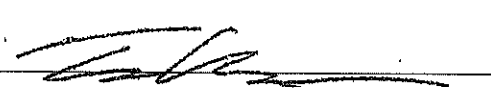


ORIGINAL

Submit Bid to: CITY OF DELTONA Attn: Kate Duffy, CPPO, CPPB 2345 Providence Blvd. Deltona, Florida 32725 Attn: Purchasing CLEARLY MARK SEALED ENVELOPE WITH BID NAME AND NUMBER	BID# 23009 INSTALLATION OF WATER METERS
<u>Contact:</u> Kate Duffy, CPPO, CPPB Purchasing Manager kduffy@deltonafl.gov Phone: (386) 878-8570 Fax: (386) 878-8571 <u>PRE-BID MEETING:</u> <u>There will be a mandatory pre-bid meeting on Tuesday, March 21, 2023 at 9:00 a.m. in City Hall Commission Chambers located at 2345 Providence Blvd., Deltona, FL 32725.</u> <u>Response Due Date & Time:</u> MONDAY, APRIL 3, 2023 AT 2:30 P.M. AT CITY HALL LOCATED AT 2345 PROVIDENCE BLVD., DELTONA, FL 32725, 1ST FLOOR CONFERENCE ROOM	RESPONDENTS NAME AND ADDRESS: Vanguard Utility Service, Inc. 1421 W. 9th St. Owensboro, KY 42301  Phone#: 270-926-4646
<u>Location of Public Opening:</u> City of Deltona, 1st Floor Conference Room 2345 Providence Blvd., Deltona, FL 32725	

GENERAL CONDITIONS, INSTRUCTIONS AND INFORMATION

These documents constitute the complete set of terms and conditions, specification requirements, and forms. Respondents shall complete and submit the additional required information together with the forms herein in a binder and in the order as they are requested. All responses shall be submitted in a sealed envelope. The face of the envelope shall contain Company's name, return address, the due date and time, the BID# and title. Companies shall submit **three typed copies and one unbound original (please do not use three ring binders)** of their response, complete with all supporting documentation. SUBMITTAL OF A RESPONSE TO THIS REQUEST FOR PROPOSALS CONSTITUTES AN OFFER BY THE COMPANY SUBMITTING RESPONSE. Bid responses which do not comply with these requirements may be rejected at the option of the City.

CONTACT: All prospective Respondents are hereby instructed not to contact any member of the City of Deltona Commission, City Manager, or City of Deltona Staff members other than the noted contact person regarding this Request for Proposals their or their response at any time during the BID process. Any such contact shall be cause for rejection of your response.

DELAYS: The City, at its sole discretion, may delay the scheduled due dates indicated above if it is to the advantage of the City to do so. The City will notify Bidders of all changes in scheduled due dates by written addendum.

EXECUTION OF BID: BID must contain a manual signature, in ink, of an authorized representative, who has the legal ability to bind the Proposer in contractual obligations Responses must be typed or legibly printed in ink. Use of erasable ink is not permitted. The original Bid conditions and specifications cannot be changed or altered in any way. Altered BID's will not be considered. Clarification of bids submitted shall be in letter form, signed by proposers and attached to the bid.

RESPONDENT INFORMATION: Firms shall complete the "Corporate Authority", "Joint Venture", "Sole Proprietorship", or "Partnership" portion of the BID Information Sheet, whichever part applies, and include with their submittal.

JOINT VENTURES: Responses submitted by firms under "joint venture" arrangements or other multi-party agreements must submit a power of attorney delegating authority to one principal with authority to negotiate and execute any/all contract documents resulting from negotiations/award of this Request for Proposals.

NO RESPONSE: If not submitting a BID response, respond by returning only the Statement of No Response, and give the reason in the space provided. Failure to respond three (3) times in succession without justification may be cause for removal of the proposers name from the mailing list.

BID OPENING: Shall be public, at the above address, on the date and at the time specified above. The date and time shall be scrupulously observed. Under no circumstances shall submittals delivered after the time specified be considered; such Submittals will be returned unopened. The City will not be responsible for late deliveries or delayed mail. The time/date stamp clock located in the Finance Department serve as the official authority to determine lateness of any response. It is the Respondents sole responsibility to assure that his/her submittal is complete and delivered at the proper time and place of the BID opening. Submittals which for any reason are not so delivered will not be considered. Offers by facsimile, telegram or telephone are **not** acceptable. A Bid may **NOT** be altered by the Bidder after opening of the Bids. Bid tabulations will be furnished upon written request which includes a self-addressed, stamped envelope.

Persons with disabilities needing assistance to participate in the Public BID Opening should contact the City Clerk at least 48 hours in advance of the meeting at 386-878-2100.

TAXES: The City is exempt from Federal Excise and State Sales Taxes on direct purchases of tangible personal property. The City's exemption numbers are on the face of the purchase order. If requested, the Purchasing Manager will provide an exemption certificate to the awarded Proposer. Vendors/contractors doing business with the City shall **not** be exempted from paying sales tax to their suppliers for materials to fulfill contractual obligations with the City nor shall any Vendor/Contractor be authorized to use the City's Tax Exemption Number in securing such materials.

CERTIFICATES

The City reserves the right to require proof that the Bidder is an established business and is abiding by the Ordinances, Regulations, and Laws of their Community and the State of Florida such as but not limited to: Occupational Licenses, Business Licenses, Florida Sales Tax Registration, Federal Employee Identification Number.

MISTAKES: Proposers are expected to examine the terms and conditions, specifications, delivery schedule, proposed prices, extensions and all instructions pertaining to supplies and services. **FAILURE TO DO SO WILL BE AT PROPOSER'S RISK.** In the event of extension error(s), the unit price will prevail and the Proposer's total offer will be corrected accordingly. Written amounts shall take precedence over numerical amounts. In the event of addition errors(s), the unit price, and extension thereof, will prevail and the Proposer's total offer will be corrected accordingly. Bids having erasures or corrections must be initialed in ink by the Proposer.

AWARD TERM The award period will be for a period of two years and will renew annually upon satisfactory review of the work and upon agreement by both parties.

INVOICING AND PAYMENT: Payment for any and all invoice(s) that may arise as a result of a contract or purchase order issued pursuant to this specification shall minimally meet the following conditions to be considered as a valid payment request:

- a. A timely submission of a properly certified invoice(s), in strict accordance with the price(s) and delivery elements as stipulated in the contract or purchase order document, and be submitted to the Finance Department at the address as stipulated on the Purchase Order.
- b. All invoices submitted shall consist of an original and one (1) copy; clearly reference the subject contract or purchase order number; provide a sufficient salient description to identify goods or service for which payment is requested; contain date of delivery; original or legible copy of signed delivery receipt including both manual signature and printed name of a designated City employee or authorized

Agent; be clearly marked as "partial", "complete" or "final" invoice. The City will accept partial deliveries.

- c. The invoice shall contain the Proposer's Federal Employer Identification Number (F.E.I.N.).
- d. The City's terms are "Net 30 Days" after acceptance of goods or services and receipt of an acceptable invoice as described herein. Any discounts must be offered on the BID Response Form.

GENERAL: The City of Deltona, having limited storage facilities, requires the service of private firms to provide materials, supplies and/or services on an as needed basis, as indicated herein, to support the City's needs.

ADDITIONAL TERMS AND CONDITIONS: Unless expressly accepted by the City, the following conditions shall apply: No additional terms and conditions included with the response shall be considered. Any and all such additional terms and conditions shall have no force and effect, and are inapplicable to this request if submitted either purposely through intent or design, or inadvertently appearing separately in transmittal letters, specifications, literature, price lists or warranties. It is understood and agreed that the general and/or any special conditions in these Documents are the only conditions applicable to this BID and the Proposer's authorized signature on the BID Response Form attests to this. Exceptions to the terms and conditions will not be accepted.

INTERPRETATIONS: All Respondents shall carefully examine the Bid Documents. Any ambiguities or inconsistencies shall be brought to the attention of the City in writing prior to the opening of Submittals; failure to do so, on the part of the Respondent, will constitute an acceptance by the Respondent of any subsequent decision. Any questions concerning the intent, meaning and interpretations of the BID Documents shall be requested in writing (facsimile transmission acceptable (386) 878-8571, and received by the City at least seven (7) calendar days prior to the Bid Opening. Inquires shall be addressed to the attention of the Contact person as indicated on Page 1. No person is authorized to give oral interpretations of, or make oral changes to, the Bid. Therefore, oral statements given before the Bid opening will not be binding. Any interpretation of, or changes to, the Bid will be made in the form of a written Addendum to the Bid and will be furnished to all Respondents through DemandStar. Receipt of all addenda shall be acknowledged by the Respondents by signing and enclosing said addenda or addendum acknowledgement with their response.

ADDENDUM: The City will record its responses to inquiries, any supplemental instructions, and/or necessary revisions to BID Documents, in the form of a written addendum. Should revisions to the Bid Documents become necessary, the City will post a written addendum to the DemandStar website which will go out to all Respondents who received a Bid package through DemandStar. All addenda are posted to the DemandStar website and current plan holders are notified that an addendum has been issued. Respondents who obtain BID Documents from other sources must officially register with the City's

Purchasing Manager in order to be placed on the DemandStar website as a Bid holder in order to receive any forthcoming addenda or other official communications. Failure to register as a prospective Respondent may cause your Bid to be rejected as non-responsive if you have failed to submit a Bid without an addendum acknowledgment for the most current addendum. It is the vendor's responsibility to check the DemandStar website at www.demandstar.com in order to be sure latest addendum and any prior addendum have been received.

PROTESTS: Any Respondent who disputes the BID selection or contract award recommendation shall file such protest according to the Bid protest procedures. These procedures are available upon request from the City.

CONFLICT OF INTEREST: All Respondents must disclose with their BID the name of any officer, director, or Agent who is also an employee of the City. All Respondents must disclose the name of any City employee who owns, directly or indirectly, an interest of five percent (5%) or more in the Respondent's firm or any of its branches.

LEGAL REQUIREMENTS: Respondents are required to comply with all provisions of Federal, State, City and local laws and ordinances, rules and regulations that are applicable to the items being Bid. Lack of knowledge by the Respondent shall in no way be a cause for relief from responsibility, or constitute a cognizable defense against the legal effect thereof.

DRUG-FREE WORKPLACE: Preference shall be given to business with Drug-Free Work Place (DFW) programs. Whenever two or more BID's which are equal with respect to price, quality, and service are received by the City for the procurement of commodities or contractual services, a Bid received from a business that completes the attached DFW form certifying that it is a DFW shall be given preference in the award process.

POSTING OF BID AWARD: Recommendation for award will be posted for review by interested parties on DemandStar. Failure to file a protest to Purchasing within the time prescribed in the City's Purchasing Manual, shall constitute a waiver of proceedings.

AWARD: As the best interest of the City may require, the right is reserved to make award(s) by individual item, group of items, "All or None", or a combination thereof; with one or more suppliers; to reject any or all Submittals, or waive any minor irregularity or technicality in Submittals received, award or eliminate a portion of the submittal, and may, at its sole discretion, request a re-Bid, or abandon the project in its entirety. Respondents are cautioned to make no assumption until the City has entered into a contract or issued a purchase order.

EEO STATEMENT: The City is committed to assuring equal opportunity in the award of contracts, and, therefore complies with all laws prohibiting discrimination on the basis of race, color, religion, national origin, age or sex.

CONTRACTUAL AGREEMENT: The contents of this Bid and all provisions of the successful firm's submittal deemed pertinent by the City may be incorporated into a contract and become legally binding. A separate contract document, other than the purchase order, may or may not be issued. Any and all legal action necessary to enforce a contract or purchase order will be interpreted according to the laws of Florida. The venue shall be County of Volusia, Florida.

GOVERNMENTAL RESTRICTIONS: In the event that any governmental restrictions are imposed which would necessitate alteration of the material quality, workmanship or performance of the items offered on this BID prior to their delivery, it shall be the responsibility of the Respondent to notify Purchasing at once, indicating in his/her letter the specific regulation which required an alteration, including any price adjustments occasioned thereby. The City reserves the right to accept such alteration or to cancel the contract or purchase order at no further expense to the City.

PERMITS/LICENSES/FEES: Any permits, licenses, or fees required will be the responsibility of the Contractor, no separate or additional payment will be made.

Adherence to all applicable code regulations (Federal, State, City, City) are the responsibility of the Contractor.

INDEMNIFICATION: The Respondent, without exemption, shall indemnify and save harmless, the City, its employees and/or any of its Commissioners from liability of any nature or kind, including cost and expenses for or on account of any copyrighted, patented, or unpatented invention, process, or item manufactured by the Respondent. Further, if such a claim is made, or is pending, the Respondent may, at its option and expense, procure for the City the right to use, replace or modify the item to render it non-infringing. If none of the alternatives are reasonably available, the City agrees to return the article on request to the Respondent and receive reimbursement. If the Respondent used any design, device, or materials covered by letters, patent or copyright, it is mutually agreed and understood, without exception, that the BID prices shall include all royalties or cost arising from the use of such design, device, or materials in any way involved in the work.

ADVERTISING: In submitting a BID, Respondent agrees not to use the results therefrom as a part of any commercial advertising, without the express written approval, by the appropriate level of authority within the City.

ASSIGNMENT: Any purchase order or contract issued pursuant to this Request for Proposals and the monies which may become due hereunder are not assignable except with the prior written approval of the City, through the Finance Department.

COMPLIANCE WITH OCCUPATIONAL SAFETY AND HEALTH: Respondent certifies that all material, equipment, etc., contained in his/her proposal meets all applicable O.S.H.A. requirements. Respondent further certifies that, if he/she is the successful Respondent, and the material, equipment, etc.,

delivered is subsequently found to be defective in any applicable O.S.H.A. requirement in effect on the date of delivery, all costs necessary to comply with the requirements shall be borne by the Respondent.

RESPONSIBILITY: A Respondent must have at the time of the BID opening, a company in operation, (if applicable) or be a fully authorized Agent or representative of the product proposed, and capable of producing or providing the items proposed, and follow-up parts and service, including any warranty services as applicable, and so provide such certification upon request.

FACILITIES: The City reserves the right to inspect the Respondent's facilities at any reasonable time, during normal working hours, to determine that Respondent has a bona fide place of business, and is a responsible Respondent.

DISQUALIFICATION OF RESPONDENT: More than one response from an individual, firm, partnership, corporation, or association under the same or different names will not be considered. Reasonable grounds for believing that a Respondent is involved in more than one proposal submittal will be cause for rejection of all bids in which such Respondents are believed to be involved. Any or all Submittals will be rejected if there is reason to believe that collusion exists between Respondents. BID's in which the prices obviously are unbalanced will be subject to rejection.

ADJUSTMENTS / CHANGES / DEVIATIONS: No adjustments, changes or deviations shall be accepted on any item unless conditions or specifications of a BID expressly so provide. Any other adjustments, changes or deviations shall require prior written approval, and shall be binding **ONLY** if issued by the City's Finance Department. The Respondent shall bear sole responsibility for any and all costs of claims arising from any adjustments, changes or deviations not properly executed as required herein.

PUBLIC RECORDS: Upon award recommendation or ten (10) days after opening, whichever is earlier, BID's become "public records" and shall be subject to public disclosure consistent with Chapter 119.07(3)(o), Florida Statutes. Respondents must invoke the exemptions to disclosure provided by law in the response to the BID, and must identify the data or other materials to be protected, and must state the reasons why such exclusion from public disclosure is necessary.

BID's may be reviewed at City Hall, 2345 Providence Blvd., Deltona, FL 32725.

BID PREPARATION COSTS: Neither the CITY nor its representatives shall be liable for any expenses incurred in connection with preparation of a response to this Request for Proposals. Respondents should prepare their submittals simply and economically, providing all information and prices as required.

ACCEPTANCE / REJECTION: The City of Deltona reserves the right to accept or reject any or all Submittals and to

make the award to that Respondent, who in the opinion of the City will be in the best interest of and/or the most advantageous to the City. The City of Deltona also reserves the right to reject the response of any vendor who has previously failed in the proper performance of an award or to deliver on time contracts of a similar nature or who, in the City's opinion, is not in a position to perform properly under this award. The City of Deltona reserves the right to inspect all facilities of respondents in order to make a determination as to the foregoing. The City of Deltona reserves the right to waive any irregularities, informalities, and technicalities in offers received, and may, at its discretion, request a re-Bid, or abandon the project/procurement in its entirety.

TERMINATION FOR CONVENIENCE This Agreement may be terminated for convenience by the City upon thirty (30) days advance written notice to the consultant; but if any work is in progress but not completed as of the date of termination, then this Agreement may be extended upon written approval of the City until said work is completed by the Consultant and accepted by the City

ANY AND ALL SPECIAL TERMS AND CONDITIONS, TECHNICAL REQUIREMENTS, SCOPE OF WORK OR SPECIFICATIONS ATTACHED HERETO WHICH VARY FROM THESE GENERAL CONDITIONS SHALL HAVE PRECEDENCE.

