**Request for Proposals CS14-0747F**

##### **Utility Bill Migration to OpenText and**

##### **Redesign Implementation Services**

##### **Response and Work Breakdown Form**

**ENTER RESPONDENT NAME HERE**

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# Executive Summary

Include:

1. A brief history and description of your firm, including organizational structure, areas/regions served, and number of employees, etc.
2. Background information of the parent company, if any.
3. Presence, if any, in Puget Sound region.
4. Name and address of firm, telephone number, email address, website address, and contact person, with title, for this solicitation.
5. Name, title, and contact information of the person authorized to execute a contract on behalf of the Respondent.
6. Name, title, and contact information of the person who will be managing this Contract on behalf of the Respondent.
7. Identify which of the additional optional efforts, if any, are included in the Submittal.
8. Identify the name and title of your proposed project manager, technical lead and functional lead for this project.

* Contents of this section begin here and are not to exceed five pages.

# Qualifications/Experience of Firm

## Relevant Client List

Describe experience successfully implementing the StreamServePersuasion 5.6 solution by listing implementations that reflect experience and expertise in work of a similar nature and magnitude to that requested in this RFP, and at utilities similar in size and services to those provided by Tacoma Public Utilities (TPU). These clients may be used as references during the vendor selection process.

* Please complete the client listing below. Add or remove rows to the table as appropriate. A minimum of three entries is requested.

|  |  |
| --- | --- |
| **Relevant Client List** | |
| **1. Client name** |  |
| Location |  |
| Contact name |  |
| Contact title |  |
| Contact telephone number |  |
| Contact email address |  |
| Customer base |  |
| Services provided (those services provided by Respondent) |  |
| Implementation dates (project start date and go-live date) |  |
| SAP version number |  |
| Stream Serve Persuasion version number |  |
| Other products implemented |  |
| Prime Contractor (if other than Respondent) |  |
| Description of hardware and operating systems involved |  |
| Brief description of the engagement |  |
|  |  |

|  |  |
| --- | --- |
| **2. Client name** |  |
| Location |  |
| Contact name |  |
| Contact title |  |
| Contact telephone number |  |
| Contact email address |  |
| Customer base |  |
| Services provided (those services provided by Respondent) |  |
| Implementation dates (project start date and go-live date) |  |
| SAP version number |  |
| Stream Serve Persuasion version number |  |
| Other products implemented |  |
| Prime Contractor (if other than Respondent) |  |
| Description of hardware and operating systems involved |  |
| Brief description of the engagement |  |
|  |  |

|  |  |
| --- | --- |
| **3. Client name** |  |
| Location |  |
| Contact name |  |
| Contact title |  |
| Contact telephone number |  |
| Contact email address |  |
| Customer base |  |
| Services provided (those services provided by Respondent) |  |
| Implementation dates (project start date and go-live date) |  |
| SAP version number |  |
| StreamServe Persuasion version number |  |
| Other products implemented |  |
| Prime Contractor (if other than Respondent) |  |
| Description of hardware and operating systems involved |  |
| Brief description of the engagement |  |
|  |  |

|  |  |
| --- | --- |
| **4. Client name** |  |
| Location |  |
| Contact name |  |
| Contact title |  |
| Contact telephone number |  |
| Contact email address |  |
| Customer base |  |
| Services provided (those services provided by Respondent) |  |
| Implementation dates (project start date and go-live date) |  |
| SAP version number |  |
| StreamServe Persuasion version number |  |
| Other products implemented |  |
| Prime Contractor (if other than Respondent) |  |
| Description of hardware and operating systems involved |  |
| Brief description of the engagement |  |
|  |  |

|  |  |
| --- | --- |
| **5. Client name** |  |
| Location |  |
| Contact name |  |
| Contact title |  |
| Contact telephone number |  |
| Contact email address |  |
| Customer base |  |
| Services provided (those services provided by Respondent) |  |
| Implementation dates (project start date and go-live date) |  |
| SAP version number |  |
| StreamServe Persuasion version number |  |
| Other products implemented |  |
| Prime Contractor (if other than Respondent) |  |
| Description of hardware and operating systems involved |  |
| Brief description of the engagement |  |
|  |  |
| Other Clients (add as many rows as needed) |  |

## Firm Stability / Implementation Experience

Provide information sufficient to evaluate that Respondent is a well-established business, is financially stable, has fully trained and capable staff, and is in a position to dedicate adequate focus and resources on this project.

