Request for Proposals

For

Hansen Upgrade Project

RFP20-08

Project No. 18055.01

August 12, 2020

In accordance with the Americans with Disabilities Act (“ADA”) and California law, it is the policy of the El Dorado Irrigation District (“EID” or “District”) to offer its public programs, services and meetings in a manner that is readily accessible to everyone, including individuals with disabilities. If you are a person with a disability and require information or materials in an appropriate alternative format; or if you require any other accommodation, please contact the ADA Coordinator at the number or address below at least 72 hours prior to the meeting or when you desire to receive services. Advance notification within this guideline will enable the District to make reasonable arrangements to ensure accessibility. The District ADA Coordinator can be reached at: Phone: (530) 642-4045; email: adacoordinator@eid.org
Contents

I. INTRODUCTION ..................................................................................................... 1

II. RFP REQUIREMENTS ........................................................................................... 1
   A. RFP COORDINATOR ......................................................................................... 1
   B. PROJECT SCHEDULE ...................................................................................... 2
   C. RFP SCHEDULE CHANGES ............................................................................. 2
   D. MANDATORY PRE-BID VIDEOCONFERENCE ................................................ 2
   E. QUESTIONS PERTAINING TO THE RFP .......................................................... 3
   F. RFP AMMENDMENT AND CANCELLATION .................................................... 3
   G. COVID-19 CONSIDERATIONS .......................................................................... 3

III. PROPOSAL SUBMITTAL ...................................................................................... 3

IV. INFORMATION TO BE SUBMITTED IN PROPOSAL ............................................ 5
   A. MINIMUM QUALIFICATIONS ............................................................................ 5
   B. RFP GUIDELINES ............................................................................................. 5
   C. PROPOSAL RESPONSE .................................................................................. 6
      Cover .................................................................................................................... 6
      Table of Contents (with all figures and tables)..................................................... 6
      Transmittal Letter.................................................................................................. 6
      Section 1 - Executive Summary ............................................................................ 6
      Section 2 - Bidder Qualifications ........................................................................ 6
      Section 3 - System Overview .............................................................................. 7
      Section 4 – Upgrade Implementation Plan ........................................................ 7
      Section 5 – Optional Product Support, Maintenance and Enhancement Programs 8
      Section 6 – Optional On-Going Training After Go-Live ......................................... 8
      Section 7 - Team Experience and Capabilities ..................................................... 8
      Section 8 - Legal Documents ............................................................................. 9
      Appendix A – Forms ........................................................................................... 9
      Appendix B - Resumes ......................................................................................... 9
   D. Fee RESPONSE ................................................................................................ 9
      Pricing Template ................................................................................................... 9
      Rate Sheet ........................................................................................................... 10
      Milestone Payment Schedule ............................................................................. 10
   E. NON-DISCLOSURE AND DISCLOSURE OF PROPOSALS ........................... 10

V. SELECTION CRITERIA ........................................................................................ 11
   A. QUALIFICATION PROCESS ........................................................................... 11
   B. SHORTLIST SELECTION ................................................................................ 11
   C. FINALISTS PROCESS .................................................................................... 12
      Interviews: ........................................................................................................... 12
      Demonstrations: .................................................................................................. 12
      Site Visits: .......................................................................................................... 13
   D. NEGOTIATION AND AWARD .......................................................................... 13
   E. PROTEST PROCEDURE ................................................................................... 14
I. INTRODUCTION

El Dorado Irrigation District ("EID" or "District"), an irrigation special district organized and existing under the California Irrigation District Law (Water Code § 20500, et seq.), hereby gives notice that it is accepting proposals for workflow transformation, optimization, and upgrade services of the District’s existing Infor Hansen 7.x system to the latest release of Infor’s Public Sector ("IPS") solution as described in this Request for Proposals ("RFP").

The District is seeking both business and technology transformation via the planned Hansen upgrade. The District has employed various Hansen modules for the past 20 years and Hansen is a critical business solution for the District’s utility billing, customer service, permitting, and asset and maintenance management functions. However, the District’s current version is outdated and many of the District’s core business processes have necessitated work around or drifted away from industry best practices. Through this upgrade the District wishes to modernize its software and transform its business processes in alignment with best practices.

The District is in El Dorado County, California, located on the western slope of the Sierra Nevada Mountains. Its contiguous service area covers approximately 220 square miles and 100,000 residents, ranging from El Dorado Hills in the west to Strawberry in the east, and from the South Fork American River in the north to the Cosumnes River in the south.

The District provides treated water, wastewater treatment and disposal, recycled water, recreation services and operates FERC Hydroelectric Project 184. It is a local public agency, governed by a five-member elected Board of Directors with approximately 225 to 250 total employees, including permanent, temporary and contract workers. Additional information about the District is available at its website, www.eid.org.

II. RFP REQUIREMENTS

A. RFP COORDINATOR

All communications concerning this RFP must be submitted in email to the RFP Coordinator identified below. The RFP Coordinator will be the sole point of contact for this RFP.

Mr. Srinivasan Sundaram – RFP Coordinator
ssundaram@eid.org

The Bidder’s contact with anyone else in the District except the RFP Coordinator is expressly forbidden and may result in disqualification of the proposer’s bid.
B. PROJECT SCHEDULE

The following represents the District’s schedule for this RFP process:

**RFP Schedule of Events**

<table>
<thead>
<tr>
<th>RFP Event</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>RFP Issue Date</td>
<td>8/12/2020</td>
</tr>
<tr>
<td>Mandatory Pre-Bid Videoconference</td>
<td>8/24/2020</td>
</tr>
<tr>
<td></td>
<td>9:00 am to 11:00 am PT</td>
</tr>
<tr>
<td>Deadline for Written Questions and Comments</td>
<td>8/27/2020</td>
</tr>
<tr>
<td></td>
<td>5:00 pm PT</td>
</tr>
<tr>
<td>Response Issued to Written Questions and Comments</td>
<td>9/02/2020</td>
</tr>
<tr>
<td>Deadline for Submitting a Proposal</td>
<td>10/2/2020</td>
</tr>
<tr>
<td></td>
<td>3:00 pm PT</td>
</tr>
<tr>
<td>District Notifies Finalists and Provides Proof-of-</td>
<td></td>
</tr>
<tr>
<td>Capabilities (POC) material</td>
<td>11/4/2020*</td>
</tr>
<tr>
<td>Finalist Interviews and POC Demonstrations</td>
<td>11/16/2020 to 12/11/2020*</td>
</tr>
<tr>
<td>Vendor Selection</td>
<td>12/18/2020*</td>
</tr>
<tr>
<td>Conclusion of Contract Negotiations with Finalist</td>
<td>1/29/2021*</td>
</tr>
<tr>
<td>Award of Proposal and Contract Signing</td>
<td>February 2021*</td>
</tr>
<tr>
<td>Contract Start Date</td>
<td>3/1/2021*</td>
</tr>
</tbody>
</table>

*Anticipated dates.

C. RFP SCHEDULE CHANGES

The District reserves the right, at its sole discretion, to adjust this schedule, as it deems necessary. Notification of any adjustment to the RFP Schedule of Events will be provided through the District’s website. Prospective Bidders are encouraged to sign-up on the District’s website at [http://www.eid.org/about-us/advanced-components/enews-sign-up](http://www.eid.org/about-us/advanced-components/enews-sign-up) to be notified of RFP schedule changes.

D. MANDATORY PRE-BID VIDEOCONFERENCE

All Bidders responding to this RFP as the Prime must attend the Mandatory Pre-Bid Videoconference on the due date published in the RFP Event Schedule. All Prime Bidders must register in advance for the videoconference by indicating no less than three (3) calendar days prior to the event their intent to participate via email communication with the RFP Coordinator.
E. QUESTIONS PERTAINING TO THE RFP

Specific questions concerning the RFP should be submitted in writing, via e-mail to the RFP Coordinator before the deadline published in the RFP Event Schedule. Proposer questions should clearly identify the relevant section of the RFP and page number(s).

F. RFP AMMENDMENT AND CANCELLATION

The District reserves the unilateral right to amend this RFP in writing at any time. The District also reserves the right to cancel or reissue the RFP at its sole discretion. Proposers will respond to the final written RFP and any exhibits, attachments, and amendments. All such addenda shall be part of this RFP and binding upon each Bidder. If an amendment is issued, it will be posted on the District’s website and each Bidder is solely responsible for obtaining all posted addenda. Prospective Bidders are encouraged to sign-up on the District’s website at http://www.eid.org/about-us/advanced-components/enews-sign-up to be notified of addenda postings.

G. COVID-19 CONSIDERATIONS

Vendors are required to review and comply with EID’s Contractor/Vendor SOP during COVID-19 (see Appendix E in Exhibit C of this RFP).

III. PROPOSAL SUBMITTAL

The Bidder’s proposal must be received via email by the RFP Coordinator and cc’d to ContractManagement@eid.org no later than the Proposal Deadline, as determined by the District’s email receipt time. Proposals received after the Proposal Deadline will NOT be accepted. It is the sole responsibility of the Bidder to assure that its proposal is received by the District prior to the deadline date and time. Each proposal must contain the full set of completed forms as required by this RFP. There is no appeal from a refusal for an incomplete or late response. The Proposal Submittal email subject should be clearly labeled:

“Proposal for Hansen Upgrade Project”

The Bidder’s proposal submittal to the District’s RFP shall consist of two (2) separate files:

- **One (1) PDF file** for the Bidder’s “Proposal Response” including the Bidder’s Transmittal Letter, Proposal Response Contents, and required forms.

- **One (1) PDF file** for the Bidder’s “Fee Response” including the Pricing Template (Exhibit B.4), Bidder’s Milestone Payment Schedule, and Bidder’s Rate Sheet for optional, future services.

Each of the Bidder’s PDF files must be clearly labeled as such.

The District’s email attachment size limit is 20 MB per message. Because of the possible large size of the files, the specific details for accepting the Bidder’s electronic submission by the due date will be discussed in the Mandatory Pre-Proposal Videoconference.
The District reserves the right to reject any or all proposals and to re-issue this RFP. The District may waive any minor informalities or irregularities in any Bidder’s proposal that are immaterial and inconsequential in nature. The District reserves the right to request additional written or oral information from the Bidder(s) to obtain clarification of their proposal. The District has the right to determine which Bidder(s), in the sole judgment of EID, have met the minimum qualifications for evaluation for this project.

Before submitting its proposal, the Bidder should fully inform itself of the terms, conditions, and specifications of the items or services required. Proposals offering terms other than those shown herein may be declared non-responsive and may not be considered and will be at the Bidder’s own risk. All proposals become the property of the District. All costs associated with development of the proposal shall be the sole responsibility of the proposing firm and shall not be charged in any manner to the District.

The Bidders shall comply with all applicable federal, state, and local laws, rules, and regulations regarding nondiscrimination in employment because of race, color, ancestry, national origin, religion, sex, marital status, age, medical conditions, disability, or any other reason.

The signer of the Bidder’s proposal must represent in the Transmittal Letter that they are duly authorized to execute and sign documents on behalf of their respective entity. By submission of a signed proposal, Bidder consents to be bound by all terms and conditions set forth in the pages of this solicitation and all attachments hereto, including without limitation the Professional Services Agreement sample (and insurance requirements attached thereto) attached to this RFP as Exhibit C.

By signing the Transmittal Letter, the Bidder hereby agrees that the goods or services offered will meet all the requirements of the specifications or scope of services in this solicitation unless deviations from them are clearly indicated in the Bidder’s response. A Bidder may submit an attachment entitled “Exceptions for Specification” which must be signed by Bidder’s authorized representative. An explanation must be made for each item to which an exception is taken, giving in detail the extent of the exception and the reason for which it is taken. Proposals failing to comply with this requirement may be considered ‘non-responsive.’ The District reserves the right not to accept any exceptions.

The terms Bidder, Supplier, Vendor, Proposer, Consultant, Contractor or similar name may be used interchangeably in this solicitation and shall refer exclusively to the person, company, or corporation with whom the District enters into a contract as a result of this solicitation. Any changes to this RFP are invalid unless specifically modified by the District and issued as a separate addendum document. Should there be any question as to changes to the content of this document, the District’s copy shall prevail.
Copies of the general prevailing rates of per diem wages for each craft, classification, or type of worker needed to execute the Contract, as determined by Director of the State of California Department of Industrial Relations are deemed included in this RFP and can be found here: https://www.dir.ca.gov/OPRL/dprewagedetermination.htm.

IV. INFORMATION TO BE SUBMITTED IN PROPOSAL

The Scope of Work for professional services being solicited is found in Exhibit A attached to this RFP. The successful proposal(s) will demonstrate sufficient staff resources, expertise, relevant experience, and lack of disabling professional conflicts to perform the scope of work, along with demonstrated commitment to cost control and client service that meet the District’s needs.

A. MINIMUM QUALIFICATIONS

The following minimum qualifications shall be clearly stated in III. C. Section 2 - Bidder Qualifications to be considered for this procurement.

1. The Bidder must have similar upgrade projects from Infor Hansen 7.x to Infor 8.x or Infor Public Sector v.11.x for the core Hansen/IPS modules covered in this RFP. The Bidder shall refer to III. C. Section 2.1 of this RFP for a complete list of the Hansen software modules to be upgraded or anticipated newly procured by the District.

2. At least three (3) Hansen upgrade projects must be in production within utility and/or public sector organizations in the United States.

3. At least two (2) of these upgrades must have been completed within the past five (5) years.

4. At least one (1) must be in Production with the Infor Public Sector v.11.x.

5. If the Bidder’s team is comprised of more than one legal entity, the Bidder must propose a single point of contact (‘Prime’) with the overall responsibility for the successful solution implementation.

B. RFP GUIDELINES

The District’s RFP Guidelines are summarized below:

1. The Bidder’s response must follow the content Outline provided in Section VI.C.

2. All forms and questionnaires must be completed using the electronic versions provided with this RFP.

3. The District requires a ‘not-to-exceed’ contract for the upgrade services. The successful Bidder will be required to complete the agreed-upon scope of work for the negotiated price without change orders.

4. The District requires each Bidder to provide a Milestone Payment Schedule in their proposal as part of the separate Bidder’s Fee Response.
C. PROPOSAL RESPONSE

Brevity and conciseness are valued by the District. Each proposal shall be limited to 100 pages (not including Appendices, completed Forms, and Resumes). The Bidder’s general marketing materials are not to be included in the response.

Each Bidder must use the following format and should include each section detailed below in the order presented. Details are provided to represent the items that are to be covered in each section. Failure to follow the proposal instructions or to address all items will negatively impact the Bidder’s scoring. Failure to address a significant portion of the items may classify the response as ‘non-responsive’ and preclude the Bidder from further consideration. Appendices must be in its own section at the back of the RFP response.

