)
9	<b>County Technical Standards (Scope Section 3)</b>	Using Exhibit E – County Technology Standards Requirements for On-Premise, Hybrid, or Cloud/Hosted Solutions, describe Offeror’s ability to conform to the applicable County requirements for hybrid or cloud-hosted Solutions. This document will also be provided to Offerors as an MS Word Document to facilitate responses.
9	<b>Compliance with Laws, Regulations, and Industry Standards and Audit Reports (Scope Section 4)</b>	Demonstrated understanding of the requirements and ability to provide the requested services as described in this section of the Scope of Services. Offerors should provide a clear narrative and provide any information specifically requested in the Scope of Services for each of the sections listed. <b>Restate the section from the Scope of Services when responding.</b>
10	<b>Proposed Project, Initiation, Management and Implementation Plan (Scope Sections 5 - 7)</b>	Demonstrate understanding of and ability to provide and conform to the requested Project Initiation, Management, and Implementation services as described in the Scope of Services. Offerors should provide a clear narrative, approach and methodology for Project Management and Implementation; provide a project schedule (tabular and with detailed narrative) with all estimated tasks, phases, deliverables, Project milestones, the County responsibilities, and any other pertinent Project Implementation steps clearly defined at each stage of implementation. <b>Restate the section from the Scope of Services when responding.</b>  <ol style="list-style-type: none"> <li>1. Section 5 – Project Initiation Meeting</li> <li>2. Section 6 – Project Management</li> <li>3. Section 7 – Project Implementation</li> <li>4. Include a typical work breakdown structure and responsibility matrix for the Project for both the Contractor and County.</li> <li>5. Identify specific skills and certifications required for County staff involved in the implementation.</li> </ol>
11	<b>Training and Consulting (Scope Section 8)</b>	Demonstrate understanding of and ability to provide and conform to the requested Training and Consulting services as described in the Scope of Services. <b>Restate the section from the Scope of Services when responding.</b>  <ol style="list-style-type: none"> <li>1. Offerors should provide a brief summarized narrative to demonstrate their understanding of Section 8 of the Scope of Services.</li> <li>2. Using Exhibit H Tab 05, provide the requested information for all training offered throughout the term of an agreement.</li> </ol>
12	<b>Additional, Optional, and</b>	Demonstrate understanding of this requirement by

Section Number	Section Title	<p style="text-align: center;"><b>Submission Information</b></p> <p>(In addition to any other information requested in this RFP)</p>
	<p style="text-align: center;"><b>Future Functionality and Services (Scope Sections 9 and 10)</b></p>	<p>providing the information requested in this Section. <b>Restate the section from the Scope of Services when responding.</b></p> <ol style="list-style-type: none"> <li>1. Section 9 – 9.1 - Affirm Offeror’s understanding of the requested information.</li> <li>2. Section 9.2 – Provide the requested information for No-Cost Offerings.</li> <li>3. Section 9.3 – Provide the requested information for Offerings for a Fee</li> <li>4. Section 10 - Possible Future Replacement or Implementation of Integrated Systems</li> </ol>
13	<p style="text-align: center;"><b>Exhibit H - Cost Proposal</b></p>	<ol style="list-style-type: none"> <li>1. Provide Total Costs Proposed for all years of an agreement using Exhibit H - Cost Proposal and the instructions provided herein on the Exhibit H coversheet.</li> </ol>
14	<p style="text-align: center;"><b>Submission of County’s Standard Sample Service Agreement with Deviations or Exceptions Noted or Acknowledgment of No Deviations or Exceptions.</b></p>	<ol style="list-style-type: none"> <li>1. Offeror should note any deviations or exceptions to Exhibit A in Offeror’s response. Provide the original language with the County’s standard terms and any suggested edits or acknowledge that Offeror has no deviations or exceptions. Offerors should note that the Confidential Information Disclosure Statement noted as “Exhibit X”, is an Exhibit to the Sample Services Agreement and should be included in Offeror’s review of the Sample Service Agreement.</li> <li>2. Offerors should provide with their Proposal any of their own standard contractual terms or provisions the County will be asked to consider if Offeror is selected for award. This may include, but is not limited to, such things as a sample Master Services Agreement or Licensing Agreement <b><u>and any additional governing documents referenced within those sample standard agreements.</u></b> Offerors should note if their own standard contractual terms or provisions conflict with those provisions provided in Exhibit A, and should provide any suggested edits to Exhibit A. <b><u>The County may consider, but is under no obligation to accept, any of Offeror’s contractual terms or provisions included in Offeror’s Proposal.</u></b></li> <li>3. County may, but is not required to, negotiate changes in contract terms and provisions. The Services Agreement as finally agreed upon must be in form and content acceptable to County.</li> </ol>
15	<p style="text-align: center;"><b>Valid Licenses, Permits, Trainings and Certifications</b></p>	<ol style="list-style-type: none"> <li>1. Offerors should describe all applicable pertinent licenses, permits, bonds, registrations and/or certificates they possess to carry out the Services required in the State of New Mexico. County reserves the right to independently verify any information</li> </ol>

Section Number	Section Title	Submission Information (In addition to any other information requested in this RFP)
		submitted in response to this Proposal Response Component.
16	<b>Additional Documents to Submit with Proposals</b>	<p>In addition to all other components requested in the Proposal Format and Scope of Services section, submitted Proposals should include, but may not be limited to the following:</p> <ol style="list-style-type: none"> <li>1. Exhibit B: Certification Regarding Debarment, Suspension, and other Responsibility Matters</li> <li>2. Exhibit C: Campaign Contribution Disclosure Form</li> <li>3. Exhibit D: Verification of Authorized Offeror</li> <li>4. Signed copies of any addenda issued.</li> <li>5. Exhibit F: Product Information</li> </ol>
17	<b>Virtual Software Demonstrations</b>	<p>As described in Virtual Software Demonstrations below, the County requests Software demonstrations.</p> <ol style="list-style-type: none"> <li>1. Offerors should acknowledge in their Proposals that they have read and understand the virtual Software demonstration requirements as stated herein.</li> <li>2. Offerors should acknowledge in their Proposals that they will be able to provide such virtual demonstrations.</li> <li>3. Offerors should acknowledge in their Proposals that the individuals specified in the Virtual Software Demonstrations section can be available at the demonstrations.</li> <li>4. Offerors should acknowledge in their Proposals that if, after initial review of Proposals, they are found to be non-responsive or non-responsible, or if after Step 1 evaluation they are not selected as finalists to move on to Step 2, they will not be scheduled to provide a demonstration.</li> </ol>

(This section intentionally left blank)

## EXHIBIT LIST

In addition to all other information and documents requested in this RFP, the following completed Exhibits should be returned with Offeror's Proposal. These Exhibits may already be referenced above in the Proposal Response Components but are restated here in this summarized list for the convenience of Offerors.

1. Exhibit A – Sample Services Agreement with any deviations or exceptions noted or a confirmation that Offeror proposes no deviations or exceptions and any copies of Offeror's own Master Services Agreement, License Agreement, or other terms and conditions Offeror would like County to consider.
2. Exhibit B – Certification regarding Debarment, Suspension, and Other Responsibility Matters
3. Exhibit C – Campaign Contribution Disclosure Form
4. Exhibit D – Verification of Authorized Offeror
5. Exhibit E – County Technology Standards Requirements for On-Premise, Hybrid, or Cloud/Hosted Solutions
6. Exhibit F – Product Information
7. Exhibit G – Software Functionality Matrix
8. Exhibit H – Cost Proposal

The following Exhibits are included for informational purposes.

1. Exhibit I – VFLEX File Specifications
2. Exhibit J – Sample Utility Bill
3. Exhibit K – Munis Property Lockbox Layout

## VIRTUAL SOFTWARE DEMONSTRATIONS FOR STEP 2 FINALISTS

1. Offerors who are determined to be reasonably likely to be selected for award under the criteria set forth in Step 1 ("Finalists") will be selected to move on to Step 2. Finalists are required to demonstrate their Software during a virtual demonstration via MS Teams, or other virtual format acceptable to County. The primary purpose of demonstrations is to evaluate *how* the Software can meet the required Software functionality and technical specifications as described in Offeror's Proposal.
2. The demonstration date, time, location, questions, and Software demonstration instructions will be coordinated with and e-mailed to all Offerors before the demonstration. County will release Step 2 to each Finalist via e-mail approximately one week in advance of scheduled demonstrations. Step 2 will include demonstration scripts which may include instructions and questions common to all Finalists and may also include questions specific to a Finalist for the purpose of clarification to ensure full understanding and conformation with solicitation requirements for the purpose of obtaining best and final offers.
3. Each demonstration will consist of up to four (4) hours for Offeror to demonstrate how the proposed Software provides the requested Software features and functionality as described in the demonstration script and one (1) hour for Evaluation Committee Member questions and answers.
4. The Offeror's team during demonstrations should include, but not be limited to, the following individuals unless otherwise proposed and accepted by County:
  - Person(s) who have detailed knowledge of all software functionality responsive to Exhibit G requirements.
  - Person(s) who are able to discuss helpdesk support functions and roles.
  - Person(s) who will answer committee member questions.
  - The person with primary responsibility and final authority for the project throughout the term of any potential Agreement.