* Please complete the table below. Respond to each statement or answer each question in the space provided to the right of the item.

|  |  |
| --- | --- |
| **Qualifications / Experience of Firm** | |
| 1. Demonstrate that your firm is a well-established professional organization offering the implementation / integration of OpenTextStreamServe, SAP, and other 3rd party software. |  |
| 1. Demonstrate that your firm is a financially healthy institution capable of conducting business during the entire proposed solution implementation period and the associated post go-live support period as measured by financial statements, D&B report, etc. Attach financial records, D&B reports, etc. |  |
| 1. Describe your firm’s experience and knowledge of the U.S. utility industry and its related services, products, and programs. |  |
| 1. Describe your firm’s experience being primarily responsible for the successful implementation of StreamServe within various client engagements. The proposed product has been implemented at a minimum of 3 utilities with a customer base near that of TPU in the last 5 years.   Include details demonstrating you’ve implemented the proposed product on a Microsoft platform. |  |
| 1. Demonstrate that your firm maintains and staffs a North American based office. |  |
| 1. Demonstrate that your firm is not involved in any litigation that may potentially impact your ability to support this implementation project and post go-live support. Disclose all existing and pending litigation. |  |

# Qualifications of KEY PROJECT TEAM MEMBERS

Present a project organization chart outlining the reporting structure and primary responsibilities of each position associated with this scope of work.Identify all personnel required to successfully complete proposed project activities.

TPU will not allow discretionary changes in key project personnel subsequent to award of contract without written consent. Additionally, TPU reserves the right to approve any and all personnel changes or to request personnel changes as TPU deems appropriate during the course of the project.

* Please insert the organization chart and information here.

Supply resumes of Key Project Team Members who **WILL be assigned to this project**. This includes the Project Manager, Technical Lead, and Functional Lead. If using third-party contractors,identify those relationships and associated roles. Also, include resumes of all other key personnel.

* Please respond in the table below with references specific to the COMMITTED and NAMED Key Project Team Members. Submit resumes for these stated individuals, as well.

|  |  |
| --- | --- |
| **Project Manager** | *Insert Project Manager Name Here* |
| **Experience and Client References** | |
| **1. Client name** |  |
| Contact name |  |
| Contact title |  |
| Contact telephone number |  |
| Contact email address |  |
| Services and customer base |  |
| Role filled by this person |  |
| Person’s start date on the project |  |
| Person’s final date on the project |  |
| Implementation dates (project start date and go-live date) |  |
| SAP version number |  |
| StreamServe version number |  |
| Name of person who supervised this person |  |
| Brief description of the engagement |  |
|  |  |

|  |  |
| --- | --- |
| **2. Client name** |  |
| Contact name |  |
| Contact title |  |
| Contact telephone number |  |
| Contact email address |  |
| Services and customer base |  |
| Role filled by this person |  |
| Person’s start date on the project |  |
| Person’s final date on the project |  |
| Implementation dates (project start date and go-live date) |  |
| SAP version number |  |
| StreamServe version number |  |
| Name of person who supervised this person |  |
| Brief description of the engagement |  |
| **3. Client name** |  |
| Contact name |  |
| Contact title |  |
| Contact telephone number |  |
| Contact email address |  |
| Services and customer base |  |
| Role filled by this person |  |
| Person’s start date on the project |  |
| Person’s final date on the project |  |
| Implementation dates (project start date and go-live date) |  |
| SAP version number |  |
| StreamServe version number |  |
| Name of person who supervised this person |  |
| Brief description of the engagement |  |
| Other Clients (add as many rows as needed) |  |