CITY OF DELTONA, FL

BID #23009 FOR: WATER METER INSTALLATIONS

SCOPE OF WORK/SERVICES PROJECT REQUIREMENTS

Contractor will be responsible for the installation and activation of all two inch and less meters, The Contractor will be responsible for capturing all data, as specified within this bid, for all meters within the City's meter reading platform.

Contractor will install new water and reclaimed meters along with modifying meter box lids for antenna installations and corresponding water endpoints. Installation locations will be returned to pre-installation condition, or better. Costs are to be incorporated into the appropriate item(s) of work as determined by the Proposer.

Any water service lines, meter couplings, meter valves, service fittings, irrigation lines, other underground utilities (i.e. electrical, communications, gas, etc.), sprinkler heads, meter boxes or lids damaged during excavation or installation shall be repaired, PRIOR to restoration activities. Damaged water lines shall be tested PRIOR to restoration activities. Restoration activities to include, but not be limited to, any backfill placement; landscaping; the placement of concrete, asphalt or bricks for driveways; sidewalks; concrete pads; or other items encountered. Restoration shall be completed per governing standards and specifications. All existing landscaping, ground cover, grass, plants, shrubs, and/or trees which are damaged during construction shall be replaced with the same type or approved variety within forty-eight (48) hours. Restoration costs are to be incorporated into the appropriate item(s) of work as determined by the Proposer.

Activation of new endpoints.

Electronically transfer new meter data to the billing system (Utility Billing Software), without interruption to meter read and billing cycles.

Digital photograph of the following: location, before and after installation, meter reading before and after installation, old and new meter serial number, new meter MIU number, Date/Time Stamp each photo.

Provide or capture GPS data of new meter locations.

Contractor will be responsible for compliance with all Local, State and Federal laws, regulations, provisions and requirements in the execution of all aspects of the Project.

The Contractor is responsible to provide maintenance of traffic as required to perform the work. The work areas will consist of multiple jurisdictions. The contractor will be required to coordinate the available work hours (and work days) with these jurisdictions. The contractor will be responsible to apply and pay for permits as needed. At a minimum, Maintenance of Traffic should be in accordance with FDOT Standard Specifications for Road and Bridge Construction July 2020, Section 102 (or most current version). Costs are to be incorporated into the appropriate item(s) of work as determined by the Proposer.

The contractor shall provide a Worksite Traffic Supervisor who possesses a current FDOT recognized certification for Advanced Training for Maintenance of Traffic (or Temporary Traffic Control). Costs are to be incorporated into the appropriate item(s) of work as determined by the Proposer.

At each installation location, the condition of the existing customer service piping and shut-off valve shall be inspected by the Contractor prior to attempting replacement of the meter.

If the contractor determines that existing conditions are such that the damage to the existing piping on customer's property would result from attempting to replace the meter, the contractor shall notify the City of Deltona and shall not proceed with the work at that location without further direction from the City of Deltona.

Old piping shall not be accepted as an excuse for not being able to replace the meter. Only when old piping is leaking or deteriorated to a point that it will be damaged by replacement will poor piping be accepted as a reason for not performing the replacement. An inspection shall then be performed by the City of Deltona to verify conditions. Once verified, the City of Deltona will direct the customer to correct the piping.

In cases where the curb stop is not capable of shutdown, the Contractor shall notify the City for assistance in stopping the flow of water. The Contractor shall remove the existing water meter. The Contractor shall take special care to ensure the safety of the installers, the homes and residents.

METER INSTALLATIONS

Replacement of water meters and appurtenances shall be performed by workers thoroughly experienced in such work and all piping and wiring work shall be properly supported and aligned and shall present a neat and workmanlike appearance. Any damage to the couplings, unions or meter threads by the use of improper tools or by cross-threading SHALL BE CORRECTED AT THE EXPENSE OF THE CONTRACTOR. **All meter installation work must be completed by a Florida Licensed Certified Underground Utility and Excavation Contractor or a Licensed Plumber pursuant for Florida Law. A copy of this license must be included in response. The failure to include this license will result in rejection of response.**

Before installation, the contractor will remove all ground water and or soil/sand and debris to a level of 4" below the bottom plate or the meter. The contractor is responsible for the proper disposal of waste materials left over.

COMPLETE METER REPLACEMENTS

The following steps are required to successfully replace a water meter to AMR:

- 1) Door-tags will be placed at each resident's home door no less than 7 days prior to commencement of the work. The Door-tags shall have the estimated date of service.
- 2) Installation technician arrives for meter replacement
- 3) Technician examines existing conditions of meter setting and takes pre-installation digital photo
- 4) Technician clears debris (sand, dirt) from meter box and/or de-waters meter pit as required
- 5) Technician shuts curb stop valve to stop flow of water.
- 6) Prior to installation, the Technician sanitizes the meter couplings and meter ends with a chlorine/water sanitizing solution.
- 7) Technician removes old meter & gaskets, installs new gaskets, replaces existing meter with a new meter and radio unit.
- 8) Technician restores water and checks for leak and verifies that there is a watertight seal at the meter fittings.
- 9) Technician mounts pit lid antenna to meter pit lid
- 10) Technician installs authorized equipment (supplied by City) and enters the data into the electronic format and paperwork order
- 11) Technician cleans work area and takes the post installation digital photo
- 12) Technician completes meter change work order indicating the following: customer account number, read sequence, install date, meter size & type, new meter serial number, new MIU serial number, reading on old meter. Technician purges the water lines from the outside hose spigot (if available).

Technician informs the customer of the successful installation. In the event the customer was not home during the installation a Flush the Water line notice will be left at the property.

INSTALLATION OF RETROFIT MIU TO EXISTING NEPTUNE ENCODER METERS

Retrofitting of existing water meters and appurtenances compatible with the existing system shall be performed by workers thoroughly experienced in such work and all piping and wiring work shall be properly supported and aligned and shall present a neat and workmanlike appearance. Any damage to registers, RF Units, the couplings, unions or meter threads by the use of improper tools or by cross-threading SHALL BE CORRECTED AT THE EXPENSE OF THE CONTRACTOR.

Before installation the contractor will remove all ground water and or soil/sand and debris to a level of 4" below the bottom plate or the meter. The contractor is responsible for the proper disposal of waste materials left over.

The following steps are required to successfully retrofit a water meter to AMR:

- 1) Installation technician arrives for meter upgrade/retrofit
- 2) Technician examines existing conditions of meter setting and takes pre-installation digital photo
- 3) Technician clears debris (sand, dirt) from meter box and/or de-waters meter pit as required
- 4) Technician mounts pit antenna to meter pit lid
- 5) Technician installs all authorized equipment (supplied by City) and enters the data into the electronic format and paper work order
- 6) Technician cleans work area and takes the post installation digital photo
- 7) Technician completes meter upgrade work order indicating the following: customer account number, read sequence, install date, meter size & type, new register serial number, new MIU serial number, reading on old register.
- 8) Technician informs the customer of the successful installation. In the event the customer was not home during the installation a notice will be left at the property informing the customer of the upgrade.

Following completion of the installation, the Contractor shall remove all debris assuring that the work-site is left in the condition it was found and return old meter to the City.

DIGITAL INSTALLATION PHOTOS

Are required showing conditions before installation, after installation, meter reading and mounted remote/RF unit (fourth photo if applicable). The photos must show the area around where the work was done including the meter setting before and after. The meter and property must be identified in all photos by a meter tag or white board clearly marked with the property location, date and installer ID. All photos must be available on the customer portal and appended to the appropriate account. The photos should be in a thumbnail format on the proposed customer portal and when clicked on expanded into a full screen view.

1. INSTALLATION QUALIFICATIONS

Bids will be considered only from Contractors with a minimum of 5 years' experience and skill in a meter installation programs that total 5,000 units or more, and a proven track record of customer satisfaction. The Contractors must include in their qualifications a list of municipalities or water companies where similar work has been performed as well as the number of meter installations and meter replacements completed in each municipality or facility.

Bidders are requested to submit with their bids the following:

- 1) Utility where similar work was performed.
- 2) Name of person/engineer in charge of the project
- 3) Dollar amount of contract
- 4) Scope of Work
- 5) Contract Period of Performance date, Substantial Completion Date & Final Completion Date
- 6) Number of units installed and type for each contract
- 7) Managing personnel names and resume'
- 8) Corporate structure
- 9) Detailed Installer Training program

Each proposal shall contain (on separate sheet) adequate proof of the bidders' qualifications for the work to be performed. Contractors with a minimum of (5) projects satisfactorily completed of this type of construction (meter installations) will be considered for this project.

CONTRACTOR'S EMPLOYEE REQUIREMENTS

The Contractor shall employ competent, efficient and experienced employees skilled in the work assigned to them. The Contractor shall provide the City a list of names and other required information of the employees selected. The Contractor's employees shall have on their persons, always, displayed in a noticeable manner, pictured identifications. The pictured I.D. shall have the Contractor's name,

employee's name, title and signature and employee's I.D. number. Contractor shall provide to the City an employee list indicating employee names, and identification numbers. Contractors shall provide a description of its organizational structure showing responsibilities, and duties of employees, supervisors and managers. Employees without proper uniforms and I.D. will not be allowed to work. All Contractor's employees, and all employees of all subcontractors, shall have the legal right to work in the United States and be fully insured by the Contractor.

Contractor's employees shall have uniforms of the same type and color and shall include shirt, pants, jackets. Contractor's identification patches shall be permanently attached to shirts and jackets. Contractor's vehicles, including private vehicles, used for contract work shall have company logos prominently displayed. As required by Florida State Law, the Contractors' license number(s) shall be displayed.

All Contractor's employees shall be neat and presentable and always present a professional appearance. All required safety clothing is the responsibility of the contractor.

Whenever the City notifies the Contractor in writing of any person whose work is deemed careless, incompetent, disorderly or otherwise unsatisfactory, such person shall be discharged from working on this contract and shall not again be employed on this contract except with written consent of the City. The contractor shall employ competent, efficient employees skilled in the work assigned to them. The contractor shall provide the City of Deltona with a list of names and other required information of the employees selected.

The City of Deltona reserves the right to approve the selection of any proposed employee to provide services under this contract. This will, in no way, however, relieve the Contractor of his responsibility for hiring appropriate personnel. The Contractor shall, at all times, enforce strict discipline and good order among his employees. All employees of the contractor will have a background check done and a copy forwarded to the City of Deltona. This will be at the expense of the contractor.

ALL Contractor & sub-contractor vehicles, used for contract work shall have company logos prominently displayed and ALL vehicles used for work on this project must remain permanently labeled with the contractor's information, logo, vehicle number and phone number and website.

Employees without proper uniforms and I.D. will not be allowed to work.

All contractor employees shall be neat and presentable and at all times present a professional appearance. Uniforms are required and shall consist of matching shirts and pants (jackets when required) with the company name clearly displayed. Silkscreen "T" shirts with company name will not be acceptable as uniforms without PRIOR City of Deltona approval. The contractor at his expense will conduct background checks of all employees working on this project. The background check must be done and all data then forwarded to the City of Deltona. The City of Deltona reserves the right to have any employee it deems disorderly or disruptive prohibited to work on this project.

2. SITE VISITATION

Responses to this contract shall be based on a prior representative sampling of premises in the contract area. The Contractor shall be familiar with the conditions under which this work is to be done and with the type of obstacles to be overcome.

The submission of any proposal shall be held as an acknowledgement that this requirement has been complied with. The Contractor shall satisfy himself as to the nature and location of the work and general and local conditions. Failure of the Contractor to be acquainted with all the available information shall not relieve the Contractor from any responsibility for performing the work properly.

Gaining familiarity with the conditions of the contract area after bidding will not be considered a justification of change orders relating to the contract. Furthermore, no additional compensation will be allowed for conditions, increasing the cost, which were not known to or appreciated by the Contractor when bid proposal was submitted.

INSTALLATION SEQUENCE

The Contractor shall conduct installations by groups of accounts (e.g., Portions, Meter Read Routes). The City will provide the successful contractor with the available meter reading schedule. The successful contractor will utilize the City's meter reading schedule, so as not to interfere with meter reading operations, when developing an installation sequence schedule. No installations are to occur five (5) days prior to and five (5) days after, a planned meter read. The City will notify the Contractor of any required changes to the schedule and the Contractor will adjust their implementation schedule accordingly. Installation sequence schedules will be provided to the City on a monthly basis, or as required to ensure continuity of meter reading requirements. The City requires installation completion and System activation of a defined Portion, prior to moving to the next Portion area.

The City, at times, needs to modify and change its meter reading schedule. The City will notify the Contractor of these changes, as soon as they are made, and the Contractor must adjust their installation sequence accordingly.

The City Meter Changeout Team will continue to replace stuck and broken meters that are identified during daily operations. The City will coordinate these changeouts, with the Contractor, during preparation of submittal of the monthly implementation schedules, in order to clearly identify which meters will be the Contractor's responsibility to replace.

METER INSTALLATION REQUIREMENTS

All labor, tools, equipment, storage, testing, and transportation necessary to install and test meter and registers, but not limited to, meter manufacturer's tools for checking readings and account numbers shall be included as part of the Contractor's cost. Provide line item costs and descriptions for your system. Replacement of meters and appurtenances shall be performed by workers thoroughly experienced in such work. All piping and wiring work shall be properly supported and aligned and shall present a neat and workmanlike appearance. Any damage to the couplings, unions, or meter threads by the Contractor shall be corrected at the expense of the Contractor.

Clearance under the meter and couplings shall not be less than 4-inches to ensure contaminants do not enter the customer piping, the couplings or either the new or old meters. The costs for the removal and disposal of excess soil from within an existing meter box shall be incorporated into the appropriate item(s) of work as determined by the Proposer. Adequate communication and notice shall be provided to all property owners prior to meter replacement. Condominiums and medical facilities have stringent criteria for providing advanced notice and the Contractor shall adhere to those requirements. Prior to installation, and after proper notification, all debris, dirt, etc. that could enter the lines must be removed, service shall be turned off, the meter couplings loosened and undone, old gaskets removed, and new gaskets installed. Meter spuds and couplings will be sanitized with a sanitary solution of 1-part chlorine and 4 parts water to ensure proper sterilization of the meter and open pipes.

Once the new meter is installed, service is to be restored and the site checked for leaks. The Contractor shall notify the customer that proper procedure following installation requires the Contractor to open an outdoor hose bib to flush out the potable and/or reclaimed water lines, purging them from air and any possible contaminants. The Contractor shall then proceed to open the hose bib and flush the line. If a hose bib is inoperable or not accessible, the Contractor shall coordinate with the property owner or property manager to determine if there are other means available to flush the lines. At no point in time shall the Contractor enter any property to flush the lines from inside the property. If no one is available at the time of the installation, a door hanger with clear flushing instructions shall be left for the customer. The Contractor shall make all efforts to advise the property owner or property manager of the meter replacement, letting them know the work is complete. Information shall be provided, in a door hanger format, to each property explaining what work was completed with flushing instructions for each customer. Contractor shall be responsible for any damage caused to hose bibs by forcibly opening them. Additionally, Contractor shall be responsible for any high-water bills caused by leaving the hose bib open after flushing the line.

The Contractor will be responsible for the capture of the GPS coordinates of the new AMR meter installations and relocation. This information shall be provided to the City for mapping and diagnostic purposes.

The City can inspect any installation for compliance with Contract requirements. Any installations that do not meet installation requirements will be corrected, by the Contractor to meet all City requirements.

3. **WARRANTY**

All installation work performed under this contract shall be guaranteed for a period of one (1) year from the completion for defects in workmanship. The meters and equipment will be warranted by the manufacturer's warranty.

The contractor will be responsible for all leaks reported within 5 feet of the meter for 30 days from the date of the meter replacement.

RESPONSIBILITY FOR DAMAGE

All damage to water services; house piping and/or customer's property resulting from the performance of work of work under this contract shall be borne and sustained by the Contractor. For a period of thirty days from date of meter installation any leaks 5 feet before or after the meter the contractor will be responsible for to repair.

4. **CUSTOMER NOTIFICATION, INSTALLATION APPOINTMENTS & WORKING HOURS**

Upon award, the City will supply the Contractor with the potable and reclaimed water customer locations to be included in this Contract. The Contractor shall notify the customers of the water shutoff and meter replacement a minimum of one week (1-week) prior to meter change out. The Contractor shall also leave a door hanger, once the change out work has been completed, notifying them of the completed work and a phone number to call if there are any issues. Special circumstances may apply to condominiums and medical facilities. It is the Contractor's responsibility to provide notice as required by these facilities. Contractor shall provide an example of a door hanger utilized by the Contractor in a previous Project to the City with their submittal. The successful Proposer will be required to provide the actual door hangers to be utilized for this Project for review and approval by the City. At a minimum, the door hangers shall have the Contractor's name, brief description of the work to be performed, date and time of meter replacement, Contractor's customer service number, and flushing requirements. At the time of award, the Contractor will provide to the City, for review and approval, the specific door hangers to be utilized for this Project. Any written notices or letters shall also require prior review and approval from the City. The Contractor will find that many of the homes are not accessible to the installers during normal working hours. Installers shall be available during evening hours and/or weekends to accommodate the customer's reasonable requests for appointments. The Contractor shall take this into account in preparing their submittal.