**PROPOSAL EVALUATION CRITERIA FOR STEP 1:** As described and/or demonstrated in the RFP response.

<b>Number</b>	<b>Criteria</b>	<b>Max Points</b>
1	Software Requirements; Software Features and Functionality (Exhibit G); and Ability to Conform to County's Technical Standards (Exhibit E)	35
2	Ability to Provide the Scope of Services and overall suitability to County of Optional Services Proposed	20
3	Proposed Staff Qualifications; Experience; References; and Valid Licenses, Permits, Training and Certifications	10
4	Proposed Project Initiation, Management, and Implementation Plan	10
5	Cost Proposal	20
6	Ability to Provide Services and Pricing for a Full Fifteen (15) Year Agreement Term <ul style="list-style-type: none"> <li>• Fifteen (15) Years = 5 points</li> <li>• Seven (7) to Fourteen (14) = 3 points</li> <li>• Less than Seven (7) Years = 0 points</li> </ul>	5
<b>Total Points</b>		<b>100</b>

**PROPOSAL EVALUATION CRITERIA FOR STEP 2**

Proposal Evaluation Criteria for Step 2 will be finalized prior to issuance of Step 2 and will be included in the Step 2 RFP issued to Finalists whose Proposals have been determined by the evaluation committee to be qualified to move on to Step 2 under the evaluation criteria set forth in Step 1.

Exhibit A  
SAMPLE SERVICES AGREEMENT  
RFP NO: 25-07  
RFP Name: Utility Billing and Work Order Software

**\*Offerors should note any deviations or exceptions to Exhibit A in Offeror's response. Provide the original language with the County's standard terms and any suggested edits or acknowledge that Offeror has no deviations or exceptions.**

AGRXX-XX



**INCORPORATED COUNTY OF LOS ALAMOS  
SERVICES AGREEMENT**

This **SERVICES AGREEMENT** ("Agreement") is entered into by and between the **Incorporated County of Los Alamos**, an incorporated county of the State of New Mexico ("County"), and \_\_\_\_\_, a \_\_\_\_\_ corporation ("Contractor"), collectively (the "Parties"), to be effective for all purposes \_\_\_\_\_, 202X ("Effective Date"). *[Alternate: to be effective on the date of last signature. Depending on timing of Services this alternate may be appropriate. Preferred practice is to use a defined date. If project schedule is time sensitive, recommend using a defined date.]*

**WHEREAS, [FOP RFP'S]** -- the County Purchasing Officer determined in writing that the use of competitive sealed bidding was either not practical or not advantageous to County for procurement of the Services and County issued Request for Proposals No. 2X-XX ("RFP") on \_\_\_\_\_, requesting proposals for \_\_\_\_\_, as described in the RFP **[FOR SMALL PSA'S]** -- procurement of the Services was made in accordance with Los Alamos Procurement Code Sec. 31-103 Small Purchases. **[FOR SOLE SOURCE PROCUREMENTS]** -- the County Purchasing Officer determined in writing, after conducting a good faith review of available sources, that there is only one source for the Services *[Alternate: goods/construction]* **[FOR COOPERATIVE AGREEMENT PRICING]** Section 31-3(b)(4) of the County Code of Ordinances allows for procurement of goods, services, or construction items under existing contracts that are with a person that has a current contract, that was subject to competitive solicitation, with another government or agency thereof; and

**[FOR COOPERATIVE AGREEMENT PRICING]** -- **WHEREAS**, Contractor was awarded a *[type of agreement]* with *[agency]* on *[date]*, as a result of *[type of competitive solicitation, name and number]*; and

**[FOR COOPERATIVE AGREEMENT PRICING]** -- **WHEREAS**, County requested a quote from Contractor for *[services or goods requested]*, as provided for in the *[type of cooperative agreement]*, and Contractor provided a quote to County that complies with the pricing terms of the *[type of cooperative agreement]*; and

**[FOR RFP'S ONLY]** -- **WHEREAS**, Contractor timely responded to the RFP by submitting a response dated \_\_\_\_\_ ("Contractor's Response"); and

**[FOR RFP'S ONLY] -- WHEREAS**, based on the evaluation factors set out in the RFP, Contractor was the successful Offeror for the services listed in the RFP; and

**[FOR DPU CONTRACTS MORE THAN \$100,000.00] -- WHEREAS**, the Board of Public Utilities approved this Agreement at a public meeting held on \_\_\_\_\_; and

**[FOR CONTRACTS MORE THAN \$300,000.00] -- WHEREAS**, the County Council approved this Agreement at a public meeting held on \_\_\_\_\_; and

**WHEREAS**, Contractor shall provide the Services, as described below, to County.

**NOW, THEREFORE**, for and in consideration of the premises and the covenants contained herein, County and Contractor agree as follows:

**SECTION A. SERVICES:** *[To be added based on services requested by County and proposed by Contractor and accepted by County.]*

**SECTION B. TERM:** The term of this Agreement shall commence \_\_\_\_\_ and shall continue through \_\_\_\_\_, unless sooner terminated, as provided herein. At County's sole option, the **[County Manager/County Utilities Manager]** may renew this Agreement for up to \_\_\_\_\_ (\_\_\_\_) consecutive one-year period(s), unless sooner terminated, as provided therein.

**SECTION C. COMPENSATION:**

- 1. Amount of Compensation.** County shall pay compensation for performance of the Services in an amount not to exceed \_\_\_\_\_ (\$ \_\_\_\_\_), which amount does not include applicable New Mexico gross receipts taxes ("NMGR"). Compensation shall be paid in accordance with the rate schedule set out in Exhibit A, attached hereto and made a part hereof for all purposes.
- 2. Monthly Invoices.** Contractor shall submit itemized *[monthly, per the completion of the Project Phase/Task, annually, or upon some other schedule proposed by Contractor and accepted by County]* invoices to County's Project Manager showing amount of compensation due, amount of any NMGR, and total amount payable. Payment of undisputed amounts shall be due and payable thirty (30) days after County's receipt of the invoice.

**SECTION D. TAXES:** Contractor shall be solely responsible for timely and correctly billing, collecting and remitting all NMGR levied on the amounts payable under this Agreement.

**SECTION E. STATUS OF CONTRACTOR, STAFF, AND PERSONNEL:** This Agreement calls for the performance of services by Contractor as an independent contractor. Contractor is not an agent or employee of County and shall not be considered an employee of County for any purpose. Contractor, its agents, or employees shall make no representation that they are County employees, nor shall they create the appearance of being employees by using a job or position title on a name plate, business cards, or in any other manner, bearing County's name or logo. Neither Contractor nor any employee of Contractor shall be entitled to any benefits or compensation other than the compensation specified herein. Contractor shall have no authority to bind County to any agreement, contract, duty, or obligation. Contractor shall make no representations that are intended to, or create the appearance of, binding County to any agreement, contract, duty, or obligation. Contractor shall have full power to continue any outside employment or business, to employ and discharge its employees or associates as it deems appropriate without interference from County; provided, however, that Contractor shall at all times



during the term of this Agreement maintain the ability to perform the obligations in a professional, timely, and reliable manner.

**SECTION F. STANDARD OF PERFORMANCE:** Contractor agrees and represents that it has and shall maintain the personnel, experience, and knowledge necessary to qualify it for the particular duties to be performed under this Agreement. Contractor shall perform the Services described herein in accordance with a standard that meets the industry standard of care for performance of the Services.

**SECTION G. DELIVERABLES AND USE OF DOCUMENTS:** All deliverables required under this Agreement, including material, products, reports, policies, procedures, software improvements, databases, and any other products and processes, whether in written or electronic form, shall remain the exclusive property of and shall inure to the benefit of County as works for hire; Contractor shall not use, sell, disclose, or obtain any other compensation for such works for hire. In addition, Contractor may not, with regard to all work, work product, deliverables, or works for hire required by this Agreement, apply for, in its name or otherwise, any copyright, patent, or other property right, and acknowledges that any such property right created or developed remains the exclusive right of County. Contractor shall not use deliverables in any manner for any other purpose without the express written consent of County.

**SECTION H. EMPLOYEES AND SUB-CONTRACTORS:** Contractor shall be solely responsible for payment of wages, salary, or benefits to any and all employees or contractors retained by Contractor in the performance of the Services. Contractor agrees to indemnify, defend, and hold harmless County for any and all claims that may arise from Contractor's relationship to its employees and subcontractors.

**SECTION I. INSURANCE:** Contractor shall obtain and maintain insurance of the types and in the amounts set out below throughout the term of this Agreement with an insurer acceptable to County. Contractor shall assure that all subcontractors maintain like insurance. Compliance with the terms and conditions of this Section is a condition precedent to County's obligation to pay compensation for the Services, and Contractor shall not provide any Services under this Agreement unless and until Contractor has met the requirements of this Section. County requires Certificates of Insurance, or other evidence acceptable to County, stating that Contractor has met its obligation to obtain and maintain insurance and to assure that subcontractors maintain like insurance. Should any of the policies described below be cancelled before the expiration date thereof, notice shall be delivered in accordance with the policy provisions. General Liability Insurance and Automobile Liability Insurance shall name County as an additional insured *[County shall be named as an additional insured on all coverages, except Worker's Compensation. This sentence may be updated depending on the insurance requirements defined below as may be applicable to the awarded Agreement]*.

1. **General Liability Insurance:** ONE MILLION DOLLARS (\$1,000,000.00) per occurrence; ONE MILLION DOLLARS (\$1,000,000.00) aggregate.
2. **Workers' Compensation:** In an amount as may be required by law. County may immediately terminate this Agreement if Contractor fails to comply with the Worker's Compensation Act and applicable rules when required to do so.
3. **Automobile Liability Insurance for Contractor and its Employees:** ONE MILLION DOLLARS (\$1,000,000.00) combined single limit per occurrence; ONE MILLION DOLLARS (\$1,000,000.00) aggregate on any owned, and/or non-owned motor vehicles used in performing Services under this Agreement.