|  |  |
| --- | --- |
| **Technical Lead** | *Insert Technical Lead Name Here* |
| **Experience and Client Reference** |  |
| **1. Client name** |  |
| Contact name |  |
| Contact title |  |
| Contact telephone number |  |
| Contact email address |  |
| Services and customer base |  |
| Role filled by this person |  |
| Person’s start date on the project |  |
| Person’s final date on the project |  |
| Implementation dates (project start date and go-live date) |  |
| SAP version number |  |
| StreamServe version number |  |
| Name of person who supervised this person |  |
| Brief description of the engagement |  |
| **2. Client name** |  |
| Contact name |  |
| Contact title |  |
| Contact telephone number |  |
| Contact email address |  |
| Services and customer base |  |
| Role filled by this person |  |
| Person’s start date on the project |  |
| Person’s final date on the project |  |
| Implementation dates (project start date and go-live date) |  |
| SAP version number |  |
| StreamServe version number |  |
| Name of person who supervised this person |  |
| Brief description of the engagement |  |

|  |  |
| --- | --- |
| **3. Client name** |  |
| Contact name |  |
| Contact title |  |
| Contact telephone number |  |
| Contact email address |  |
| Services and customer base |  |
| Role filled by this person |  |
| Person’s start date on the project |  |
| Person’s final date on the project |  |
| Implementation dates (project start date and go-live date) |  |
| SAP version number |  |
| StreamServe version number |  |
| Name of person who supervised this person |  |
| Brief description of the engagement |  |
| Other Clients (add as many rows as needed) |  |

|  |  |
| --- | --- |
| **Functional Lead** | *Insert Functional or Business Lead Name Here* |
| **Experience and Client Reference** |  |
| **1. Client name** |  |
| Contact name |  |
| Contact title |  |
| Contact telephone number |  |
| Contact email address |  |
| Services and customer base |  |
| Role filled by this person |  |
| Person’s start date on the project |  |
| Person’s final date on the project |  |
| Implementation dates (project start date and go-live date) |  |
| StreamServe version number |  |
| Name of person who supervised this person |  |
| Brief description of the engagement |  |
|  |  |
| **2. Client name** |  |
| Contact name |  |
| Contact title |  |
| Contact telephone number |  |
| Contact email address |  |
| Services and customer base |  |
| Role filled by this person |  |
| Person’s start date on the project |  |
| Person’s final date on the project |  |
| Implementation dates (project start date and go-live date) |  |
| StreamServe version number |  |
| Name of person who supervised this person |  |
| Brief description of the engagement |  |
|  |  |

|  |  |
| --- | --- |
| **3. Client name** |  |
| Contact name |  |
| Contact title |  |
| Contact telephone number |  |
| Contact email address |  |
| Services and customer base |  |
| Role filled by this person |  |
| Person’s start date on the project |  |
| Person’s final date on the project |  |
| Implementation dates (project start date and go-live date) |  |
| StreamServe version number |  |
| Name of person who supervised this person |  |
| Brief description of the engagement |  |
| Other Clients (add as many rows as needed) |  |

# ProposedImplementation Methodology and Approach

**Note:** Describe how the Minimum Objective, as stated in RFP Section 1.01 Project Overview and Purpose A.1, will be achieved.

“Minimum Objective: Implementation services to migrate TPU’s utility bill production from Adobe Central Pro to OpenTextStreamServe Persuasion 5.6 (or most current version) and implement formatting design updates with only those features supported by existing data in the current print stream.”

## Project Timeline

Present an implementation plan addressing the major components to migrate to StreamServe at TPU.Include an implementation schedule delineating all activities, tasks, and responsibilities of the Contractor, as well as TPU’s Core Project Team and TPU’s Subject Matter Experts. This schedule shall contain three major components:

1. A timeline indicating from what points in the project, and for how long, specific TPU staffing resources should be dedicated to the project as well as from your firm;
2. Using Gantt charts (or similar graphic depiction) to illustrate phases, activities, tasks, comments, milestones, decision points, training plans and deliverables, the sequence of events from the point of contract award through Final System Acceptance for the implementation activities; and
3. Delineate the deliverables for each of the designated milestones.

* Please address the proposed project timeline, as indicated immediately above, in standard paragraphs and diagrams as needed. Also include a detailed project timeline in Microsoft Project or Microsoft Excel, referencing the Response and Work Breakdown form item number in any attachments.

Respond here:

## Project Approach and Methodology

Include a comprehensive description of your implementation strategy, including the description of the use of subcontractors and independent contractors if applicable.

