

Appendix J

Required Proposal Response Format

TO: VIRGIN ISLANDS WATER AND POWER AUTHORITY

Cover Letter

The cover letter must include:

- If Offeror is a corporation, set forth the legal name of the corporation together with the signature of the officer or officers authorized to sign contracts on behalf of the corporation. If the Offeror is a partnership, set forth the name of the firm together with the signature(s) of the partner or partners authorized to sign contracts on behalf to the partnership
- Business Address of Company
- Point of contact for this proposal
- Business Address of the point of contact
- Telephone Number and e-mail address of the point of contact

Section 1: Solution Summary

Provide a summary (no more than 5 pages) of the Offeror's company legal name, state incorporated, company background, corporate structure, relevant experience, including deployment, installation and operations services and solutions offered including existing products and potentially new products that could be available at the time of deployment. The summary should demonstrate the Offeror's understanding of VIWAPA's communication needs as set forth in this RFP and shall describe how the proposed AMI solution will support VIWAPA's requirements (as specified in Section 3 of this RFP). This summary should also briefly explain (no more than 1 additional page) why the proposed AMI is the best solution for VIWAPA to provide reliable communication to all metering and endpoint devices as well as any future growth.

VIWAPA is requesting that the Offeror provide the following:

- Summary of the Offeror's Company, background, relevant experience and the solutions offered (no more than 5 pages)
- Summary of why the Offeror's solution is the best for VIWAPA (no more than 1 page)
- Summary of the Project from Start to Finish including an overview of AMI operations once deployment has been completed. (no more than 5 pages)

Section 2: Network Coverage Plans

Offeror shall provide two separate coverage scenarios (no more than 6 pages each). Please refer to Appendices E, F, and G for additional detail in support of the network design. No additional information is available at this time, including location data for network device pole attachments. Guidance to the Offeror is as follows:

- AMI network devices can be in the best locations available for the proposed technology.

- VIWAPA has agreed that in the event a suitable pole is not available within one span of the network design selected location VIWAPA will install a storm hardened pole at the desired location.
- VIWAPA is assuming all installed poles will be 20 to 25 feet AGL and network devices will be installed within the communications space.
- VIWAPA is instructing AMI Vendors that it is their responsibility to install proper grounding, remote service switches and associated coax, antennas and mounting hardware suitable of 125+ MPH winds.

Offeror should perform detailed RF propagation studies on VIWAPA's service territories to develop these coverage plans and the number of network devices required to support the following scenarios:

Requirement Scenario 1 (Baseline)

- 100% of Residential meters delivering 4 channels 15 minute energy consumption and voltage every 4 hours
- 100% of Commercial meters delivering 8 channels of 5 minute energy consumption and voltage every 1-2 hours
- Power Quality or similar data delivered every 4 hours from all meters
- Average Voltage, Min and Max voltage data delivered once every 24 hours from all meters
- Offeror is to provide an overview of the network as proposed that includes the max number of hops or layers, if applicable, for both rural and urban areas on each island.
- Network enhancements to accommodate water and street lights for future expansion at the discretion of the utility

Requirement Scenario 2 (Real Time)

- 100% of meters delivering 4 channels of 15 minute energy consumption and voltage from every Residential meter and 8 channels of 5 minute energy consumption and voltage every 15 minutes within all areas of the deployment area (i.e. rural areas will have the same network performance as urban areas).
- Power Quality or similar data delivered every 4 hours from all meters
- Average Voltage, Min and Max voltage data delivered once every 24 hours from all meters
- Offeror is to provide an overview of the network as proposed that includes the max number of hops or layers if applicable for both rural and urban areas on each island
- Network enhancements to accommodate water and street lights for future expansion at the discretion of the utility

For each plan, please provide or consider the following:

- The use of VIWAPA's existing communication infrastructures should be considered in the proposed design including locations where fiber or ethernet connectivity is available. Proposed design should focus on optimizing cost and operational capability by leveraging the optimal mix of VIWAPA's existing communication

infrastructure and that of public carriers.