The contents of the Bidder’s Proposal Response shall include the following:

Cover

Table of Contents (with all figures and tables)

Transmittal Letter: The transmittal letter will indicate the intention of the Bidder to adhere to the provisions described in the RFP. The letter of transmittal will:

1. Identify the Bidder’s organization.
2. Identify the person, by name and title, authorized to obligate the organization contractually.
3. Identify the Bidder’s primary contact with phone and email address.
4. Identify all subcontractors and their specific role.
5. Acknowledge the proposal is considered firm for one hundred and eighty (180) days after the due date for receipt of proposals and 90 days after receipt of the last best and final offer.
6. Duly authorized person, with name and title, to sign the Transmittal Letter on behalf of the Bidder’s organization.

Section 1 - Executive Summary

1. Each Bidder will provide an Executive Summary that presents in brief, concise terms a summary level description of the contents of the proposal response.

Section 2 - Bidder Qualifications

1. Vendor Profile and Product History: Each Bidder will provide a profile of its organization and all other companies who will be providing products or services through a subcontracting arrangement with the Bidder. Each Bidder will complete Exhibit B.1. If more than one vendor is submitting a profile must be included for each.

2. Experience: Each Bidder will describe their organization’s experience in Hansen upgrades for all the modules included in this RFP and how their approach has improved the customer's operations. Each Bidder shall clearly describe how their organization or team satisfies the stated Minimum Qualifications in this RFP. Failure to do so is at Bidder’s own risk.
3. **References:** Each Bidder is to provide at least three (3) references in the utility and/or public sector market with 2 upgrades completed in the past five years and at least one in Production with the proposed version. (including description of customer’s business and operations) in the U.S. per Exhibit B.3. References from similar utilities of similar size in geographic proximity to EID will be given preference in scoring.

**Section 3 - System Overview**

Each Bidder must cover the following in the proposal:

1. Identify the system architecture and development tools.
2. Identify any other software or services that is required for the solution.
3. Identify recommended operating environments: production, test, QC, etc. (and verify which/how many are included in the proposal).
4. Describe the approach to writing and managing interfaces.
5. Add the appropriate technical system documentation. Do not include marketing materials.

**Section 4 – Upgrade Implementation Plan**

Each Bidder is to describe their approach for the upgrade that cover the following items:

1. Project Management
2. Application(s) Installation (including database)
3. Application Set Up (including tailoring, configuration, user set up, access controls)
4. Configuration Change Management Control
5. Data Mapping and Conversion
6. Testing – Unit and System
7. Business Process Improvement
   - Process Changes
   - Detailed To-Be Process Map Documentation
8. Forms/Screens Changes & Design
9. Interface Development
10. Reports
11. Backup & Recovery
12. Training – Core Team, System and End-User
13. System Acceptance Testing
14. Transition to full operations (cut-over)
15. Post Go Live Support
Please note that the District currently envisions to implement all new IPS modules in one software upgrade. However, each Bidder should address the implementation options for upgrading the new IPS modules either as one phase or in a phased approach; including the advantages and disadvantages to the District for each and provide the Bidder’s recommended approach, with applicable pricing in the Fee Response.

The District also currently envisions the new IPS modules will be upgraded to operate On-Premise utilizing the District’s existing IT infrastructure. However, each Bidder should address the implementation options for upgrading the new IPS modules as a Hosted, On-Premise or Hybrid approach; including the advantages and disadvantages to the District for each and provide the Bidder’s recommended approach, with applicable pricing in the Fee Response.

**Section 5 – Optional Product Support, Maintenance and Enhancement Programs**

Each Bidder shall describe and price all aspects of ongoing support and maintenance activities for a five-year (5) period from Go-live in their response.

Each Bidder should also describe additional product support, maintenance and system enhancement strategies or services relevant to this project that can be provided under an optional sole source professional service agreement. This may include additional support or the development of further solution enhancements, implementing additional or new features and functionality, developing further reporting or dashboards, additional interfaces, etc.

**Section 6 – Optional On-Going Training After Go-Live**

Each Bidder is to describe optional On-Going Training services and capabilities that their team can provide under an optional sole source professional service agreement after the Go-Live. The District will give preference to post Go-Live online training solutions that offer:

1. Training content the District can use and enhance as necessary to train new users and existing users about new enhancements.
2. Task-oriented refresher training content easily accessible at time of need from mobile devices and computer workstations.

**Section 7 - Team Experience and Capabilities**

Each Bidder is to provide the following, including for any subcontractors:

1. Identify each proposed key/core team member and their role(s) on the project,
2. Identify project-relevant experience for the proposed key/core team members, and especially the team’s Project Manager
3. State your experience beyond the IPS core applications, specifically with Infor Mobile, Configured Assets, Infor OS and any additional recommended software. All Project team staffing changes must be pre-approved by the District.
Section 8 - Legal Documents
Each Bidder must explicitly indicate their acceptance of the Terms and Conditions in the Exhibit C – Professional Services Agreement Sample and/or identify any exceptions. The District reserves the right to not accept any exceptions.

Appendix A – Forms
Each Bidder shall complete and attach the required Forms.

- B.1 – Vendor Profile
- B.2 – Roles and Responsibilities
- B.3 – References Form

The Bidder’s completed Forms do not add to the response page limit.

Appendix B - Resumes
Each Bidder shall provide detailed Resumes of the proposed Project Manager and the team members including subcontractors. The Bidder’s Resumes do not add to the response page limit.

D. FEE RESPONSE
The Bidder’s shall submit its Fee Response in conformance with the Submittal Instructions.

Pricing Template
Each Bidder shall use the Pricing Template (Exhibit B.4) to provide the details and total cost of their proposed services. The contract will be based on a not-to-exceed cost including reimbursable expenses for upgrade services. Pricing is an important aspect of the overall evaluation of the Bidder’s response and should be as accurate as possible.

1. Each Bidder shall submit their Fee Response including the completed Pricing Template under separate cover per the Submittal Requirements.

2. Each Bidder shall include their services and costs for implementing all proposed software modules in their response. The completed Pricing Template shall include a complete listing of all charges for the Bidder’s proposed services with a detailed itemization of each task to be performed.

3. The Bidder must include also include pricing for a five-year (5) period in the pricing response associated with all aspects of ongoing support and maintenance activities. Bidder shall specify any minimums or bundles (e.g. 4 hour minimum, 10 hour per month allocation, etc.)

4. All items not defined in the scope must be shown separately as optional modules or tasks and priced separately.

5. The Pricing Template must be signed by a duly authorized person to contractually obligate the organization.
6. Any Bidder who significantly under-bids their solution may be disqualified from this procurement.

Failure to adhere to these requirements may classify the response as ‘non-responsive’ and preclude the Bidder from further consideration.

At its discretion, the District may seek additional clarification. If clarifications are not received within one week of request, they may be considered non-responsive and the Bidder may be precluded from further evaluation.

Please note that the District will procure the required Infor software licenses and support agreements directly from Infor. This includes both the Hansen upgrade licenses to the latest version of Infor IPS, as well as any new Infor software licenses (e.g., including Configured Assets, Infor Mobile, CSS and Infor OS middleware (if recommended by the successful Bidder). Each Bidder shall include their services and costs for implementing these modules in their response, including any other recommended non-Infor software or middleware options.

**Rate Sheet**

The District requires that each Bidder provides a Rate Sheet for each type of resource being proposed. These set rates will be used for any agreed-upon out-of-scope work that arises out of the implementation of the Bidder’s proposed solution, plus possible solution enhancement needs arising with production use. These rates will remain in effect for the duration of the implementation effort, and for up to five (5) one-year terms after the completion of the project.

**Milestone Payment Schedule**

The District requires that each Bidder provides a Milestone Payment Schedule to be included in the Fee Response.

**E. NON-DISCLOSURE AND DISCLOSURE OF PROPOSALS**

Proposals will be held in confidence during the evaluation process until District staff issues Notice of Intent to Award the contract. Thereafter, all proposals will be treated as documents subject to disclosure under the California Public Records Act (Act).

If the Bidder believes any portion of its proposal contains confidential or proprietary information, exempt from public disclosure under the Act, Bidder must label each page containing such information as “Confidential”. The “Confidential Information” label must be clear and legible. Except as compelled by court process, the District will not release any such documentation claimed to be exempt that is submitted in said manner without prior written notice to the Bidder.
V. SELECTION CRITERIA

The proposals received shall be subject to an evaluation by the District as deemed appropriate for purposes of selection. A cross-functional team of District staff will comprise the Evaluation Selection Team, with representation from each of the District’s functional areas identified herein, the District’s Information Technology Department, as well as representation from the District’s CMMS/CIS Technology Consultant, Westin Technology Solutions. This team is responsible for evaluation and scoring of the proposals, Bidder demonstrations, and other evaluation tasks that may include site visits.

A broader Advisory Group consisting of subject matter experts from the District's departments will be established to participate in various phases and provide input on specific modules that are being assessed. The Advisory Group members will provide input to the Evaluation Selection Team on the specific modules they evaluate the overall functionality of the solutions being considered.

The District’s evaluation will be comprised of several phases described below:

A. Qualification Process: District’s review of Transmittal Letter and Bidder’s relevant experience to determine the Bidder’s ability in meeting the minimum qualifications.

B. Short-List Selection: District’s review of written proposals and references to develop a short-list of Bidders for further evaluation

C. Finalists Selection: Interviews, demonstrations, and site visits for the District to select the finalist Bidder(s) for further scope and price negotiation.


A. QUALIFICATION PROCESS

The District will initially review the responses to determine if the Bidder meets the minimum requirements as listed in Section IV.A. The Bidder shall clearly demonstrate in the Executive Summary that their team meets the stated Minimum Requirements. Failure to do so is at the Bidder’s own risk. Any response that does not meet the Minimum Requirements at the sole discretion of the District may be deemed to be ‘non-responsive’ and will not be further considered.

B. SHORTLIST SELECTION

For all proposals that meet the minimum qualifications, this phase involves an assessment of the major strengths and weaknesses of each software/implementation proposal, including discussion of the extent to which each proposal meets the RFP requirements as evidenced by the information submitted in the proposal. The evaluation criteria to be used during this Phase include the following:
• **Implementer Profile – (25%)** The District intends to evaluate and score each Bidder’s proposal for similar project experiences, qualifications, and financial health (e.g., company stability, customer base, Project Manager and team experience and qualifications).

• **Upgrade Implementation Plan - (25%)** The District intends to evaluate and score each Bidder’s proposal on the responsiveness to the RFP requirements contained in this document (e.g., completeness of plan, quality, implementation schedule, time commitment).

• **References – (35%)** The District intends to seek feedback on each Bidder’s references. The District may inquire as to other client’s experiences with the Bidder’s performance. The District may also inquire as to the Bidder’s responsiveness, implementation quality, ease and cost of upgrades and maintenance, post Go Live support services, and full-time staffing needs once implementation is complete.

• **Price – (15%).** The District intends to review of the Bidder’s Fee Responses for professional services and other proposed items.

Through this process, the District intends to short-list two (2) to three (3) Bidders from the RFP responses to move forward for further evaluation. Additional discovery efforts may be performed at the District’s sole discretion to select the short-list Bidders.

**C. FINALISTS PROCESS**

*Interviews*: During this stage, the District will request the short-list Bidders to make oral presentations and answer pertinent questions. These presentations will provide the short-list Bidders with an opportunity to explain their approach and qualifications and answer any questions from the District’s Selection Committee.

*Demonstrations*: The short-list Bidders may be expected to spend approximately 3 hours demonstrating their knowledge of Infor Public Sector functionality. The logistics, scenarios and exercises for the demonstration “scripts” will be provided by the District. These scripted demonstrations will be used to assess the following:

- Bidder’s ability to successfully demonstrate the provided scripts;
- Bidder’s ability to support the District’s business process improvement goals;
- Bidders ability to propose best practice solutions to the District’s current and future needs; and
- Bidder’s insights to the IPS system flexibility and use.

The scripted demonstrations will not include any functionality that is considered beta or part of a future release.
**Site Visits:** Following the interviews, the District may visit or call any of the Bidder’s reference sites to evaluate the installed IPS solutions and discuss with the current users. The District may then select up to two (2) Bidders deemed to be fully qualified and best suited among those submitting proposals on the evaluated factors. Should the District determine in its sole discretion, that only one Bidder is fully qualified or that one Bidder is clearly more highly qualified than the others under consideration, a contract may be negotiated and awarded to that Bidder. The selected finalist Bidder(s) will move forward to the District’s Final Negotiation and Award process.

**D. NEGOTIATION AND AWARD**

Negotiations will be conducted with the finalist Bidder(s) to allow the parties to seek clarification on project scope, expectations, and ask any needed questions. The District may ask the finalist Bidder(s) for written clarification/updates to the initial proposal, including any exceptions the Bidder(s) may have to contract conditions included in the RFP. The District may ask the finalist Bidder(s) to confirm all requirements and representations. This may include clarification on the implementation scope, or any additional items that either party requires to be confirmed.

**Best and Final Offer (BAFO”):** The District may ask the finalist Bidder(s) for its best and final offer (“BAFO”) to solidify final negotiations. The following items are typically included in the BAFO.

- Final Interface Requirements and Design Checklist
- Final Software Module licenses
- Detailed Implementation Plan by Task
- Detailed Training Plan
- Detailed Cost Worksheet
- Contract Terms and Conditions
- Special Terms and Conditions

The BAFO should clearly state the implementation tasks, hours and participation required by the finalist Bidder(s) and the District, any optional software and services, and an updated detailed Pricing Template (Exhibit B.4). Price shall be considered important but the sole determining factor.

Once the BAFO and contractual issues are reviewed, the District may select to move forward with one finalist upon the condition that the parties are able to agree upon a contractual Statement of Work.

**Statement of Work:** The finalist Bidder and District will jointly develop the detailed Statement of Work, which must be approved by District. If agreement for implementation services cannot be reached with the finalist Bidder, the District may elevate any of the other proposals submitted in response to the RFP for further evaluation and negotiations.
Furthermore, the District reserves the right to elevate any previously non-elevated Bidder if it deems it in the District’s best interest.

**Contract Award:** The District’s Evaluation Selection Team will make a procurement recommendation to the Project’s Executive Steering Committee. Final contract award must be presented to the District’s Board for approval. The District reserves the right to award the contract in phases, in total, or not at all. The District staff presently anticipates making contract award recommendations to the District’s Board of Directors at a regularly scheduled meeting in February 2021. Notice of Intent to Award for the professional service contract will be issued prior to the Board meeting at which the contract is considered.