TPUwill provide management, technical, and business resources to be involved in the project effort based on the Contractor’s project management approach and associated activities. Address how you will utilize TPU personnel and ensure comprehensive knowledge transfer. In the sections below, indicate the necessary TPU skill/position levels for each FTE.

### PROJECT MANAGEMENT APPROACH

Describe your approach to managing this project including the identification of clearly defined project management process, tasks and deliverables. The proposed approach must provide for insight into the Respondent’s capability to manage the project, respond to day-to-day problems, manage issues, provide regular status reports, coordinate and supervise staff, manage project resources, project documentation, and configuration control. In addition, describe process controls to be put in place to ensure the work required throughout this project is performed in a timely and accurate manner.

* Please respond in the table below.

|  |  |
| --- | --- |
| **Project Management** | **Response/Comments** |
| RespondentStaffing (# of hours) |  |
| TPU Staffing ( # of hours) needed |  |
| **Deliverables** | **Response/Comments** |
| Weekly written project status. |  |
| Formal status reports as required by TPU’s Project Manager or designee. |  |
| Development and maintenance of a comprehensive implementation plan complete with a timeline of all activities, deliverables and resources required for successful product implementation. Please include information and proposed plans. |  |
| Other (add as many rows as needed) |  |
| **Processes** | **Response/Comments** |
| Describe the project management methodology that will be utilized. |  |
| Discuss project coordination activities and the responsible parties. |  |
| Discuss the approach and controls which will be in place for project time and budget management. |  |
| Explain the change order management process. |  |
| Define quality management and how it will be applied in this project. |  |
| Discuss risk management approach and controls. |  |
| Discussfinancial and budget management approach. |  |
| Discuss testing management, tools and metrics. |  |
| Discussdocument management approach. |  |
| Other (add as many rows as needed) |  |

### Product and Environment Installation andConfiguration

Product and Environment installation and configuration services are required tomanage and/or provide oversight for implementation of the technology infrastructure necessary to operate the new StreamServe solution. This may also include the implementation of the database, design and configuration of the application environments, implementation and/or certification of the baseline StreamServe solution and customization and upgrades to the baseline application.

Contractor shall facilitate the set up and configuration of users’ roles and system security.

Contractor shall be responsible for training TPU’s implementation team in all aspects of the base product, and ensuring correct set-up and configuration of the base product to accommodate TPU’s specific environment and business requirements.

Supply a price listing, timetable, and suggested audience for continued training in order to achieve the necessary level of product proficiency for successful operation of the StreamServe solution.

* Please respond in the table below.

|  |  |
| --- | --- |
| **Product and Environmental Installation/Validation Configuration** | **Response/Comments** |
| Respondent Staffing (# of hours) |  |
| TPU Staffing (skill set and # of hours) |  |
| **Deliverables** | **Response/Comments** |
| Certification of the product on the development and production environments. |  |
| Configuration training plan for the core team and TPU support and technical staff. Include price list, timetable and suggested training audience. |  |
| Product documentation detailing choices and flexibility in system configuration. |  |
| Other (add as many rows as needed) |  |
| **Processes** | **Response/Comments** |
| Install/validate the base software and prepare it for operation and access by the project team. Please describe how this will be achieved. |  |
| Train TPU core team and TPU support staff in the base product. Please describe how this will be achieved. |  |
| Ensure correct set-up and configuration of the base product to accommodate TPU’s specific environment. Please describe how this will be achieved. |  |
| Pursue continued training of TPU core team in order to achieve a level of product proficiency. Please describe how this will be achieved. |  |
| Environment configuration tasks. Please describe how this will be achieved. |  |
| Discuss the methodology and controls for a software staging area including applicable patches. Please describe how this will be achieved. |  |
| Other (add as many rows as needed) |  |

### Product Engineering and Design

Please describe staffing and approachfor the identification, development of design specifications, interfaces, modification of base product code, complete testing of the product, and documentation for the delivery ofTPU’s minimum objective and any optional features.

In addition, please provide the details of OpenText application modules, as well as all other third party software required to support the proposed solution. Note: The hardware, infrastructure, application licenses, third-party software, and the technical platform licenses will be procured separately from the implementation services.