If the customer refuses access under all circumstances to the meter box or refuses installation services, including a conscientious effort by the Contractor's manager, then the Contractor shall thereafter notify the City and provide documentation of their efforts. It will be the responsibility of the City to take appropriate action to secure access for the Contractor.

5.

The Contractor will send or otherwise provide literature to each customer introducing and explaining the replacement of water meters. The literature will include the Contractor's name, point of contact and telephone number.

Upon award, the City of Deltona will supply the Contractor with the customer locations to be included in this contract. The City of Deltona shall not be liable, nor will any consideration be given for extra payment claims by the Contractor if such information is found to be inaccurate.

Any written notices or letters shall have prior approval from the City of Deltona. The Contractor will find that many of the homes are not accessible to the installers during normal working hours. Installers shall be available during evening hours and or weekends to accommodate the customer's reasonable requests for appointments. The Contractor shall take this into account in preparing his bid.

The Contractor shall be required to concentrate installations in specific geographic areas such as designated by the City of Deltona.

The City of Deltona shall approve all work (meter installation) schedules laid out by the contractor.

METER CHANGEOUT DATA REPORTING REQUIREMENTS

The contractor will be responsible for providing the City meter change out data in a timely and accurate manner and within one (1) week of each meter changeout. The Proposer will provide means and methods on how they will meet the meter changeout data requirements. The meter changeout data required are:

Water or Reclaimed Water Service
Address Old meter serial number
Meter read, prior to
removal New meter
serial number New AMI
Register MIU
New meter read, after installation procedures
GPS coordinate locations for the new meter installations.

TWENTY-FOUR HOUR CUSTOMER ACCESS DURING INSTALLATION PROCESS

The Contractor must respond on a 24-hour-per-day basis to calls from the City or from the customer associated with that installation, concerning leaks, loss of service, low pressure, and other problems associated with installation. Contractor must respond within thirty (30) minutes of receiving the call and arrive at customer's premises ready to correct any problems within thirty (30) minutes of receiving the call. The Contractor will provide the City the Customer Access phone number.

RESPONSE TO COMPLAINTS

Should the Contractor receive a call or complaint from a customer or the City regarding installation, the Contractor shall immediately log the call, including caller's name, address, phone number, account number if available, date and time of call, nature of problem and the action taken. Copies of all call logs shall be forwarded to the City, not less than once per day.

IMPROPER INSTALLATIONS

The Contractor shall be responsible for replacing any meter, MIU or appurtenances improperly set and correct any damage to couplings, threads, unions or meters by use of improper tools or cross threading by a contractor's installer.

Any water service lines, meter couplings, meter valves, service fittings, irrigation lines, other underground utilities (i.e. electrical, communications, gas, etc.), sprinkler heads, meter boxes or lids damaged during excavation or installation shall be repaired, PRIOR to restoration activities. Damaged water lines shall be tested PRIOR to restoration activities. Restoration activities to include, but not be limited to, any backfill placement; landscaping; the placement of concrete, asphalt or bricks for driveways; sidewalks; concrete pads; or other items encountered. Restoration shall be completed per governing standards and specifications. All existing landscaping, ground cover, grass, plants, shrubs, and/or trees which are damaged during construction shall be replaced with the same type or approved variety within forty-eight (48) hours. Restoration costs are to be incorporated into the appropriate item(s) of work as determined by the Proposer

LEAKS AFTER INSTALLATION

The Contractor shall be responsible for correcting any leaks at the valves, couplings or service lines that could reasonably be attributed to the meter installation, if reported by the City or customers.

INSTALLATION CONTROL AND AUDIT PROCEDURES

Contractor shall describe in detail its proposed system for ensuring that all data pertaining to installation is correctly recorded during installation, and that all data transferred to the City is accurate. Proposer shall describe procedures for eliminating any opportunities for a meter or MIU to be associated in the with the wrong address or account number.

INSTALLATION/FIELD TESTING CONTROL HARDWARE AND SOFTWARE

Contractor will be required to provide firm's method of managing installation data.

CUSTOMER SUPPORT

The Contractor is required to offer 24-hours per day, 7-days per week customer support. Contractor shall be required to correct all discrepancies with the property owners within 24-hours of notice. Documentation of each complaint and corrective measures shall be maintained by the Contractor and provided to the City monthly, as part of the Contractor's monthly pay request. The Contractor shall be responsible for investigating all customer complaints with respect to remote and/or meter replacement and correcting such deficiencies including, but not limited to, leaks, restoration, debris in the customer building (see previous information about the licensed plumber) or any work directly related to the meter or meter box/lid replacement. Customer support shall be initiated, starting with the Proof of Concept and be available throughout the duration of the Project.

6. CUSTOMER COMPLAINTS/CALL BACKS

The Contractor shall be responsible for investigating all customer complaints with respect to remote and/or meter replacement and correcting such deficiencies including, but not limited to, leaks that are a direct or indirect result of said work. Contractor shall respond to customer complaints within 24 hours and within 48 hours provide a written, detailed report to the City advising of the situation and the resolution.

PROJECT MANAGEMENT SOFTWARE AND CUSTOMER PORTAL

The successful contractor must provide an integrated portal for the utility's access to every customer account being handled by the contractor. The portal will be an information convergence and decision support tool, for utility access to live operational data about each and every one of its end-point customers. When logging on, the utility is presented with an overview dashboard of the entire project. The dashboard will provide all pertinent and relevant project status data, at a glance.

Based on the portal user's needs, the user can drill down from overview to categorical all the way to individual installation detail. Each layer of reporting including an increasing level of detail in an attempt to anticipate the user's needs.

End-Point Customer view – A complete view of the end-point user, including:

Checklist/Installation Status - Details of contractor internal operational status. A complete status of a particular installation/retrofit. Appointment scheduling details, customer contact journal.

Installation Details – A Complete digital work-order. References all data provided, verified and collected during execution. Installation Details must include Automatic date and time stamping, Image Database, initial/installation configuration data

Reporting module – Drill down reports, user customizable, on the fly, by date target range, selectable by route/walk/book/cycle/technician.

Search module – Extensive search capabilities. Search by ANY item - Including non-indexed data. Even when an exact match is cannot be found, provides a best guess result set that saves administrative staff time in identifying issues and speeding resolution.

Export Module - Billing System Integration – Meter change out projects are extremely difficult by design. Each and every detail of a change out must be documented and passed, properly and efficiently, billing systems – with billing utility. The portal will provide a Self-Service Checkout of meter changeout data. Designed in concert with utility's billing company to provide a highly reliable data update methodology. Exception rates must be lower than baseline exceptions.

Ability to output data needed for utility billing system in an input data file format.

REAL TIME WORK ORDER (METER INSTALLATION REQUEST FORM)

Contractor will be required to demonstrate his ability to provide the "live" updates as detailed prior to award of the project.

The City of Deltona shall supply the Contractor with a file for each customer location. The change-out data must be available to the City of Deltona in real time with a before, meter reading and after digital photo of the location appended to the report.

The reports will be web based and contain both the original customer meter data and the new meter installation data in addition to any customer information captured including contact information and appointment schedule information. All data in from the field must be uploaded within 24 hours of the meter replacement.

A paper back-up work order shall also be provided to the City of Deltona.

After the completion of the work, the contractor shall return the work order indicating the action taken, pertinent data required by the City of Deltona, date on which work was performed.

A corrective work order may also be issued for each installation that requires corrective action. The contractor shall return the corrective work order indicating the corrective action taken.

The contractor must be able to allow installation downloads (self-serve) from the website at the City of Deltona discretion as often needed at no additional charge.

Prior to award the successful bidder will be required to demonstrate his proposed software, Customer Portal, Live Update, Real Time Work Order, software to the City of Deltona before award. Should the low bidder fail to demonstrate the functionality of the software or if the software does not have the required features, his bid will be disqualified and the second lowest bid will be reviewed. This process will continue should the second bidder not meet the qualifications/specifications until a vendor does meet the above referenced requirements. The contractor must indicate in his response where – Town/Utility or authority the proposed software was successfully used. 3 References are required, and all must be in excess of 2,500 units

7. REPORTS

The Contractor shall accurately fill out the work order which is titled "Meter Installation Request" noting all pertinent data as required by the City of Deltona.

The pertinent data shall include but not be limited to:

- a) Old and new meter number
- b) Old and new meter readings
- c) Leaking Plumbing
- d) Cross connections
- e) Faulty inlet valve
- f) Encoded identification number
- g) RF ID number
- h) Installers Name & Id. Number
- i) Photo number's
- j) notes
- k) Customer Contact information (if available)
- l) Signature

The captured data from the field must be made available to the City of Deltona within 24 hours via a Customer Portal accessible through the internet or direct connect to the contractor database or project managing software.

The Contractor will also be required to sound the customer's service line during meter change-out for detecting underground service leaks. Sounding shall be done when the inlet valve is closed, and the old meter is removed from the service line.

The result of said test shall be noted on the reverse side of the work order (Meter Installation Request) form.

8. PROJECT OFFICE and STORAGE AREA

The Contractor shall be responsible for providing a project office and storage area within the City of Deltona. The project office/storage area must be able to stock all supplies and material for the duration of said contract.

The Contractor shall maintain a full-time customer service unit for scheduling appointments and handling customer complaints during normal working hours.

9. PAYMENT

The Contractor's attention is called to the fact that the unit price bid for installation of Encoder water meters and equipment shall include all labor costs.

10. The unit price bid shall cover all the Contractors expenses and no additional payments will be allowed.

The Contractor shall submit requests for payment on a monthly basis with all reports being submitted in the first week of the month.

Payments will not be made until the installation is complete and has been successfully read, remotely, by the City of Deltona.

11. PRECONSTRUCTION MEETING

Prior to starting of any work, a pre-construction meeting will be held at the City of Deltona City Hall Commission Chambers. The purpose of this meeting will be to lay out general rules and outline of how the project will flow.

The contractor will be required to submit at this time a detailed work schedule indicating approximate production/installation goals, additional customer notices and follow up calls on non-responsive customers.

RESPONSE REQUIREMENT

1. Affidavit of Compliance to all specifications – signed by Office of Company and signed and sealed by Notary public. Any and all deviations from specifications shall be clearly noted and included on separate letterhead by vendor and signed by officer of company.
2. Copy of Florida Licensed Certified Underground Utility and Excavation Contractor License or Plumbers License.
3. All information requested under INSTALLATION QUALIFICATIONS section of specifications.
4. Contractor's current insurance documentation.

Risk Management/Bonding RequirementsRequirements:

A. Bid Security will be submitted and shall be made payable to City, in an amount of not less than five percent (5%) of the Bidder's Contract Price and in the form of a certified or cashier's check or a Bid Bond issued by a Surety meeting the requirements of Article 5 of the General Conditions as amended by the Supplementary Conditions. The Bid Bond shall be issued by a company having a registered agent in the State of Florida. Personal checks are not acceptable. The Bid Security of the Successful Bidder will be retained until such Bidder has executed the Agreement and furnished the required payment and performance bonds, whereupon the Bid Security will be returned. If the Successful Bidder fails to furnish the qualifications submittals or fails to execute and deliver the Agreement and furnish the required Bonds within ten (10) days of the Notice of Award, City may annul the Notice of Award and the Bid Security of that Bidder will be forfeited. The Bid Security of any Bidder whom City believes to have a reasonable chance of receiving the award may be retained by City until the ninety-first (91) day after the Bid opening. Bid Security of other Bidders will be returned approximately seven (7) days after the Bid opening.

B. Payment and Performance Bonds

A payment and performance bond for 100% of the contract price will be required from the awarded bidder.

B. Contractual Provisions Relative to Risk Management

All contracts for any public works to be performed, and service-related contracts, for or on behalf of the City shall include the following, or substantially similar, provisions:

1. Hold Harmless**(a) General**

The City and their agents, employees, and officials, both elected and appointed, shall be held harmless from and against all claims for bodily injury, sickness, disease, death or personal injury or damage to property or loss of use resulting therefrom, arising out of the agreement, contract or lease unless such claims are a result of the City's sole negligence, as determined by the final arbiter of such claim.

DISQUALIFICATION OF RESPONDENTS

Public Entity Crimes. A person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a response/Bid on a contract to provide any goods or services to a public entity, may not submit response/Bids on leases or perform work as a contractor, supplier, subcontractor, or consultant under a contract with any public entity, and may not transact business with any public entity in excess of the threshold amount provided in section 287.017, Florida Statutes. Attachment "B" must be completed, signed and included in the Respondent's proposal.

Conflict of Interest. Any Respondent who is deemed to have a conflict of interest prohibited by Chapter 112, Florida Statutes, shall be disqualified.

Prohibited Communication. Any form of communication, except to the Purchasing Manager, shall be prohibited regarding this particular bid, between:

1. Any person or person's representative or any person on behalf of anyone seeking an award from such competitive solicitation; and
2. Any City Commissioner, Selection Committee member, City Manager, City Attorney, or any City employee not identified as a point of contact for this Request for Proposals.

The prohibited communication shall be in effect as of the date of release of this BID. The provisions of this section shall terminate at the time the City awards or approves a contract, rejects all Bids or responses, or otherwise takes action which ends the solicitation process.

A violation of the prohibited communication section shall be cause for disqualification of the Bid or proposal. The determination of a violation shall be made by the City and communicated to the proposer.

**BID RESPONSE FORM
BID NO. 23009
METER INSTALLATION**

In accordance with the foregoing terms, conditions and specifications, the undersigned bidder, having visited the site of the work and having become familiarized with the conditions affecting the cost of the work and with all requirements of the proposed Contract Documents, and duly issued Addenda to said documents, as acknowledged herein, proposes to furnish and perform all things required in labor, material, necessary tools, expendable equipment, and all services necessary to perform and complete in a workmanlike manner all work required by said documents and Addenda.

DESCRIPTION	QUANTITY	UNIT	UNIT PRICE	TOTAL
Meter installation 5/8 x 3/4 Concrete Basic	10,000	Meters		

There are currently 39,000 meters to be installed in total. The initial phase will be for 10,000 to be installed. Work will be completed in phases over multiple years.

EXAMINATION OF BID DOCUMENTS

Each Respondent shall carefully examine the bid and other contract documents, and inform him or herself thoroughly regarding any and all conditions and requirements that may in any manner affect cost, progress, or performance of the work to be performed under the contract. Ignorance on the part of the Respondent will in no way relieve the Respondent of the obligations and responsibilities assumed under the contract.

Should a Respondent find discrepancies or ambiguities in, or omissions from, the specifications, or be in doubt as to their meaning, Respondent shall at once notify the City's Purchasing Manager in writing.


Public Records. The Contractor shall allow public access to all documents, papers, letters, or other material subject to the provisions of Chapter 119, Florida Statutes, and made or received by the Contractor in conjunction with this Agreement. Specifically, the Contractor shall:

- (a) Keep and maintain public records that ordinarily and necessarily would be required by the City in order to perform the service.
- (b) Upon request of the City's custodian of public records, provide the City with a copy of the requested records or allow the records to be inspected or copied within a reasonable time at a cost that does not exceed the cost provided in state law or as otherwise provided by law.
- (c) Ensure that public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law for the duration of the contract term and following completion of the contract if the contractor does not transfer the records to the City.
- (d) Meet all requirements for retaining public records and transfer, at no cost, to the City all public records in possession of the Contractor upon termination of the Agreement and destroy and duplicate public records that are exempt or confidential and exempt from the public records disclosure requirements. All records stored electronically must be provided to the City in a format that is compatible with the information technology system of the City.

(e) IF THE CONTRACTOR HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO THE CONTRACTOR'S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS CONTRACT, CONTACT THE CUSTODIAN OF PUBLIC RECORDS AT (386) 878-8100, jraftery@deltonafl.gov, 2345 Providence Blvd., Deltona, Florida 32725.