**E. PROTEST PROCEDURE**

The District will post on its website, [www.eid.org](http://www.eid.org), and in the glass case outside the District’s main office the Notice of Intent to Award for Professional Services (NOIA) no later than the Business Day after issuance. Any protest must be submitted via email to ContractManagement@eid.org before 3:00 p.m. of the fifth calendar Day following the issuance of the NOIA. Any delay or failure to submit a protest within the timeline described above will not extend the protest deadline.

a. The initial protest must contain a complete statement of the basis for the protest.

b. The protest must refer to the specific portion of the document that forms the basis for the protest.

c. The protest must include the name, address, and telephone number of the person representing the protesting party.

d. The party filing the protest must concurrently transmit a copy of the initial protest document and any attached documentation to all other parties with a direct financial interest that may be adversely affected by the outcome of the protest. Such parties shall include all other Bidders who appear to have a reasonable prospect of receiving an award depending upon the outcome of the protest.

e. The procedure and time limits set forth in this paragraph are mandatory and are Bidder’s sole and exclusive remedy in the event of a protest. Bidder’s failure to comply with these procedures shall constitute a waiver of any right to further pursue the protest, including filing a Government Code Claim or legal proceedings. A Bidder may not rely on a protest submitted by another Bidder but must timely pursue its own protest.
VI. ATTACHMENTS

EXHIBIT A – Scope of Work (18 pages)
EXHIBIT B – Forms (under separate file)
   B.1 – Vendor Profile (2 pages)
   B.2 – Roles and Responsibilities (2 pages)
   B.3 – References Form (2 pages)
   B.4 – Pricing Worksheet (4 pages)
EXHIBIT C – Professional Services Agreement Sample (22 pages)
APPENDIX A – Hansen Custom Tabs (7 pages)
APPENDIX B – Hansen Custom Triggers (1 page)
EXHIBIT A - SCOPE OF WORK

1.0 BACKGROUND

The El Dorado Irrigation District (“District” or “EID”) is seeking business and technology transformation via the planned upgrade of its Infor Hansen software from version 7.7 to the latest release of the Infor Public Sector (“IPS”) solution. The District’s Hansen software is a critical solution for utility billing, customer service, permitting, and asset and maintenance management functions.

1.1 Project Business Objectives

The District’s specific business objectives for this project are:

1. Modernize and transform the District’s business processes in alignment with best practices,
2. Provide like functionality or better in the new solution,
3. Significantly improve the District’s customer experience and self-service capabilities,
4. Significantly increase the District’s operating efficiency through effective applications of mobile and data-driven results,
5. Avoid recurring and redundant data management tasks in the new solution through effective workflow design and automation,
6. Provide staff and contract workers with secure and timely role-based access to available information, standardized features and functionality,
7. Provide comprehensive role-based online solution training and documentation in an open and maintainable format suitable for ongoing use over solution life,
8. Provide strategies and solutions to identify and populate required and essential data into the new solution with high levels of efficiency and accuracy,
9. Implement an open, robust, extendable, efficient and maintainable middleware integration platform,
10. Deliver a production solution that leverages the available strengths and capabilities of the District’s current IT infrastructure and databases wherever feasible,
11. Deliver a production solution that is highly robust, responsive, and reliable,
12. Perform all work including solution development, testing and go-live cutover(s) with minimal business disruption, and
13. Complete the entire project in scope, on time, and within budget.

The new IPS solution will interface with the District’s existing core applications as described in this document.
1.2 Transformation Objectives

The opportunities for improving EID business processes can be grouped into three major classifications. Each of the opportunities are identified and defined in the following tables.

**Table 1.1 - New and Improved Business Functions:** identifies the major business process improvements that should be provided by the new system.

**Table 1.2 - Productivity Improvements:** identifies the functional improvements that will allow EID staff to make more efficient use the new CIS and CMMS.

**Table 1.3 - Integration Improvements:** identifies the integration improvements that are needed to improve efficiency and eliminate the manual transfer of data.

*Table 1.1 – New and Improved Business Functions*

<table>
<thead>
<tr>
<th>Category</th>
<th>Description of Opportunity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer Management</td>
<td>The District desires to more effectively and proactively care for the customers’ needs, including the ability to manage all information associated with its customers, accounts, premises, meters, service orders, work orders and metrics.</td>
</tr>
<tr>
<td>Customer Self Service (CSS)</td>
<td>The District expects to greatly enhance the customers’ ability to use Customer Self Service via an online portal to manage their accounts, including the ability to make requests for communication and service.</td>
</tr>
<tr>
<td>Mobile Work Management</td>
<td>The District wishes to take advantage of functionality related to mobile work management including service requests, work orders and field maintenance work. The District also wishes to leverage GIS spatially for the field crews by taking advantage of modern mobile technologies.</td>
</tr>
<tr>
<td>Asset Management</td>
<td>EID is using the Hansen CMMS as a major component in its asset management program. Efforts are underway to define the District’s asset hierarchy, asset classes, asset attributes, asset condition rating and new strategies. This project will prepare the District for future asset management forecasting by making specific fields required fields (ex. installation date, replacement cost, expected life, etc.) and build condition rating information into the process of closing work orders. The District desires the IPS solution to help with complete end-to-end asset life cycle management from installation, usage, inspections, maintenance to asset replacement/retirement.</td>
</tr>
</tbody>
</table>
### Table 1.2 – Productivity Improvements

<table>
<thead>
<tr>
<th>Category</th>
<th>Description of Opportunity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improved Report Generation</td>
<td>The Hansen upgrade is expected to provide improved and easy to use report generation and publication capabilities. Dashboards, queries, and other analytics tools should be used in addition to classic reports to effectively manage performance metrics and data.</td>
</tr>
<tr>
<td>Paperless System Operation</td>
<td>The District would like to provide automated reporting and report distribution using the intranet or other electronic method. In addition, copies of the electronic files and reports should be available for viewing, downloading, and printing. EID wants the ability to transition to a paperless system in the future.</td>
</tr>
<tr>
<td>Improved Workflow</td>
<td>The District wishes to modify several current workflows to improve efficiency and accuracy utilizing best practices and enhanced functionality in the new IPS solution. EID wants an able and experienced partner to help facilitate and guide the optimization of workflows while not being allowed nor forced into implement unnecessary or complex workflows.</td>
</tr>
<tr>
<td>Performance Management</td>
<td>The District is interested in enhancing its performance management practices and would like to utilize the inherent capabilities of the upgraded system.</td>
</tr>
<tr>
<td>Integrations &amp; Interfaces</td>
<td>All new application systems built to integrate IPS solution with other District systems, and interfaces built to supplement or provide for additional functionality to support business workflows at the District, must be easy to use, configurable with adequate security and audit functions, schedule, troubleshoot and support.</td>
</tr>
</tbody>
</table>

### Table 1.3 – Integration Improvements

<table>
<thead>
<tr>
<th>Category</th>
<th>Description of Opportunity</th>
</tr>
</thead>
<tbody>
<tr>
<td>IVR (Interactive Voice Response)</td>
<td>The District is pursuing a project to select and implement a new IVR system independent of Hansen upgrade project. The Bidder should anticipate integrating the new CMMS with the District's new IVR system, once it is selected. This will allow more calls and current customer payments to be handled automatically without a customer service representative (“CSR”).</td>
</tr>
<tr>
<td>FIS /HRIS Integration</td>
<td>There are many components of the District’s GP Financial/HR Information System that should be integrated with the upgrade. While full discovery will highlight the necessary touch points, several of the possible integrations include fixed assets, purchasing, inventory, meters, project accounting, employees, and timekeeping. The system must also provide a good audit system to track changes and system use.</td>
</tr>
</tbody>
</table>
Category | Description of Opportunity
--- | ---
Document Management | The District desires to manage more of its documents in an electronic environment. The District wants to fully leverage the embedded file attachment capability in the primary application with effective interfaces to EID’s SharePoint 2016 content management system and to its Doc Locator EDMS software.
GIS | EID expects to use the upgrade project to fully integrate the new system with GIS.
Screen Pop | EID expects to integrate the upgrade with the District’s phone system so CSRs will have the ability to have customers' information pop up on their screens automatically when taking calls.

### 1.3 Hansen Overview

The major business functions within this project predominately involve the District’s current Hansen users within the:

1. Finance Department (e.g. Customer Services and Fleet Divisions),
2. Operations Department (e.g. Drinking Water, Wastewater/Recycled Water, Hydro/Watershed Management, and Recreation Divisions) and
3. Engineering Department (e.g. Development Services and Environmental Compliance Divisions).

**Table 1.4** below provides an overview of each department's current organization, functional responsibilities and approximate number of current Hansen users.

**Table 1.4 – Current Hansen Users**

<table>
<thead>
<tr>
<th>Finance Department</th>
<th>Functional Responsibilities</th>
<th>Approx. Users</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer Services</td>
<td>• Customer Service and Dispatch</td>
<td>22</td>
</tr>
<tr>
<td>Division</td>
<td>• Cashiering</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Meter Reading and Utility Billing</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Meter Maintenance</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• USA Locate Services</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Water Use Efficiency</td>
<td></td>
</tr>
<tr>
<td>Fleet Division</td>
<td>• Fleet and Heavy Equipment Operations and Maintenance</td>
<td>9</td>
</tr>
<tr>
<td></td>
<td>• Fabrication and Industrial Coatings</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Facility and Warehouse Services</td>
<td></td>
</tr>
<tr>
<td>Accounting Division</td>
<td>• Accounts Receivable from UB</td>
<td>3</td>
</tr>
<tr>
<td></td>
<td>• Project Accounting</td>
<td></td>
</tr>
<tr>
<td>Operations Department</td>
<td>Functional Responsibilities</td>
<td>Approx. Users</td>
</tr>
<tr>
<td>---------------------------------------</td>
<td>-----------------------------------------------------------------------------------------------</td>
<td>---------------</td>
</tr>
<tr>
<td>Drinking Water Division</td>
<td>• Water Services&lt;br&gt;• Water Treatment Plant Operations and Maintenance&lt;br&gt;• Distribution System Operations and Maintenance</td>
<td>48</td>
</tr>
<tr>
<td>Wastewater / Recycled Water Division</td>
<td>• Sewer and Recycled Water Services&lt;br&gt;• Wastewater Treatment Plant Operations and Maintenance&lt;br&gt;• Collections System Operations and Maintenance</td>
<td>40</td>
</tr>
<tr>
<td>Hydro / Watershed Management Division</td>
<td>• Hydropower Generation and Ditch Services&lt;br&gt;• Hydroelectric Operations and Maintenance&lt;br&gt;• Impoundment and Conveyance Operations and Maintenance&lt;br&gt;• Pest and Vegetation Management (District-wide)&lt;br&gt;• Process Control and Electricians (District-wide)</td>
<td>31</td>
</tr>
<tr>
<td>Engineering Department</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Development Services Division</td>
<td>• New Construction Modeling and Permitting&lt;br&gt;• Sundry Billing</td>
<td>4</td>
</tr>
<tr>
<td>Construction Inspection Division</td>
<td>• Construction Management&lt;br&gt;• Inspection</td>
<td>6</td>
</tr>
<tr>
<td>Environmental Division</td>
<td>• New Connection Permitting&lt;br&gt;• Backflow and Cross Connection Inspections&lt;br&gt;• Industrial Pretreatment Program&lt;br&gt;• Environmental Compliance Audits and Reporting</td>
<td>12</td>
</tr>
</tbody>
</table>

The District’s Engineering Division and the Parks & Recreation Department do not currently use Hansen but will begin using the new IPS solution as part of this upgrade. The District’s inventory has been previously stored in Microsoft Dynamic GP 2016, but EID would like to fully leverage the new IPS solution inventory capabilities. The Functional Responsibilities and approximate number of new Hansen users are shown in **Table 1.5** below.
### Table 1.5 New IPS Users

<table>
<thead>
<tr>
<th>New Hansen Users</th>
<th>Functional Responsibilities</th>
<th>Approx. Users</th>
</tr>
</thead>
</table>
| Engineering Division | • Planning (including GIS)  
  • Capital Improvement Project Development  
  • Asset Drawing and Record Management | 12 |
| Parks & Recreation Division | • Parks Management Services  
  • Maintenance Services  
  • Fee Collections | 7 |
| Warehouse | • Goods Receipts and Delivery  
  • Inventory Maintenance | 3 |

#### 1.4 District Information Technology Overview

The District's Information Technology (IT) infrastructure, software applications, and technology services are managed by an internal IT Department. The IT Department has 7 full-time staff members that share responsibility for infrastructure operations and support. The District anticipates IT staff will work closely with the selected Bidder to develop and implement the technology resources required for a successful project.

The District has established a set of standards for hardware, software, and protocols, selected from the wide array of available technologies. For example, the solution must run on Microsoft SQL Server effectively as its database management system. EID intends to procure only products that substantially conform to these standards. The standards are generally reviewed each year and modified to reflect changes in technology and the marketplace. EID currently includes the following system standards:

#### Table 1.6 – District IT Standards

<table>
<thead>
<tr>
<th>System</th>
<th>Standard</th>
</tr>
</thead>
<tbody>
<tr>
<td>Database</td>
<td>Microsoft SQL Server 2016 or later</td>
</tr>
<tr>
<td>Server OS</td>
<td>Windows 2016 Server or later</td>
</tr>
<tr>
<td>Desktop OS</td>
<td>Windows 10</td>
</tr>
<tr>
<td>Server Hardware</td>
<td>VMware</td>
</tr>
<tr>
<td>Desktop Hardware</td>
<td>VMware VDI on zero-client terminals (about 250 dynamically provisioned VMs)</td>
</tr>
</tbody>
</table>
| Laptop Hardware      | Intel Core i7 / 16 GB RAM with docking stations (about 45 units)  
  Primary use: online VDI terminal  
  Secondary use: offline personal productivity or technical support software |
### System Specifications

<table>
<thead>
<tr>
<th>System</th>
<th>Standard</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mobile</td>
<td>Apple iPADs, iPhones, and BYOD smart phones supported (about 250 devices)</td>
</tr>
<tr>
<td>Office Productivity</td>
<td>Microsoft Office 2016</td>
</tr>
</tbody>
</table>

#### 1.5 Computer Systems/Core Applications

The District utilizes many software database systems to manage its operations, including:

1. Microsoft Dynamic GP 2016 is used for accounting, inventory, procurement, and Project Accounting.
2. Esri ArcGIS 10.8 is used to track horizontal assets.
3. Aveva Wonderware is used to monitor and control treatment plant processes.
4. Innovyze InfoWorks and InfoWater is used for hydraulic modeling.
5. Kronos Workforce Ready is used for timekeeping, payroll, recruitment and other HR functions.
6. Hach WIMS is used for Wastewater lab information tracking.
7. Procore is used for construction management.
8. Pipelogix is used for sewer inspection.
9. Flexnet from Sensus is used to manage AMR meters.
10. Columbiasoft DocLocator is used for enterprise document management
11. Microsoft Exchange 2016 is used for Email services.
12. Microsoft SharePoint 2016 is used for Intranet services.
13. SAP Crystal Reports 2016 and Microsoft SQL Reporting Services (SSRS) is used for custom reports.
14. Agiloft is used for IT/OT Incident and Service Requests management

#### 2.0 SCOPE OF SERVICES

This procurement is for the upgrade services of the District’s existing Infor Hansen system to the latest release of Infor’s Public Sector (“IPS”) solution and best practice business transformation.