4. **Professional Liability Insurance:** ONE MILLION DOLLARS (\$1,000,000.00). Professional Liability Insurance shall provide coverage for Services provided hereunder during the term of this Agreement and for a period of at least five (5) years thereafter.
5. **Cyber Insurance:** In addition to insurance required under the Agreement, Contractor shall, at its sole cost and expense, procure and maintain through the term of the Agreement and for two (2) years following the termination or expiration of the Agreement, cyber/network privacy insurance with limits of THREE MILLION DOLLARS (\$3,000,000.00) per claim/in aggregate. Such policy shall provide coverage for disclosures and/or breaches of County Data arising out of or relating to Contractor's Services. Such policy shall also include coverage for the costs associated with restoring lost or damaged County Data, sending breach notifications to affected individuals, public relations expenses, fines, and penalties. Such policy shall not contain exclusions for the acts or omissions of either Contractor, County, or their respective employees, agents, subcontractors, or volunteers, whether intentional or unintentional, resulting in or relating to any use of County Data not expressly permitted by this Agreement. Contractor must notify County at least thirty (30) days prior to the cancellation or modification of such policy.
6. *[Other types of insurance which are project specific. Check with Risk Manager when needed.]*

**SECTION J. RECORDS:** Contractor shall maintain, throughout the term of this Agreement and for a period of six (6) years thereafter, records that indicate the date, time, and nature of the services rendered. Contractor shall make available, for inspection by County, all records, books of account, memoranda, and other documents pertaining to County at any reasonable time upon request.

**SECTION K. DUTY TO ABIDE:** Contractor shall abide by all applicable federal, state, and local laws, regulations, and policies and shall perform the Services in accordance with all applicable laws, regulations, and policies during the term of this Agreement.

**SECTION L. NON-DISCRIMINATION:** During the term of this Agreement, Contractor shall not discriminate against any employee or applicant for an employment position to be used in the performance of the obligations of Contractor under this Agreement, with regard to race, color, religion, sex, age, ethnicity, national origin, sexual orientation or gender identity, disability, or veteran status.

**SECTION M. CHOICE OF LAW:** The interpretation and enforcement of this Agreement shall be governed by and construed in accordance with the laws of the State of New Mexico.

**SECTION N. VENUE, FORUM NON-CONVENIENS, EXCLUSIVE STATE JURISDICTION:** County and Contractor knowingly, voluntarily, intentionally, and irrevocably agree that any and all legal proceedings related to this Agreement, or to any rights or any relationship between the parties arising therefrom, shall be solely and exclusively initiated, filed, tried, and maintained in the First Judicial District Court of the State of New Mexico. County and Contractor each expressly and irrevocably waive any right otherwise provided by any applicable law to remove the matter to any other state or federal venue, consents to the jurisdiction of the First Judicial District Court of the State of New Mexico in any such legal proceeding, waives any objection it may have to the laying of the jurisdiction of any such legal proceeding. County and Contractor also agree that this term is a material inducement for each to enter this Agreement, and that both County and Contractor warrant and represent that each have had the opportunity to review this term with legal counsel.

**SECTION O. WAIVER OF JURY TRIAL:** In the event of any action or proceeding, (including without limitation, any claim, counterclaim, cross-claim or third party claim) arising out of or, relating to this Agreement, or the transaction contemplated by this Agreement, County and Contractor KNOWINGLY, VOLUNTARILY, INTENTIONALLY, AND IRREVOCABLY WAIVE ANY RIGHT TO A JURY TRIAL, and agree that a court shall determine and adjudicate all issues of law and fact with a jury trial being expressly waived. County and Contractor also agree that this waiver of a jury trial was a material inducement for each to enter this Agreement, and that both County and Contractor warrant and represent that each have had the opportunity to review this jury waiver with legal counsel.

**SECTION P. INDEMNITY:** Contractor shall indemnify, defend, and hold harmless County, its Council members, employees, agents, and representatives, from and against all liability, claims, demands, actions (legal or equitable), damages, losses, costs, or expenses, including attorney fees, of any kind or nature, to the extent that the liability, claims, demands, actions, damages, losses, costs, and expenses are caused by, or arise out of, the acts or omissions of the Contractor or Contractor's officers, employees, agents representatives, and subcontractors in the performance or breach of the Services under this Agreement.

**SECTION Q. FORCE MAJEURE:** Neither County nor Contractor shall be liable for any delay in the performance of this Agreement, nor for any other breach, nor for any loss or damage arising from uncontrollable forces such as fire, theft, storm, war, or any other force majeure that could not have been reasonably avoided by exercise of due diligence; provided, however, that the Party failing to perform shall (i) as soon as possible, inform the other Party of the occurrence of the circumstances preventing or delaying the performance of its obligations, and describe at a reasonable level of detail the circumstances causing such delay, and (ii) exert reasonable efforts to eliminate, cure, or overcome any of such causes and to resume performance of its Services with all possible speed. In such event, the non-performing Party may be excused from any further performance or observance of the obligation(s) so affected for as long as such circumstances prevail and such Party continues to use its best efforts to recommence performance or observance whenever and to whatever extent possible without delay.

**SECTION R. NON-ASSIGNMENT:** Contractor shall not assign this Agreement or any privileges or obligations herein and shall not novate this Agreement to another without the prior written consent of the [\[County Manager/County Utilities Manager\]](#).

**SECTION S. LICENSES:** Contractor shall maintain all required licenses including, without limitation, all necessary professional and business licenses, throughout the term of this Agreement. Contractor shall require and shall assure that all of Contractor's employees and subcontractors maintain all required licenses including, without limitation, all necessary professional and business licenses.

**SECTION T. PROHIBITED INTERESTS:** Contractor agrees that it presently has no interest and shall not acquire any interest, direct or indirect, which would conflict in any manner or degree with the performance of its services hereunder. Contractor further agrees that it shall not employ any person having such an interest to perform services under this Agreement. No County Council member or other elected official of County, or manager or employee of County shall solicit, demand, accept, or agree to accept, a gratuity or offer of employment contrary to Section 31-282 of the Los Alamos County Code.

**SECTION U. TERMINATION:**

1. **Generally.** The [\[County Manager/County Utilities Manager\]](#) may terminate this Agreement with or without cause upon ten (10) days prior written notice to Contractor. Upon such

termination, Contractor shall be paid for Services actually completed to the satisfaction of County at the rate set out in Section C. Contractor shall render a final report of the Services performed to the date of termination, and shall turn over to County originals of all materials prepared pursuant to this Agreement.

- 2. Funding.** This Agreement shall terminate without further action by County on the first day of any County fiscal year for which funds to pay compensation hereunder are not appropriated by County Council. County shall make reasonable efforts to give Contractor at least ninety (90) days advance notice that funds have not been and are not expected to be appropriated for that purpose.

**SECTION V. NOTICE:** Unless otherwise provided in this Agreement, any notices required under this Agreement shall be made in writing. Notices shall be sent via 1) hand-delivery; 2) registered or certified mail; 3) a nationally recognized overnight courier service; or 4) electronic mail (with copy by mail or courier). All notices shall be sent to each party at the addresses set out in this section or any address later provided by such party in writing, with postage prepaid by the sender, and shall be deemed delivered upon hand delivery, verified proof of delivery by courier, or three (3) days after deposit in the United States Mail.

County:

Project Manager

Incorporated County of Los Alamos  
Address

Los Alamos, New Mexico 87544

E-mail:

Contractor:

Title

Company  
Address

With a copy to:

County Attorney's Office  
1000 Central Avenue, Suite 340  
Los Alamos, New Mexico 87544

E-mail:

**SECTION W. INVALIDITY OF PRIOR AGREEMENTS:** This Agreement supersedes all prior contracts or agreements, either oral or written, that may exist between the parties with reference to the services described herein, and expresses the entire agreement and understanding between the parties with reference to said services. It cannot be modified or changed by any oral promise made by any person, officer, or employee, nor shall any written modification of it be binding on County until approved in writing by both authorized representatives of County and Contractor. In the event of any conflict between the terms, conditions, and provisions of this Agreement, and the terms, conditions and provisions of any exhibits or attachments, the terms, conditions and provisions of this Agreement shall control and take precedence.

**SECTION X. NO IMPLIED WAIVERS:** The failure of County to enforce any provision of this Agreement is not a waiver by County of the provisions, or of the right thereafter, to enforce any provision(s).

**SECTION Y. SEVERABILITY:** If any provision of this Agreement is held to be unenforceable for any reason: (i) such provision shall be reformed only to the extent necessary to make the intent of the language and purpose of the Agreement enforceable; and (ii) all other provisions of this Agreement shall remain in effect so long as the substantive purpose of the Agreement is possible.

**SECTION Z. CAMPAIGN CONTRIBUTION DISCLOSURE FORM:** A Campaign Contribution Disclosure Form is attached as Exhibit X. Contractor must submit this form with this Agreement, if applicable.

OR

**SECTION Z. CAMPAIGN CONTRIBUTION DISCLOSURE FORM:** A Campaign Contribution Disclosure Form was submitted as part of the Contractor’s Response and is incorporated herein by reference for all purposes.

**SECTION AA. LEGAL RECOGNITION OF ELECTRONIC SIGNATURES:** Pursuant to NMSA 1978 § 14-16-7, this Agreement may be signed by electronic signature.

**SECTION AB. DUPLICATE ORIGINAL DOCUMENTS:** This document may be executed in two (2) counterparts, each of which shall be deemed an original.

**SECTION AC. NEGOTIATED TERMS:** This Agreement reflects negotiated terms between the parties, and each party has participated in the preparation of this Agreement with the opportunity to be represented by counsel, such that neither party shall be considered to be the drafter of this Agreement or any of its provisions for the purpose of any statute, case law, or rule of interpretation or construction that would or might cause any provision to be construed against the drafter of this Agreement.