ATTACHMENT "A"

Addendum Acknowledgment

Acknowledgment is hereby made of receipt of addenda issued during the solicitation period. BID#23009 Meter Installation	Addendum # <u>1</u> through # <u>3</u> Initial: Date: 3-30-2023
Person Completing BID (Signature) 	
Name (Printed): Robert A. Bates	Title: President/Owner

>>>Failure to submit this form would have a negative impact on your evaluation score<<<

**ATTACHMENT
"B"**

THE CITY
OF DELTONA

SWORN STATEMENT UNDER SECTION 287.133(3)(a), FLORIDA
STATUTES, ON PUBLIC ENTITY CRIMES

**TO BE RETURNED WITH
BID**

THIS MUST BE SIGNED IN THE PRESENCE OF A NOTARY PUBLIC OR OTHER OFFICER AUTHORIZED TO ADMINISTER OATHS

1. This sworn statement is submitted with Bid, Proposal or Contract
for
INSTALLATION OF WATER METERS.
2. This sworn statement is submitted by Vanguard Utility Service, Inc.
(entity submitting sworn statement), whose business address is
1421 W. 9th St. Owensboro, KY 42301
and its Federal Employee Identification Number (FEIN) is 30-0040633
. (if the entity has no FEIN, include the Social Security Number of the
individual signing this sworn statement: _____).
(please print name of individualsigning), and my relationship to the entity named
above is Robert A. Bates, President/Owner.
4. I understand that a "public entity crime" as defined in Paragraph
287.133(1)(g), Florida Statutes, means a violation of any state or federal
law by a person with respect to and directly related to the transaction of
business with any public entity or with an agency or political subdivision
of any other state or with the United States, including, but not limited to,
any Bid or contract for goods or services, any leases for real property, or
any contract for the construction or repair of a public building or public
work, to be provided to any public entity or an agency or political
subdivision of any
other state or of the United States and involving antitrust, fraud,
theft, bribery, collusion, racketeering, conspiracy, or material
misrepresentation.
5. I understand that "convicted" or "conviction" as defined in paragraph
287.133(1)(b), Florida Statutes, means a finding of guilt or a conviction
or a public entity crime, with or without an adjudication of guilt, in any
federal or state trial court of record relating to charges brought by
indictment or information after July 1, 1989, as a result of a jury
verdict, non-jury trial, or entry of a plea of guilty or nolo contendere.
6. I understand that an "affiliate" as defined in paragraph 287.133(1)(a),
Florida
Statutes, means:
 - a) A predecessor or successor of a person convicted of a public
entity crime; or
 - b) An entity under the control of any natural person who is active
in the management of the entity and who has been convicted of a
public entity crime. The term "affiliate" includes those
officers, directors, executives, partners, shareholders,

employees, members, and agents who are active in the management of an affiliate. The ownership by one person of shares constituting a controlling interest in another person, or a pooling of equipment or income among persons when not to fair market value under an arm's length agreement, shall be prima facie case that one person controls another person. A person who knowingly enters into a joint venture with a person who has been convicted of a public entity crime in Florida during the preceding thirty-six (36) months shall be considered an affiliate.

7. I understand that a "person" as defined in Paragraph 287.133(1)(e), Florida Statutes, means any natural person or entity organized under the laws of any state or of the United States with the legal power to enter into binding contract and which Bids or applies to Bid on contracts let by a public entity, or which otherwise transacts or applies to transact business with a public entity. The term "person" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in management of an entity.
8. Based on information and belief, the statement, which I have marked below, is true in relation to the entity submitting this sworn statement.
(Please indicate which statement applies.)

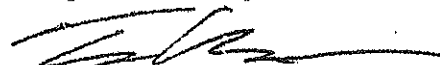
X Neither the entity submitting this sworn statement, nor any of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in management of the entity, nor any affiliate of the entity have been charged with and convicted of a public entity crime subsequent to July 1, 1989.

_____ The entity submitting this sworn statement, or one of more of the officers, directors, executives, partners, shareholders, employees, members, or agents who are active in management of the entity, or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989, and (Please indicate which additional statement applies.)

_____ There has been a proceeding concerning the conviction before a hearing officer of the State of Florida, Division of Administrative Hearings. The final order entered by the Hearing Officer did not place the person or affiliate on the convicted vendor list. (Please attach a copy of the final order.)

_____ The person or affiliate was placed on the convicted vendor list. There has been a subsequent proceeding before a hearing officer of the State of Florida, Division of Administrative Hearings. The final order entered by the hearing officer determined that it was in the public interest to remove the person or affiliate from the convicted vendor list. (Please attach a copy of the final order.)

_____ The person or affiliate has not been placed on the convicted vendor list. (Please describe any action taken by or pending with the Department of General Services.)



(Signature)

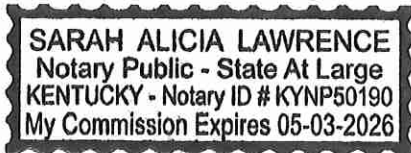
Robert A. Bates, President/Owner

Date 3-30-2023

STATE OF KENTUCKY
CITY OF Daviess

PERSONALLY APPEARED BEFORE ME, the undersigned authority,
, who, after first being sworn by me, affixed his/her signature in the space
provided above on this 30th day of March, 2023

Sarah Alicia Lawrence



CITY OF DELTONA
FIRM INFORMATION FORM

The information below is required to complete your Bid packet. Type or print only.

Company Name: Vanguard Utility Service, Inc.
Address: 1421 W. 9th St.
City: Owensboro
State: Kentucky
Zip Code: 42301
Phone Number: 270-926-4646
Fax Number: 270-926-6393
Project Contact: Robert Shelton
e-mail address: sales@vusinc.com

Remittance (Payment) Mailing Information

Address: 1421 W. 9th S.
City: Owensboro State: Kentucky Zip Code: 42301
Phone Number: 270-926-4646
Fax Number: 270-926-6393
Project Contact: Robert Shelton, CFO
e-mail address: accounting@vusinc.com
Federal Tax ID No.: 30-0040633
Tax ID Type: ☒ Federal Tax ID ☐ Social Security Number

This Form Must Be Completed and Returned with your Submittal.

STATEMENT OF NO BID

Kate Duffy, Purchasing Manager
Purchasing Division, Finance Department
City of Deltona
City Hall
2345 Providence Blvd.
Deltona, FL 32725
(386) 878-8570
kDuffy@deltonafl.gov

We, the undersigned, have declined to respond to BID 23009 for Water Meter Installation for the following reason(s):

- ☐ We do not offer this service\product.
- ☐ Our schedule would not permit us to perform.
- ☐ Unable to meet specifications.
- ☐ Other

We understand that if the Statement of No Bid letter is not executed and returned, our name may be deleted from the list of qualified Respondents to the City of Deltona.

N/A

Company Name

Authorized Person's Signature

(Print or type name and title of signer)

Company Address

Telephone Number

Toll Free Number

FAX Number

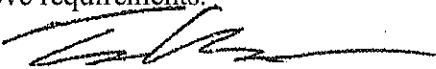
Date

DRUG FREE WORKPLACE FORM

The undersigned Respondent, in accordance with Florida Statute 287.087 hereby certifies that does: (Name of Business) Vanguard Utility Service, Inc.

1. Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.
2. Inform employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for drug abuse violations.
3. Give each employee engaged in providing the commodities or Contractual services that are under Bid a copy of the Drug-Free statement.
4. Notify the employees that as a condition of working on the commodities or Contractual services that are under Bid, employee will abide by the terms of the statement and will notify the employer of any conviction of, or plea of guilty or no lo contendere to, any violation of Chapter 1893 or of any controlled substance law of the United States or any state, for a violation occurring in the workplace no later than five (5) days after such conviction.
5. Impose a sanction on, or require the satisfactory participation in a drug abuse assistance or rehabilitation program if such is available in the employee's community, by any employee who is so convicted.
6. Make a good faith effort to continue to maintain a drug-free workplace through implementation of this section.

As the person authorized to sign the statement, I certify that this business complies fully with the above requirements.



(Authorized signature)

3-30-2023


(Date)

NON-COLLUSION AFFIDAVIT OF PRIME RESPONDENT

STATE OF (Kentucky) COUNTY OF (Daviess)

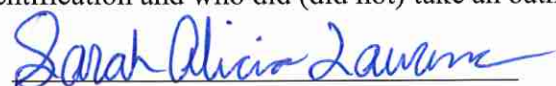
Robert A. Bates, being duly sworn, deposes and says that:

- (1) He/she is of President/Owner firm, Respondent that has submitted the attached response.
- (2) He/she is fully informed respecting the preparation and contents of the attached solicitation and of all pertinent circumstances respecting such solicitation.
- (3) Such solicitation is genuine and is not a collusive or sham solicitation.
- (4) Neither the said Respondent nor any of its officers, partners, City's, agent representatives, employees or parties in interest including this affiant, has in any way, colluded, conspired, or agreed, directly or indirectly, with any other Respondent or person, to submit a collusive or sham response in connection with the Agreement for which the attached response has been submitted or to refrain from Bidding in connection with such Agreement, or has in any manner, directly or indirectly, sought by Agreement or collusion or communication or conference with any other Respondent, firm or person to fix the price or prices in the attached solicitation or of any other Respondent, or to fix any overhead, profit or cost element of the proposed price or the proposed price of any other Respondent, or to secure through any collusion, conspiracy, connivance or unlawful Agreement any advantage against the City of Deltona, Florida, or any person interested in the proposed Agreement.
- (5) The price or prices quoted in the attached response are fair and proper and are not tainted by any collusion, conspiracy, or unlawful Agreement on the part of the Respondent or any of its agents, representatives, City's, employees, or parties of interest, including affiant.


(Signed)
President/Owner
(Title)

KENTUCKY
STATE OF FLORIDA COUNTY OF Daviess

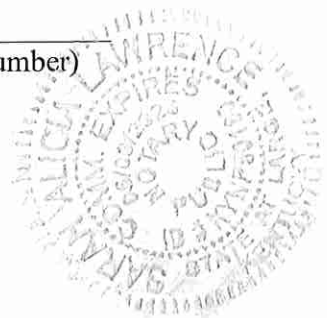
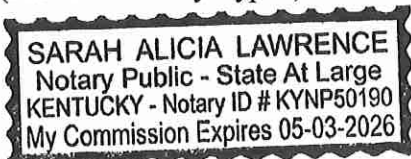
The foregoing instrument was acknowledged before me this 30th day of March 2023 by
Robert A. Bates, who is personally known to me or who has produced
Personally Known to me as identification and who did (did not) take an oath.


(Signature of Notary Public)

Sarah Alicia Lawrence

(Name of Notary Typed, Printed or Stamped) Notary Public KYNP50190

(Commission Number)



INSURANCE REQUIREMENTS

The Contractor/Respondent agrees to provide and maintain at all times during the term of any agreement resulting from this BID, or for such longer periods as may be required, without cost or expense to the City of Deltona, policies of insurance insuring the Contractor/Respondent against any and all claims, demands, or causes of action whatsoever, for injuries received or damage to property relating to the performance of duties, services and/or obligations of the Contractor under the terms and provisions of this agreement. The awarded vendor shall secure and maintain, at its sole cost and expense during the contract term, the following minimum insurance coverage:

Commercial General Liability – Shall have minimum limits of \$1,000,000 Per Occurrence. Combined Single Limit for Bodily Injury Liability and Property Damage Liability. This shall include Premises and/or Operations, Independent Contractors and Products and/or completed Operations, and a Contractual Liability Endorsement.

Workers Compensation – Coverage to apply for all employees for statutory limits in compliance with the applicable state and federal laws. The policy must include Employers' Liability with a limit of \$1,000,000 each accident.

Requirements for Contractors that qualify for an exemption under the Florida Worker's Compensation law in Chapter 440 Florida Statutes are detailed below: Incorporated or unincorporated Contractors with one or more employees shall be required to provide a copy of their "Notice of Election to be Exempt," along with valid proof of coverage for non-exempt employees.

The City reserves the right to request a copy of the complete insurance policy(ies) and any endorsements for the insurance referenced above. A certificate of insurance indicating that the respondent has coverage in accordance with the requirements herein set forth shall be furnished prior to the execution of the contract and annually upon renewal thereafter. **The respondent shall either cover any sub-Contractors on its policy or require the sub-Contractors to conform to all requirements for insurance contained herein.**

Respondent agrees that City will make no payments pursuant to the terms of the contract until all required proof or evidence of insurance has been provided to the City Representative. Respondent agrees that the insurer shall waive its rights of subrogation, if any, against the City on Commercial General Liability and Workers Compensation.

E-VERIFY FORM

Project Name:	INSTALLATION OF WATER METERS
Project No.:	BID# 23009

ACKNOWLEDGEMENT

Definitions:

"Contractor" means a person or entity that has entered or is attempting to enter into a contract with a public employer to provide labor, supplies, or services to such employer in exchange for salary, wages, or other remuneration.

"Subcontractor" means a person or entity that provides labor, supplies, or services to or for a contractor or another subcontractor in exchange for salary, wages, or other remuneration.

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

- a) All persons employed by Vendor/Consultant/Contractor to perform employment duties within Florida during the term of the contract; and
- b) All persons (including subvendors/subconsultants/subcontractors) assigned by Vendor/Consultant/Contractor to perform work pursuant to the contract with the Department. The Vendor/Consultant/Contractor acknowledges and agrees that use of the U.S. Department of Homeland Security's E-Verify System during the term of the contract is a condition of the contract with the City of Coconut Creek; and
- c) *Should vendor become successful Contractor awarded for the above-named project, by entering into this Contract, the Contractor becomes obligated to comply with the provisions of Section 448.095, Fla. Stat., "Employment Eligibility," as amended from time to time. This includes but is not limited to utilization of the E-Verify System to verify the work authorization status of all newly hired employees, and requiring all subcontractors to provide an affidavit attesting that the subcontractor does not employ, contract with, or subcontract with, an unauthorized alien. The contractor shall maintain a copy of such affidavit for the duration of the contract. Failure to comply will lead to termination of this Contract, or if a subcontractor knowingly violates the statute, the subcontract must be terminated immediately. Any challenge to termination under this provision must be filed in the Circuit Court no later than 20 calendar days after the date of termination. If this contract is terminated for a violation of the statute by the Contractor, the Contractor may not be awarded a public contract for a period of 1 year after the date of termination.*

COMPANY CONTACT INFORMATION

Company Name: Vanguard Utility Service, Inc.

Authorized Signature:

Print Name: Robert A. Bates

Title President/Owner

Date: 3-30-2023

Phone: 270-926-4646

Email: sales@vusinc.com

Website: www.vusinc.com

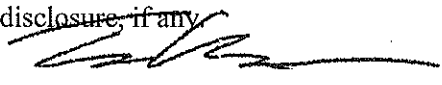
BYRD ANTI-LOBBYING AMENDMENT CERTIFICATION
(To be submitted with each bid or offer exceeding \$100,000)

The undersigned, [Company] Vanguard Utility Service, Inc. certifies, to the best of his or her knowledge, that:

1. No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of an agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement.
2. If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form - LLL, "Disclosure Form to Report Lobbying," in accordance with its instructions.
3. The undersigned shall require that the language of this certification be included in the award documents for all subawards at all tiers (including subcontracts, subgrants, and contracts under grants, loans, and cooperative agreements) and that all subrecipients shall certify and disclose accordingly.

This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by 31, U.S.C. § 1352 (as amended by the Lobbying Disclosure Act of 1995). Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

The Contractor, [Company] Vanguard Utility Service, Inc., certifies or affirms the truthfulness and accuracy of each statement of its certification and disclosure, if any. In addition, the Contractor understands and agrees that the provisions of 31 U.S.C. § 3801 *et seq.*, apply to this certification and disclosure, if any.



Signature of Contractor's Authorized Official

Robert A. Bates, President/Owner
Name and Title of Contractor's Authorized Official

3-30-2023

Date

This project is federally funded with SLFRF (The State and Local Fiscal Recovery Funds program), therefore the following provisions shall be incorporated into the agreement.

Appendix II to Part 200 - Contract Provisions for Non-Federal Entity Contracts Under Federal Awards

In addition to other provisions required by the Federal agency or non-Federal entity, all contracts made by the non-Federal entity under the Federal award must contain provisions covering the following, as applicable.

(A) Contracts for more than the simplified acquisition threshold, which is the inflation adjusted amount determined by the Civilian Agency Acquisition Council and the Defense Acquisition Regulations Council (Councils) as authorized by [41 U.S.C. 1908](#), must address administrative, contractual, or legal remedies in instances where contractors violate or breach contract terms, and provide for such sanctions and penalties as appropriate.

(B) All contracts in excess of \$10,000 must address termination for cause and for convenience by the non-Federal entity including the manner by which it will be effected and the basis for settlement.

(C) Equal Employment Opportunity. Except as otherwise provided under [41 CFR Part 60](#), all contracts that meet the definition of “federally assisted construction contract” in [41 CFR Part 60-1.3](#) must include the equal opportunity clause provided under [41 CFR 60-1.4\(b\)](#), in accordance with Executive Order 11246, “Equal Employment Opportunity” ([30 FR 12319, 12935, 3 CFR Part, 1964-1965](#) Comp., p. 339), as amended by Executive Order 11375, “Amending Executive Order 11246 Relating to Equal Employment Opportunity,” and implementing regulations at [41 CFR part 60](#), “Office of Federal Contract Compliance Programs, Equal Employment Opportunity, Department of Labor.”

Davis Bacon not applicable to this project.