#### 2.1 Software Licenses

The following table lists the existing licenses that the District currently owns for its Infor Hansen v.7.7 application. All existing licenses are covered by Infor software maintenance and the District has negotiated with Infor a no-cost conversion for these licenses to IPS products.
Table 2.1 – Existing Infor Hansen Concurrent Seats

<table>
<thead>
<tr>
<th>Module</th>
<th>Number of Concurrent Seats</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hansen 7.x - Inventory Control Advanced</td>
<td>1</td>
</tr>
<tr>
<td>Hansen 7.x - Plant/Fleet</td>
<td>37</td>
</tr>
<tr>
<td>Hansen 7.x – Sewer</td>
<td>31</td>
</tr>
<tr>
<td>Hansen 7.x – Water</td>
<td>29</td>
</tr>
<tr>
<td>Hansen 7.x - Cashiering Module</td>
<td>5</td>
</tr>
<tr>
<td>Hansen 7.x - Customer Service – COMBINED</td>
<td>33</td>
</tr>
<tr>
<td>Hansen 7.x - Inventory Control Ordering</td>
<td>1</td>
</tr>
<tr>
<td>Hansen 7.x - Image Display</td>
<td>1</td>
</tr>
<tr>
<td>Hansen 7.x - Construction &amp; Use Permits</td>
<td>7</td>
</tr>
<tr>
<td>Hansen 7.x - Work Notice</td>
<td>11</td>
</tr>
<tr>
<td>Hansen 7.x - Meter Management</td>
<td>50</td>
</tr>
<tr>
<td>Hansen 7.x - OLE Container</td>
<td>1</td>
</tr>
<tr>
<td>Hansen 7.x - Spot Inspection</td>
<td>1</td>
</tr>
<tr>
<td>Hansen 7.x - Tab Editor</td>
<td>1</td>
</tr>
<tr>
<td>7G-XCB-2 - Hansen 7.x - Advanced Inspections Bundle CB-2</td>
<td>50</td>
</tr>
<tr>
<td>Hansen GeoAdmin (Named User)</td>
<td>1</td>
</tr>
<tr>
<td>Hansen Integrated Map Viewer (Named User)</td>
<td>5</td>
</tr>
<tr>
<td>Neztek Data Utility Exchange (Named User)</td>
<td>2</td>
</tr>
</tbody>
</table>

As stated above, the District will procure the required Infor software licenses and support agreements directly from Infor. In addition, the District anticipates it may purchase the following additional modules / tools and support agreements directly from Infor based on the final solution architecture and District’s best interests:

- Infor OS (or Bidder’s recommended alternate middleware solution),
- Infor Mobile,
- Customer Portal, and
- Configured Asset.

2.2 User Types

The District’s personnel have been grouped into general user type categories as shown in Table 2.2 below.
Table 2.2 – General Hansen User Types

<table>
<thead>
<tr>
<th>General User Type</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Managers &amp; Directors</td>
<td>17</td>
</tr>
<tr>
<td>Business Operations Personnel &amp; Supervision</td>
<td>47</td>
</tr>
<tr>
<td>Utility Operations Personnel &amp; Supervision</td>
<td>32</td>
</tr>
<tr>
<td>Field Services Personnel &amp; Supervision</td>
<td>114</td>
</tr>
<tr>
<td>Technical Support Personnel &amp; Supervision</td>
<td>28</td>
</tr>
<tr>
<td><strong>Total Employees</strong></td>
<td><strong>238</strong></td>
</tr>
</tbody>
</table>

Each general category will require different modules access, information access requirements, and user training. The District anticipates the number of system users will remain relatively flat over the next 5 years.

2.3 Application Requirements

The District is expecting to convert its existing Hansen 7.7 licenses to IPS v.11.x with the listed modules in Section 2.1 and including Infor OS (if recommended), Infor Mobile, Customer Portal, and Configured Asset.

2.4 Interfaces

The upgraded system will require interaction with other EID core systems which will send and receive data. The interfaces definition table below lists target interfaces between the upgraded system and other systems maintained by EID. Bidders are expected to provide their approach for each interface.

Table 2.3 – Interface Definition

<table>
<thead>
<tr>
<th>CIS Interface</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>MS Dynamics GP (Financials)</td>
<td>The upgrade will require integration to the MS Dynamics GP Financials system. This would include integration with the general ledger for billed receivables, cash receipts, connection fees collected, and connection fees earned. The interface to Financials will also send and receive information related to credit refund checks.</td>
</tr>
<tr>
<td>Sensus AutoRead / AutoView Meter Reading</td>
<td>The upgrade will require a two-way interface with the current Sensus meter reading system to download meter information, location, previous read and high/low information to handheld devices and upload meter read information and problem/status codes.</td>
</tr>
<tr>
<td>DataProse Bill Print &amp; Pay</td>
<td>The upgrade will require a two-way batch interface to EID bill print vendor DataProse’s system to print on-cycle bills and late notices as well as upload payment batches. The upgrade must be able to connect to DataProse to view stored bill images and display those to both CSR view and customer view.</td>
</tr>
<tr>
<td><strong>IVR System (New)</strong></td>
<td>The upgrade will require a two-way real time interface integrating with a future IVR system. An additional two-way real time interface will be required to the IVR system and Metavante for customer payments.</td>
</tr>
<tr>
<td>----------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Issue Notification</strong></td>
<td>The upgrade will require an interface for GIS-based polygon-driven outbound automated calling to notify customers via phone/text.</td>
</tr>
<tr>
<td><strong>Bank of America Deposits</strong></td>
<td>The upgrade will require a two-way interface to process payments.</td>
</tr>
<tr>
<td><strong>ACH</strong></td>
<td>The upgrade will require a two-way interface to process ACH payments.</td>
</tr>
<tr>
<td><strong>NRA Collection Agency</strong></td>
<td>The District currently uses the National Recovery Agency (&quot;NRA&quot;) as its collection agency for bad debt accounts. The upgrade will require a two-way interface to send customer account information and receive payment information for customers.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>CMMS Interface</strong></th>
<th><strong>Description</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>MS Dynamics GP (Financials)</strong></td>
<td>The upgrade will require a two-way interface for cost codes, project numbers, requisitions, costs, etc.</td>
</tr>
<tr>
<td><strong>WACHS Valve Turning (New)</strong></td>
<td>The upgrade will require a two-way interface to download asset and WO data to WACHS and upload valves turns, torque, direction, etc. from WACHS software.</td>
</tr>
<tr>
<td><strong>Pipelogix (New)</strong></td>
<td>The upgrade will require a two-way interface between Pipelogix to download asset and WO data and upload for inspection results.</td>
</tr>
<tr>
<td><strong>Kronos Workforce Ready Timekeeping (New)</strong></td>
<td>The upgrade will require a two-way interface to download holidays, vacation time off, valid project charge codes, etc. from Kronos and upload time entries.</td>
</tr>
<tr>
<td><strong>GIS</strong></td>
<td>The upgrade will require a two-way interface between GIS and Hansen for asset information.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Custom Code to be Replaced</strong></th>
<th><strong>Description</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Lockbox (CPI), Check Free &amp; Remittance Data Processing</strong></td>
<td>Update payment details across utility accounts based on payment information received from various 3rd party Online Payment processing vendors - CheckFree, Metavante, DataProse and CPI.</td>
</tr>
</tbody>
</table>
Update cost of inventory items (COSTPART) in Hansen from Great Plains based on Work order information. The District plans to use IPS inventory and Procurement functionality, which may result in this code being replaced or modified.

Runs a query of unpaid bills by stage number to assess late fees to accounts eligible to be charged based on set criteria.

SQL code pulls the data from GIS database using DB link and uploads it into Hansen.

Removes the null rows created in recycled water inspection records table whenever an address is modified with Hansen.

The upgrade must integrate with electronic document management system Document Locator. The Bidder should discuss its experience integrating with Document Locator or similar EDMS platforms.

Optional / Future

The District is considering buying and leveraging Infor OS integration platform. However, each Bidder is to clearly describe their recommended interface methodology to be used. If the Bidder wishes to propose another option, (e.g., Web Services, REST API, etc.), the Bidder shall clearly describe the benefits (adaptability, scalability, maintainability, etc.) and the Bidder’s past experiences with this method.

- All interfaces are to be priced separately in the Pricing Template in Exhibit B.4.
- Any 3rd party tools used must be compatible with Active Directory.
- If 3rd party tools are proposed, the Bidder is to provide details about the tool and any customer references for the District to validate.

### 2.5 Software Configuration vs. Customization

The District prefers to use tailoring and configuration of the upgraded system, rather than code modification. Any custom code required to fulfill EID’s functionality must be incorporated in the system’s base code line to ensure future upgradeability. Custom code modifications that are outside of this constraint will only be allowed in extreme cases, and the selected Solution Implementer will be contractually obligated to support it for all future upgrades. Hence, the standard maintenance agreement will include upgrades/certifications for all custom code. The District will need to review and agree in writing to any custom code before it is deployed.
2.6 System Requirements
The Bidder should address the implementation options for upgrading the new IPS modules in IV. C. Section 3 – System Overview of the Bidder’s response. This should include a Hosted vs. On-Premise or Hybrid approach including the advantages and disadvantages for each and provide the Bidder’s recommended approach.

The solution must provide documentation and procedures for backup and quick recovery of data in the event of a disaster. It is expected that multiple environments be installed and maintained, including at a minimum, a production environment, test / development / training environments, and a Disaster Recovery ("DR") environment. The DR environment must retain full functionality and may be installed at EID facilities or at a hosted data center.

The section shall also include the Bidder’s technology requirements of the District.

2.7 Upgrade Services
The District may contract with other consultants/vendors to provide services as part of the project team. The selected Solution Implementer will work with the District’s designated consultants as it would with EID staff. The District may appoint the other consultants/vendors to be responsible for any number of duties as described herein. For the purposes of this document, all references duties/responsibilities of the “Project Manager” and “Subject Matter Expert” shall include other consultants/vendors staff as determined by EID. The District shall maintain sole signature authority for all documents that require sign off.

The District requires that each Bidder prepare in sufficient detail an Upgrade Implementation Plan in Section 4 of the Bidder’s Response detailing the required tasks, responsibilities, major deliverables, timing and estimated hours for both the Bidder team and the EID team. Each Bidder shall include a Project Plan in Gantt format based on the information provided in this RFP. Each Bidder is required to use the Roles and Responsibilities Form in Exhibit B.2 as part of their response. At a minimum, the RFP response for Upgrade Services will cover the following areas:

1. Project Management
2. Application(s) Installation (including database)
3. Application Set Up (including tailoring, configuration, user set up, access controls)
4. Configuration Change Management Control
5. Data Mapping and Conversion
6. Testing – Unit and System
7. Business Process Improvement
   a. Process Changes
   b. Detailed To-Be Process Map Documentation
8. Forms/Screens Changes & Design
9. Interface Development
10. Reports
11. Backup & Recovery
12. Training – Core Team, System and End-User
13. System Acceptance Testing
14. Transition to full operations (cut-over)
15. Post Go Live Support

Each Bidder shall define the level of resources required for each task, the timing of resource needs, and all deliverables for both the Bidder and for EID.

2.7.1 Software Installation: The selected Solution Implementer will be responsible for the installation of IPS solution. At a minimum, three instances will be needed for the project. The Solution Implementer will be responsible for the installation of the Map Drawer and GeoAdmin, along with the Configured Assets. If the District elects to acquire Infor OS licenses, then the installation and configuration is included as well. Each Bidder will need to identify this cost separately in the costing form.

**Deliverables:**

- Installed IPS software modules and GeoAdmin
- Tools / software required for integration to other systems - GIS, Sensus, Flexidata, DataProse, IVR, etc.

2.7.2 Business Process Improvements: The selected Solution Implementer will review the existing business processes and work with District staff to optimize the use of the new release functionality and improve the business processes applying best practices where possible. As such, the Bidders should include conducting overview training of the new systems for the project core team prior to starting the business processes workshops. Inventory and Procurement functionality in the new IPS need to be evaluated and options presented to the District’s team. The business processes to be covered in this scope include, but are not limited to:

- CMMS – including asset life cycle, service requests, work order creation, planning, preventive maintenance, inventory, procurement, and timekeeping.
- CIS - including new premise management, meter management, billing, customer self-service.
- Permitting – including development services, customer self-service, flow with new premises from Permitting to CIS and billing.

Each Bidder shall assume **eight weeks** for pricing this activity. The District is expecting detailed To Be process maps documentation.
Deliverables:
- Business processes documentation
- Detailed To Be process maps and description

2.7.3 Configuration: The District currently envisions the new solution will be entirely configured and developed using commercially available software (commonly referred to as COTS). However, each Bidder shall clearly disclose if any implementation options within their proposal include “custom” compiled code developed by or licensed exclusively through the Bidder or through a subcontracting arrangement with the Bidder.

The District currently has 25 custom tabs that will need to be converted, see Appendix A. In addition, there are 13 custom triggers that were developed over the years with no documentation, see Appendix B.

The selected Solution Implementer will be responsible for making configuration changes as needed and approved by EID, including migrating existing workflows. The Solution Implementer will configure IPS based on the business processes defined and approved in Section 2.7.2. The Solution Implementer will provide appropriate documentation in an open and maintainable electronic format for all the configuration changes and train the District’s staff on supporting it.

Deliverable:
- Final configuration documentation

2.7.4 Data Conversion: The District has historical data stored in its legacy Hansen system that needs to be converted with the IPS upgrade. The following tables provide the Bidder with the size of the data currently stored within the District’s Hansen system and the data required for conversion to the new IPS solution.