**SECTION AD. CONFIDENTIAL INFORMATION:** [REMOVE IF NOT APPLICABLE] Any confidential information of one party that is provided to the other party during the term of this Agreement shall be kept confidential and shall not be made available to any individual or organization in accordance with the Confidential Information Disclosure Statement in Exhibit X. The Confidential Information Disclosure Statement shall be completed by Contractor as a condition precedent and submitted as part of this Agreement. Its terms shall govern as if fully set forth herein.

**IN WITNESS WHEREOF,** the parties have executed this Agreement on the date(s) set forth opposite the signatures of their authorized representatives to be effective for all purposes on the date first written above.

**ATTEST**

**INCORPORATED COUNTY OF LOS ALAMOS**

\_\_\_\_\_  
**NAOMI D. MAESTAS**  
**COUNTY CLERK**

**BY:** \_\_\_\_\_  
**ANNE W. LAURENT** **DATE**  
**COUNTY MANAGER**

**Approved as to form:**

\_\_\_\_\_  
**J. ALVIN LEAPHART**  
**COUNTY ATTORNEY**

\_\_\_\_\_, A \_\_\_\_\_  
**CORPORATION**

**BY:** \_\_\_\_\_

**DATE**

**NAME:** \_\_\_\_\_

**TITLE:** \_\_\_\_\_

**SAMPLE SERVICES AGREEMENT AGRXX-XXX**  
**Exhibit X**  
**Confidential Information Disclosure Statement**

The Incorporated County of Los Alamos is a governmental entity subject to certain disclosure laws including, but not limited to, the New Mexico Inspection of Public Records Act, NMSA 1978, §§ 14-2-1, et seq. Nothing in this Agreement is intended to diminish or expand the application of any applicable disclosure laws to any proprietary or confidential information.

This Confidential Information Disclosure Statement (“Statement”) defines obligations and waivers related to Confidential Information disclosed pursuant to the above referenced Agreement between County and Contractor. County and Contractor agree to the following:

1. Statement Coordinator – Each party designates the following person as its Statement Coordinator for coordinating the disclosure or receipt of Confidential Information:

	<b>Contractor</b>	<b>County</b>
<b>Name:</b>		
<b>Title:</b>		
<b>Address:</b>		
<b>City/State/Zip:</b>		Los Alamos, New Mexico 87544
<b>Email:</b>		

2. Definitions:
  - a) **Confidential Information** - any form of information, in any format, disclosed by the Discloser to the Recipient and identified in writing as confidential.
  - b) **Discloser** - the party disclosing Confidential Information.
  - c) **Exception** – An exception is satisfied if the Confidential Information disclosed: (i) was in Recipient’s possession prior to receipt from Discloser, (ii) is publicly known or readily ascertainable by legal means, (iii) is lawfully received by Recipient from a third party without a duty of confidentiality, (iv) is disclosed by Discloser to a third party without a duty of confidentiality on the third party, (v) is independently developed or learned by Recipient, or (vi) is disclosed by Recipient with Discloser’s prior written approval.
  - d) **Recipient** – the party receiving Confidential Information.
3. Obligations – Recipient shall protect and ensure its participating subcontractors, agents, or associates shall protect all Confidential Information by using the same degree of care, but no less than a reasonable degree of care, to prevent the unauthorized use, dissemination, or publication of the Confidential Information as Recipient uses to protect its own information of a like nature. If any person or entity requests or demands, by subpoena or otherwise, all or any portion of the Confidential Information provided by one party to another, the party receiving such request shall immediately notify the Discloser of such request or demand. The party receiving the request or demand shall independently determine whether the information sought is subject to disclosure under applicable law including the New Mexico Inspection of Public Records Act. If the party receiving the request or demand determines that the information is subject to disclosure, it shall notify the Discloser of its intent to permit the disclosure with sufficient time to permit the Discloser to invoke the jurisdiction of an appropriate court or administrative body to raise any legitimate objections or defenses it may have to the disclosure. In the absence of an appropriate order prohibiting the disclosure, the party receiving the request or demand shall permit and proceed with the disclosure without incurring any duty, obligation or liability to the Discloser.

**Exhibit B**

**CERTIFICATION REGARDING DEBARMENT, SUSPENSION, AND  
OTHER RESPONSIBILITY MATTERS – PRIMARY COVERED TRANSACTIONS  
RFP NO: 25-07**

**RFP Name: Utility Billing and Work Order Software**

**\*This document should be returned with RFP submittal.\***

- (1) I or We, \_\_\_\_\_ (the "Offeror/Bidder") hereby certify to the best of our knowledge and belief that neither the Offeror/Bidder nor any of its principals:
- (a) are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any federal, state, or local department or agency; and
  - (b) have, within a 3-year period preceding this certification, been convicted of or had a civil judgment rendered against them for: commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (federal, state, or local) transaction or contract under a public transaction; violation of federal or state antitrust statutes; or commission of embezzlement, theft, forgery, bribery; falsification or destruction of records; making false statements; or receiving stolen property; and
  - (c) are presently indicted for or otherwise criminally or civilly charged by a governmental entity (federal, state, or local) with commission of any of the offenses enumerated in paragraph (1)(b) of this certification; and
  - (d) are not current or former County employees. If an Offeror/Bidder is a current or former county employee, Offeror/Bidder shall provide additional information as described in paragraph (2) of this certification; and
  - (e) are not considered to be an "immediate family member" of a County employee or public official. Immediate family means the employee's or public official's spouse, parents, step-parents, child, step-child, sibling, step-sibling, half-sibling, grandparent, grandchild, aunt, uncle, niece, nephew, or their in-laws, or an individual claimed by the public official or his/her spouse as a dependent under the United States Internal Revenue Code; and
  - (f) have within a 3-year period preceding this certification had one or more public transactions or contracts (federal, state, or local) terminated for cause or default.
- (2) If we are unable to certify to any of the statements in this certification, we shall attach an explanation hereto.
- (3) Certification to any of the statements in this certification will be thoroughly reviewed, and may not necessarily preclude the Offeror/Bidder from consideration for award.
- (4) Falsification of any statement in this Form shall constitute grounds for non-consideration of the Offeror's/Bidders proposal or bid or rescinding of a contract award.

\_\_\_\_\_  
Date

\_\_\_\_\_  
Authorized Representative's Signature

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Print Title



**Exhibit C**  
**Campaign Contribution Disclosure Form**  
**RFP NO: 25-07**  
**RFP Name: Utility Billing and Work Order Software**

**\*This document should be returned with RFP submittal.\***

Any prospective contractor seeking to enter into a contract with the Incorporated County of Los Alamos must file this form disclosing whether they, a family member or a representative of the prospective contractor has made a campaign contribution to an applicable public official during the two (2) years prior to the date on which prospective contractor submits a proposal or, in the case of a sole source or small purchase contract, the two (2) years prior to the date prospective contractor signs the contract, if the aggregate total of contributions given by the prospective contractor, a family member or a representative of the prospective contractor to the public official exceeds TWO HUNDRED FIFTY DOLLARS (\$250.00) over the two (2) year period.

THIS FORM MUST BE FILED BY ANY PROSPECTIVE CONTRACTOR WHETHER OR NOT THEY, THEIR FAMILY MEMBER, OR THEIR REPRESENTATIVE HAS MADE ANY CONTRIBUTIONS SUBJECT TO DISCLOSURE.

The following definitions apply:

**“Applicable public official”** means a person elected to an office or a person appointed to complete a term of an elected office, who has the authority to award or influence the award of the contract for which the prospective contractor is submitting a competitive sealed proposal or who has the authority to negotiate a sole source or small purchase contract that may be awarded without submission of a sealed competitive proposal.

**“Campaign Contribution”** means a gift, subscription, loan, advance or deposit of money or other things of value, including the estimated value of an in-kind contribution, that is made to or received by an applicable public official or any person authorized to raise, collect or expend contributions on that official’s behalf for the purpose of electing the official to either statewide or local office. “Campaign Contribution” includes the payment of a debt incurred in an election campaign, but does not include the value of services provided without compensation or unreimbursed travel or other personal expenses of individuals who volunteer a portion or all of their time on behalf of a candidate or political committee, nor does it include the administrative or solicitation expenses of a political committee that are paid by an organization that sponsors the committee.

**“Contract”** means any agreement for the procurement of items of tangible personal property, services, professional services, or construction.

**“Family member”** means a spouse, father, mother, child, father-in-law, mother-in-law, daughter-in-law or son-in-law of:  
(a) a prospective contractor, if the prospective contractor is a natural person; or  
(b) an owner of a prospective contractor.

**“Pendency of the procurement process”** means the time period commencing with the public notice of the request for proposals and ending with the award of the contract or the cancellation of the request for proposals.

**“Person”** means any corporation, partnership, individual, joint venture, association or any other private legal entity.

**“Prospective contractor”** means a person who is subject to the competitive sealed proposal process set forth in the Procurement Code or is not required to submit a competitive sealed proposal because that person qualifies for a sole source or a small purchase contract.

**“Representative of a prospective contractor”** means an officer or director of a corporation, a member or manager of a limited liability corporation, a partner of a partnership or a trustee of a trust of the prospective contractor.

DISCLOSURE OF CONTRIBUTIONS: (Report any applicable contributions made to the following - COUNTY COUNCILORS: Theresa Cull; Denise Derkacs; Melanee Hand; Susie Havemann; Keith Lepsch; David Reagor; and Randal Ryti.)