* Please respond in the table below.

|  |  |
| --- | --- |
| **Product Engineering** | **Response/Comments** |
| Respondent Staffing (# of hours) |  |
| TPU Staffing (skill set and # of hours) |  |
| **Deliverables** | **Response/Comments** |
| Identification, finalization, and documentation of TPU required modifications. |  |
| Development of design specifications. |  |
| Modification of base product code, system integration and other product functional support. |  |
| Full life cycle testing of the product. |  |
| Describe OpenText Application Modules. |  |
| Describe Third party software solutions if any. |  |
| Other (add as many rows as needed) |  |
| **Processes** | **Response/Comments** |
| Describe process for designing, configuring, coding and testing. |  |
| Other (add as many rows as needed) |  |

### Product Reporting

Please describe staffing and approachfor developing, testing, and documenting postal reports as identified during requirements gathering.

* Please respond in the table below.

|  |  |
| --- | --- |
| **Product Reporting** | **Response/Comments** |
| RespondentStaffing (# of hours) |  |
| TPU Staffing (skill set and # of hours) |  |
| **Deliverables** | **Response/Comments** |
| Describe report design and development effort. |  |
| Design specification |  |
| Other (add as many rows as needed) |  |
| **Processes** | **Response/Comments** |
| Discuss the training of TPU IT team in order to modify, enhance, and develop new reports. |  |
| Provide the process to be used to modify and enhance the standard product report offerings. |  |
| Discuss any third party or non-standard products required to manage and maintain reports. |  |
| Other (add as many rows as needed) |  |

### Product Interfaces and Integration

Please describe staffing and approach for interface/integration design, construction, and unit testing, including responsibility for developing and coordinating the integration test plan, scripts, and the integrated testing of these interfaces with any internal or external interface.

* Please respond in the table below.

|  |  |
| --- | --- |
| **Interfaces & Integrations** | **Response/Comments** |
| Respondent staffing (# of hours) |  |
| TPU Staffing (skill set and # of hours) |  |
| **Deliverables** | **Response/Comments** |
| Describe any design specifications necessary for addressing product modifications for required interfaces (SAP, postal software, etc.) |  |
| Other (add as many rows as needed) |  |
| **Processes** | **Response/Comments** |
| Discuss the process to be used to assess necessary interfaces/integrations. |  |
| Describe the approach to creating necessary interfaces/integrations. |  |
| Discuss the process used to modify base product code and successfully unit test and system test. |  |
| Describe how security on all external interfaces will be handled. |  |
| Other (add as many rows as needed) |  |

### Product Documentation

Please describe staffing and approachfor providing, in cooperation from the product vendor, system and user documentation. Contractorshall modify the documentation as required to reflect TPU’s customizations. All documentation will be maintained at TPU and be the property of TPU.

* Please respond in the table below.

|  |  |
| --- | --- |
| **Product Documentation** | **Response/Comments** |
| Respondent Staffing (# of hours) |  |
| TPU Staffing (skill set and # of hours) |  |
| **Deliverables** | **Response/Comments** |
| Confirm ability to provide at least one copy of systems documentation for applications software, as well as system administration documentation and training manuals. |  |
| Confirm agreement to modify the documentation as required to reflect TPU customizations. |  |
| Other (add as many rows as needed) |  |
| **Processes** | **Response/Comments** |
| Other (add as many rows as needed) |  |

### Product Training

Contractorshall be responsible for providing detailed training to the core team and TPU support staff for training all TPU’s primary, secondary and casual users.

### TRAINING AND KNOWLEDGE TRANSFER APPROACH

Describe your approach and method for training developers, testers, system administrators, operational support personnel and end-users of the system prior to, during and post implementation of the system. The training plan must address the approach for determining training needs, developing a training strategy, and the method and schedule to deliver the appropriate level of training at the right time. Describe in detail Respondent’s on-going knowledge transfer approach.