Table 2.4 – Existing Customer and Permitting Data in Hansen

<table>
<thead>
<tr>
<th>Customer Record Type</th>
<th>Current Count</th>
<th>Data Conversion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of total accounts</td>
<td>82,600</td>
<td>CY +2 Years</td>
</tr>
<tr>
<td>Current number of active accounts</td>
<td>42,400</td>
<td>CY + 2 Years</td>
</tr>
<tr>
<td>Number of Connections</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Water</td>
<td>42,143</td>
<td>CY + 2 Years</td>
</tr>
<tr>
<td>Sewer</td>
<td>23,784</td>
<td></td>
</tr>
<tr>
<td>RW</td>
<td>5,545</td>
<td></td>
</tr>
<tr>
<td>Addresses</td>
<td>57,192</td>
<td>All</td>
</tr>
<tr>
<td>Parcels</td>
<td>54,610</td>
<td>All</td>
</tr>
<tr>
<td>Number of Service Requests</td>
<td>329,981</td>
<td>All</td>
</tr>
<tr>
<td>Billing years of history</td>
<td>2006 to Current</td>
<td>CY +2 Years</td>
</tr>
<tr>
<td>Historical Permits</td>
<td>3,481</td>
<td>All</td>
</tr>
<tr>
<td>Contacts</td>
<td>112,818</td>
<td>CY +2 Years</td>
</tr>
<tr>
<td>OLE – Development Services</td>
<td>5,617</td>
<td>All</td>
</tr>
</tbody>
</table>
The District’s historical customer data is shown in Table 2.4 (above) goes back to 2006. The Bidder’s proposal and fees shall provide for the District’s customer data in Hansen as summarized in Table 2.4 to be converted to the new IPS solution.

Table 2.5 – Existing Asset Data in Hansen

<table>
<thead>
<tr>
<th>Asset Record Type</th>
<th>Current Count</th>
<th>Asset Record Type</th>
<th>Current Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Water Assets – Plant</td>
<td>5,909</td>
<td>Hydro Assets</td>
<td>700</td>
</tr>
<tr>
<td>Water Assets – Linear</td>
<td>182,745</td>
<td>Work Orders</td>
<td>876,549</td>
</tr>
<tr>
<td>Sewer Assets – Plant</td>
<td>5,500</td>
<td>Backflow Devices</td>
<td>7,652</td>
</tr>
<tr>
<td>Sewer Assets – Linear</td>
<td>50,726</td>
<td>OLE Images</td>
<td>39,683</td>
</tr>
<tr>
<td>Recycled Water Assets - Linear</td>
<td>11,132</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The size and quality of the District’s asset data varies greatly by District service. For example, the District’s water and sewer asset records in Hansen go back as far as 1999. However, over the years, the asset numbering, job coding and work practices have significantly changed. The District’s backflow device records have been stored in Hansen since 2018. The District’s Hydro’s assets have been tracked in Hansen since 2015 but are currently structured under the legacy Hansen water model and therefore must be mapped to their proper asset nomenclature (e.g., flumes, dams, canals, reaches, etc.). The District’s Parks & Recreation Department has not used Hansen in the past, so the Recreation’s asset will be newly obtained by the District for inclusion in the IPS solution.

For comparison, each Bidder’s proposal and fees shall assume that ALL of the District’s asset data and work orders in Hansen as summarized in Table 2.5 (above) will be converted over the new IPS solution. In addition, any new asset records the District identifies will be added to the new system.

Due to the obvious asset data management inconsistencies over the past 20 years, the District may choose during Contract Negotiations that some historical asset data may not be advantageous or cost-effective for conversion to the new IPS solution.

Accordingly, each Bidder should provide details about their proposed method and tools for data conversion and who will be responsible for the extraction of data, mapping and upload, and templates for data uploading that will be used in the conversion process.

The District expects to have at minimum six (6) data conversion/loads plus the Go Live; initial conversion, three revised conversions based on testing results, two mock conversions and final conversion for Go Live. All Bidders should provide an additional conversions cost as optional service. The Solution Implementer will provide appropriate documentation in an open and maintainable electronic format for lookup and reference of all the conversion mappings and train the District’s staff on using and supporting it.
**Deliverables:**

- Minimum of six data conversions and successful conversion at Go Live.
- Implementation of the new asset hierarchy, classes, attributes, and condition ratings
- Final conversion mapping documentation

2.7.5 *Interfaces:* The District’s list of interfaces and custom codes are listed in the **Scope of Work Section 2.4** above. The selected Solution Implementer will implement new interfaces where possible and upgrade the interfaces as needed using either Web services, REST APIs, or InforOS. In addition, the District is planning on using Infor Public Sector Map Drawer and GeoAdmin functions in the upgrade to improve field productivity. All Bidders should include installation, configuration, and training on this module in their response.

All Bidders should provide pricing for the interfaces identified in **Table 2.3.** It is expected that the selected Solution Implementer will work with the District’s team during the development of these interfaces and ensure knowledge transfer so the District can support these interfaces after Go Live.

Enhanced mobility is a major objective of this project. As such, all Bidders should detail their Upgrade Implementation Plan for the IPS mobile solution, testing and training in their response. Each Bidder shall assume a total of **250 mobile devices** and **250 computer workstations.**

**Deliverables:**

- Interfaces design documentation (functional and technical) and development
- Implementation of IPS mobile solution

2.7.6 *Testing:* The selected Bidder will provide services to support and guide the testing of the upgraded system through unit testing, system testing (interfaces and mobile), and acceptance testing. The Solution Implementer will address any issues that arise from the testing and ensure successful testing end to end. The Solution Implementer shall provide test scripts for use in the different testing.

**Deliverables:**

- Testing Plan
- Test Scripts
- Testing results documentation

The Bidder should quote an optional task of **160 hours** to cover configuration changes needs identified during testing.
2.7.7 Reports: The District maintains an abundant library of Crystal and SSRS reports for Hansen v.7.7. The selected Solution Implementer will evaluate these reports and make recommendations on which ones will be covered through the ad-hoc and/or dashboard capabilities in the new version versus the reports that will require re-creation due to changes in the database structure and/or workflow transformation. The Solution Implementer will be responsible for converting these reports upon the District’s approval. Each Bidder shall assume 500 hours to cover this effort in their Fee Response.

Deliverable:
- Configured dashboard and converted reports.

2.7.8 Training: The selected Solution Implementer will be responsible for training the District’s core team in all aspects of the upgraded product and assist with set-up and configuration of the product to accommodate EID’s specific environment. The District is expecting the Bidder to train all the District’s end users at the utility and provide training manuals. The District is using Target Solutions as its learning management tool and expects the Bidder to leverage this tool for structured training.

All Bidders should include the cost of this on-site training in the Pricing Template found in Exhibit B.4. The training should cover system Admin, GeoAdmin, and all configured modules. Training should also include any other proposed 3rd party software.

Deliverables:
- Training of All End Users
- Training Manuals and Supporting Materials

2.7.9 Go Live: All Bidders are expected to detail their approach on the transition process from the old Hansen version to the most recent IPS version with minimum impact on the District’s business and identify the District’s responsibilities. This should include how to handle open transactions and ensure the integrity of the data converted.

Deliverable:
- Successfully converted/upgraded system in Production.

2.7.10 Post Go live Support: Each Bidder shall describe their Post Go Live Support methodology, timing, issue priority, response time, tracking, and associated support process. Each Bidder shall assume 500 hours of support in combination of on-site and remote support for this task in their Fee Response.

2.8 Optional Product Support, Maintenance and Enhancement Programs
The Bidder shall describe and price all aspects of ongoing support and maintenance activities for a five-year (5) period from Go-live in IV C. Section 5 of the Bidder’s response. Each Bidder shall describe the proposed support:
• Software maintenance tasks to be performed to ensure the proposed solution and interfaces perform optimally;
  - Maintenance task description including purpose and whether recommended or required for ongoing solution performance
  - Recommended task frequency and typical duration
  - Recommended technical skill level to perform the task (DBA/Senior IT Analyst, IT Programmer/Analyst, IT Technician, Other).

• Product help desk (Minimum at least weekdays 7:00 AM – 5:00 PM PT);
• Product fixes;
• Product enhancements; and
• Regular product releases based on a defined on-going maintenance fee.

If there are alternatives to this level of support, the Bidder must provide this detail and the corresponding pricing. All Bidders should describe the process for the District to request future product enhancements. Each Bidder must disclose the on-going costs for product maintenance and upgrades. Each Bidder must also specify the escalation limit for annual maintenance fees beyond five years.

Each Bidder should also describe additional product support, maintenance and system enhancement strategies or services relevant to this project that can be provided under an optional sole source professional service agreement. This may include additional support or the development of further solution enhancements, implementing additional or new features and functionality, developing further reporting or dashboards, additional interfaces, etc.

**Deliverable:**

• On-site and remote support as directed by the District.

**2.9 Optional Training After Go Live**

Each Bidder is to describe optional On-Going Training services and capabilities in Section 6 of their Response that their team can provide under an optional sole source professional service agreement after the Go-Live. All Bidders must supply an hourly price list for continued training of the District’s core team to achieve a level of product proficiency. For pricing purposes, all Bidders should assume a core team of up to 10 members. The Bidders should provide on-going training schedules, locations, and estimated costs for possible future user succession training. The pricing of these items should be included in the Pricing Template found in Exhibit B.4.
EXHIBIT B – FORMS (UNDER SEPARATE FILE)

B.1 VENDOR PROFILE (2 PAGES)
B.2 ROLES AND RESPONSIBILITIES (2 PAGES)
B.3 REFERENCES FORM (2 PAGES)
B.4 PRICING WORKSHEET (4 PAGES)
B.1 VENDOR PROFILE (UNDER SEPARATE FILE)
B.2 ROLES AND RESPONSIBILITIES *(UNDER SEPARATE FILE)*
B.3 REFERENCE FORMS (UNDER SEPARATE FILE)
B.4 PRICING TEMPLATE *(UNDER SEPARATE FILE)*
EXHIBIT C - PROFESSIONAL SERVICES AGREEMENT SAMPLE

[See Attachment]
PROFESSIONAL SERVICES AGREEMENT

Between

EL DORADO IRRIGATION DISTRICT

And

CONSULTANT FIRM NAME

for the

Hanson Upgrade Project

Project No. 18055.01

Dated _______ ______, 20____
EL DORADO IRRIGATION DISTRICT

_____________________________
AGREEMENT BETWEEN
EL DORADO IRRIGATION DISTRICT AND

CONSULTANT CO NAME

THIS PROFESSIONAL SERVICES AGREEMENT (“Agreement”) is dated this _____ day of __________, 20__, in the City of Placerville, State of California, by and between CONSULTANT FIRM NAME, a ___________________________, with a principal place of business at ________________, hereinafter referred to as “Consultant” and the EL DORADO IRRIGATION DISTRICT, an irrigation special district organized and existing under the California Irrigation District Law (Water Code §20500, et seq.), hereinafter referred to as “District.”

NOW, THEREFORE, for good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, stipulated and agreed, the parties agree as follows:

1. Scope of Professional Services. The Consultant shall perform all services described in Appendix A (“Services”), for the compensation set forth in Appendix B (“Compensation”), which appendices are attached and made a part of this Agreement.

2. Term. This Agreement shall become effective upon its execution by Consultant and by District (including approval as to form by the District’s Office of the General Counsel). All Services whenever performed shall be deemed performed under this Agreement, and all compensation paid to Consultant on account of the Services performed shall be deemed as payments of the Compensation.

3. Standard of Performance. Consultant represents that it is qualified to perform the Services and that it possesses and will continue to possess at its sole cost and expense, all necessary licenses, registrations, permits, and personnel or will obtain such licenses, registrations, permits and personnel prior to the time required. Consultant also represents that it has extensive knowledge of, and will comply with, all applicable building codes, laws, regulations and ordinances.

4. Subconsultants. Consultant shall perform the Services using the personnel and subconsultants listed in Appendix A. Consultant shall hire only qualified persons or firms who are experienced in performing work of like nature and complexity to the Services, and who agree to be bound to the terms of the Agreement to the extent of this scope of services. Consultant may substitute personnel or subconsultants prior to any such subconsultants commencing work only upon District’s written consent, which may be withheld or delayed in District’s discretion.

5. Representatives for Both Parties. Both parties shall designate a representative, authorized to act on the parties’ behalf with respect to this Agreement. The parties or such authorized representatives shall render required decisions promptly, to avoid unreasonable delay in the progress of Consultant’s services. The parties may delegate all or some of the representatives’ role and function to some other representative.

6. Indemnification and Liability.

6.1 To the fullest extent permitted by law (including, without limitation, California Civil Code Section 2782), Consultant shall defend (with legal counsel reasonably acceptable to District), indemnify and hold harmless District and its officers, agents, departments, officials, representatives and employees (collectively “Indemnitees”) from and against any and all claims, loss, cost, damage, injury (including, without limitation, injury to or death of an employee of Consultant or its sub-consultants), expense and liability of every kind, nature and description (including, without limitation, incidental and consequential damages, court costs, attorneys’ fees, litigation expenses and fees of expert consultants and/or expert witnesses incurred in connection therewith and costs
of investigation) that arise from or relate to, directly or indirectly, in whole or in part, but only to the extent that any of the above are actually caused by, any negligent or reckless act or omission, or willful misconduct, of Consultant, any sub-consultant, anyone directly or indirectly employed by them, or anyone that they control (collectively “Liabilities”). Such obligations to defend, hold harmless and indemnify any Indemnitee shall not apply to the extent that such Liabilities are caused in whole or in part by the sole negligence, active negligence, or willful misconduct of any Indemnitee.

6.2 Consultant shall defend (with legal counsel reasonably acceptable to District), indemnify and hold harmless the Indemnitees from all loss, cost, damage, expense, liability or claims, in law or in equity, including attorneys’ fees, court costs, litigation expenses and fees of expert consultants or expert witnesses, that may at any time arise for any infringement of the patent rights, copyright, trade secret, trade name, trademark, service mark or any other proprietary right of any person or persons in consequence of the use by District, or any of the other Indemnitees, of articles or Services to be supplied in the performance of this Agreement.

6.3 District shall include a provision in any resulting construction contract with the general contractor on the Work requiring the general contractor to indemnify Consultant for damages resulting from the negligence of the general contractor and its subcontractors. District shall also include a provision in the construction contract with the general contractor on the work requiring the general contractor to name Consultant as an additional insured on its CGL insurance coverage. Consultant shall bear the risk of an inadvertent omission of such provisions. Therefore, Consultant shall review the construction contract prior to bidding to ensure that such provision has been included in the draft of the bid documents.

6.4 Consultant shall place in its subconsulting agreements and cause its subconsultants to agree to indemnities and insurance obligations in favor of District and other Indemnitees in the exact form and substance of those contained in this Agreement.