<b>Contribution Made By:</b>			
<b>Relation to Prospective Contractor:</b>			
<b>Name of Applicable Public Official:</b>			
<b>Contribution(s) Date(s)</b>	<b>Contribution Amount(s):</b>	<b>Nature of Contribution(s):</b>	<b>Purpose of Contribution(s):</b>
	\$		
	\$		
	\$		
	\$		
	\$		

(Attach extra pages if necessary)

Please check the box next to the applicable statement.

<input type="checkbox"/>	<b>CONTRIBUTIONS IN THE AGGREGATE TOTAL OVER TWO HUNDRED FIFTY DOLLARS (\$250.00) WERE MADE</b> to an applicable public official by me, a family member or representative, and I have disclosed those contributions.
<input type="checkbox"/>	<b>NO CONTRIBUTIONS IN THE AGGREGATE TOTAL OVER TWO HUNDRED FIFTY DOLLARS (\$250.00) WERE MADE</b> to an applicable public official by me, a family member or representative.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Title (position)

**Exhibit D**  
**VERIFICATION OF AUTHORIZED OFFEROR**  
**RFP NO: 25-07**  
**RFP Name: Utility Billing and Work Order Software**

**\*This document should be returned with RFP submittal.\***

Sec. 31-261. - State and local preferences.

(a) *Definitions.* For the purposes of this section:

- (1) The terms "resident business" and "resident veteran business" shall be defined as set out in NMSA 1978, § 13-1-21;
- (2) The term "local" as applied to a business shall mean that it meets the requirements of the above definition, maintains its principal office and place of business in Los Alamos County, and has a required Los Alamos County business license.

(b) *Requirements for preference qualification.* The chief purchasing officer shall determine if a preference is applicable to a particular bid or offer on a case-by-case basis. A bidder or offeror must submit a written request for preference, with a copy of the state-issued preference certificate, with its bid or proposal to qualify for this preference.

- (1) If a corporation, it shall be incorporated in New Mexico and maintain its principal office and place of business in the state;
- (2) A person shall have qualified with the state chief purchasing officer as a resident business or resident veteran business and obtained a certification number as provided in NMSA 1978, § 13-1-22.

(c) *Preference factor.*

- (1) The preference factor for qualifying resident and local businesses applied to bids and proposals shall be five percent.
- (2) The preference factor for qualifying resident veteran businesses shall be in accordance with the requirements set forth in NMSA 1978, § 13-1-21.

(d) *Invitations for bids.* When bids are received, the price quoted by the qualifying vendor shall be multiplied by 0.95. After application of the preference factor, the contract shall be awarded to the lowest bidder. If one or more low prices are equal, the bid shall be awarded with respect to the next category of offerors listed below, and the next, until an offer qualifies for award. The priority of categories of offers is as follows:

- (1) Local business;
- (2) Resident business.

(e) *Requests for proposals.* When proposals are received, the total evaluation score with or without the cost factor of each proposal received from a qualifying vendor shall be multiplied by 1.05. After application of the factor, the contract shall be awarded to the highest score. If one or more scores are equal, the same procedure shall be followed with respect to the next category of offerors listed, and the next, until an offer qualifies for award. The priority of categories of offerors is the same as listed in subsection (d) of this section.

(f) *Exemptions from preferences.* The resident and local preference specified in this article shall not be applied:

- (1) To requests for qualifications;
- (2) To any purchase of goods or services in excess of \$500,000.00;
- (3) When the expenditure of federal funds designated in whole or in part for a specific purchase is involved; or
- (4) When the expenditure of grant funds, a condition of which prohibits a local preference, is involved.

(Ord. No. 02-098, § 2, 12-2-2008; Ord. No. 02-305, § 8, 2-25-2020)

Are you requesting Preference?

YES       NO

By answering "yes," the bidder or offeror is submitting a written request for preference.

A Bidder or Offeror must submit a copy of the state-issued preference certificate with its bid or proposal to qualify for this preference.

Having read the proposal conditions and examined the scope of services and deliverables for this RFP, this Proposal is hereby submitted by:

\_\_\_\_\_/\_\_\_\_\_  
**Signature and Printed Name of Authorized Offeror** **Title**

\_\_\_\_\_  
**Organization's Legal Name** **State of Incorporation**

\_\_\_\_\_  
**Email Address**

\_\_\_\_\_  
**Mailing Address** **City**      **State**      **Zip Code**

\_\_\_\_\_  
**Physical Address** **City**      **State**      **Zip Code**

\_\_\_\_\_  
**Telephone No.**

\_\_\_\_\_  
**Federal Tax I.D. #** **NM CRS # (if located in-state)**

\_\_\_\_\_  
**Contract Manager Printed Name, Title and Email Address**

**If your firm meets the definition of one or more of the types of business described below as defined by the Small Business Administration, please check the appropriate box:**

- Small Business**
- Woman-owned Business**
- Minority-owned Business**

**Exhibit E**  
**County Technology Standards Requirements for On-Premise, Hybrid, or Cloud/Hosted Solutions**  
**RFP NO: 25-07**  
**RFP Name: Utility Billing and Work Order Software**

**\*This attachment shall be returned with the RFP submittal.\***

The following Los Alamos County Technology Standards are required and shall be supported by the vendor, contractor, reseller henceforth in this Exhibit called “Operator”, for any County solicitation requiring technology or integration to the County network and incorporated into any resultant agreement. Standards are listed with the expectation that the Operator will provide Software updates to allow Los Alamos County to stay on supported versions of hardware, underlying Software and protocols as outlined below.

Respondents must provide documentation that they meet the requirements in respect to the Solution that they are responding with. **On premise respondents do not need to comply with hosted requirements. Hosted Solution respondents do not need to comply with on-premise requirements. If the Solution is a hybrid of both categories of Solution, then both on-premise and hosted requirements apply as applicable to the response.**

For each standard requirement in Table 1 below, check “YES” to indicate compliance, “NO” to indicate non-compliance, or N/A to indicate that the requirement is not applicable. In the cell beneath each standard requirement, ***briefly*** describe ***how*** Offeror will comply or why a standard requirement is not applicable. If Offeror can comply, but not exactly in the way described in the standard, please describe the substantial equivalent offered or alternate method for conforming to the requirement.

Where other County policies or documents are referenced, Offeror’s may find these policies on the County’s website at the following web address: <https://tinyurl.com/RFP25-07-SolicitationDocs>

	STANDARD REQUIREMENT	YES	NO	N/A
Server Operating system (OS) (On-Premises)	Microsoft (MS) Windows Server 2019, 64 bit or current (Standard and Datacenter). Contractor software must be maintained to run on a supported platform service level as defined by Microsoft at the latest stable patch level. Departments will be responsible for licensing costs and must request cost estimates from Information Management (IM) Division.			
Describe how Offeror will comply, alternate methods, or why a standard requirement is not applicable.				
Server Hardware (On-Premise)	<b>Preferred:</b> Use of County VMware server platform. Environment design must be submitted and reviewed by IM Division for acceptance. Proposals shall include required hardware and licensing of VMware, operating system, and proposed application-based requirements. Application with a proven Virtual installation template is preferred.			

	Physical Server minimum hardware specifications consist of: Multi Socket/Multi Core processor Intel or AMD based server (standalone or blade server as determined by Los Alamos County IM Division with a minimum 64 GB RAM and RAID capability. Contractor software must be maintained to run on a supported platform service levels as defined by Microsoft at the latest stable patch level.			
Describe how Offeror will comply, alternate methods, or why a standard requirement is not applicable.				
Network Infrastructure	See LAC Standards and Specifications for Building and Campus Distribution Systems Version 3 (Primarily used for building construction purposes).			
Describe how Offeror will comply, alternate methods, or why a standard requirement is not applicable.				
Network <b>(On-Premise)</b>	Supported network protocol is TCP/IP (IPv4). Standards based NIC rated at 100/1000/10G copper or fiber is supported. If considering a 10G connection County IT network group shall be consulted to ensure equipment compatibility and availability at proposed site. Additional hardware cost, may be required of the project, based on project requirements, equipment and availability. The County uses Cisco technology as its default network equipment standard. Solutions shall be compatible with Cisco Network Technology.			
Describe how Offeror will comply, alternate methods, or why a standard requirement is not applicable.				
Remote Network Access <b>(On-Premise)</b>	Direct remote access to the County network and server environment shall be done using the County's Cisco AnyConnect SSH VPN. Once a VPN connection is established end-point connections are supported via Microsoft RDP. Operator support accounts shall be set up in accordance with the adopted Los Alamos County IT Usage and Security Policy #1210.			
Describe how Offeror will comply, alternate methods, or why a standard requirement is not applicable.				

LAC Network Account Privilege <b>(On-Premise &amp; Hosted)</b>	Desktop Client Software shall function for end users with standard user privileges. User cannot install software and shall not have administrative rights.			
Describe how Offeror will comply, alternate methods, or why a standard requirement is not applicable.				
Desk Hardware <b>(On-Premise &amp; Hosted)</b>	Physical unit minimum hardware requirements consist of: Intel core i5 based processor, minimum 8 GB RAM, Intel integrated graphics 1280 capable video minimum, display port, input or HDMI, 4 USB 2/3 ports.  Support deployment onto Virtual Desktop Infrastructure (VDI) platform, specifically cloud-based platforms from Microsoft Azure, Amazon Web Service (AWS) or Google Cloud Platform.			
Describe how Offeror will comply, alternate methods, or why a standard requirement is not applicable.				
Desktop OS <b>(On-Premise &amp; Hosted)</b>	Microsoft Windows 10 at current Service Pack (SP).			
Describe how Offeror will comply, alternate methods, or why a standard requirement is not applicable.				
Internet Browser <b>(On-Premise &amp; Hosted)</b>	Internal County Network: Google Chrome and Edge, at its latest version, are the installed browsers on county devices. Google Chrome is the county standard. New web Applications must be based on HTML5. Applications requiring Internet Explorer, Microsoft Silverlight, Java and Flash are not supported. Web applications requiring .NET framework shall not be considered. IM Division shall be consulted for compatibility issues prior to considering new application purchases requiring Java.			
Describe how Offeror will comply, alternate methods, or why a standard requirement is not applicable.				