* Please respond in the table below.

|  |  |
| --- | --- |
| **Product Training** | **Response/Comments** |
| RespondentStaffing (# of hours) |  |
| TPU Staffing (skill set and # of hours) |  |
| **Deliverables** | **Response/Comments** |
| Provide a listing of up front training required of the Core Team. |  |
| Provide a plan for comprehensive knowledge transfer for key power users and technical staff in order to maintain the system in the futureto include system patching and other maintenance. |  |
| Provide a training plan identifying the minimum number of training hours that will be provided as a part of the base package. Plan should include price listing, timetable and suggested audience. The plan will identify the actual training staff, hours, and materials. |  |
| Describe the assumed skill levels of each group, training room requirements and the functional responsibilities covered in each session. |  |
| Describe how an online (self-help) training program, if available, for ongoing training requirements would be utilized. |  |
| Other (add as many rows as needed) |  |
| **Processes** | **Response/Comments** |
| Describe the key elements of knowledge transfer approach. |  |
| Identify the timeline for knowledge transfer, training curriculum and other factors that ensure knowledge transfer has occurred. |  |
| Describe the process or tools that will be used to facilitate knowledge transfer. |  |
| Describe how the knowledge transfer documentation will be updated/maintained. Indicate how much of this documentation would be leveraged from existing documentation. |  |
| Describe the “train the trainer” approach that will be used to instruct the TPU training team in how to provide training to TPU end users. |  |
| Other (add as many rows as needed) |  |

### Product Testing

Please describe your approach to testing services, which focuses on planning, executing and approving the tests to be conducted which includes the following activities:

1. Test Planning. A series of system tests will be conducted to ensure that the new solution has been successfully configured and enhanced. This activity deals with the development of the various test plans that govern the testing and acceptance process, and will guide the overall approach, unit test conditions, unit test data, and anticipated unit test results. The test plan will govern all aspects of the testing process.
2. Test Execution. Perform testing with, TPU business units and IT resources. Once the enhancements, interfaces, and reports have been unit tested, delivered, and preliminarily accepted by TPU, they will be placed into an integration test environment. The integration test ensures that the new solution works with the enhancements that have been made to the system. In addition, the integration test will confirm that the system has been accurately configured. This is a lengthy process that requires robust regression testing. Further, performance and volume tests are conducted to ensure that batch and on-line service levels are being met by the system. In some instances a parallel test of some nature will be conducted.

* Please respond in the table below.

|  |  |
| --- | --- |
| **Product Testing** | **Response/Comments** |
| RespondentStaffing (# of hours) |  |
| TPU Staffing (skill set and # of hours) |  |
| **Deliverables** | **Response/Comments** |
| Provide test plan outlining the testing approach, methods, tools, data, participants, and other items required for successful product testing. |  |
| Other (add as many rows as needed) |  |
| **Processes** | **Response/Comments** |
| Describe plan to conduct a comprehensive systems test utilizing TPU’s environment and its data. |  |
| Discuss verification and validation of the Contractor’s test plan and test scripts by TPU. |  |
| Discuss how TPUtesting team will be trained to test and the purpose and approach for each testing phase. |  |
| Describe approach for the management of (tracking and resolving) issues/bugs in the software. |  |
| Describe a typical test team (size, skill set, etc.) and environment based on experience with similar projects. |  |
| Other (add as many rows as needed) |  |

### Go Live Readiness and Product Roll-Out

The Contractor shall provide a readiness evaluation based on pre-determined, approved criteria. TPU will review the final results of testing to accept readiness of the system and approve production cutover. At least 2 successful full-cycle parallel runs will be required prior go live. The Contractor, along with TPU, will stage all aspects of the system, develop a schedule, and conduct all Production Cutover activities.

* Please respond in the table below.

|  |  |
| --- | --- |
| **Product Roll-Out (Go Live)** | **Response/Comments** |
| RespondentStaffing (# of hours) |  |
| TPU Staffing (skill set and # of hours) |  |
| **Deliverables** | **Response/Comments** |
| Provide sample product and test plans showing results and metrics for each test cycle. |  |
| Provide validation and reconciliation reports, metrics plan. |  |
| Provide a detailed deployment plan including a pre cutover, cut over and post go live activities checklist. |  |
| Other (add as many rows as needed) |  |
| **Processes** | **Response/Comments** |
| Describe the process for final reviewof testing and parallel runs to accept readiness of the system and approve Production Cutover. |  |
| Describe any other manual activities anticipated at Go Live. |  |
| Describe the approach to defining and managing the rollout of project capability, to planning and facilitating workforce training, production turnover and to providing system support. |  |
| Other (add as many rows as needed) |  |

### Post Implementation Support

The Contractor shall provide immediate production critical support to TPU for a minimum of 90business days after go live. The key members of the Contractor’s implementation team who were in lead positions during the implementation of the solutions will provide this post go live support on site for at least the first 30business days.