- Describe the number of network devices and meters requiring third party (e.g. cellular) communications services and the associated roadmap for 4G to 5G migration (can be an additional page).
- Should the Offeror feel strongly that an all cellular solution is best for VIWAPA please provide a summary how the solution will be implemented including the choice of carrier, any additional monthly data cost and how the solution will be maintained in light of reliance on the carriers 4G/5G technology. Please provide a roadmap and migration strategy for the proposed all cellular solution. Also, Offeror should provide cellular coverage maps showing the availability and performance of data services. Offeror must include a guarantee of coverage and provide a description of mitigation processes and equipment, at no cost to VIWAPA, where the required performance is not met.
- Where cellular data services is required (for any network device or meter), Offeror vendors are to use their cellular partners to inform WAPA of coverage or lack thereof and demonstrate coverage for all devices using cellular coverage.
- Include any installation requirements, such as antenna heights, third party locations (e.g. buildings, streetlights, etc.) and equipment installation standards that are assumed in the plan. Include installation requirements for windloading of no less than 125 MPH. Note: VIWAPA, as part of the AMI deployment, will be installing new dedicated composite poles in support of Grid hardening of the AMI solution.
- Offeror is free to choose the “best fit location” for their network equipment (with the exception of existing fiber or ethernet locations utilized in the design) as VIWAPA will deploy or will be deploying via 3rd party a new AMI Network pole as required by location to harden the grid infrastructure as part of T&D improvements and storm preparedness
- Include endpoint loading of various components (e.g., Meters per tower/collector or total hops) and bandwidth utilization information to demonstrate the capacity of the network plan to support the steady state load as well as any additional traffic associated with fail over should a network device fail.
- For any backhaul communications link not utilizing VIWAPA’s communications network, identify the capacity and quality of service requirements for any third party communications and the annual communications costs associated with such third party communications services for those carriers located on the islands.
- The coverage plans should indicate the available network bandwidth to support distribution automation (DA), endpoint distributed intelligence (DI) and an indication of the number of devices, which would be supported without additional network equipment.
- Each individual design must include sufficient information to understand the communications network installation requirements for all proposed device types and locations as described above.

In summary, the AMI Communications and Coverage Plan must include designs with sufficient detail about the required network devices and additional costs associated with third party locations and/or communications required. Further, the network, as designed, should have the resiliency to allow for temporary loss of a tower or collector due to maintenance or

storms with no impact to meter communications (i.e. redundant path design).

Section 3: Customer References and Experience

Provide three (3) customer references (1 page per reference) for your electric solution, as proposed, where the Offeror has deployed the solution within the past five (5) years. These references should demonstrate projects of similar size and scope as VIWAPA, with “in production” functionality as desired within this RFP.

The customer reference must include:

- Name and address of the customer
- Name, telephone number and email address of the contact person
- Number of electric meters
- AMI technology version deployed
- Work scope
- Start Date
- Completion Date

Specifically, these references should include:

- All references should be from utilities of 50,000 or more electric meters and where possible co-deployed with water meters and streetlights using the proposed version of the solution.
- At least one (1) reference should be from a utility with similar environmental characteristics. i.e. temperature, humidity and storms. VIWAPA prefers that this be a Caribbean island.
- At least one (1) reference should have a highly varied geography similar to that of VIWAPA’s mountainous and dense foliage territory.
- At least one (1) reference should be from a turnkey solution where the Offeror provided the Deployment Services and Managed Services.
- Offerors should provide contact information of individuals who can speak to the work completed on referenced projects. Failure to provide the contact information will cause the RFP response to be non-compliant.

Section 4: Project Deployment/Installation and Implementation ***Communication / Network Equipment Installation***

Offeror shall describe the communication equipment installation process including ordering, receiving, material logistics and the deployment process including the configuration and configuration management of network devices.

If Offeror has included a cellular component to the communications to network devices, Offeror shall describe the process for validating cellular data services capabilities before the installation of the network devices and a commitment to resolve any data performance issues as part of the installation and commissioning effort.

Offeror should describe their plan and an estimated timeline for network design and deployment including associated equipment lead-times.

- Overall proposed deployment installation rate including month by month installation projections.
- Number of crews expected to be assigned to the project on a month by month bases to support projected installations.
- Any warehousing recommendations with respect to maintaining inventory on the islands.