(D) Davis-Bacon Act, as amended ([40 U.S.C. 3141-3148](#)). When required by Federal program legislation, all prime construction contracts in excess of \$2,000 awarded by non-Federal entities must include a provision for compliance with the Davis-Bacon Act ([40 U.S.C. 3141-3144](#), and [3146-3148](#)) as supplemented by Department of Labor regulations ([29 CFR Part 5](#), “Labor Standards Provisions Applicable to Contracts Covering Federally Financed and Assisted Construction”). In accordance with the statute, contractors must be required to pay wages to laborers and mechanics at a rate not less than the prevailing wages specified in a wage determination made by the Secretary of Labor. In addition, contractors must be required to pay wages not less than once a week. The non-Federal entity must place a copy of the current prevailing wage determination issued by the Department of Labor in each solicitation. The decision to award a contract or subcontract must be conditioned upon the acceptance of the wage determination. The non-Federal entity must report all suspected or reported violations to the Federal awarding agency. The contracts must also include a provision for compliance with the Copeland “Anti-Kickback” Act ([40 U.S.C. 3145](#)), as supplemented by Department of

Labor regulations ([29 CFR Part 3](#), “Contractors and Subcontractors on Public Building or Public Work Financed in Whole or in Part by Loans or Grants from the United States”). The Act provides that each contractor or sub recipient must be prohibited from inducing, by any means, any person employed in the construction, completion, or repair of public work, to give up any part of the compensation to which he or she is otherwise entitled. The non-Federal entity must report all suspected or reported violations to the Federal awarding agency.

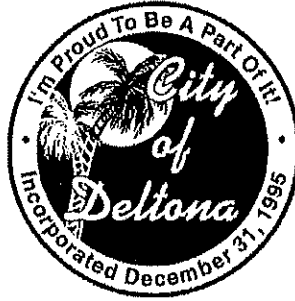
(E) Contract Work Hours and Safety Standards Act ([40 U.S.C. 3701-3708](#)). Where applicable, all contracts awarded by the non-Federal entity in excess of \$100,000 that involve the employment of mechanics or laborers must include a provision for compliance with [40 U.S.C. 3702](#) and [3704](#), as supplemented by Department of Labor regulations ([29 CFR Part 5](#)). Under [40 U.S.C. 3702](#) of the Act, each contractor must be required to compute the wages of every mechanic and laborer on the basis of a standard work week of 40 hours. Work in excess of the standard work week is permissible provided that the worker is compensated at a rate of not less than one and a half times the basic rate of pay for all hours worked in excess of 40 hours in the work week. The requirements of [40 U.S.C. 3704](#) are applicable to construction work and provide that no laborer or mechanic must be required to work in surroundings or under working conditions which are unsanitary, hazardous or dangerous. These requirements do not apply to the purchases of supplies or materials or articles ordinarily available on the open market, or contracts for transportation or transmission of intelligence.

(F) Rights to Inventions Made Under a Contract or Agreement. If the Federal award meets the definition of “funding agreement” under [37 CFR § 401.2 \(a\)](#) and the recipient or subrecipient wishes to enter into a contract with a small business firm or nonprofit organization regarding the substitution of parties, assignment or performance of experimental, developmental, or research work under that “funding agreement,” the recipient or sub recipient must comply with the requirements of [37 CFR Part 401](#), “Rights to Inventions Made by Nonprofit Organizations and Small Business Firms Under Government Grants, Contracts and Cooperative Agreements,” and any implementing regulations issued by the awarding agency.

(G) Clean Air Act ([42 U.S.C. 7401-7671q](#).) and the Federal Water Pollution Control Act ([33 U.S.C. 1251-1387](#)), as amended - Contracts and subgrants of amounts in excess of \$150,000 must contain a provision that requires the non-Federal award to agree to comply with all applicable standards, orders or regulations issued pursuant to the Clean Air Act ([42 U.S.C. 7401-7671q](#)) and the Federal Water Pollution Control Act as amended ([33 U.S.C. 1251-1387](#)). Violations must be reported to the Federal awarding agency and the Regional Office of the Environmental Protection Agency (EPA).

(H) Debarment and Suspension (Executive Orders 12549 and 12689) - A contract award (see [2 CFR 180.220](#)) must not be made to parties listed on the governmentwide exclusions in the System for Award Management (SAM), in accordance with the OMB guidelines at [2 CFR 180](#) that implement Executive Orders 12549 (3 CFR part 1986 Comp., p. 189) and 12689 (3 CFR part 1989 Comp., p. 235), “Debarment and Suspension.” SAM Exclusions contains the names of parties debarred, suspended, or otherwise excluded by agencies, as well as parties declared ineligible under statutory or regulatory authority other than Executive Order 12549.

(I) Byrd Anti-Lobbying Amendment ([31 U.S.C. 1352](#)) - Contractors that apply or bid for an award exceeding \$100,000 must file the required certification. Each tier certifies to the tier above that it will not and has not used Federal appropriated funds to pay any person or organization for influencing or attempting to influence an officer or employee of any agency, a member of Congress, officer or employee of Congress, or an employee of a member of Congress in connection with obtaining any Federal contract, grant or any other award covered by [31 U.S.C. 1352](#). Each tier must also disclose any lobbying with non-Federal funds that takes place in connection with obtaining any Federal award. Such disclosures are forwarded from tier to tier up to the non-Federal award.



ADDENDUM #1 TO BID#23009
Water Meter Installation
March 7, 2023

Plumbers are not permitted to do this work. All meter installation work must be completed by a Certified Underground Utility and Excavation Contractor.

A copy of this license must be included in response. The failure to include this license will result in rejection of response.

This Form Must Be Completed and Returned with your Submittal.

I hereby confirm that I am authorized to submit this addendum on behalf of:

Vanguard Utility Service, Inc.

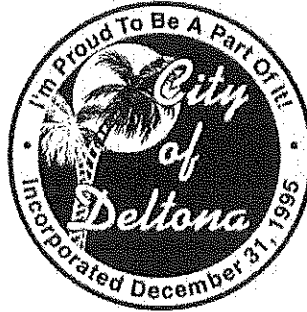
Company Name



Representative

3-30-2023

Date



ADDENDUM #2 TO BID#23009

Water Meter Installation

March 15, 2023

1. How long do we have to install the 10,000 water meters ? The bid documents state that the award is for one year with extensions . Is the expectation that in one year we would change out the 10,000 water Meters. **We are anticipating between 5,000 and 10,000 meters the first year.**
2. If More meters could be changed out prior to the end of the contract, can the 10,000 be extended? **Yes**
3. Are these meters manual read or AMR? **The new meters will be AMR**
4. Are these meters manual read being changed to AMR? **Yes**
5. Will the meters be replaced inline addresses or random addresses (Jumping around) ? **Mostly inline**

This Form Must Be Completed and Returned with your Submittal.

I hereby confirm that I am authorized to submit this addendum on behalf of:

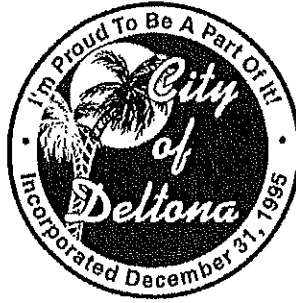
Vanguard Utility Service, Inc.

Company Name

Representative

3-30-2023

Date



ADDENDUM #3 TO BID#23009
Water Meter Installation
March 24, 2023

1. Would it be possible to attend the mandatory pre-bid meeting virtually? N/A
2. What is the existing meter brand? Neptune, Badger
3. Who provides gaskets? Contractor
4. What brand of meter and reading system will the contractor be installing? Neptune T10 R9000I 5/8 1" 1 1/2" Mach 10R900I
5. On the Bid Sheet, please clarify what is intended by "Concrete Basic"? Please disregard
6. Is programming necessary? No
7. If yes, will a programmer be provided? No
8. Will reading testers be provided if pre-programmed? No
9. What are the approximate square miles of the service area? 45 sq. miles
10. Who takes possession of the old meters and registers? All meters will be returned to the City
11. What is the Billing Software the City is utilizing? Munis/Tyler
12. Will the City provide an electronic listing of addresses and account information? No, we cannot provide that
13. If the collection of GPS points is required, is 1-5-meter accuracy acceptable? No
14. Does the City have an area to drop a storage container? Yes
15. Will this be a like for like exchange (same lay length)? Yes
16. Would the City consider adding a line item for the Payment and Performance Bond? Yes. Please use attached revised bid form.
17. Will contractor have to drill holes in the existing lids? If yes, what is the material of the existing lids? Yes, in most of the lids. Some (approximately 5%) of the lids have holes. They are 95% plastic. 5% fibercrete. A separate line item has been added to the bid form for drilling the lids.
18. Are all valves in the meter box? Yes
19. What is the procedure for any inoperable or broken valves? Contact the Water Department and we will shut it off and replace it
20. Will we be installing any additional product, i.e., broken stop valves, dual check valves, meter lids, meter boxes, set box to grade? Meter boxes and lids that are broken
21. What is the age and primary make-up of service lines? (copper, plastic galvanized) Service lines have been installed from 1965 to present mostly poly
22. Are the meters in setters, or are they connected with straight meter couplings? Straight meter couplings

From Pre-bid meeting

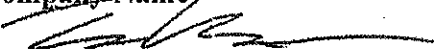
- Endpoint is E360
- Any raising or lowering of service lines and boxes anticipated? It is not likely but if needed, it will be dealt with on a case-by-case basis.
- Any box resetting anticipated? The meters are pre-set. The old one comes out and the new one goes in.
- Any ground restoration services needed? Sod, Cement, Blacktop? No. There will be no concrete, asphalt or sod replacement. The meters are already pre-set. The old one comes out and the new one goes in.
- Existing leaks or other pre-existing issues - Return to Utility? Yes
- Any meters on faster moving or rural roads where visibility is bad? Yes, this is where the required traffic supervisor with state certification is needed.
- Utility has 24,000 meters in inventory with 15,000 on order.

This Form Must Be Completed and Returned with your Submittal.

I hereby confirm that I am authorized to submit this addendum on behalf of:

Vanguard Utility Service, Inc.

Company Name



Representative

3-30-2023

Date

REVISED BID RESPONSE FORM
BID NO. 23009
METER INSTALLATION

In accordance with the foregoing terms, conditions and specifications, the undersigned bidder, having visited the site of the work and having become familiarized with the conditions affecting the cost of the work and with all requirements of the proposed Contract Documents, and duly issued Addenda to said documents, as acknowledged herein, proposes to furnish and perform all things required in labor, material, necessary tools, expendable equipment, and all services necessary to perform and complete in a workmanlike manner all work required by said documents and Addenda.

DESCRIPTION	QUANTITY	UNIT	UNIT PRICE	TOTAL
Meter installation	10,000	Meters	\$ 49.10	\$ 491,000
Drilling of lids	10,000	Lids	\$ 3.80	\$38,000
Payment and Performance Bonds				\$ 18,515.00
GRAND TOTAL				\$547,515.00

There are currently 39,000 meters to be installed in total. The initial phase will be for 10,000 to be installed. Work will be completed in phases over multiple years.

Vanguard Utility Service, Inc.

Company Name



Representative

3-30-2023

Date

President/Owner

Title

City of Deltona, FL



Affidavit of Compliance to all Specifications:

Vanguard agrees to all specifications of the INSTALLATION OF WATER METERS

BID# 23009 other than the clarifications listed below.

Vanguard's Assumptions and Clarifications:

- Vanguard's price assumes installation of 5/8" to 1" meters only
- Additional Pricing for 1 1/2" to 2" meters is \$215.00 each location.
- Since it is unknown what accuracy is required for collection of GPS points, included in our unit pricing is 1-5 meter accuracy. If sub-meter is required the charge is \$6.50 per location.
- Addendum 3 item #20. Will we be installing additional product, i.e. broken stop valves, dual check valves, meter lids, meter boxes, set box to grade? Meter boxes and lids that are broken-Vanguard assumes boxes and lids will be replaced only if our installers break them and pre-existing broken boxes and lids will be negotiated with the City.

Robert A. Bates, President/Owner

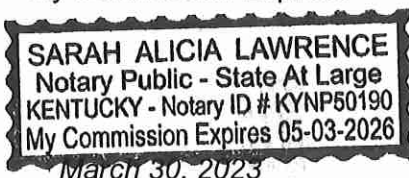
3-30-2023

Date

Sworn to before me and subscribed in my presence this 30th day of March 2023.

Notary Public #KYNP50190

My Commission Expires:



March 30, 2023

Date

Daviess
County

Kentucky
State

THE AMERICAN INSTITUTE OF ARCHITECTS



AIA Document A310

Bid Bond

Bond Number N/A

KNOW ALL MEN BY THESE PRESENTS, that we **Vanguard Utility Service, Inc.**

**1421 W. 9th Street
Owensboro, KY 42301**

(Here insert full name and address or legal title of Contractor)

as Principal, hereinafter called the Principal, and **Liberty Mutual Insurance Company**

**175 Berkeley Street
Boston, MA 02116**

(Here insert full name and address or legal title of Surety)

a corporation duly organized under the laws of the State of **Massachusetts**

as Surety, hereinafter called the Surety, are held and firmly bound unto **City of Deltona**

**2345 Providence Blvd
Deltona, FL 32725**

(Here insert full name and address or legal title of Owner)

as Obligee, hereinafter called the Obligee, in the sum of **5** % of the amount bid not to exceed

Five Percent of Amount Bid***** Dollars (**\$ 5% of Amount Bid*******),

for the payment of which sum well and truly to be made, the said Principal and the said Surety, bind ourselves, our heirs, executors, administrators, successors and assigns, Jointly and severally, firmly by these presents.

WHEREAS, the Principal has submitted a bid for **Installation of Water Meters**

Deltona, FL

(Here insert full name and address and description of project)

Project No. **Bid # 23009**

NOW, THEREFORE, if the Obligee shall accept the bid of the Principal and the Principal shall enter into a Contract with the Obligee in accordance with the terms of such bid, and give such bond or bonds as may be specified in the bidding or Contract Documents with good and sufficient surety for the faithful performance of such Contract and for the prompt payment of labor and material furnished in the prosecution thereof, or in the event of the failure of the Principal to enter such Contract and give such bond or bonds, if the Principal shall pay to the Obligee the difference not to exceed the penalty hereof between the amount specified in said bid and such larger amount for which the Obligee may in good faith contract with another party to perform the Work covered by said bid, then this obligation shall be null and void, otherwise to remain in full force and effect.

Signed and sealed this **3rd** day of **April**, 2021

(Witness)

Vanguard Utility Service, Inc.

(Principal)

Robert A Bates

(Title) **President**

Liberty Mutual Insurance Company

(Surety)

(Witness)

A.M. DiGeronimo

(Title) **Attorney in Fact**





This Power of Attorney limits the acts of those named herein, and they have no authority to bind the Company except in the manner and to the extent herein stated.

Bond No.: N/A

Liberty Mutual Insurance Company
The Ohio Casualty Insurance Company
West American Insurance Company

Certificate No: 8205029-985692

POWER OF ATTORNEY

KNOWN ALL PERSONS BY THESE PRESENTS: That The Ohio Casualty Insurance Company is a corporation duly organized under the laws of the State of New Hampshire, that Liberty Mutual Insurance Company is a corporation duly organized under the laws of the State of Massachusetts, and West American Insurance Company is a corporation duly organized under the laws of the State of Indiana (herein collectively called the "Companies"), pursuant to and by authority herein set forth, does hereby name, constitute and appoint, A.M.
DiGeronimo, Colin Y. Tumy

all of the city of Norcross state of GA each individually if there be more than one named, its true and lawful attorney-in-fact to make, execute, seal, acknowledge and deliver, for and on its behalf as surety and as its act and deed, any and all undertakings, bonds, recognizances and other surety obligations, in pursuance of these presents and shall be as binding upon the Companies as if they have been duly signed by the president and attested by the secretary of the Companies in their own proper persons.

IN WITNESS WHEREOF, this Power of Attorney has been subscribed by an authorized officer or official of the Companies and the corporate seals of the Companies have been affixed thereto this 12th day of March, 2021.



Liberty Mutual Insurance Company
The Ohio Casualty Insurance Company
West American Insurance Company

By: David M. Carey
David M. Carey, Assistant Secretary

State of PENNSYLVANIA ss
County of MONTGOMERY

On this 12th day of March, 2021 before me personally appeared David M. Carey, who acknowledged himself to be the Assistant Secretary of Liberty Mutual Insurance Company, The Ohio Casualty Company, and West American Insurance Company, and that he, as such, being authorized so to do, execute the foregoing instrument for the purposes therein contained by signing on behalf of the corporations by himself as a duly authorized officer.

IN WITNESS WHEREOF, I have hereunto subscribed my name and affixed my notarial seal at King of Prussia, Pennsylvania, on the day and year first above written.



Commonwealth of Pennsylvania - Notary Seal
Teresa Pastella, Notary Public
Montgomery County
My commission expires March 28, 2025
Commission number 1126044
Member, Pennsylvania Association of Notaries

By: Teresa Pastella
Teresa Pastella, Notary Public

This Power of Attorney is made and executed pursuant to and by authority of the following By-laws and Authorizations of The Ohio Casualty Insurance Company, Liberty Mutual Insurance Company, and West American Insurance Company which resolutions are now in full force and effect reading as follows:

ARTICLE IV - OFFICERS: Section 12. Power of Attorney.