Describe your post-implementation and ongoing support plan, including:

* Help desk support
* Configuration Management
* Development support
* Infrastructure support
* System/Database support
* Please respond in the table below.

|  |  |
| --- | --- |
| **Post Installation Support** | **Response/Comments** |
| Respondent staffing (# of hours) |  |
| TPU Staffing (skill set and # of hours) |  |
| **Deliverables** | **Response/Comments** |
| Provide an action plan and associated timeline to address post implementation issues. |  |
| Other (add as many rows as needed) |  |
| **Processes** | **Response/Comments** |
| Describe the roles/titles of each key person who will participate in post go-live support on-site at TPU and the number of hours that they will plan to be on-site. |  |
| Describe the roles/titles of each key person who will participate in post go-live support off-site and the number of hours that they will be devoted to the support of TPU’sStreamServesolution following go-live. |  |
| Other (add as many rows as needed) |  |

### Final System Acceptance

Describe final systemacceptance and stabilization plan.

* Please respond in the table below.

|  |  |
| --- | --- |
| **Deliverables** | **Response/Comments** |
| Provide final system acceptance and stabilization plan. |  |
| Other (add as many rows as needed) |  |
| **Processes** | **Response/Comments** |
| Other (add as many rows as needed) |  |

## Statement of Work

Include a Statement of Work (SOW) specifically for the implementation of StreamServe 5.6 (most current version) at TPU. SOW should include, but not be limited to, the tasks, responsibilities and timeframes discussed in Item4.2.

* Please include a detailed Statement of Work for the implementation of StreamServe5.6(most current version) at Tacoma Public Utilities.

# OPTIONAL EFFORTS

Respond to TPU’s Optional Efforts as described in RFP Section 2.04.G. The description of the effort, resources, hours and cost provided for each of the selected Optional Efforts isincremental to the Minimum Objective effort, staffing and cost described in 4.2 above.

## Desired Utility Bill Features

Provide a response in any or all of the items below if any of the Optional Efforts regarding Desired Bill Features will be included in the response.

TPU will provide management, technical, and business resources to be involved in the project effort based on the Contractor’s project management approach and associated activities described in 4.2. Describe if and how your approach and methodology will differ for these optional efforts. Also address how you will utilize TPU personnel and ensure comprehensive knowledge transfer.

### Combine energy and energy delivery charges into one line for Power

The charges are shown separately on the current utility bill.

|  |  |
| --- | --- |
| Describe the process to accomplish this Optional Effort. Describe how this complements or is different than the effort described in 4.2 above for the RFP’s Minimum Objective. |  |
| Number of hours required to complete this Optional Effort. Include any subcontractor hours. |  |
| 3rd Party hours (for work that will be required by someone other than the Contractor (and subcontractors) and TPU. |  |
| TPU hours required. |  |

### Addition of demand meter data on consumption graphs (dual axes display)

This feature is intended to provide customers that have demand meters with demand and consumption data on the same graph for more comprehensive analysis.

|  |  |
| --- | --- |
| Describe the process to accomplish this Optional Effort. Describe how this complements or is different than the effort described in 4.2 above for the RFP’s Minimum Objective. |  |
| Number of hours required to complete this Optional Effort. Include any subcontractor hours. |  |
| 3rd Party hours (for work that will be required by someone other than the Contractor (and subcontractors) and TPU. |  |
| TPU hours required. |  |

### Addition of average cost per day for each service

This data is not currently derived in SAP and therefore not included in current utility bill.

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| --- | --- |
| Describe the process to accomplish this Optional Effort. Describe how this complements or is different than the effort described in 4.2 above for the RFP’s Minimum Objective. |  |
| Number of hours required to complete this Optional Effort. Include any subcontractor hours. |  |
| 3rd Party hours (for work that will be required by someone other than the Contractor (and subcontractors) and TPU. |  |
| TPU hours required. |  |

### Addition of tax breakdown for each service (taxes are currently rolled into the rate in SAP)

|  |  |
| --- | --- |
| Describe the process to accomplish this Optional Effort. Describe how this complements or is different than the effort described in 4.2 above for the RFP’s Minimum Objective. |  |
| Number of hours required to complete this Optional Effort. Include any subcontractor hours. |  |
| 3rd Party hours (for work that will be required by someone other than the Contractor (and subcontractors) and TPU. |  |
| TPU hours required. |  |

## Migrate Remaining Forms to OpenText

Provide a response below for any or all of the Optional Efforts regarding the migration of TPU’s remaining forms to OpenText/StreamServeif they will be included.