6.5 District acknowledges that the discovery, presence, handling or removal of asbestos products, polychlorinated biphenyl (PCB) or other hazardous substances which may presently exist at the Work site is outside of Consultant’s expertise and is not included in the scope of Services Consultant is to perform nor included in Consultant’s insurance. District shall either hire an expert consultant in this field if the Work involves such materials or, the event the hazardous materials consist of naturally occurring asbestos, District shall require the contractor to comply with all applicable requirements of the El Dorado County Air Quality Management District (AQMD) and any other applicable governmental requirements relating thereto. Consultant shall not be responsible or be involved in any way with the discovery, presence, handling, or removal of such materials. Consultant shall be responsible to coordinate with District’s expert consultant as required by Appendix A.

7. Notices. District and Consultant shall provide notices to the other in the form of a writing, sent by certified mail return receipt requested, or by overnight courier or delivery service with signature required, as follows:

ATTN SRINI SUNDARAM
EL DORADO IRRIGATION DISTRICT
2890 MOSQUITO RD
PLACERVILLE CA 95667

ATTN PROJECT MANAGER
CONSULTANT FIRM NAME
ADDRESS
CITY STATE ZIP

or to such other place as either party may similarly in writing designate to the other. Notices shall be effective three business days after mailing by certified mail, or upon receipt if delivered by overnight courier or delivery service.

8. Insurance. Consultant shall comply with all requirements of Appendix C, which is attached and made a part of this Agreement.

9. Independent Contractor. Consultant shall at all times be deemed an independent contractor wholly responsible for the manner in which it performs the Services, and fully liable for the acts and omissions of its employees, subconsultants and agents. Under no circumstances shall this Agreement be construed as creating an employment, agency, joint venture or partnership relationship between District and Consultant, and no such relationship shall be implied from performance of this Agreement. Terms in this Agreement referring to direction
from District shall be construed as providing for direction as to policy and the result of services only, and not as to means and methods by which such a result is obtained. Consultant shall pay all taxes (including California sales and use taxes) levied upon this Agreement, the transaction, or the Services and/or goods delivered pursuant hereto without additional compensation, regardless of which party has liability for such tax under applicable law, and any deficiency, interest or penalty asserted with respect thereto. Consultant represents that it will collect, report, and pay all sales and or use taxes to the State Board of Equalization. Upon full payment, the Consultant will issue District a receipt pursuant to California Revenue and Taxation Code Section 6203, relieving District of all liability for any tax relating to the scope of this Agreement. The Consultant shall pay all other taxes including but not limited to any applicable city, county or other business tax, not explicitly assumed in writing by District hereunder. The Consultant shall comply with all valid administrative regulations respecting the assumption of liability for the payment of payroll taxes and contributions as above described and to provide any necessary information with respect thereto to proper authorities.

10. Conflict of Interest; Confidentiality.

10.1 Consultant represents that it is familiar with Sections 1090 et seq. and Section 87100 et seq. of the Government Code of the State of California, and that it does not know of any facts that constitute a violation of said sections. If, following execution of this Agreement, Consultant becomes aware of any such facts, whether presently existing or after-arising, Consultant shall promptly inform District of same, along with a proposal for remedying the violation. District may determine whether the proposal, or any other proposed resolution, is satisfactory, in its sole discretion.

10.2 Consultant represents that it has completely disclosed to District, and if applicable will disclose in the future, all facts bearing upon any possible interests, direct or indirect, which Consultant believes any member of District, or other officer, agent or employee of District or any department presently has, or will have, in this Agreement, or in the performance thereof, or in any portion of the profits thereunder. Willful failure to make such disclosure, if any, shall constitute ground for termination of this Agreement by District for cause. Consultant agrees to comply with all conflict of interest codes adopted by the District and its reporting requirements, including without limitation the Conflict of Interest Code for the El Dorado Irrigation District.

10.3 Consultant covenants that it presently has no interest, and shall not have any interest, direct or indirect, which would conflict in any manner with the performance of Services required under this Agreement. Without limitation, Consultant represents to and agrees with District that Consultant has no present, and will have no future, conflict of interest between providing District the Services hereunder and any interest Consultant may presently have, or will have in the future, with respect to any other person or entity (including but not limited to any federal or state wildlife, environmental or regulatory agency) which has any interest adverse or potentially adverse to District, as determined in the reasonable judgment of District. The provisions of this Section 10 shall remain fully effective indefinitely after termination of Services to District hereunder.

10.4 Consultant acknowledges and agrees that, in the performance of the Services under this Agreement or in the contemplation thereof, Consultant may have access to private or confidential information which may be owned or controlled by District and that such information may contain proprietary or confidential details, the disclosure of which to third parties may be damaging to District. Consultant agrees that all information disclosed by District to or discovered by Consultant shall be held in strict confidence and used only in performance of the Agreement. Consultant shall exercise the same standard of care to protect such information as a reasonably prudent Consultant would use to protect its own proprietary data, and shall not accept employment adverse to District’s interests where such confidential information could be used adversely to District’s interests. Consultant agrees to notify District immediately in writing if it is requested to disclose any information made known to or discovered by Consultant during the performance of or in connection with this Agreement.

10.5 Any publicity or press releases with respect to the Project or Services shall be under District’s sole discretion and control. Consultant shall not discuss the Services or Project, or matters pertaining thereto, with the public press, representatives of the public media, public bodies or representatives of public bodies, without District’s prior written consent. Consultant shall have the right, however, without District’s further consent, to include representations of Services among Consultant's promotional and professional material, and to communicate with persons or public bodies where necessary to perform under this Agreement.

---

AGREEMENT FOR PROFESSIONAL SERVICES
CONSULTANT
BOARD APPROVED
PURCHASE ORDER NO.
10.6 The provisions of this Section 10 shall remain fully effective indefinitely after termination of Services to District hereunder.

11. Suspension and Termination of Services.

11.1 District may direct Consultant to suspend, delay or interrupt Services, in whole or in part, for such periods of time as District may determine in its sole discretion. District may issue such directives without cause. District will issue such directives in writing. Suspension of Services shall be treated as an excusable delay.

11.2 District may terminate performance of the Services under this Agreement in whole, or from time to time in part, for default, should Consultant commit a material breach of this Agreement, or part thereof, and not cure such breach within ten (10) calendar days of the date of District’s written notice to Consultant demanding such cure. In the event District terminates this Agreement for default, Consultant shall be liable to District for all loss, cost, expense, damage and liability resulting from such breach and termination.

11.3 District may terminate performance of the Services under this Agreement in whole, or from time to time in part, for convenience, whenever District determines that such termination is in District’s best interests. In the event District terminates this Agreement for convenience, Consultant shall be entitled to be paid for Services satisfactorily performed to the termination date, but may recover no other cost, damage or expense.

11.4 Following any termination under this Section 11, Consultant shall:

11.4.1 Stop Services under the Agreement on the date and to the extent specified in the notice of termination;

11.4.2 Terminate and settle all outstanding liabilities and all claims arising out of such termination of orders and subcontracts, with approval or ratification of District to the extent District may require.

11.4.3 Assign to District in the manner, at times, and to the extent directed by District, all right, title, and interest of Consultant under orders and subcontracts so terminated; and

11.4.4 Complete performance of any part of the Services which were not terminated; and

11.4.5 Take such action as may be necessary, or as District may direct, for the protection and preservation of property related to this Agreement which is in Consultant’s possession and in which District has or may acquire an interest.
12. **Ownership of Work Product/Public Records Act.** Any interest (including copyright interests) of Consultant, in studies, reports, memoranda, computational sheets, drawings, plans or any other documents (including electronic media) prepared by Consultant and delivered to District at any time in connection with the Services, shall be the property of District. Documents not delivered to the District, or prepared by subconsultants or by any other party not subject to this Agreement, shall remain the property of the person or entity that prepared them. To the extent permitted by Title 17 of the United States Code, work product produced under this Agreement and delivered to District shall be deemed works for hire and all copyrights in such works shall be the property of District. In the event that it is ever determined that any works and any former works created by Consultant under this Agreement are not works for hire under U.S. law, Consultant hereby assigns to District all copyrights to such works when and as created. With District’s prior written approval, Consultant may retain and use copies of such works for reference and as documentation of experience and capabilities. Both parties understand and agree that District must comply with the California Public Records Act (“Act”). If Consultant believes that any document or information delivered to District in connection with Consultant’s performance of Services is exempt from public disclosure under the Act, it shall so advise District in writing at the time the document or information is furnished.

13. **Audit/Inspection of Records.**

13.1 Consultant shall maintain all documents and records prepared by or furnished to Consultant during the course of performing the Services for at least three (3) years following completion of the Services, except that all such items pertaining to hazardous materials shall be maintained for at least thirty (30) years. Such records include, but are not limited to, correspondence, internal memoranda, calculations, books and accounts, accounting records documenting its work under its Agreement, and invoices, payrolls, records and all other data related to matters covered by this Agreement. Consultant shall permit District to audit, examine and make copies, excerpts and transcripts from such records. The State of California or any federal agency having an interest in the subject of Agreement shall have the same rights conferred to District by this section. Such rights shall be specifically enforceable.

13.2 The Consultant shall maintain full and adequate records in accordance with District requirements to show the actual costs incurred by the Consultant in the performance of this Agreement. If such books and records are not kept and maintained by Consultant within a radius of seventy-five (75) miles from the offices of District at 2890 Mosquito Road, Placerville, California 95667, Consultant shall, upon request of District, make such books and records available to District for inspection at a location within said seventy-five (75) mile radius or Consultant shall pay to District the reasonable, and necessary costs incurred by District in inspecting Consultant's books and records, including, but not limited to, travel, lodging and subsistence costs. Consultant shall provide such assistance as may be reasonably required in the course of such inspection. District further reserves the right to examine and reexamine said books, records and data during the three (3) year period following termination of this Agreement or completion of all work hereunder, as evidenced in writing by District, and the Consultant shall in no event dispose of, destroy, alter, or mutilate said books, records, accounts, and data in any matter whatsoever for three (3) years after District makes the final or last payment or within three (3) years after any pending issues between District and Consultant with respect to this Agreement are closed, whichever is later.

14. **Non-discrimination.** Consultant shall not discriminate against any employee or applicant for employment, nor against any subcontractor or applicant for a subcontract, because of race, color, religious creed, age, sex, actual or perceived sexual orientation, national origin, disability as defined by the ADA or veteran’s status. To the extent applicable, Consultant shall comply with all federal, state and local laws (including, without limitation, County ordinances, rules and regulations) regarding non-discrimination, equal employment opportunity, affirmative action and occupational-safety-health concerns, shall comply with all applicable rules and regulations thereunder, and shall comply with same as each may be amended from time to time. Consultant shall provide all information reasonably requested by District to verify compliance with such matters. Consultant stipulates, acknowledges and agrees that District has the right to monitor Consultant’s compliance with all applicable non-discrimination requirements, and may impose sanctions upon a finding of a willful, knowing or bad faith noncompliance or submission of information known or suspected to be false or misleading.

15. **Disputes.** Consultant shall continue its work throughout the course of any dispute, and Consultant’s failure to continue work during a dispute shall be a material breach of this Agreement. Consultant shall continue to receive payment under this Agreement for work that is unrelated to the dispute and completed in accordance with this Agreement.
16. **No incidental, etc. damages.** Notwithstanding any other provision of this Agreement, in no event shall District be liable, regardless of whether any claim is based on contract or tort, for any special, consequential, indirect or incidental damages, including, but not limited to, lost profits or revenue, arising out of or in connection with this Agreement or the Services performed in connection with this Agreement.

17. **California Law.** This Agreement shall be deemed to have been executed in the City of Placerville, El Dorado County, California. Enforcement of this Agreement shall be governed by the laws of the State of California, excluding its conflict of laws rules. Venue for all litigation arising from or relating to this Agreement shall be in El Dorado County, California. Should any clause, provision or aspect of this Agreement be determined at any time to be unenforceable or in contravention of law, then the remaining clauses and provisions of this Agreement shall be enforceable to the fullest extent permitted by law and construed to give effect to fullest extent possible the intent of this Agreement.

18. **Prevailing Wage Laws.** When applicable, the Consultant must comply with all prevailing wage laws applicable to public works projects and related requirements contained in this Agreement. Copies of the general prevailing rates of per diem wages for each craft, classification, or type of worker needed to execute this Agreement, as determined by Director of the State of California Department of Industrial Relations, are on file at the District’s office and are deemed included in this Agreement. Upon request, District will make available copies to any interested party. Also, Consultant shall post the applicable prevailing wage rates at the Site. The California Department of Industrial Relations website is www.dir.ca.gov.

19. **No Third Party Beneficiaries.** Except as expressly provided in this Agreement, nothing in this Agreement shall operate to confer rights or benefits on persons or entities not party to this Agreement. Time is of the essence in the performance of this Agreement.

20. **Entire Agreement.** This Agreement and any written modification shall represent the entire and integrated agreement between the parties hereto regarding the subject matter of this Agreement, shall constitute the exclusive statement of the terms of the parties’ agreement, and shall supersede any and all prior negotiations, representations or agreements, written or oral, express or implied, that relate in any way to the subject matter of this Agreement or written modification. All prior negotiations are merged into this Agreement and shall be inadmissible in any enforcement of this Agreement.

21. **No Waiver.** The granting of any payments, and any inspections, reviews, approvals or oral statements by any District representative, or certification by any governmental entity, shall in no way limit Consultant’s obligations under this Agreement. Either party’s waiver of any breach, or the omission or failure of either party, at any time, to enforce any right reserved to it, or to require strict performance of any provision of this Agreement, shall not be a waiver of any other right to which any party is entitled, and shall not in any way affect, limit, modify or waive that party’s right thereafter to enforce or compel strict compliance with every provision hereof. This Agreement may not be modified, nor may compliance with any of its terms be waived, except by written instrument executed and approved by fully authorized representatives of District and Consultant.

22. **Statutes of Limitation.** As between the parties to this Agreement, any applicable statute of limitations for any act or failure to act shall commence to run on the date of District’s issuance of the final Certificate for Payment, or termination of this Agreement, whichever is earlier, except for latent defects. The commencement and running of the statute of limitations for latent defects shall be as provided by California Code of Civil Procedure section 337.15 or any successor statute.

23. **Survival.** Without limiting any of the parties’ other rights or obligations arising from this Agreement, and in addition to all other provisions indicated as surviving the termination or expiration of this Agreement, the following provisions will survive any termination or expiration hereunder: 6, 10, 11, 12, 13, 16, 17, 18, 19, 20, 21, 22 and 23.