Any officer or other official of the Corporation authorized for that purpose in writing by the Chairman or the President, and subject to such limitation as the Chairman or the President may prescribe, shall appoint such attorneys-in-fact, as may be necessary to act in behalf of the Corporation to make, execute, seal, acknowledge and deliver as surety any and all undertakings, bonds, recognizances and other surety obligations. Such attorneys-in-fact, subject to the limitations set forth in their respective powers of attorney, shall have full power to bind the Corporation by their signature and execution of any such instruments and to attach thereto the seal of the Corporation. When so executed, such instruments shall be as binding as if signed by the President and attested to by the Secretary. Any power or authority granted to any representative or attorney-in-fact under the provisions of this article may be revoked at any time by the Board, the Chairman, the President or by the officer or officers granting such power or authority.

ARTICLE XIII - Execution of Contracts: Section 5. Surety Bonds and Undertakings.

Any officer of the Company authorized for that purpose in writing by the chairman or the president, and subject to such limitations as the chairman or the president may prescribe, shall appoint such attorneys-in-fact, as may be necessary to act in behalf of the Company to make, execute, seal, acknowledge and deliver as surety any and all undertakings, bonds, recognizances and other surety obligations. Such attorneys-in-fact subject to the limitations set forth in their respective powers of attorney, shall have full power to bind the Company by their signature and execution of any such instruments and to attach thereto the seal of the Company. When so executed such instruments shall be as binding as if signed by the president and attested by the secretary.

Certificate of Designation - The President of the Company, acting pursuant to the Bylaws of the Company, authorizes David M. Carey, Assistant Secretary to appoint such attorneys-in-fact as may be necessary to act on behalf of the Company to make, execute, seal, acknowledge and deliver as surety any and all undertakings, bonds, recognizances and other surety obligations.

Authorization - By unanimous consent of the Company's Board of Directors, the Company consents that facsimile or mechanically reproduced signature of any assistant secretary of the Company, wherever appearing upon a certified copy of any power of attorney issued by the Company in connection with surety bonds, shall be valid and binding upon the Company with the same force and effect as though manually affixed.

I, Renee C. Llewellyn, the undersigned, Assistant Secretary, The Ohio Casualty Insurance Company, Liberty Mutual Insurance Company, and West American Insurance Company, do hereby certify that the original power of attorney of which the foregoing is a full, true and correct copy of the Power of Attorney executed by said Companies is in full force and effect and has not been revoked.

IN TESTIMONY WHEREOF, I have hereunto set my hand and affixed the seals of said Companies this 3rd day of April, 2023.



By: Renee C. Llewellyn
Renee C. Llewellyn, Assistant Secretary



Seal No. 5678

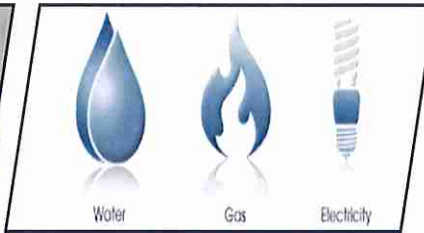
Not valid for mortgage, note, loan, letter of credit, currency rate, interest rate or residual value guarantees.

For bond and/or Power of Attorney (POA) verification inquiries, please call 610-832-8240 or email HOSUR@libertymutual.com.



City of Deltona, FL

**REQUEST FOR PROPOSAL FOR THE
CITY OF DELTONA, FL
INSTALLATION OF WATER METERS
BID# 23009**



PREPARED APRIL 3, 2023, BY

VANGUARD UTILITY SERVICE, INC.

STATE CONTRACTOR'S LICENSE# (CUC1225083)

Designated Contact:

Robert A. Bates
President/Owner
Vanguard Utility Service, Inc.
1421 W. 9th St.
Owensboro, KY 42301
Telephone: 270-926-4646
Email: Sales@vusinc.com
www.vusinc.com

INSTALLATION OF WATER METERS
BID# 23009

Vanguard Utility Service, Inc.



City of Deltona, FL

April 3rd, 2023

City of Deltona,
2345 Providence Blvd.,
Deltona, FL 32725

To Whom It May Concern:

On behalf of the Vanguard team, thank you for the opportunity to participate in the INSTALLATION OF WATER METERS Project for the City of Deltona. This submittal focuses on Vanguard's experience, personnel, and services, and provides a thoughtful scope of work to meet or exceed the the City's project goals.

City of Deltona offers a vision of improved infrastructure, a future in which water use is accurately accounted for, and the foundation for enhanced operational efficiencies enhanced customer engagement and revenue protection. Moreover, this vision also embraces the use of experienced management in its execution. This vision deserves a partner that is wholly invested in delivering on its promise. The Vanguard team is that partner. If selected, we will work collaboratively with the the City staff to develop and construct your upgraded water meter infrastructure program.

We are technology and meter neutral, and as a result, we can offer a broad product portfolio and options that help utilities responsibility and efficiently manage resources. We supply, integrate, install, and maintain proven meter networks with the latest state-of-the-art smart metering technologies. We also offer field maintenance and operations, technical support services, and consulting services for your meter assets.

We have carefully reviewed your RFP and understand the Scope of Work and the project timeline. With our years of experience working with all major AMR providers, we bring our experiences and recommendations on how to maximize value using the planned work processes and tools that will be used in the project.

On behalf of Vanguard, we would like to thank you for the opportunity to participate in this process and for the opportunity to grow a strong partnership with the City of Deltona. I trust you will find that Vanguard has offered a detailed and compliant response, which demonstrates Vanguard's ability to be a consultative partner with the stability and resolution required to implement and warrant the best value project for the City of Deltona.

Sincerely,

A handwritten signature in black ink, appearing to read "Robert A. Bates".

Robert A. Bates
President/Owner
Vanguard Utility Service, Inc.
1421 West 9th Street
Owensboro, KY 42301
Telephone: 270-926-4646
sales@vusinc.com
www.vusinc.com

INSTALLATION OF WATER METERS
BID# 23009

Vanguard Uility Service, Inc.



City of Deltona, FL

Company Background

Vanguard Utility Service, Inc., was incorporated on February 18, 2002. Vanguard is centrally located at 1421 West 9th Street, Owensboro Kentucky 42301. Our primary contact for the City of Deltona project is Kathy Kolter, Regional Director of Sales, who can be contacted by email at sales@vusinc.com or by phone at 270-926-4646.

Vanguard is a privately held, venture-backed company that is dedicated to the resourceful use of water. We have been delivering solutions to address the unique challenges facing the water industry, including increasing demand and resource scarcity for nearly 21 years. Vanguard has proven expertise in AMI/AMR, broad knowledge, and a long history of managing very successful AMI/AMR projects. We provide comprehensive solutions that measure, manage, and analyze water and energy usage data at the customer, the City, and system levels. From day one, our goal has been to modernize the nation's infrastructure, while improving revenues, reducing operating costs, and enhancing the customer experience for our clients. The solutions we provide deliver on the promise of AMI/AMR by translating data into actionable intelligence throughout the the City. Our clients will have the flexible tools that meet its needs today and can evolve to meet the business needs of tomorrow.

- Over 8+ Million Endpoints/Meters Deployed
- Successfully engaged in over 800 projects
- Single point of accountability
- Focused on delivering full end-to-end solutions that are business goal driven and independent technology-enabled
- Value added partnerships
- Experts in long-term management, maintenance & repair contracts

Since we are product neutral, we can offer a broad product portfolio that helps utilities responsibly and efficiently manage resources. We supply, install, and maintain standard meter networks to the latest smart metering technologies and smart wellfield solutions for your water system. These include smart water analytics and customer engagement tools software-as-a-service (hosted software applications), managed services, e.g., field maintenance and operations, technical support services, and consulting services. We also hold contractor's license statuses in 19 states.

Vanguard has performed more than 800 projects over the past 21 years across the United States. Each installation project has ranged from as small as 100 to well over 100,000 water meters. Vanguard strives to ensure all projects are completed efficiently and timely. These projects include Lee County FL, Durham NC, Charlotte NC, Tallahassee FL, Fort Worth TX, and Evansville IN. With our experience, Vanguard has proven our installation services exceed all expectations and more.

The Vanguard Difference

Our senior management includes team members from the water, gas, and electric industries with a combined 75 years of experience. It is a bank of knowledge that has allowed Vanguard Utility Service, Inc. to flourish and become a leader in the meter & AMI/AMR industry today.

With dedicated water, energy, and business professionals with years of experience and strong commitment to customer satisfaction and service, Vanguard offers you the resources needed to successfully plan, execute, and even finance the water program that will create real, sustained economic and operating benefits to fulfill your unique requirements.



City of Deltona, FL

For the City of Deltona, we have assembled a team that is experienced in the procurement, design, and implementation of AMR Water Meter projects. All team members have supported all aspects of our the City clients, from project inception through system integration to the actual operation of the AMR solutions and follow-on value creation. Our involvement with all phases of the AMR Project Lifecycle has given us an unparalleled understanding of the requirements, approaches, best practices, lessons learned, and delivery accelerators.

The team will leverage our collective resources to offer the the City a solution that we feel no other can deliver. We will staff our project team with the right people, with the right knowledge and experience, at the right time to implement an efficient and successful solution. We have successfully performed with our team members, and we are confident our combined skill set will result in long-term, cost-effective success for the City of Deltona.

Our leaders are dedicated to making Vanguard Utility Service, Inc., a thriving business. They are devoted to the success of our partners, our vision, and our mission. Together with over 75 years combined experience, Vanguard's senior management have an exceptional diverse array of talent and knowledge to bring to our organization.

- ✦ Robert Bates, President/Owner
- ✦ Rick Hauf, Vice President
- ✦ Robert Shelton, Chief Financial Officer/Treasurer
- ✦ Keith Tamminga, Chief Operations Officer
- ✦ Kathy Kolter, Secretary/Regional Director of Sales

Vanguard provides exceptional services to offer the City of Deltona:

- Vanguard installs water and electric meters of all sizes and brands
- Vanguard has installed AMR Systems, Automatic Meter Reading (Drive-by) and AMI System, Advanced Meter Infrastructure (Fixed Network)
- Vanguard retrofits gas and water meters of all sizes and brands
- Vanguard installs large water meters including vault replacement or repair
- Vanguard provides On-site Test, Repair and Recalibration of industrial and commercial water meters
- Vanguard's fully equipped mobile testing units can field test up to 36-inch source services
- Surveys of large meters
- Independent Auditing Services
- Project Managers have OSHA 10 Certification, and Large Meter Managers have the Confined Space Certification

Vanguard also provides additional services, such as:

- Electronic Work Order Management System (VUSS)
- Collection of GPS (standard to sub-meter)
- In-House test bench for all size meters
- Managing a Call Center



City of Deltona, FL

Vanguard Experience in Similar Projects

Vanguard has managed, installed, and maintained AMR solutions and meters with great success using our Vanguard Project Management Methodology and Vanguard Work Order Management System (WOMS) work-order tools delivering advanced metering projects to hundreds of utilities and municipalities. Of our many customers, we can highlight several North American water utility deployments of our AMI/AMR systems:



Vanguard has performed more than 800 projects over the past 21 years across the United States. Each installation project has ranged from as small as 100 to well over 100,000 water meters. Vanguard strives to ensure all projects are completed efficiently and timely. With our experience, Vanguard has proven our installation services exceed all expectations and more.

These projects include:

- Lee County FL – Installation of approximately 87,000 water meters
- Durham NC – Replacement of approximately 300 commercial water meters
- Durham NC – Replacement of approximately 80,000 residential meters
- Charlotte NC – Installation of 58,000 Endpoints
- Tallahassee FL – Installation of approximately 80,000 water meters and retrofit 6,600 registers
- Evansville IN – Replacement of approximately 60,000 water meters

Vanguard confirms we are absent of any previous litigation activities involving other municipal clients. Vanguard also certifies all key personnel have been actively involved in the management, and implementation of at least three projects of more than 10,000 meters.



City of Deltona, FL

References

Cape Coral, FL

1015 Cultural Park Blvd

Cape Coral, FL 33990

Contact: Bill Sperry, PE Ph. #: 239-574-0729 Cell # 804-517-5312 Email:

wsperry@capecoral.net

Contact: Mark Connelly Ph. #: 239-574-0861 Ph. #: 239-574-0831 Email:

mconnell@capecoral.net

Project Name: 5/8" & 1" Potable Water Meter Exchange Program

Contract Term: Initial 3-year contract started June 2018 and has been extended through 2023

Final Contract Price: \$1,500,000 to date

Number of Meters: 70,000

System: Neptune Drive by System

Detail of Work Performed: Neptune Drive by System, Project Management and Installation services for the replacement of 70,000 water meters sizes 5/8" to 1", Replace curb stop, meter boxes, and backflow preventers.

Fort Mill, SC

200 Tom Hall Street

FORT MILL, SC 29715

Contact: Phillip Aycock, Procurement Officer Ph# 803-547-2116 ext: 1169

Email: paycock@fortmillsc.gov

Project Name: RDM Meter Installation RFP

Contract Term: November 2019- May 2020

Final Contract Price: \$252,700.00

Number of Meters: 7,000

System: Mueller Systems Mi.Net AMI

Billing System: Tyler Tech

Detail of Work Performed: Project Management and installation of 7,000 5/8" x 3/4" water meters, drilled meter box lids

County of Henrico

Virginia Dept. of Risk Management

P.O. Box 90775

Henrico, VA 23273

Contact: Nellow Simukonde, Senior Engineer Ph# 804-501-4729 Email: sim69@henrico.us

Project Name: Water Meter Replacement

Contract Term: Nov. 2017 to Present

Final Contract Price: \$800,000 to date

Number of Meters: 19,000

System: Itron

Detail of Work Performed: Project Management for Water Meter and ERT Replacement of approximately 4,700 (5/8" -2") Badger displacement type water meters & Itron Encoder Receiver Transmitters



City of Deltona, FL

Lee County Board of County Commissioners

2120 Main Street

Fort Myers, FL

Contact: Bill Tartaglia

Ph. #: 682-220-8605

Email:

btartaglia@muellerwp.com

Project Name: Water Meter Replacement Project

Contract Term: January 2017 through August 2019

Final Contract Price: \$2,284,082

Number of Meters: 80,000

System: Mueller MiNet and Mueller Water Meters

Detail of Work Performed: Project Management and installation of approximately 78,000 residential water meters ranging in size from 3/4", 5/8" and 1."

ONWASA WATER & SEWER AUTHORITY

228 Georgetown Road

Jacksonville, NC 28540

Contact: Sherry Jones , Operations Coordinator

Ph. #: 910-937-7550

Email: SJones@onwasa.com

Project Name: AUTOMATED METER READING PROJECT, Phase I, Phase II and Phase III

Contract Term: May 2018-July 2020

Final Contract Price: \$4,892,614.98

Number of Meters: 21,854

System: Mueller and Itron

Billing System: Applied Technology Solutions

Detail of Work Performed: Project Management and Installation services, Phase I - F&I 4,950 AMR meters 5/8" – 1", Phase II F&I 9,660 AMR meters (9,565 - 3/4" and 95 - 1" AMR meters), Phase III F&I 7,149 (7,092 3/4" and 57 1" AMR meters); on thirteen (13) service routes Mueller & Itron

Charleston Water System

1256 SUPPLY STREET

Charleston, S.C. 29405

Contact: Jon Dizon

Ph. #: 843-308-8231

Email: dizonPJ@charlestoncpw.com

Project Name: Automated Meter Installations

Contract Term: January 2016- ongoing as of 2019

Final Contract Price: \$1,275,500 as of November 2019

Number of Meters: approx. 42,600 as November 2019

System: Neptune

Detail of Work Performed: Project management and Installation of approximately 42,000 Neptune water meters and registers 5/8" to 1" and/or registers within the water service area of Charleston Water System. These installs included both domestic and commercial accounts.

City of Deltona, FL

Vanguard's Principal Personnel for the City of Deltona :

Keith Tamminga, VP of Field Operations – Project Sponsor, 5-10% On site – With 25 years of experience in operations management, business development, supply chain management, process engineering, logistics, strategic planning, budget development, personnel training and management, utility control, including ISO implementation, performance, and quality standards. With focus on customer satisfaction. Keith will work closely with leadership team representatives to ensure that a successful project is delivered.

Byron Weaver, Operations Manager- Project Plan Implementation Administration - 20% On-site – Mr. Weaver has 21 years of hands-on technical skills in all areas managed. Functional experience includes field operations management, quality assurance, budgetary tracking, logistical management, and technical installations. Sets company standards for hiring project management, quality, and field employees. Byron has been in the meter installation industry with Vanguard for 14 years and has been involved with large projects for over 21 year and will be overseeing the installation processes and management personnel for this project; he will be onsite until the project is in production and monthly after that.



Project Manager, TBD, 100% On-site – The project manager ensures site consistency exceeds expectations while maintain inventory and productivity. Responsibilities also include coordination between the customer, vendors, residents, and the corporate office to ensure quality installation of the AMI/AMR system.