Describe if and how your approach and methodology will differ for this optional effort to migrate TPU’s remaining forms to OpenText/StreamServe. Also address how you will utilize TPU personnel and ensure comprehensive knowledge transfer.

### Migrate Warning Notice from Adobe Pro Central to StreamServe

|  |  |
| --- | --- |
| Describe the process to accomplish this Optional Effort. Describe how this complements or is different than the effort described in 4.2 for the RFP’s Minimum Objective. |  |
| Number of hours required to complete this Optional Effort. Include any subcontractor hours. |  |
| 3rd Party hours (for work that will be required by someone other than the Contractor (and subcontractors) and TPU. |  |
| TPU hours required. |  |

### Migrate Disconnect Notice from Adobe Pro Central StreamServe

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| --- | --- |
| Describe the process to accomplish this Optional Effort. Describe how this complements or is different than the effort described in 4.2 above for the RFP’s Minimum Objective. |  |
| Number of hours required to complete this Optional Effort. Include any subcontractor hours. |  |
| 3rd Party hours (for work that will be required by someone other than the Contractor (and subcontractors) and TPU. |  |
| TPU hours required. |  |

### Migrate Power Crews Timesheet from Adobe Pro Central StreamServe

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| --- | --- |
| Describe the process to accomplish this Optional Effort. Describe how this complements or is different than the effort described in 4.2 above for the RFP’s Minimum Objective. |  |
| Number of hours required to complete this Optional Effort. Include any subcontractor hours. |  |
| 3rd Party hours (for work that will be required by someone other than the Contractor (and subcontractors) and TPU. |  |
| TPU hours required. |  |

### Migrate Annual Meter Reading Schedule from Adobe Pro Central to StreamServe

|  |  |
| --- | --- |
| Describe the process to accomplish this Optional Effort. Describe how this complements or is different than the effort described in 4.2 above for the RFP’s Minimum Objective. |  |
| Number of hours required to complete this Optional Effort. Include any subcontractor hours. |  |
| 3rd Party hours (for work that will be required by someone other than the Contractor (and subcontractors) and TPU. |  |
| TPU hours required. |  |

### Migrate MARCO (red bill without boilerplate) from Adobe Pro Central to StreamServe

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| --- | --- |
| Describe the process to accomplish this Optional Effort. Describe how this complements or is different than the effort described in 4.2 above for the RFP’s Minimum Objective. |  |
| Number of hours required to complete this Optional Effort. Include any subcontractor hours. |  |
| 3rd Party hours (for work that will be required by someone other than the Contractor (and subcontractors) and TPU. |  |
| TPU hours required. |  |

## Recommend Move of Post-Processing from SAP(ZBS)to Streamserve and other Improvements

Provide a response below if the optional effort of recommending (and helping to implement) a more standardized post processing process (removal of customization in SAP/ZBS transaction) is included.

TPU will provide management, technical, and business resources to be involved in the project effort based on the Contractor’s project management approach and associated activities described in 4.2 above. Describe if and how your approach and methodology will differ for this optional effort to standardize the invoice process. Also address how you will utilize TPU personnel and ensure comprehensive knowledge transfer.

|  |  |
| --- | --- |
| Describe the process to accomplish this Optional Effort. Describe how this complements or is different than the effort described in 4.2 above for the RFP’s Minimum Objective. |  |
| Number of hours required to complete this Optional Effort. Include any subcontractor hours. |  |
| 3rd Party hours (for work that will be required by someone other than the Contractor (and subcontractors) and TPU. |  |
| TPU hours required. |  |

# Additional information

Product and company brochures and other additional information related to this RFP may be included with here. Note, however, that while inclusion of such materials is allowed,these will not be evaluated and may not be used in lieu of providing requested information. SeeRFP section3.01.