Offeror must describe the required roles and responsibilities for VIWAPA's team members to support the deployment.

Electric Meter Deployment

Offeror shall describe the electric meter deployment plan including meter program design, ordering, material logistics and the deployment and commissioning process for each island starting with St John followed by St Thomas and finishing with St Croix. NOTE that VIWAPA expects AMI electric meters to be fully commissioned and subject to all performance SLAs within 60 days of deployment and this plan must be consistent with this expectation. The deployment plan should include the following based upon the meter numbers provided.

- Estimated deployment start and finish date based on deploying each island separately.
- Recommended logistics for storage and warehousing sufficient to cover all the VIWAPA islands.
- Recommended ramp up period
- Steady state deployment process and timeline
- Ramp down of deployment

Project Implementation Methodology

Offeror shall describe its project implementation methodology (in no more than 8 pages), including its design, configuration and systems integration management practices for the proposed solution. Note that VIWAPA is expecting the selected vendor to integrate the AMI HeadEnd system and AMI Installation Management system to the CentralSquare CIS and MeterSense MDMS which will not require customization of either system. Offeror shall include a high level schedule, with milestones and checkpoints, for the delivery and installation of the AMI Solution.

Offeror shall describe the implementation methodology, and include a list of all project deliverables, including those services identified in Sections 11 and 12 below. Offeror should include detailed information on their deployment methodology to ensure communications and commissioning to all electric meters within 60 days of installation. Further, Offeror should provide their methodology which ensures that as a meter is exchanged, the new AMI meter will communicate sufficient for billing over the AMI Solution and how Offeror will manage this methodology. Offeror's response to this section must be consistent with the attached SOW.

Offeror must provide a description of the AMI Solution team that will be assigned to this

engagement, including the location and availability of each team member, their position and relevance to the project. Identify the individuals who will be involved, their experience in delivering and deploying AMI solutions and the primary role and responsibilities of each member, as well as the principal/senior officer (“Principal”) who will serve as the Project Manager. Please provide resumes for each member of the project team. Members of the project team must be present during the onsite vendor presentations at VIWAPA’s headquarters. If necessary, Offerors may form teams in support of an integrated proposal based upon the phases of implementation or expertise required during the implementation of the AMI solution; however, Offerors will be required to assign a lead organization / individual for the overall project responsibility and specifically explain how its team members or sub-contractors (depending upon the Offeror’s proposed structure) will be managed.

Offeror must describe the suggested roles and responsibilities for the VIWAPA team members as well as a recommended structure for the team and the expected level of support these team members would need to provide.

Section 5: QA/Prod Environment Requirements

Provide the software and hardware overview (in no more than 3 pages) for the AMI Head End System which will support the proposed AMI meters and network to meet the stated performance and requirements described in Appendix A. Refer to Section 1.2.3 of Appendix A for the information that should be included in this overview. The overview should include environments for QA, Prod and DR.

Section 6: Requirement Compliance Responses

Offeror shall include responses to all individual requirements listed in the requirements attachment (Appendix A) of this document with appropriate heading designations.

Further, VIWAPA has identified the following requirements for this response. Offeror must provide a confirmation that your proposal and price will meet these requirements along with any clarifying language.

- Offeror will manage and assist VIWAPA in the ordering of all necessary equipment.
- Offeror will manage all aspects of network deployment including design and surveys, installation and documentation of all network devices, commissioning and verification of connectivity operating as a communication installation vendor or managing a communication installation vendor.
- Offeror will manage all aspects of meter deployment including installation, RTU’s (return to utility) and work orders associated with necessary meter service maintenance or replacement as the Meter Installation Vendor (MIV) or managing a sub-contracted MIV.
- Offeror will ensure that no more than 0.5% of the proposed meter exchanges are returned to VIWAPA for their resolution.
- Offeror will be responsible for replacing any meter which does not communicate or fails within 10 days of installation.

- All of VIWAPA's electric meters will be fully covered with the AMI communications or with cellular coverage with a 90% minimum daily data collection performance
- Offeror will operate the solution, AMI as a Service, working in conjunction with and support VIWAPA's AMI Field Operations.
- Offeror technology and components must meet or exceed all ANSI standards and cannot be sourced from China.