Becky Tillis, Safety Management & Trainer, 10% On-site – Over 21 years of safety management experience in the industrial and marine construction sectors. Certifications have included OSHA General Industry Trainer, FA, CPR, BBP, O2P, BOP (Association of Reciprocal Safety Councils), Passport (LG&E, KU, PPL facilities). Becky is our current Safety Trainer.

Human Resources, 5% Remote–Assists in Recruiting (full-time and temp associates), as well as new hire orientation, performance evaluations, open enrollment, compliance maintenance, safety training, editing and enforcement of policies and procedures, OSHA records, FMLA approvals/tracking, scheduling, managing company functions and authoring company newsletters. Acts as a liaison between the staff in the field, which are located throughout the U.S., and the corporate office located in Owensboro, Kentucky.

Tom Carter, Manager Call Center, Data Integrity, QC, 20% Remote– Over 15 years of Information Technology Business Management, and Accounting, Tom reviews and audits of cash, inventory, accounts payable, revenue and expenses, accounts receivable and leases. He has experience with managing over 150 employee's IT staff at a time while implementing new inventory tracking software. Tom holds a master's degree and 2 bachelor's degrees in IT, Accounting, and Business Management.





City of Deltona, FL

Team Resumes

Position	Keith Tamminga VP of Field Operations – Project Sponsor, 10% On site	
Position Description	With 25 years of experience in operations management, business development, supply chain management, process engineering, logistics, strategic planning, budget development, personnel training and management, utility control, including ISO implementation, performance, and quality standards. With focus on customer satisfaction. Keith will work closely with leadership team representatives to ensure that a successful project is delivered.	
Industry Experience	Mt. Vernon, IL Gatlinburg TN ONWASA NC Opp, AL Elberfeld, IN Covington TN Lawrence, IN Henrico County VA Thomasville, AL Fort Mill SC	Camp Lejeune NC Kure Beach NC Magnolia, AR Mulga AL Elberfeld, IN Charleston Water System SC Lee County, FL Baltimore, MD Mebane NC Leesville LA
Project Experience	Experienced in supporting and installing meters and AMI/AMR solution from; Xylem (Sensus) Badger, Neptune, Kamstrup, Itron, Mueller, Aclara, Master Meter and Zenner.	
Education	University of Kentucky, Lexington, KY ISO Certified Blackbelt	



City of Deltona, FL

Position	Byron Weaver Regional Manager- On-Site 20%	
Position Description	Functional experience includes field operations management, quality assurance, budgetary tracking, logistical management, and technical installations. Sets company standards for hiring project management, quality, and field employees. Byron has been in the meter installation industry with Vanguard for 14 years and has been involved with large projects for over 21 year and will be overseeing the installation processes and management personnel for this project; he will be onsite until the project is in production and monthly after that. 21 years of hands-on field experience, and managing operations teams	
Industry Experience	Taylor, MI Waterford, MI Durham, NC Kinston, NC Newton, MA Kingsport, TN New Braunfels, TX Cary, NC Charlotte, NC	Bismarck, ND Mena, AR Colonial Beach, VA Smyrna, GA Marshall, MN Thief River Falls, MN Colorado Springs, CO Charleston, SC Jacksonville, NC Westland, MI
Project Experience	Experienced in supporting and installing meters and AMI/AMR solutions from; Xylem (Sensus), Badger, Neptune, Kamstrup, KP Solutions, Elster/Amco, Metron, Itron, Mueller, Aclara and Zenner.	
Education	University of Kentucky, Lexington, KY Itron and Aclara Certification OSHA Certification & Training, blood-borne pathogens, radiation safety, biohazardous waste disposal, and confined space Certified train-the-trainer in WOMS WO Management tool and AWWA best meter practices	



City of Deltona, FL

Position	Thomas Carter Internal Data Manager- On-Site 10%
Position Description	Manager of Quality Control, Project Support, and Call Center Departments; Responsible for ensuring data quality by implementing processes and procedures; Responsible for all project support and data integrity after integration to utility; Responsible for all customer calls and appointments
Industry Experience	<div> Mt. Vernon, IL Gatlinburg TN ONWASA NC Opp, AL Elberfeld, IN Covington TN Lawrence, IN Henrico County VA Thomasville, AL Fort Mill SC </div> <div> Camp Lejeune NC Kure Beach NC Magnolia, AR Mulga AL Elberfeld, IN Charleston Water System SC Lee County, FL Baltimore, MD Mebane NC Leesville LA </div>
Project Experience	Experienced in data management of all meters and AMI/AMR solution from; Xylem (Sensus) Badger, Neptune, Elster/Amco, Metron, Itron, Mueller, Aclara and Zenner, Kamstrup and Master Meter
Employment History	<p>March 2019 - Current Vanguard Utility Service, Inc. (Owensboro, KY) Internal Data Manager</p> <p>February 2016 – March 2019 Micronutrients (Santa Claus, IN) Forecast, Planning, & Analyst Manager</p> <p>January 2012 – February 2016 Barber Manufacturing (Anderson, IN) Director of Administration</p>
Education	<p>January 2008 to May 2010 University of Indianapolis Master's in business administration</p> <p>August 2005 – December 2008 University of Indianapolis Bachelor's in accounting & Information Technology</p>



City of Deltona, FL

Management Plan

Once identified as the successful contractor, Vanguard Utility Service, Inc. will assign a project manager who will be responsible for all aspects of the project. He will be the primary contact with decision-making ability in communication with the City during the duration of the project. He will have available to him any resources needed from his regional office as well as all corporate resources in order to ensure a smooth efficient implementation and operation of this project plan.

Responsibilities will include:

- Co-ordinate with the Product Manufacturer to schedule training
- Safety on project and OSHA requirements
- Production, scheduling, monitoring, and reporting
- Work Scheduling and identification of required training as needed
- Quality control of installations and tracking
- Electronic Inventory Control
- Customer Relations including contact with Owner CIS department
- Customer Appointment scheduling capabilities via www.vusinc.com
- Material Supply/Inventory Control including warehouse and waste management
- Manpower Levels to maintain production schedule
- Prepare Coordination and follow-up and notification to Owner's Project Manager
- Field personnel will report directly to the Field Project Manager. All field personnel will be responsible for maintaining production schedules in a professional and timely manner as issued by the Project Manager.

Execution Plan

Once identified as the successful Contractor the overall project is reviewed at the Corporate Center to assure that all facets of the project have been isolated and a management team member is assigned.

The normal order of schedule is purchasing reviews the material requirement and issues the required Purchase orders to assure an orderly flow of product is in place at time of project ramp up. The Data Processing Division contacts the Utility to establish the requirements of the CIS and Billing Departments. This usually results in various customer and account data to be downloaded and tested for compatibility and electronic transfer compatibility. Once the data and electronic connections are assured the customer and account information is downloaded to the project files. Project planning meeting with the Owner and Manufacturer will then be scheduled to create an overview of the project. The purpose of this meeting is to identify all company, manufacturers' representative and Owner's personnel and make all introductions to assure every party understands their roles to running a successful project. The preconstruction meeting will also identify specific system integration plans for software installation, hardware installation, training schedules and material management and warehousing plans. A timeline and project ramp up schedule will then be established and approved by all parties involved.

The assigned project manager will move to the area and begin working up the operational schedules and meet with the Owners personnel to begin the ramp up phase. Usually, the project manager will meet with Owner and Manufacturer personnel on some predetermined schedule



City of Deltona, FL

of meetings to assure that all facets of the ramp up process moves smoothly, and all problems are resolved as they are identified. The project manager will arrange for housing of the installation technicians and set up the warehouse if needed to receive the product to be installed. Upon arrival of technicians to the ramp up area the project manager will issue specific product training if required and orient the technicians to the area to be installed. If pre-notifications to the Owners customers were required, the project manager, working with the Corporate Data Processing Department, authorizes the sending of those notifications only after assuring all parts of the project are in a go position.

Vanguard's workorder management system is put into place and work routes are assigned to the technicians. Startup of the actual installation process begins. The project manager then establishes the Quality control portion of the project typically this requires 10% of all installations to be re checked for adherence to manufacturers requirements and the standards established by Vanguard Utility Service, Inc. All QCs are logged, and records are maintained to assure that any problems are corrected and resolved. This process continues until the contract has been fulfilled. The project manager continues working with the training team to assure that all Owners affected personnel receive the training they need to respond to the new environment and systems.

The in-field data collected (see our hand held system for specifics) is reformatted and on a day by day basis is electronically uploaded into the Owners CIS system. Problems associated with a successful merger of the CIS system and the data collection system from the field are identified and assigned to the appropriate personnel either Vanguard Utility Service, Inc. the software developer or the Manufacturer of the product for resolution.

At the completion of the project a Post-Construction meeting is scheduled with all parties to review the overall success of the project as designed and all parties resolve any remaining problems and sign off of the completed project.

Project Planning

Vanguard has carefully reviewed City of Deltona program goals, objectives, and has assembled a team of experts to plan successfully, prepare, design, and implement the AMR system We understand the AMR program requirements of the RFP and know that we will be able to leverage our experiences from similar projects around the country to assist City of Deltona in meeting all the requirements. Vanguard will provide the following implementation functions related to the project:

- Program management for project and full responsibility
- Co-ordination of all aspects of project
- Contract adherence
- QC/QA
- All field installation of meters and endpoints
- Inventory control and management
- Project communications planning support



City of Deltona, FL

Project Communication

Our Project Management centers around communication, organizing project meetings during all phases of the projects to ensure that there is proper and frequent communication with City of Deltona staff. The goals and expectations are appropriately communicated and understood by all project team members. During the ramp up-phase, critical issues identified are addressed and adequately communicated to staff. Proper reporting procedures ensure timely and appropriate generation, collection, dissemination, storage, and ultimate disposition of project information. It provides a critical link among people, ideas, and knowledge necessary for success, and all involved are prepared to deal with and understand these communications effectively. Examples of such critical issues are:

- Work scheduling and quality monitoring
- Security or escort issues
- Disruptions to normal facility operations
- Shutdown or interruption of utility services
- Housekeeping issues throughout the deployment phase
- Safety issues relating to subcontractors, hazardous materials, traffic, construction areas
- Location of equipment, tools, offices, parking for the project team, etc.
- Permits, rules and regulations, and other requirements
- Deployment milestone reviews

Project Schedule Development - All the tasks for the development and implementation phases will be developed thoroughly by the project team in close coordination with the staff of City of Deltona. Cooperation will ensure a co-authored timeline that considers all unique variables and produces a timeframe for implementation that is most beneficial to the the City and the project. The calendar is approved, presented for the City approval, and then used diligently by the field staff to track the project's development. The project schedule is a living document and is continuously updated during the project life. Any changes to the project schedule are communicated immediately to the the City's staff.

Customer and Internal Project Communication Planning

AMR programs are highly public and prone to customer scrutiny. By proactively educating customers about the benefits of AMR, sharing case studies and customer testimonials, and communicating with customers both pre- and post-installation, utilities can gain support from their customers, community, and local elected officials. Water utilities start seeing savings and operational improvements from AMR almost immediately.

Utilities with the highest level of customer engagement with AMR conduct extensive education and outreach to register customers on the portal (e.g., asking to help register customers on every call, incentivizing registration with a one-time bill credit). Customers with portal access will receive nearly real-time usage alerts and review their hourly water consumption, warnings, and conservation.

Vanguard will work with the City of Deltona team on their AMR outreach and customer communication strategy at no additional costs to the Utility. Included in our pricing is marketing and communications planning, call center services, and optional door hangers and post-cards.

Items to consider during an AMR deployment:








City of Deltona, FL

- Provide information through standard channels like bill inserts and do not solely rely on electronic communications to educate and inform customers about upcoming changes.
- Develop an AMR fact sheet and frequently asked questions document; make this available on the website, in payment centers, and in community centers and all utility employees
- Provide information in multiple languages to meet targeted customer needs
- Update phone recordings to explain the purpose and benefits of AMR
- Educate local officials and community groups on the upcoming AMR program and benefits to the community
- Send customers a pre- AMR letter/mailler 30-60 days before their installation, describing the work that will be performed and the benefits of AMR
- Develop a policy and process for customers to opt out of AMR, including how this will be identified in the customer information system and what meter reading fees will be assessed in the future
- Post a door hanger notifying customers of successful or unsuccessful AMR installation
- Send a welcome to AMR email (or postcard, if no email is available), linking the customer to the portal registration website
- Note all outbound communications in the customer information system so this information is available to customer service representatives if a customer calls with questions in the Vanguard WOMS application



City of Deltona, FL

Sample Notification Door Hangers:

  <p>Deltona FLORIDA</p> <p>• • • ATTENTION • • •</p> <p>Dear Customer: Your Service Representative from Vanguard Utility Service, Inc., the contractor for The City of Deltona will be conducting a change out of your water meter in the next 7 days:</p> <p> The change out will only take approximately 15 minutes and there is no action required on your part.</p> <p> All Vanguard employees will have photo identification and be driving marked vehicles</p> <p>Other: _____</p> <p> Please contact Vanguard Utility Service with any questions: Ph# (XXX XXX-XXXX</p> <p>Thank You, Representative: _____</p>	  <p>Deltona FLORIDA</p> <p>• • • ATTENTION • • •</p> <p>Dear Customer: Your Service Representative from Vanguard Utility Service, Inc., the contractor for the City of Deltona stopped by:</p> <p><input type="checkbox"/> Your new water meter with Automatic Read has been installed. If there is any discoloration of your water, let it run for a few moments at your bathtub or utility sink and it should clear.</p> <p><input type="checkbox"/> Was unable to gain access to your water meter. Please call the number below to set a time that would be convenient to allow access.</p> <p><input type="checkbox"/> Other: _____</p> <p><input type="checkbox"/> Please contact me at: (xxx) xxx-xxxx</p> <p>Thank You, Representative: _____</p>
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Conclusion

Vanguard is a unique and extremely flexible AMR solution service provider that can implement City of Deltona's project by managing the program with a feature rich WOMS system with effective dashboard KPI's and real-time views of the entire project on a daily basis.

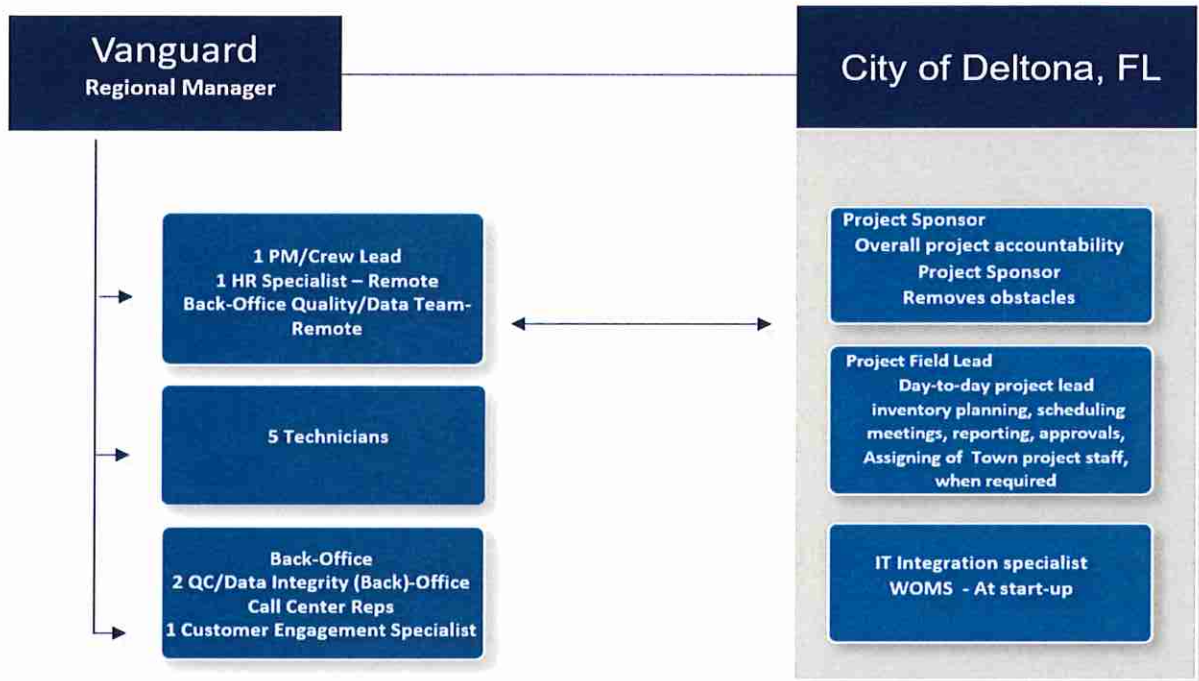
City of Deltona, FL

Possible Outreach Campaign Program for City of Deltona

On-going internal and external communications during project is key. Below are examples to consider

- Appointment portal (if required) Call center information (if required)
- Coordination with billing department in advance for notes to be added to water bill by route mail notification post card
- Plan for special customer requirements

Proposed Project Team For the City of Deltona, FL



Field Staffing & Production Rates

Vanguard Installation Crew

10,000 Water Meter Installs	(5) Installers	5 Days per week
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Field Support Staff

Project Manager	1	5 Days per week
Field QA/QC	1	5 Days per week

Average Install Production Rates Over 7 months

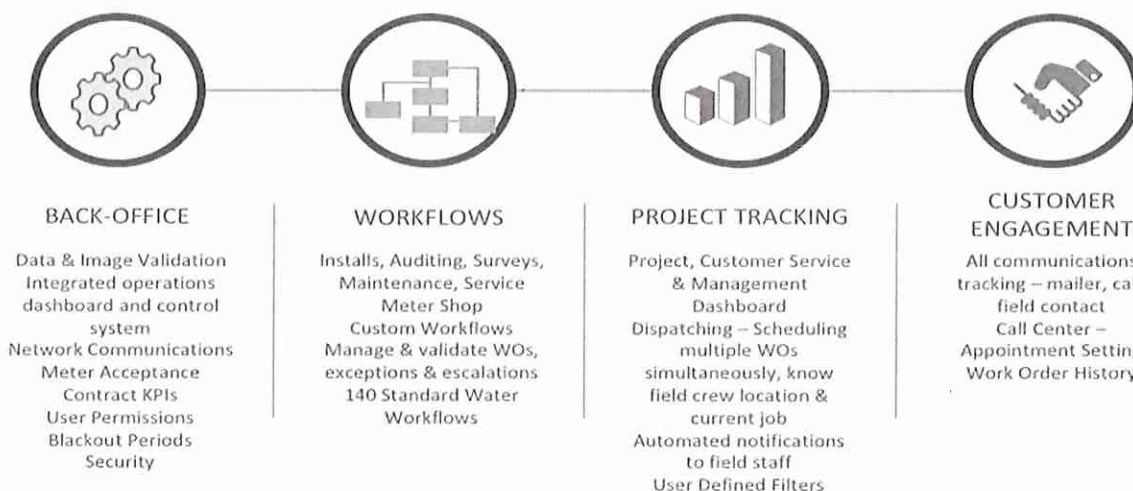
Total	Daily	Weekly	Monthly
10,000	75	370	1,575



Proposed Solution

At the kick-off of every project, Vanguard's first goal is to deliver a quality project on time and within budget. Our proven methodology is based on best practices gained from our experience deploying smart AMR metering projects for over 21 years across the United States in all types of environments, size, and scope. With the knowledge we have gained, we have built-in processes, procedures, and deployment approaches into our methodology program that ensure the successful implementation of your project.