<p>Database Software Products <b>(On-Premise)</b></p>	<p>Supported database software is Microsoft (MS) SQL server version 2016 through current. New MS SQL Server product installations will require review, purchasing of licenses, appropriate hardware, and maintenance in support of proposed project or instance install to the County MS SQL Server Environment. MS SQL server software for new implementations shall be at within the Microsoft certified support release level or current. Server components for proposed projects require review and purchasing as part of the project initiative. Operator software must be maintained to run on a supported platform service level as defined by Microsoft.</p> <ul style="list-style-type: none"> <li>• Passwords are not permitted to be transported in clear\plain text.</li> <li>• Vendor implementation shall not use the SA password for user level functions. SA passwords shall be maintained by the County DBA.</li> <li>• Only database instances can be installed on the County MS-SQL Environment. If a vendor software component install is necessary on the database server, a standalone installation will be required.</li> <li>• Vendor software must use standard Access &amp; Connection architecture for accessing databases on the County MS-SQL Environment.</li> <li>• Applications based on Microsoft Access are not supported. Applications based on SQLEXPRESS version should be reviewed and the limitation understood by the customers and the vendor.</li> </ul> <p>Hosted solutions shall be compliant with or provide a method to provide the County with database exports in the MS-SQL Server format.</p>			
<p>Describe how Offeror will comply, alternate methods, or why a standard requirement is not applicable.</p>				
<p>Internet: Collaboration and Web Publishing <b>(On-Premise &amp; Hosted)</b></p>	<p>Use of Internet apps or links shall be considered in collaboration with the Los Alamos Information Management Division Applications group for review to ensure that compatibility and Internet publishing protocols have been satisfied prior to formation of any agreement or installation.</p>			
<p>Describe how Offeror will comply, alternate methods, or why a standard requirement is not applicable.</p>				



<p>Intranet: Collaboration and Web Publishing <b>(On-Premise &amp; Hosted)</b></p>	<p>Microsoft SharePoint Online is the basis for the County's Intranet. Any products that will integrate or utilize the County's Intranet site shall require a compatibility consultation with IM Division before purchase and implementation. Operator software shall be maintained to run on supported platform service levels as defined by Microsoft and/or the Intranet site vendor. Proposed Intranet software products shall be accompanied by roadmap for compatibility with MS SharePoint Online.</p>			
<p>Describe how Offeror will comply, alternate methods, or why a standard requirement is not applicable.</p>				
<p>Productivity Software <b>(On-Premise &amp; Hosted)</b></p>	<p>Los Alamos County uses Microsoft M365 Office Suite at its most recent version and service pack. Operator software using the Office suite must be maintained to run on supported platform service levels as defined by Microsoft.</p>			
<p>Describe how Offeror will comply, alternate methods, or why a standard requirement is not applicable.</p>				
<p>Email <b>(On-Premise &amp; Hosted)</b></p>	<p>Microsoft M365 with hub transport for relay. If SMTP relay access from on premise vendor specific software is necessary, permission to use the County Email exchange shall be obtained prior to contracting or purchase of the software or solution. If SMTP relay access from hosted vendor specific software is necessary, preference is for SMTP relay to be hosted by vendor. The vendor specific solution must be supported and maintained to relay off County email domain and directed to hand off the email message to another mail server that can get the message closer to its intended recipient in accordance with service levels as defined by Microsoft for the M365 product.</p>			
<p>Describe how Offeror will comply, alternate methods, or why a standard requirement is not applicable.</p>				
<p>Geographic Information Standards (GIS) <b>(On-Premise &amp; Hosted)</b></p>	<p>The County uses strictly ArcGIS products by Esri for GIS. Desktop software for end users includes ArcGIS Desktop and ArcGIS Pro. GIS web services are provided as REST endpoints from ArcGIS Server using Internet Information Services (IIS). Our enterprise geodatabase is managed using ArcSDE with Microsoft SQL Server. Supported versions are one or two</p>			

	iterations behind the latest ESRI-supported release. The preferred method for applications to interact with GIS is via REST services. Web applications must be hosted in either ArcGIS Online or ArcGIS Portal.			
Describe how Offeror will comply, alternate methods, or why a standard requirement is not applicable.				
Mobile Devices	Shall conform to Los Alamos County Mobile Policy #1240. Mobile devices requiring Intranet access must be secured through the County Mobile Device Management System.			
Describe how Offeror will comply, alternate methods, or why a standard requirement is not applicable.				
<b>Security &amp; SSL (On-Premise &amp; Hosted)</b>	<p>Intranet devices must be capable with multi-factor authentication (MFA) using the County's current MFA systems. Any requirements for access to ports from the Internet into the County Network shall be approved via a technical review by the IM Division before product(s) purchase and implementation. Cisco Secure EndPoint Antivirus and Antispyware Enterprise software are used on all intranet computing devices; vendor solutions shall work in conjunction with stated antivirus products.</p> <p>SSL (Secure Socket Layer) encryption is required for both internal and external facing web applications.</p> <p>Enterprise-wide applications shall be capable of Active Directory integration for user authentication and utilize County's MFA.</p> <p>Devices requiring wireless access must a) be domain integrated or b) have the ability to accept captive portal agreement (a web page that the user of a public-access network is obliged to view and interact with before access is granted).</p>			
Describe how Offeror will comply, alternate methods, or why a standard requirement is not applicable.				
Records	Shall conform to Los Alamos County Records and Information Governance Policy #0310			

Describe how Offeror will comply, alternate methods, or why a standard requirement is not applicable.				
E-Signature	Shall conform to Los Alamos County E-signature Policy #1220.			
Describe how Offeror will comply, alternate methods, or why a standard requirement is not applicable.				
Hosted/Cloud Based Services	<ul style="list-style-type: none"> <li>• Los Alamos County is interested in taking advantage of Anything as a Service (XaaS) opportunity available through Cloud Service Providers (CSP), in Government Cloud (GCC) where required. CSP data centers must be located within the United States.</li> <li>• Enterprise-wide applications shall be capable of Active Directory integration for user authentication and utilize County's MFA.</li> <li>• Data centers must be FedRAMP certified for SaaS solutions procured by departments if they also store or may store Los Alamos National Laboratory (LANL) critical infrastructure data for County operations. Departments must verify with LANL authority to confirm that this requirement is applicable to the LANL information to be stored.</li> <li>• Ownership of County data held in the CSP solution shall remain with the County of Los Alamos. County may have on-demand access to the data for export/download or have the data delivered by request by the CSP with a maximum 48-hour compliance window. Exports shall be in MS-SQL format.</li> </ul>			
Describe how Offeror will comply, alternate methods, or why a standard requirement is not applicable.				

**Exhibit F**  
**Product Information**  
**RFP NO: 25-07**  
**RFP Name: Utility Billing and Work Order Software**

**\*This document should be returned with the RFP submittal. Offerors may use this document or their own similar document\***

Product Information	Offeror Response
Product name	
Original release date of product	
Current release version	
Current release date	
Release frequency	
Planned upgrades and releases for next 6 months	
Number of individual clients	
Largest number of active users for one client (client name not needed)	

**Exhibit G**  
**Software Functionality Matrix**  
**RFP NO: 25-07**  
**RFP Name: Utility Billing and Work Order Software**

**\*This MS Excel attachment should be returned with the RFP submittal.\***

The attached MS Excel Exhibit G Software Functionality Matrix, with all tabs completed, should be returned in its original MS Excel format with the RFP submittal. This Exhibit should not be converted to PDF or any other format for submittal.

Include any associated narrative as a separate document or add it to comment columns where appropriate. Add a separate narrative to describe cost categories if such details would assist in the consideration of the cost proposal.

County reserves the right to determine the suitability to County of any proposed features, functionality, or services or to find any Offeror's Proposal "non-responsive" if Offeror is unable to adequately describe and affirm in their Proposal their ability to currently provide any requested feature, functionality, or service in a way that meets the County's operational needs. County may consider but is under no obligation to accept alternative solutions described in Offeror's Proposal that may meet the County's operational needs.

**INSTRUCTIONS:**

1. For each requested functionality, name the APP or Module that meets the requirement in the appropriate field.
2. For each requested functionality, enter the Offeror's response rating as described below in the appropriate field.

CODE	VALUE	DESCRIPTION
SUP	4	Supported as delivered "out-of-the-box"
MOD	3	Supported via modifications or an acceptable alternate solution proposed (screen configurations, reports, GUI tailoring, etc.)
3RD	2	Supported via a third-party solution (ancillary systems like electronic signature tools, remote meeting platforms, etc.).  Offerors should also name the third party and describe Offeror's relationship to the third party and describe Offeror's warranty for any third-party products offered to provide the requested functionality.
CST	1	Supported via customization (changes to source code).
FUT	0	Will be supported in a future release.
NS	0	Not supported.

3. For each item, describe HOW your proposed Solution provides the requested features and functionality and include a response to any specific additional requested information. If more room is needed, please provide a separate narrative and reference it here.