Section 7: Standard Hardware Warranty

Offeror shall include its warranty agreement (VIWAPA requires a six (6) year warranty on all equipment from the date of delivery) for the meters, communications modules, communications equipment and other hardware to be provided as part of this proposal. Offeror shall include standard maintenance and support policies, including description of return processes, help desk support, escalation processes and standard problem categories and contractually committed resolution times. Offeror should include information and terms for an extended warranty on equipment purchased after the initial deployment.

Section 8: Standard Software License and Software Maintenance Agreement

VIWAPA is requiring Managed AMI Operations Services and expects to purchase all required AMI HeadEnd Software licenses. Offeror shall include its standard software license and software maintenance agreement. Offeror shall include any terms and conditions or other applicable contractual documentation appropriate to the Services. Offeror shall include standard maintenance and support policies, including description of help desk support, escalation processes and standard problem categories and resolution times. VIWAPA requires an enterprise license which covers QA, Prod and DR environments.

Section 9: AMI Solution Requirements Compliance Matrix

Offeror shall complete the AMI Solution Requirements Compliance matrix (Appendix B) in its entirety. The requirements are formatted for a simple and succinct response, and brief answers are encouraged. However, a response to each requirement and how Offeror's solution meets this requirement is required and a simple "Comply" is not sufficient. In some cases, an additional reference document, as an appendix, will be requested to further demonstrate compliance.

NOTE: Do not modify the Requirements Excel spreadsheet by adding or moving rows, columns or tabs. Do not insert attachments in any cell. The document must be returned in its native format (Excel) as part of the electronic submission. Offeror shall NOT be required to submit this as part of the hard copies of the proposal.

Section 10: Pricing Response

Pricing information is to be recorded in the "RFP Pricing Spreadsheet.xls" (Appendix C). Offeror shall complete the Solution Pricing matrix in its entirety. The spreadsheet has specific instructions for the completion of the pricing. Refer to Appendix A for the Services for which VIWAPA is requesting quotations.

Offeror shall recommend, and provide pricing with **NO** escalation for at least 4 years, for all

of the software licenses and maintenance, services, third party communications, field tools, equipment and hardware that will meet the requirements of this RFP. Further, Offeror shall provide pricing for the deployment of the proposed network, meter shipping, meter receiving, meter installation and meter recycling or removal from the island.

NOTE: Do not modify the Excel spreadsheet by adding or moving rows, columns or tabs. Do not insert attachments in any cell. The document must be returned in its native format (Excel) as part of the electronic submission.

The signatory of the Cover Letter, having carefully read, examined and become familiar with proposed project and the scope of work and with local conditions affecting the performance and costs of the work at the place where the work is to be completed, hereby proposes and agrees to fully perform the work in accordance with the proposed contract documents, including furnishing any and all labor and material, and to do all of the work required to construct and complete said project in accordance with contract documents, for the firm base price as indicated in the Pricing Proposal.

Section 11: Managed AMI Operations Services

VIWAPA requires that Offeror will host and manage the AMI HES and monitor the AMI HES and Network to ensure the AMI solution is operating at a high reliability and subject to performance SLAs to guarantee performance and reliability. Offeror should provide a description of outsourced Software as a Service (SaaS) and Remote Management services (“Managed Services”) offered for the AMI solution. This proposal should include a complete description of the services offered, the performance guarantees associated with these services, and the roles and responsibilities of each party. VIWAPA is requesting a 20-year commitment to these outsourced services with a possible transition of the AMI Solution to the VIWAPA data center and internal operations after the 10th year.

The proposal should describe the transition costs and services as well as the cost of on-prem or remote AMI operations as a service. Offeror must include specific roles and responsibilities for VIWAPA personnel, with the expectation that VIWAPA is only responsible for field investigation and replacement of devices and Offeror is fully responsible for all backoffice activities, including administration and monitoring of the AMI HES and all interfaces, administration (including firmware upgrade) and monitoring of the AMI Network devices and the administration (including firmware upgrade) and monitoring of all of the AMI Electric Meters throughout the lifecycle of the meter. Offeror must include a standard Managed Services Agreement outlining roles and responsibilities as well as SLAs. This Managed Services Agreement must support all the requirements identified in Appendix A Section 2.1.8.