24. **Miscellaneous.** Consultant shall not subcontract, assign or delegate any portion of this Agreement or any duties or obligations hereunder unless approved by District in a written instrument executed and approved by District in writing. Subject to the foregoing, this Agreement shall bind the parties, and their permitted successors and assigns. Any provision or portion thereof of this Agreement prohibited by, or made unlawful or unenforceable under
any applicable law of any jurisdiction, shall as to such jurisdiction be ineffective without affecting other provisions or portions thereof of this Agreement. If the provisions of such applicable law may be waived, they are hereby waived to the end that this Agreement may be deemed to be a valid and binding agreement enforceable in accordance with its terms to the greatest extent permitted by applicable law. Captions to sections and subsections are for the convenience of the parties, and are not to be considered when construing this Agreement. The agreements contained herein shall not be construed in favor of or against any party, but shall be construed as if all parties prepared this Agreement. All terms not otherwise defined in this Agreement shall have the meanings provided in the Appendices or, if applicable, in the construction contract with the general contractor on the Project.

25. **Attorneys' Fees.** If either party institutes or is required to defend any legal proceeding, action or motion to enforce or interpret the terms of this Agreement, the prevailing party shall be entitled to recover all costs and expenses, specifically including, but not limited to, reasonable attorneys' fees.

26. **ADA Compliance.** If, in the course of conducting the Services subject to this Agreement, Consultant offers a public program, service, or meeting on behalf of the District, Consultant shall, in accordance with the Americans with Disabilities Act and California law, offer its public programs, services and meetings in a manner that is readily accessible to everyone, including individuals with disabilities and shall, upon reasonable request provide reasonable accommodations for persons with disabilities including information or materials in appropriate alternative formats.

27. **Working during the COVID-19 Pandemic.** Consultants are required to review and comply with EID’s Contractor/Vendor SOP during COVID-19 (attached to this Agreement as Exhibit E to Appendix A). This SOP is subject to modification at any time.
28. IN WITNESS WHEREOF, the parties hereto have executed this Agreement as of the day first mentioned above.

“District”

EL DORADO IRRIGATION DISTRICT

By: Jim Abercrombie, General Manager

By: Tim Ranstrom, Director of Information Technology

By: Srinivasan Sundaram, Sr. Information Technology Analyst

Approved as to form:

Office of the General Counsel

THIS AGREEMENT SHALL NOT BE VALID OR EFFECTIVE FOR ANY PURPOSE UNLESS AND UNTIL SIGNED BY THE DISTRICT’S OFFICE OF THE GENERAL COUNSEL.

“Consultant”

CONSULTANT FIRM NAME

By: (signed)

(printed name)

Title:

By: (signed)

(printed name)

Title:
## LIST OF APPENDICES AND SCHEDULES

<table>
<thead>
<tr>
<th>Appendix A</th>
<th>Scope of Services</th>
</tr>
</thead>
<tbody>
<tr>
<td>Appendix B</td>
<td>Payments to Consultant</td>
</tr>
<tr>
<td>Appendix C</td>
<td>Insurance</td>
</tr>
<tr>
<td>Appendix D</td>
<td>Deliverables</td>
</tr>
<tr>
<td>Appendix E</td>
<td>District SOP – Safe Work Practices/Vendor Access to District Facilities-Personnel</td>
</tr>
<tr>
<td>Schedule 1</td>
<td>Personnel</td>
</tr>
</tbody>
</table>
APPENDIX A – SCOPE OF SERVICES

This is an appendix attached to, and made a part of, the Professional Services Agreement dated ____________, 20___ (“Agreement”) between the EL DORADO IRRIGATION DISTRICT (“District”) and CONSULTANT FIRM NAME (“Consultant”), for the provision of professional services (“Services”).

Consultant shall provide business and technology services as fully described in the District’s Request for Proposals (RFP20-08 Hansen Upgrade, dated August 12, 2020, ## pages) (“RFP”) and Consultants proposal dated ______________ (## pages) submitted in response thereto RFP (“Proposal”). The RFP and Proposal are attached hereto as Exhibits 1 and 2 to this Appendix A and incorporated herein by reference in accordance with all terms and conditions of this Agreement and all attachments hereto.

END OF APPENDIX A
APPENDIX B - PAYMENTS TO CONSULTANT

This is an appendix attached to, and made a part of, the Professional Services Agreement dated ________________, 20___ (“Agreement”) between the EL DORADO IRRIGATION DISTRICT (“District”) and CONSULTANT FIRM NAME (“Consultant”), for the provision of professional services (“Services”).

1 Amount of Compensation for Services of Consultant

Excluding Additional Services only, the Guaranteed Maximum Payment to Consultant for all Services performed under this Agreement shall not exceed $________, referred to hereafter as the Guaranteed Maximum Price (“GMP”). The GMP includes within its scope the cost of all subconsultants and shall constitute full compensation for the Services.

1.1 Consultant shall be paid for its Services (and for services of its subconsultants) rendered based upon the hourly “Billing Rates” of each Consultant and subconsultant employee as described below, but except for Additional Services, in no event shall Consultant invoice or receive (including subconsultants) any payment exceeding the GMP.

1.2 The Billing Rates used as a basis for payment apply to all of Consultant’s and subconsultants’ principals, professional personnel and others engaged directly on the Project. The Billing Rates shall remain constant throughout this Agreement, and shall not be adjusted for inflation, salary adjustments, cost changes, or any other reason.

1.3 If District and Consultant previously executed a purchase order for services within the scope of the Services of this Agreement, then the services performed and the compensation paid under that purchase order shall be subject to the terms of this Agreement and the previous payments deemed payments against the GMP.

1.4 Consultant may not invoice or receive payment for the GMP greater than Consultant’s percentage completion of the Services, as determined by District based on Services performed. In no event shall Consultant invoice or receive (including subconsultants) payment for fees exceeding the GMP.

1.5 The Billing Rates shall include all overhead rates to cover costs and other compensation of Consultant’s officers, executives, principals (of partnership and sole proprietorships), general managers, engineers, architects, specialists, estimators, lawyers, auditors, accountants, purchasing and contracting agents, expediters, timekeepers, clerks and other personnel employed by Consultant whether at the site or in his principal or a branch office for general administration of the Services and not specifically included in the list of personnel, Consultant’s principal and branch offices other than Consultant’s office at the site. In addition, the hourly rates shall include any part of Consultant’s capital expenses, including necessary transportation, travel and subsistence expenses of Consultant’s employees, incurred in discharge of duties connected with the Services. The Billing Rates shall also include minor expenses connected with the Services such as copies, computers, software, office supplies, postage, faxes, long-distance telephone calls, telephone, and any other expense incurred to accomplish the Services.

2 Work Breakdown Structure (NOT USED)

3 Methods of Payment to Consultant

3.1 For Basic Services on the Project. Consultant shall submit monthly invoices with reasonable detail of the daily time incurred by personnel assigned to the Project, supported by invoices and appropriate backup documentation. Each invoice shall report on Consultant’s total billings. Subconsultants shall be billed at the amount billed to Consultant therefor times 1.05.
3.2 For Additional Services. District shall pay Consultant for Additional Services, as defined below, as follows:

3.2.1 General. For Additional Services of Consultant’s professional staff engaged directly on the Project, on the basis of a lump sum negotiated between the parties, or, at District’s option, at Consultant’s Billing Rates.

3.2.2 Subconsultants. For Additional Services of subconsultants employed by Consultant to render Additional Services, the amount billed to Consultant therefore times 1.05 for general and administrative expenses.

3.2.3 For Additional Services on an hourly basis, Consultant agrees that all subconsultant billing will be limited to a not-to-exceed amount upon prior written approval of District.

4 Definitions

4.1 “Additional Services” mean services beyond the scope of the Services defined in this Agreement.

4.2 The “Billing Rates” are the hourly rates indicated in Exhibit 2 to Appendix A.

5 Invoices

All payments shall require a written invoice from Consultant in a form acceptable to District. District shall make payment on approved amounts within each invoice within 30 days of receipt.

END OF APPENDIX B
APPENDIX C - INSURANCE

This is an appendix attached to, and made a part of, the Professional Services Agreement dated _______________ 20___ (“Agreement”) between the EL DORADO IRRIGATION DISTRICT (“District”) and CONSULTANT FIRM NAME (“Consultant”), for the provision of professional services (“Services”).

1. Consultant’s Duty to Show Proof of Insurance. Prior to the execution of this Agreement, Consultant shall furnish to District satisfactory proof, in the form of certificates of insurance and/or policy endorsements, that Consultant has taken out for the entire period required by this Agreement, as further described below, the following insurance, in a form satisfactory to District and with an insurance carrier satisfactory to District, authorized to do business in California and rated by A. M. Best & Company A- or better, financial category size VII or better, which will protect those described below from claims described below which arise or are alleged to have arisen out of or result from the acts or omissions of Consultant for which Consultant may be legally liable, whether performed by Consultant, or by those employed directly or indirectly by it, or by anyone for whose acts Consultant may be liable:

1.1 Commercial General Liability Insurance
Commercial general liability insurance, written on an “occurrence” basis, which shall provide coverage for bodily injury, death and property damage resulting from operations, products liability, liability for slander, false arrest and invasion of privacy arising out of professional services rendered hereunder, blanket contractual liability, broad form endorsement, products and completed operations, personal and advertising liability, with per location limits of not less than $2,000,000 general aggregate and $1,000,000 each occurrence.

1.2 Business Automobile Liability Insurance
Business automobile liability insurance with limits not less than $1,000,000 each occurrence including coverage for owned, non-owned and hired vehicles.

1.3 Workers’ Compensation Insurance
Workers’ Compensation Employers’ Liability limits not less than the amounts required by law. Consultant’s Workers’ Compensation Insurance policy shall, by endorsement, contain a Waiver of Subrogation as to each named and additional insured. In the event Consultant is self-insured, it shall furnish Certificate of Permission to Self-Insure signed by Department of Industrial Relations Administration of Self-Insurance, State of California.

1.4 Professional Liability Insurance (if applicable)
Professional Liability Insurance, either (a) specific to this Project only, with limits not less than $1,000,000 each claim, or (b) limits of not less than $1,000,000 each claim and aggregate, all with respect to negligent acts, errors or omissions in connection with services to be provided under this Agreement, with no exclusion for claims of one insured against another insured. Consultant shall maintain said insurance coverage for a period of five (5) years after the completion of the Services and shall, upon request of District, provide certificates of insurance evidencing Consultant has maintained said coverage.

1.5 Cyber Liability Insurance. Cyber liability insurance, with limits not less than $2,000,000 per occurrence or claim, and $2,000,000 aggregate or the full per occurrence limits of the policies available, whichever is greater. Coverage shall be sufficiently broad to respond to the duties and obligations as is undertaken by Consultant in this Agreement and shall include, but not be limited to, claims involving infringement of intellectual property, including but not limited to infringement of copyright, trademark, trade dress, invasion of privacy violations, information theft, damage to or destruction of electronic information, release of private information, alteration of electronic information, extortion and network security. The policy shall provide coverage for breach response costs as well as regulatory fines and penalties as well as credit monitoring expenses with limits sufficient to respond to these obligations.
2. Insurance policies shall contain an endorsement containing the following terms:

2.1 Status of El Dorado Irrigation District as Additional Insured.

On Consultant’s Commercial General Liability policy and Automobile Liability Policy, the El Dorado Irrigation District, and its affiliates, directors, officers, officials, partners, representatives, employees, consultants, subconsultants and agents, shall be named as additional insureds, but only with respect to liability arising out of the activities of the named insured.

2.2 The policies shall apply separately to each insured against whom claim is made or suit is brought except with respect to the monetary limits of Consultant’s insurance policy.

2.3 Written notice of cancellation, non-renewal or of any material change in the policies shall be mailed to District thirty (30) days in advance of the effective date thereof.

2.4 Consultant’s insurance shall be primary insurance and no other insurance or self-insured retention carried or held by any named or additional insureds other than that amount Consultant shall be called upon to contribute to a loss covered by insurance for the named insured. Any District insurance shall be excess and noncontributing to any insurance available to the District as an additional insured under Consultant’s primary and excess Commercial General Liability policies provided pursuant to this Agreement.

2.5 Certificates of Insurance and Endorsements shall clearly describe the coverage and shall contain a provision requiring the giving of written notice described above in subsection 2.3.

2.6 Other than Professional Liability, any insurance policy written on a claims-made basis is subject to the approval of the District’s Legal Counsel.

2.7 Nothing contained herein shall be construed as limiting in any way the extent to which Consultant or any of its employees or subconsultants may be held responsible for payment of damages resulting from Consultant’s operations.

2.8 If Consultant fails to maintain any required insurance, District may (but is not obligated to) obtain such insurance, and may deduct and retain the cost of any premium so incurred from any sums due Consultant under this Agreement.

END OF APPENDIX C
APPENDIX D – DELIVERABLES LIST

This is an appendix attached to, and made a part of, the Professional Services Agreement dated __________________, 20____ (“Agreement”) between the EL DORADO IRRIGATION DISTRICT (“District”) and CONSULTANT FIRM NAME (“Consultant”), for the provision of professional services (“Services”).

Consultant shall provide the following deliverables:

See Exhibits 1 and 2 to Appendix A.

END OF APPENDIX D
APPENDIX E – DISTRICT SOP
SAFE WORK PRACTICES/VENDOR ACCESS TO DISTRICT FACILITIES-PERSONNEL

This is an appendix attached to, and made a part of, the Professional Services Agreement dated __________________, 20___ ("Agreement") between the EL DORADO IRRIGATION DISTRICT ("District") and CONSULTANT FIRM NAME ("Consultant"), for the provision of professional services ("Services").

[See Attachment]

END OF APPENDIX E
Section 1.01 Purpose

Provide procedural information and direction regarding required safety measures for contractors, consultants, or vendors (“Vendors”) who have a need to access District facilities and/or interact with District employees. These measures are intended to reduce the risk of exposure to COVID-19 and are in compliance with the pandemic emergency statewide face coverings mandate issued by Governor Newsom on June 18, 2020.

Section 1.02 Intent

This Standard Operating Procedure (SOP) is intended to provide District personnel with direction and information on the process and safety precautions required prior to allowing Vendors access to District facilities and/or to interact with District personnel. This SOP is supplements HR-120 (SOP). Therefore, Vendors must use non-traditional Personal Protective Equipment (i.e., face coverings) as required by state law when accessing District facilities or interacting with District personnel. This requirement is consistent with the State Health Officer’s order and guidance issued in response to COVID-19 (Order). ¹ This SOP will remain in effect until the District determines that Vendors do not pose a risk to District personnel related to the COVID-19 virus.

Section 1.03 Roles and Responsibilities

All District employees are subject to and responsible for ensuring a safe working environment as detailed in the District’s Injury and Illness Prevention Program (IIPP). When a potential or active hazard exist in the workforce, the District will develop, disseminate, and implement safe work practices to eliminate and/or mitigate the potential or active workplace hazard. As determined by federal, state and local authorities, COVID-19 is considered an active workplace hazard requiring action to mitigate. This by extension applies to all outside personnel (Vendors) accessing District facilities and or while providing services to the District which require interaction with District employees.