**Exhibit H**  
**Cost Proposal**  
**RFP NO: 25-07**  
**RFP Name: Utility Billing and Work Order Software**

**\*This MS Excel attachment should be returned with the RFP submittal.\***

The attached MS Excel Exhibit H Cost Proposal, with all tabs completed, should be returned in its original MS Excel format with the RFP submittal. This Exhibit should not be converted to PDF or any other format for submittal.

Include any associated narrative as a separate document or add it to comment columns where appropriate. Add a separate narrative to describe cost categories if such details would assist in the consideration of the cost proposal.

**INSTRUCTIONS:**

1. Enter Offeror's company name at the top of each sheet where requested.
2. Do not modify forms except where it is requested that information be provided. If errors on the forms or in the formulas are found, please notify the Contacts listed in the RFP prior to RFP closing.
3. If more space is needed to further describe costs, provide it separately and reference it on the form.
4. Please note that the County Code of Ordinances, Sec. 31-111 – Types of Contracts states the following: "Subject to the limitations of this section, any type of contract which is appropriate to the procurement, and which will promote the best interests of the county will be used, provided that the use of a cost-plus-a-percentage-of-cost contract is prohibited." **County cannot accept any cost+pricing.**
5. For award of an agreement, County requires a not to-exceed ("NTE") amount for total compensation for the entire term of an agreement. In order to estimate the total NTE amount of a potential agreement, the County requests proposed pricing, a proposed pricing mechanism, or a proposed pricing escalation mechanism and process for additional, optional, and future functionality and services, which may include, but is not limited to tools, modules, apps, add-ons, or professional services not specifically named or requested herein.
6. Provide costs for all services (including additional, optional, and future services) for all years proposed up to a fifteen (15) year agreement term. County will consider, but is under no obligation to accept proposed future year unit prices or price escalations, which may include but are not limited to price escalations based on:
  - a. a specified dollar amount;
  - b. a specified percentage;
  - c. a capped not-to-exceed dollar amount or percentage (e.g., annual increases will never exceed the lesser of \$1,000.00 or 3%, per year over the prior year's fee amounts);
  - d. or some other formula (e.g., a specific Producer Price Index or Consumer Price Index).
7. If proposing such a price escalation mechanism for future years of an agreement, Offerors should also clearly describe the process and timing for Offeror to notify County of any such increase and the process by which County would approve such an increase in future years. County, at its sole discretion, reserves the right to accept any given proposed fees and price escalation mechanism and process for any agreement term length.
8. Should an Offeror choose not to provide pricing or a price escalation mechanism and process for all fifteen (15) years, the County, for purposes of cost evaluation, shall apply an escalation rate of 5% per year for each year not proposed to the final costs included in the Offeror's response.

9. County discourages autorenewal or “evergreen” provisions. If Offerors are unable to propose pricing or a price escalation mechanism and process for fifteen (15) years, County may consider contracting for a shorter term. Offerors should note that the ability to provide services and pricing or a price escalation mechanism and process for a fifteen (15) year agreement term is County’s preference and is a scored evaluation criteria.
10. If direct or reimbursable costs are proposed, please note them as such in individual separate line items in Tab 04 to facilitate the evaluation of these types of costs. If travel costs are proposed as direct reimbursable costs, Offeror’s should review the County’s travel guidelines provided in Tab 04 and should make note of any deviations or exceptions proposed by Offeror.

**Exhibit I**  
**VFLEX File Specifications**  
**RFP NO: 25-07**  
**RFP Name: Utility Billing and Work Order Software**

**COVERSHEET**

(This section intentionally left blank)



Field Name	DB_Field_Name (for mapping)	Description	Data Type	Required in Vflex	Valid Values in VFLEX	Default Value Allowed?	Munis Field
Meter ID	meter_id	Unique Electronic Meter ID Number Assigned by Manufacturer	String	Yes			Meter Serial # utmtrmst.utmtm_meter
Secondary Meter ID	meter_id_2	Unique Secondary Meter Identification Number such as Serial Number	String	No			BLANK
Radio Id	ert_id	Unique Electronic Meter ID (Example: FlexNetID)	String	No			utmtrdtl.utmtd_remote_id For demand meters utmtrdtl.utmtd_meter2
Manufacture	Meter_manufacture	Identifies the manufacturer of this device	String	No			Meter Manufacturer Code utmtrmst.utmtm_man_code
Device Status	device_status	Inactive meters are filtered out of most reports	String	No	ACTIVE, INACTIVE		If service is service Type METERED, and service status = "ACTIVE" set Device Status = "ACTIVE", else "INACTIVE"
Meter Read Method	read_method	Describes type of reading for the meter	String	No	AMI, AMR, MANUAL, UNKOWN		AMI
AutoRead Meter Type	autread_meter_type	Value provided in this field is pass through to the AutoRead Meter List file	String	no			blank
AutoRead MXU Type	autread_mxu_type	Value provided in this filed is passed through to the AutoRead Merter list file	String	No			BLANK
Commodity	commodity	Defines commodity of the supported device	String	No			"W" for Water, "G" for Gas, "E" Electric - utmtrmst.utmtm_serv_cat
Physical Location Identifier	sdp_id	Unique identifier that refers to the property where a meter or meters could be located	String	No			utactmst.utacm_parcel
Service Delivery Point Status	sdp_state	Identifies if the meter is physically connected or disconnected	String	No	CONNECTED, DISCONNECTED	NULL	NULL
Latitude	sdp_lat	GIS Latitude	String	No		NULL	Meter UDF 2
Longitude	sdp_lon	GIS Longitude	String	No		NULL	Meter UDF 3
Street Address	asset_address	Physical address where the meter is location	String	No			Account location utactmst.utacm_loc_no, utactmst.utacm_loc_no_suff, utactmst.utacm_loc_pre_dir, utactmst.utacm_loc_street, utactmst.utacm_loc_post_dir, utactmst.utacm_unit_type, utactmst.utacm_loc_apt,
City	asset_city	Physical city where the meter is location	String	No			utactmst.utacm_loc_city
State	asset_state	Physical state where the meter is location	String	No			utactmst.utacm_loc_state
ZIP	asset_zip	Physical zip where the meter is location	String	No			utactmst.utacm_loc_zip
Account ID	account_id	Billing system account number for the meter	String	Yes			UB Account # utactmst.utacm_account
Account Status	account_status	Identifies if the account is ACTIVE or INACTIVE	String	No	ACTIVE, INACTIVE		Default ACTIVE
Account Service Type	account_service_type	Single Family Residence, Multi-family...	String	No			utactmst.utacm_type

Field Name	DB_Field_Name (for mapping)	Description	Data Type	Required in Vflex	Valid Values in VFLEX	Default Value Allowed?	Munis Field
Billing Cycle	account_billing_cycle	This is the identifier that will group together all meters that will be billed together	String	No			route - from the account file
Rate Code	account_rate_code	Identifies the CIS rate code applied to this meter	String	No			Service Code ubservic.ubsv_serv_code, ubservic.ubsv_serv_seq
Route ID	service_route	Grouping mechanism to break down the meters in a billing cycle in groups for ease of drive-by reads and analysis	String	No			utsvcmst.utsvm_route_book
Export Unit of Measure	spd_usage_uom	The unit of measure expected for a billing export	String	No	CF, CCF, CCFC, CM, CY, AF, PULSE, GAL, LITERS		Unit of measure from rate code
CIS Meter Multiplier	billing_multiplier	The multiplier used to calculate the actual consumption when meter registers a flow not calibrated to actual flow.	Number	No			.01 for Water, 1 for Gas, and 1 for Electric
CIS meter multiplier and display multiplier	billing_and_display_multiplier	The multiplier is applied to billing reads in the Export file as well as display of readings in various Analytics applications	Number	No			1
Display Multiplier	display_multiplier	The multiplier is only applied to all readings displayed in Device Access	Number	No			1
Date of Last Bill	last_billed_date	Date of last bill	date	No	YYMMdd hhmmss		Date of last bill in Munis UB
Unbilled meter status	non_billable	Identifies if a meter is to be excluded from billing as there is no bill processed for this meter	String	No			0 (ZERO)
Flow Identifier	spd_flow	Identified if the meter measures INFLOW or OUTFLOW	String	No			NULL
Zone Identifier	spd_zone	Identifies a grouping of meters by zone for hydraulic modeling analysis	String	No			blank
Service_size	spd_meter_size	The size of the meter at the service	Number	No			meter size utmtrdtl.utmtd_meter_size Water only, EL and GA leave blank NOTE: If service category "E" or "G" - do not populate
Number of dials	number_of_dials	Number of electronically transmitted meter dials available	Number	No			Meter dials utmtrdtl.utmtd_dials
Last Reading	last_known_read	Last known reading as provided from the CIS	Number	No			last meter read from metered service
Low Limit Threshold	minimum_usage_threshold	The minimum quantity of usage expected from a device during billing	Number	No			blank
High Limit Threshold	maximum_usage_threshold	The maximum quantity of usage expected from a device during billing	Number	No			blank
Customer name	customer_name	First Name and Last Name	String	No			ar customer name
phone number	customer_home_phone	Home phone	String	No			ar customer phone number