Section 12: Deployment Services

Offeror is expected to provide Network and Meter Deployment Services as part of this RFP and detailed in the SOW (Appendix J).

Offeror shall provide a description of the network deployment process including warehousing, managing deployment, deployment equipment needed (bucket trucks),

installation cost and verification of all network devices as called out in the RFP network design.

Offeror shall provide a description of the meter deployment process including warehousing, managing deployment of all single phase and 120/240 Polyphase meters, and meter deployment. Offeror can sub-contract with VIWAPA's approval.

Offeror shall review the attached SOW and Contract and verify:

- The proposed responsibilities of VIWAPA in support of this turnkey effort are in compliance with the SOW and Control.
- The breakout of milestone payments for each identified milestone.

Final acceptance will be defined as 100% coverage of all VIWAPA meters and devices communicating at the identified MSaaS SLA performance, see Section 2.1.8 of Appendix A.

The SOW must identify all additional charges VIWAPA is expected to cover and incur during this project.

Note that any charges or fees not identified will be covered at the expense of the Offeror due to existing approvals and project related financing.

Section 13: Exceptions

The Offeror shall list and explain in his proposal any exceptions to the requirements stated in the Request for Proposal. All exceptions will be reviewed during the evaluation of the RFP's.

The Offeror shall review the AMI Project General Contract Terms (Exhibit A) and identify any exceptions to the terms. Any exceptions to the terms not identified are deemed accepted and only minor wording changes and clarifications will be allowed during contract negotiations.

The Offeror shall review the attached SOW (Appendix J) and identify any exceptions to the terms of this SOW. Any exceptions to the SOW not identified are deemed accepted and only minor wording changes and clarifications will be allowed during contract negotiations.

The Offeror will be expected to commit to the following performance terms along with credits for failure to meet the contractual terms (please indicate in your response to this section, your agreement to these terms or suggested language for these performance terms):

- Meter delivery: Offeror will provide lead times for the receipt of meters on island and through customs and commit contractually to this delivery. For every meter order, the meters must be received no later than 1 week beyond the committed lead time, Offeror will provide a credit of 1% for every week (up to 12 weeks) the meter order is delayed. Note that Offeror will be excused from such credit if the agreed upon meter deployment milestones continue to be met.
- Network equipment delivery commitment: Offeror will manufacture and deliver network equipment in sufficient time to not delay the agreed upon network

deployment schedule. Offeror will provide a credit of 2% of the network equipment and deployment costs for every week that the network deployment schedule is delayed. Note that Offeror will be excused from such credit if the agreed upon meter deployment milestones continue to be met (e.g. the network deployment does not impact the ability to install and commission meters).

- Excessive equipment failure: Offeror will provide a credit of \$100 per every failed meter if the annual meter failure rate (damaged meters are excluded) exceeds 2,000 meters after the meter deployment is completed and 10 years following. This credit is beyond any warranty terms and covers VIWAPA's cost to remove and return such failed meter.
- No meter left behind: Offeror will provide a credit of \$150 for every installed AMI meter which does not communicate with a minimum performance of 80% within 45 days of installation. Offeror will provide an additional credit of \$250 for any installed AMI meter which is not does not communicate with the minimum performance of 80% within 90 days of installation. This credit covers VIWAPA's cost to continue to manually read and bill such meters.
- RTU limit: Offeror will provide a credit of \$500 for every RTU over the 0.5% limit. This credit covers VIWAPA's cost to mitigate the RTU.
- Meter Deployment Completion: Offeror will provide a credit of 1% of the meter deployment costs for every week beyond 11/30/2027 for the completion of meter deployment and will receive an incentive of 2% of the meter deployment cost for completion before 7/1/2027.

Section 14: Questionnaire

The Offeror shall complete the Questionnaire (Appendix K) in its entirety and include in your response.

Section 15: Sample Meters Shipment

The Offeror shall include proof and date of the shipment of two sample AMI meters.