¹ 06/18/2020 State Public Health Officer order and guidance on required use of face coverings in public
Vendors performing work for the District will not interact with District personnel and/or ensure that if interaction is necessary, they will employee social distancing, minimum of six (6) feet and wear a face covering.

In addition, Vendors who interact with District employees and/or access District facilities in the commission of providing service to the District must take the following action if social distancing cannot be maintained at all time:

Use a face-cover, goggles sealed around the eyes and gloves when:

- Inside any District space;
- While in a District vehicle;
- Engaged in work for the District, when:
  - Interacting in-person with any District employee or members of the public;
  - Working in any space visited by District employees or members of the public, regardless of the presence of either at the time;
  - Working in or walking through common areas, such as hallways, stairways, elevators, and parking facilities;
  - In any room or enclosed area where other people are present when unable to physically distance.
  - While outdoors in District or public spaces when maintaining a physical distance of 6 feet from persons is not feasible.

The District will work in good faith with any Vendor who believes they may be exempt from wearing a face covering:

### Section 1.04 Scope

This SOP is separate from, and does not amend, revise and/or incorporate the District’s existing respiratory protection program, or any other OSHA/CalOSHA regulated District safety program(s). This SOP is however considered a District safe work practice and must be followed by all District employees as required under the Injury and Illness Prevention Program (IIPP) and the Order for all identified active workplace hazards. As such, District employees and Vendors shall adhere to this safe work practice.

### Section 1.05 Required Non Tradition Personal Safety Equipment for Vendors

To be clear, when social distancing cannot be achieved, Vendors, and District personnel must wear a face-covering, goggles sealed around the eye and gloves

---

2 Refer to § 1.07 of this SOP
(latex, Nitrile or similar) prior to the commencement of the work or interaction. Vendors should bring a sufficient supply of these resources to comply with this SOP.

In the event of unexpected circumstances, the District will provide the vendor with the necessary face coverings and/or gloves. This however should be the exception and not the norm as these resources are limited and reserved for District personnel.

**Section 1.06 Vendor Access To District Facilities**

District personnel assigned as project managers, and or who have secured the services of a Vendor, must obtain prior authorization and/or consult with affected supervisory District personnel before the commencement of work by the Vendor. This will allow District personnel to avoid such locations (preferred) and/or to ensure adequate social distancing strategies.

All projects and work that requires significant vendor/staff contact (donning of PPE or sustained onsite presence) must be reviewed and approved by the Department Director PRIOR to commencing. Those onsite Vendor activities that can be accomplished through avoidance of interaction or social distancing described above must be reviewed and approved by the Division Manager. Work plans shall be developed reviewed by Managers and Supervisors and affected staff. Once the plan is complete it must be submitted to the Division Manager or Director, as appropriate, by email for approval.

Once the work has been completed, EID staff should make sure that all surfaces that were contacted by anyone (Vendor or EID staff), are wiped down and disinfected following CDC Guidelines to prevent a possible secondary exposure risk.

**Section 1.07 Vendor Acknowledgement of this SOP**

These guidelines and requirements should be shared with all Vendors who require access to EID facilities or interaction with District personnel.

**Section 1.08 Standard Deliveries**

Standard deliveries such as chemicals and packages (USPS, UPS, and FedEx) do not require distinct approval for each event, however the principles of minimal contact and social distancing still apply. Drinking Water chemical deliveries that require testing should also follow this SOP.

**Section 1.09 Attachments / Reference Resources**
## Vendor Work Plan

<table>
<thead>
<tr>
<th>Vendor Requirements</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reviewed EID Vendor SOP</td>
<td></td>
<td></td>
</tr>
<tr>
<td>EID Vendor SOP Acknowledgement Signed</td>
<td></td>
<td></td>
</tr>
<tr>
<td>EID Staff Required</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| Authorizing Vendor Supervisor:          |     |    |
| Authorizing Vendor Supervisor Signature:|     |    |

- District Injury and Illness Prevention Program
- California Department of Public Health Guidance for the use of face coverings dated, 06/18/2020
- SharePoint
SCHEDULE 1 – PERSONNEL

This is a schedule attached to, and made a part of, the Professional Services Agreement dated ________________, 20___ ("Agreement") between the EL DORADO IRRIGATION DISTRICT ("District") and CONSULTANT FIRM NAME ("Consultant"), for the provision of professional services ("Services").

See Exhibit 2 to Appendix A.

END OF SCHEDULE 1
### APPENDIX A – HANSEN CUSTOM TABS

1. **Resources – Address:**
   Grid Table – WB_ADDRS  Parent Column – ADDRKEY  Key Column – GRIDKEY

<table>
<thead>
<tr>
<th>Inspect Date</th>
<th>Emp #</th>
<th>Met with Customer</th>
<th>BY landscapd</th>
<th>FY #Valve1</th>
<th>FY #Valve2</th>
<th>Valve Tag’d</th>
<th>Cont</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Inspect Date</th>
<th>FY #Copper</th>
<th>BY #Copper</th>
<th>Modifications</th>
<th>RW Ponding</th>
<th>FY Compli</th>
<th>BY Compli</th>
</tr>
</thead>
</table>

2. **Resources – Parcel:**
   Grid Table – ZPARCGRD  Parent Column – PRCLKEY  Key Column – PGRIDKEY

<table>
<thead>
<tr>
<th>EDU’s Available</th>
<th>Committed/Alloted</th>
<th>Purchase Amount</th>
<th>Utilized/Transferred</th>
<th>Balance Remaining</th>
</tr>
</thead>
<tbody>
<tr>
<td>Water</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Sewer</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Recycled Water</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Transaction Type</th>
<th>EDU Type</th>
<th>Special District</th>
<th>EDU’s Date</th>
<th>Employee ID</th>
<th>Comments</th>
</tr>
</thead>
</table>

   |                 |          |                  |            |             |          |

   RW Inspection
3. **Plant – Plant Equipment:**
   Grid Table – VAREQ  Parent Column – COMPKEY

<table>
<thead>
<tr>
<th>Operator</th>
<th>Radio #</th>
<th>Invented</th>
<th>Requisition #</th>
<th>Purchase Order #</th>
<th>Purchased From</th>
<th>Rebuild Date</th>
</tr>
</thead>
</table>

   [Table continues]

4. **Plant – Facility:**
   Grid Table – VARFA  Parent Column – COMPKEY

<table>
<thead>
<tr>
<th>Supervisor</th>
<th>Operator 1</th>
<th>Operator 2</th>
<th>Operator 3</th>
<th>PGE Account #</th>
<th>PGE Meter #</th>
<th>Inventoried</th>
</tr>
</thead>
</table>

   [Table continues]

   [Diagram of a form with fields for data entry]
5. Plant – Plant Miscellaneous
   Grid Table – VARMS   Parent Column – COMPKEY

   | Inventory Date |
   | Assigned Date |
   | Assigned To   |
   | EID Number    |

6. Plant – Vehicle:
   Grid Table – VARVEH   Parent Column – COMPKEY

   | Driver       |
   | Radio #      |
   | Cell Phone # |
   | Purchased From |
   | Custom Part  |
   | Custom Cost  |

   | Surplus Information |
   | Surplus Vendor     |
   | Net Sale           |
   | Out of Service     |
   | Date Sold          |

...
7. **Sewer – Sewer Main:**  
   Grid Table – VARSM  
   Parent Column – COMPKEY
   
<table>
<thead>
<tr>
<th>Inventoried</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>GIS Facility ID</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

8. **Sewer – Manhole:**  
   Grid Table – VARMH  
   Parent Column – COMPKEY
   
   | Inventoried |  |  |

9. **Sewer – Sewer Service Line:**  
   Grid Table – VARSS  
   Parent Column – COMPKEY
   
   | Account # |   |
   | System |   |
   | Sundies # |   |
   | Type of Service |   |
   | Number of EDU’s | 0.00 |
   | Rate Class |   |
   | NAICS |   |

10. **Water – Water Backflow:**  
    Grid Table – VARBF  
    Parent Column – COMPKEY
    
    | Inventoried |  |  |
    | Purchased from |   |
    | Requisition # |   |
    | Purchase Order # |   |
    | Audit Complete Y/N |   |
11. Water – Water Hydrant:
   Grid Table – VARHY    Parent Column – COMPKEY

   | Invented |  / / |
   | Manufacturer Date |  / / |
   | Buried Depth | 0.00 |
   | PSIG | 0 |

12. Water – Water Main:
   Grid Table – VARWL    Parent Column – COMPKEY

   | Invented |  / / |
   | GIS FacilityID |---------------------|

13. Water – Water Meter:
   Grid Table – VARW    Parent Column – COMPKEY

   | Invented |  / / |
   | Service Class |  |
   | Units | 0.00 |
   | Number of EDU’s | 0.00 |
   | HTE Location ID |  |
   | Node ID |  |
   | Check box if Meter is a Sub Meter |
   | Sub Meter |   |

14. Water – Water Miscellaneous:
   Grid Table – VARMS    Parent Column – COMPKEY

   | Inventory Date |  / / |
   | Assigned Date |  / / |
   | Assigned To |  |
   | EID Number |  |
15. Water – Water Node:
   Grid Table – VARND  Parent Column – COMPKEY

<table>
<thead>
<tr>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Inventoried</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Purchased</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

16. Water – Water Pump:
   Grid Table – VARWP  Parent Column – COMPKEY

<table>
<thead>
<tr>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Inventoried</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Operator License</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Warranty Expires</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Building</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Purchase Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Building Level</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Expected Life</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Warranty Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
</tr>
</tbody>
</table>

17. Water – Water Service Line:
   Grid Table – VARWS  Parent Column – COMPKEY

<table>
<thead>
<tr>
<th>Inventoried</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Account #</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Number of EDU's</th>
</tr>
</thead>
<tbody>
<tr>
<td>0 : 00</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Rate Class</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>NAICS</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>
18. Water – Water Valve:
   Grid Table – VARWV  Parent Column – COMPKEY
   Grid Table – COMPNAMP Parent Column – COMPKEY Key Column – GRIDKEY

19. Plant Work Order – Equipment:
   Grid Table – WBWOGRID  Parent Column – GRIDKEY Key Column – HISTKEY

20. Plant Work Order – Vehicle:
   Grid Table – WBWOGRID  Parent Column – GRIDKEY Key Column – HISTKEY
21. Activity Rev Details – FIL C/S Checklist Page 1

<table>
<thead>
<tr>
<th>Grid Table</th>
<th>Parent Column</th>
<th>Key Column</th>
</tr>
</thead>
<tbody>
<tr>
<td>VFBPNDS</td>
<td>APKEY</td>
<td>GRIDKEY</td>
</tr>
<tr>
<td>VFACACCT</td>
<td>APKEY</td>
<td>GRIDKEY</td>
</tr>
<tr>
<td>VFACUNS</td>
<td>APKEY</td>
<td>GRIDKEY</td>
</tr>
<tr>
<td>VFACCHK</td>
<td>APKEY</td>
<td></td>
</tr>
</tbody>
</table>

Location
- Parcels Inside/Outside District Boundaries?
- List Parcels outside District Boundaries

Previous FIL?
- If so, Details

Existing Services:
- Account #
- Meter Size
- Water EDUs
- Sewer EDUs

Special District
- District
- Parcel #
- Water

Temporary Off Site Agreements
- Parcel #

Project Equivalent Dwelling Unit
- EDU Type
- Qty

22. Activity Rev Details – FIL C/S Checklist Page 2

<table>
<thead>
<tr>
<th>Grid Table</th>
<th>Parent Column</th>
<th>Key Column</th>
</tr>
</thead>
<tbody>
<tr>
<td>VFACDIST</td>
<td>APEKY</td>
<td>GRIDKEY</td>
</tr>
<tr>
<td>VFACEDU</td>
<td>APEKY</td>
<td>GRIDKEY</td>
</tr>
<tr>
<td>VFACTEMP</td>
<td>APEKY</td>
<td>GRIDKEY</td>
</tr>
</tbody>
</table>
23. Activity Rev Details – Sundry Billing:
Grid Table – SBSUM  Parent Column – APKEY  Key Column – GRIDKEY

Grid Table – VDEVEXT  Parent Column – APKEY

25. Activity Rev Details – Project Status:
Grid Table – VGPRSTAT  Parent Column – APKEY  Key Column – GRIDKEY
### APPENDIX B – CUSTOM TRIGGERS

<table>
<thead>
<tr>
<th>No.</th>
<th>Parent Table</th>
<th>Trigger Name</th>
<th>Type Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>APPRJ</td>
<td>APPRJ_BR_UPD</td>
<td>SQL_TRIGGER</td>
</tr>
<tr>
<td>2</td>
<td>COMP</td>
<td>TRG_EXPRpresseITEID</td>
<td>SQL_TRIGGER</td>
</tr>
<tr>
<td>3</td>
<td>COMP</td>
<td>TRG_INSERTSITES</td>
<td>SQL_TRIGGER</td>
</tr>
<tr>
<td>4</td>
<td>COSTEQ</td>
<td>ai_costeq</td>
<td>SQL_TRIGGER</td>
</tr>
<tr>
<td>5</td>
<td>COSTLABR</td>
<td>ai_costlabr</td>
<td>SQL_TRIGGER</td>
</tr>
<tr>
<td>6</td>
<td>COSTVEH</td>
<td>ai_costveh</td>
<td>SQL_TRIGGER</td>
</tr>
<tr>
<td>7</td>
<td>PAYBATCH</td>
<td>UPD_BATCH_SOURCE</td>
<td>SQL_TRIGGER</td>
</tr>
<tr>
<td>8</td>
<td>VARWM</td>
<td>varwm_ins</td>
<td>SQL_TRIGGER</td>
</tr>
<tr>
<td>9</td>
<td>VARWP</td>
<td>TRG_INSUPD_VARWP</td>
<td>SQL_TRIGGER</td>
</tr>
<tr>
<td>10</td>
<td>VARWV</td>
<td>TRG_INSUPD_VARWV</td>
<td>SQL_TRIGGER</td>
</tr>
<tr>
<td>11</td>
<td>VDEV</td>
<td>VDEV_BR_UPD</td>
<td>SQL_TRIGGER</td>
</tr>
<tr>
<td>12</td>
<td>VGSBSUM</td>
<td>vgbsum_aiu</td>
<td>SQL_TRIGGER</td>
</tr>
<tr>
<td>13</td>
<td>ZPARCGRD</td>
<td>CALCULATEEDU</td>
<td>SQL_TRIGGER</td>
</tr>
</tbody>
</table>