Field Name	DB_Field_Name (for mapping)	Description	Data Type	Required in Vflex	Valid Values in VFLEX	Default Value Allowed?	Munis Field
cell phone number	customer_cell_phone	Cell Phone	String	No			ar customer cell phone number
email	customer_email	email address	String	No			ar customer email
Account Number	account_id	Billing system account number for the meter	String	Yes			ar CID #
Customer name	customer_name	First Name and Last Name	String	No			ar customer name
Security token for account setup	security_token	Text	String	No			ub account # utactmst.utacm_account
Last Billed Date	last_billed_date	Date of last bill	Date	No	YYMMdd hhmmss		Last bill date
Latitude	sdp_lat	GIS Latitude	String	No		NULL	Meter UDF 2
Longitude	sdp_lon	GIS Longitude	String	No		NULL	Meter UDF 3
Street Address	asset_address	Physical address where the meter is location	String	No			Account location utactmst.utacm_loc_no, utactmst.utacm_loc_no_suff, utactmst.utacm_loc_pre_dir, utactmst.utacm_loc_street, utactmst.utacm_loc_post_dir, utactmst.utacm_unit_type, utactmst.utacm_loc_apt,
City	asset_city	Physical city where the meter is location	String	No			utactmst.utacm_loc_city
State	asset_state	Physical state where the meter is location	String	No			utactmst.utacm_loc_state
ZIP	asset_zip	Physical zip where the meter is location	String	No			utactmst.utacm_loc_zip
Portal Tier Label	portal_tier_label_1		String	No			blank
Service Code	custom						utsvcmst.utsvm_serv_code
Service sequence	custom						utsvcmst.utsvm_serv_seq

**Exhibit J**  
**Sample Utility Bill**  
**RFP NO: 25-07**  
**RFP Name: Utility Billing and Work Order Software**

**LOS ALAMOS**  
 County of Los Alamos  
 Customer Care (505) 862-8333, [customer-care@laconm.us](mailto:customer-care@laconm.us)  
 Pay your bill online at: [ladpu.com/Paymentus](http://ladpu.com/Paymentus)

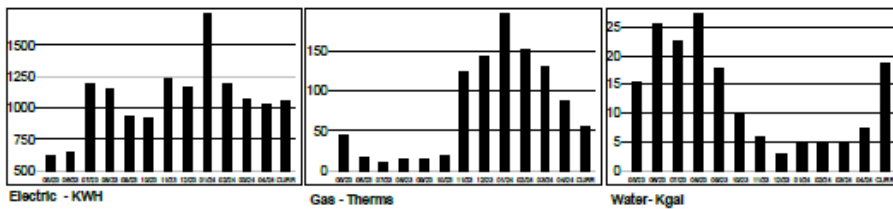
Cycle 42

Account Summary	
Bill Date	06/06/2024
Due Date	07/01/2024
Service Period	04/26/2024 to 05/29/2024
Account Number	3003520
Customer ID	2216131
Previous Balance	359.03
Adjustments	0.00
Payments	0.00
Current Billing Amount	436.39
<b>TOTAL AMOUNT DUE</b>	<b>795.42</b>

BALANCE DUE

Customer Name: XXXXXXXXX  
 Service Address: XXXXXXXXX  
 Bill Number: 776714

Description	Meter	Read Type	Previous Meter Reading	Current Meter Reading	Demand Charges	Demand Rate	Mult.	Usage	Commodity Rate	Charge
ELECTRIC	KWH	1N603660650	A	35682	36736			1,054		
								1,054	0.128200	135.12
										12.00
										147.12
-----										
GAS	THERM	0000708302	A	6360	6429			0.8		
								36.1	0.500000	18.05
								18.91	0.380000	7.19
										11.08
										36.32
-----										
WATER	KGAL	77650551	A	16687	16875			18.8		
								18.8	6.830000	128.40
										13.79
										142.19
-----										
SEWER								1		
										59.37
										68.87
-----										
REFUSE								1		
										27.00
										27.00
-----										
7.0625% Electric and Gas GRT										12.96
5% Water, Sewer and Refuse GGRT										11.43
										<b>436.38</b>
										<b>0.00</b>



✂ Detach and return the portion below with your payment ✂

COUNTY OF LOS ALAMOS  
 PO BOX 99  
 LOS ALAMOS, NM 87544-0099  
**LOS ALAMOS**

ELECTRONIC SERVICE REQUESTED

XXXXXXXXXX  
 XXXXXXXXXX  
 LOS ALAMOS, NM 87544

Bill Date	06/06/2024
Account Number	3003520
Customer ID	2216131
BALANCE DUE	795.42
Due Date	07/01/2024
	Enter Amount Paid _____
	Low Income Family Assistance _____
	Enter Contribution In Excess of Bill _____

Make Checks Payable to:  
 COUNTY OF LOS ALAMOS  
 PO BOX 99  
 LOS ALAMOS, NM 87544-0099

00006382024800776714800000795427

**Exhibit K**  
**Munis Property Lockbox Layout**  
**RFP NO: 25-07**  
**RFP Name: Utility Billing and Work Order Software**

**COVERSHEET**

(This section intentionally left blank)



## Munis Property Lockbox File Layout Specification

Munis – a Tyler ERP Solution

## Munis Property Lockbox File Layout Specification

### Overview

This format provides the ability to import a large number of payments received from a bank or other external agency. A bank or other external agency will format their payment information into the specified file format layout. When the file is received, the lockbox file will be processed into Munis through the Lockbox Processing program by selecting 'Property' as the layout. The lockbox file may contain payments for properties or specific bills of any category. The lockbox file must be formatted as defined in the provided layouts.

### Usage

The layout contains two types of entries – (1) a header record and (2) a detail record. The header record contains identifying information about the batch of payments represented in the file. The detail record(s) contains identifying information about individual payments to be processed.

To process, a detail must contain information to allow the system to identify what to pay. A detail line that is able to be processed will contain one of the following sets of data components:

- 1) Detail Category Code, Detail Bill Year, and Detail Bill Number
- 2) Detail Category Code and Detail Property Code
- 3) Detail Category Code, Detail Property Code, and Detail Customer Number
- 4) Detail Category Code, Detail Bill Year, Detail Property Code, and Detail Installment Number\*

\*When using Detail Installment Number payments must be allocated by installment number.

Typically, the file contains a single header record and multiple detail records. But, multiple header/detail sets can be combined in a single file, where needed.

## Munis Property Lockbox File Layout Specification

### Header (Batch) Record Layout

Field Name	Positions	Type	Comments
Batch Header Record Information	1	Alphanumeric	Value must be "H". Identifies this as a 'H'header entry in the file.
Batch Amount	2-11	Numeric	Total of the payment records for the batch. The decimal is implied. This field must also be right-aligned and zero-filled.
Batch Date	12-19	Date (MMDDYYYY)	Payment Date for the items in the batch.
Bank Code/Cashier	20-23	Alphanumeric	Lock Box Co. info.
Batch Number	24-27	Numeric	Lock Box Co. info.
Filler	28-80	N/A	Unused. Value should be spaces.

### Detail (Payment) Record Layout

Field Name	Positions	Type	Comments
Filler	1-3	Alphanumeric	Unused. Value should be spaces.
Detail Category Code	4-5	Numeric	The Munis category associated with the item to be paid. This may be extracted from the scan line. 20 = Real Estate 25 = Personal Property 60 = Utility Billing etc.,
Detail Bill Year	6-9	Numeric (YYYY)	The year associated with the item to be paid. This may be extracted from the scan line.
Detail Bill Number	10-17	Numeric	The bill number associated with the item to be paid. This may be extracted from the scan line. The Property Code is ignored if this field is completed.
Detail Property Code	18-47	Alphanumeric	The property code (e.g., UB account, RE parcel) of the property associated with the bills to be paid.
Detail Amount Paid	48-57	Numeric	Payment amount. The decimal is implied. This field must also be right-aligned and zero-filled. For example, 0000012300 represents \$123.00. This may be extracted from the scan line.
Detail Reference	58-73	Alphanumeric	A reference for the payment, such as a check number (optional).
Paid by CID	74-82	Numeric	The customer identification number of the payer (optional).
Paid by Name	83-102	Alphanumeric	The name of the payer (optional).
Paid by Address 1	103-132	Alphanumeric	Address line 1 for the payer (optional).
Paid by Address 2	133-162	Alphanumeric	Address line 2 for the payer (optional).
Paid by City	163-182	Alphanumeric	City for the payer (optional).
Paid by State	183-184	Alphanumeric	State for the payer (optional).
Paid by ZIP	185-194	Alphanumeric	ZIP for the payer (optional).



## Munis Property Lockbox File Layout Specification

Field Name	Positions	Type	Comments
Detail Customer Number	195-203	Numeric	For sites processing utility billing payments by account/CID this is optional, however, if it is completed Detail Category Code and Property Code must also be completed and Detail Bill Year and Detail Bill Number must be spaces.
Detail Bill Type	204	Alphanumeric	The bill type associated with the item to be paid. Used to limit payment to a subset of bills associated with the Property Code.
Detail Payment Date	205-212	Date (MMDDYYYY)	Payment date for the item to be paid. (optional)
Detail Installment Number	213-214	Numeric	The specific installment number of the bill to be paid. The installment number is used in conjunction with the Property Code, Bill Year and Category.
Detail Category Sub Filter	215-224	Alphanumeric	Category specific bill filtering information that can be used in conjunction with the Property Code, Bill Year, and Category to only pay a certain subset of bills for a given Property Code within the Bill Year and Category. (optional)  Business License category 55: [215, 218] = BL category [219, 222] = BL type
Filler	225-259	Alphanumeric	Unused. Value should be spaces.

## Munis Property Lockbox File Layout Specification

### Sample Layout

The sample layout represents a single batch (header record) containing 3 individual payments (detail records) of differing amounts.

This layout includes Detail Bill Year and Detail Bill Number.

```
H00000060000815201011118000
  60201000101010                0000020000
  60201000101011                0000030000
  63201000101012                0000010000
```

This layout includes a Property Code and Category.

```
H00000060000815201011118000
  60          123456789          0000020000
  60          987654321          0000030000
  63          abcdefghijklmnopqrstuvwxyzabcd0000010000
```