Focus on safety, data management/integrity, customer engagement, risk mitigation, reporting, and communication plan that are all critical to any successful project. With that said, we also understand that the program is a partnership between Vanguard and City of Deltona and that incorporating the the City's policies, standards, and guidelines must also be consolidated into the program to achieve your objectives and ultimately your final goals.



Project Kick-Off: City of Deltona and Vanguard, the “project team”, will develop the Project Governance, that will incorporate accurate description of what the project aims to achieve, the criteria and flexibilities involved, and its parameters, scope, range, outputs, sources, participant responsibilities, budgets, schedules, and timescales. Creating detailed terms of reference is critical, as they will define the project's Scope of Work (SOW) that is jointly developed by Vanguard and the the City.

Detail Phase Planning: This includes planning all aspects of the project; timeline, team, activities, resources, and financials. Where possible, members from the project teams will be asked to work together to identify all issues, order them appropriately, and document relationships and links between each issue.

Internal and External Customer Engagement: Involvement and communication from all members of the team are vital for cooperation and support. The team will schedule meetings with all the City employees to review the project plan and elicit feedback and buy-in.

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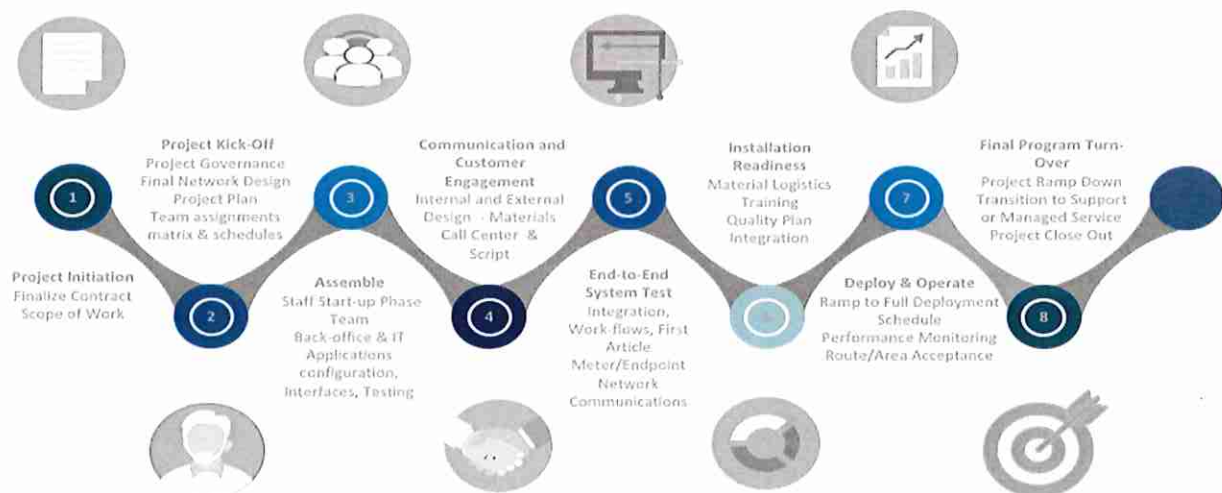
Team Assignments Matrix: The project plan identifies those responsible for each activity. Activities will be clearly described, including all relevant parameters, timescales, costs, and deliverables. They are then delegated to appropriate team members. We devote additional attention at the project kickoff to ensure the success of all delegated tasks, making sure they are clearly explained and agreed upon, and ensuring proper support and monitoring while they are in progress.

Management: At this stage, the Project Manager will focus on informing, encouraging, and enabling the project team. The Project Manager manages the team and activities in meetings, and communicates, supports, and assists with decisions.

Performance Monitoring: During the project, it is critical to measure, monitor, and review project progress. One of the most critical responsibilities of the Project Manager is to check the progress of activities against the plan. Reviewing performance regularly at the stipulated review points and confirming the validity and relevance of the remainder of the plan helps ensure that key items are progressing as expected. If necessary, the manager adjusts the plan due to performance, change in circumstances, and new information, always within the original terms of reference. Additional communication about new developments to all vital team members will be made in writing.

Risk Management Plan: An important component of each project and a task our Project Managers are keenly focused on is an effective Risk Management Plan. Our project approach includes a comprehensive risk management plan that begins before the project starts and continues through the project phases.

Project Turn-Over: Upon successful completion of the project, the Project Manager will hold a review meeting with the teams to ensure that Vanguard and City of Deltona teams understand what occurred during the project and why. This meeting will also be used to reflect on any challenges, successes, and to document to assist future projects.





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Vanguard Work Order Management System (WOMS) Application and Asset Management Tracker

Vanguard has managed, installed, and maintained AMR solutions and meters with great success using our Vanguard Project Management Methodology and Vanguard WOMS work-order management tools delivering advanced metering projects to hundreds of utilities and municipalities.

WOMS gives your smart AMR programs the best of both worlds, with out-of-the-box, field-proven, AMR deployment features and a platform entirely customizable and configurable to your requirements. WOMS provides five modules that span the full system life cycle, seamlessly integrated to deliver everything your program needs. Efficiency and accuracy are paramount concerns when deploying smart metering systems. Vanguard Utility Software Suite (VUSS), our smart metering field management software, leverages decades of experience to deliver innovative management applications in support of smart metering installations and maintenance activities.

The WOMS application offers end-to-end visibility and control of metering and AMR initiatives. With powerful collaboration and real-time reporting, WOMS comprehensive software tools safely and efficiently execute smart AMR projects, on-time, and on-budget.

- Automatically collect and consolidate project data cross all data modules to create a fully integrated, powerful application for meter deployments. All aspects of the installation process from inventory management and workforce assignments to real-time project tracking and safety management are available for all AMR project teams members.
- Manages the AMR deployment end-to-end and across the entire meter lifecycle with our suite of software tools designed specifically for utilities.
- Documents the entire AMR deployment workflow to increase productivity and quality processes. Workflows can be customized for a the City's needs and eliminate common errors that can occur during AMR deployments.

Key Features

- Multi-stage, multi-tiered inventory management to quickly reconcile inventory and provide precise stage-tracking of all project assets. WOMS provides a comprehensive, real-time view of all project assets, custody, and locations.
- Customer service is significantly improved during the installation project by utilizing the appointment, customer contact and customer claims features. Through Customer Call Center, Customer Service, and field staff communications such as appointment setting, mailers, door hangers, and field-generated contact reports in real-time via the team's mobile devices, will instantly push this data to a central server to accurately track all customer interaction.
- Our customer dashboard allows for easy access to all project and customer services representative's data collection and processing system. This allows for an easy drill down by account number, address, or customer name for our all accounts. the City clients can run and export standardized reports, at their discretion, for appointments, account status, reading route all by any date range.
- WOMS tracks each individual's account data from the the City's CIS system with new and old meter and endpoint numbers, readings, size type, manufacture, model. All new meter/endpoint information is collected with a bar code scanner. WOMS also tracks

City of Deltona, FL

inventory, customer appointments, door hangers, and letters mailed, all with time, date and GPS imbedded in the record. Service information, work performed, as well as a historical record of every time the account information was modified and by who. Overall, there are over 140 fields of data that can be captured for each account. Our field handheld device has the built-in capability to take multiple imbedded digital color pictures.

- Digital color photo records before and after install, date and time stamp, GIS, imbedded GPS location, bar-code scanning of newly installed meters and endpoints.
- All completed field data is sent to a WOMS interface which is processed by our Quality Control Department that provides for a final quality audit prior to data being sent back to the City.
- WOMS is designed to help meet contractual requirements for smart metering installation acceptance. It tracks the project's progress across all routes as installation work orders are completed and the installations are validated through successful reads of the new meters, from the AMR collection systems.
- Work orders can be filtered with user-defined criteria and user-defined elements are displayed, including unique City data elements. The data is exported as a .csv file for ad-hoc reporting or for use in external applications.
- Work order dispatching activities are optimized by utilizing WOMS's comprehensive dispatch, based on work orders, utilities, routes, map or Project Manager, Support crew dispatch features. Project defined exceptions such as installer permissions ensures work is dispatched to the right person at the right time.
- WOMS's management dashboards allow to communicate project information to all project stakeholders, view project status to date and route saturation as well as view quality audit statistics, customer claims and open exceptions requiring closure.
- Project progress, installation quality and work force productivity can be effectively managed by using WOMS's project dashboards, standard and custom power filters, standard and custom reporting.



WOMS provides users with immediate access to up-to-the-minute data from the field, supervisors can manage crew progress and challenges immediately, which means they can solve problems when they occur. Dashboard and reports provide the ability to measure monthly, weekly, or daily performance, but it also enables users to tap into current field activities and state of operations. With on-demand ability to filter, sort, query and visualize cross-platform data. WOMS helps identify patterns and predicts deployment and maintenance issues that can be eliminated with process improvements and quality controls.

Inventory Control and Management

WOMS offers a fully integrated inventory monitoring and tracking. The inventory tracker allows users to easily import, track, and manage smart meters, endpoints, and other project materials. The inventory system is comprised of a web-based server for advanced inventory management

INSTALLATION OF WATER METERS

BID# 23009

Vanguard Utility Service, Inc.



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and data syncing, as well as a native mobile app for scanning and managing inventory on the go.

WOMS leverages the inherent value of an asset inventory by managing the assets and their associated attributes (type, condition, installation date, and so forth), and by managing the work done to care for assets. The link between assets and work orders is maintained in such a way that the history of completed work orders against a specific asset is viewable and is easily retrieved. If an asset has not yet been identified in the geodatabase, WOMS can manage work performed by associating it to a valid address, and it can later seamlessly update the history once the asset is reflected in the geodatabase.

Inventory Insights

The inventory tracker makes smart meter inventory management easy for projects and maintenance. The native app user experience makes it simple for workers to instantly scan pallets or meters and endpoints, in the warehouse or in the field. The application is fully integrated, meaning inventory data can be seamlessly imported into manufacturing and shipping systems for inventory management from vendor systems.

Custom Inventory Workflows

The inventory tracker provides a configurable workflow system that can be tailored to an organization's logistics and procedural requirements, tracking each asset from manufacture to receipt, loading, internal transfers, assignment, installation, disposition, return to stock, RMA and more. Every asset's GPS location is captured throughout the lifecycle and each inventory record includes a full revision history of users, date, and time stamps. The result is a clear and transparent picture of inventory flows enabling organizations to avoid delays, minimize disruption, and prioritize resources efficiently.

- Configurable inventory and logistics workflows including receiving, loading, transferring, assigning, disposing, returning to stock, RMA and more
- Provides a full, chain of custody management solution of all critical assets
- Integrate with manufacturer and shipping systems
- Scan pallets, boxed or individual endpoint and meters for real-time tracking and data verification

Right Location at The Right Time

Smart device tracking could not be easier. At each inventory step, a quick barcode or QR code scan makes boxes or individual nodes available for the next step in the workflow. The powerful conditional logic that is built into the workflows prevents errors and enforces procedures, with record validation of the node as it is processed in real time. During the inventory management process, the app provides several data verification features including data validation, location verification, duplicate record detection, and more. These features reduce errors while inventory flows through the system. To assist in transparency and accountability, record revision history ensures that every change that is made to a record is tracked to a user and timestamp.

Benefits

Because the app allows supervisors to view the location of devices and workers in real-time, they can optimize operations and even assign tasks based on proximity.

- Streamline operations with a single pane view of inventory supply and demand levels
- Identify supply chain issues before they impact operations



City of Deltona, FL

- View location of meters/endpoints & workers in real-time, assign tasks based on proximity
- Full record revision history tracks every change with user, date, and time stamps

Quality Control and Assurance

Vanguard's 21-year track record deploying, operating, and maintaining varied water projects attests to the integrity of our Quality Control and Quality Assurance Program (QCQAP). The purpose of QCQAP is three-fold:

1. Assure that the project meets all the customer-specific requirements defined in the Statement of Work and other contract documents.
2. Assure that we comply with all federal, state, interstate, local, and facility-specific laws, codes, and regulations for the design, construction, and operation and maintenance of the proposed system. This project will also be coordinated for compliance with the the City requirements.
3. Ensure that the project reliably delivers the projected output in a consistently safe and reliable manner and accordance with all environmental and other permitting requirements

Through Vanguard's extensive experience delivering complex projects to Municipal & Public sectors, we have become well-versed in adapting our QCQAP program to AMR projects. We have also developed systems to assure that our subcontractors and suppliers comply with these requirements through proper training and education, and flow-down provisions in our subcontracts.

Quality Control Procedures

Vanguard's Quality Control procedure works on three different levels after the installation has been performed prior to being integrated with the the City's database. Our electronic work order system collects data regarding all types of installation complaints and responses. There are a host of reports that can be generated for the the City to track improper installations, leaks etc.

Further, our VUS electronic work order system collects in real time all installation information including out readings, digital pictures, and UPC scan of serial numbers. That information is transmitted for audit to corporate headquarters and then is made available to the the City by the next day. All Complaints are responded to within 1 hour. Improper installation will be corrected at the time of discovery. Leaks will be responded to within 30 minutes and be on site within 2-4 hours from call.

Any issues that may arise will be reported to the the City. Vanguard has a process that performs three verifications of 100% of all meter installations within 48 hours of the install. Included is removed meter out read is accurate, meter installed correctly, meter number is correct, clean work area, and meter is functioning.

Vanguard audits 100% of all data internally at the corporate office. Vanguard validates all data prior to the transmission of data to the the City. Vanguard will use our standard operating procedure as we have on hundreds of projects across the country. In short, it is a dual electronic and paper system that has a second verification on every step of the process from the preconstruction to post installation procedures.



City of Deltona, FL

We obtain a list of the serial number ranges on the new meters to be replaced as well as the endpoints. Once the installation route schedule has been identified, individual routes will be scheduled and assigned for installation. Each route will be divided into daily work per installer and will be assigned to the individual installer's handheld. A paper daily work log will be printed for secondary tracking with the specific accounts and information listed. Vanguard's fulltime onsite project manager or field supervisor will distribute the work, meters, and materials at the beginning of each day. Inventory will be scanned out by each technician.

The installers will begin the installation process in order of their assigned work. The first step, in the installation procedure, is to ensure that the meter serial number and address corresponds with the information that was provided by the City's billing system prior to any work being started. Once that is verified, the installation procedures begin.

During the installation process, account information is verified, and the new meter information is scanned into the electronic work order system for the bar code on the meter and endpoint. The installation tag is removed and attached to the paperwork log for that account. The old meter reading is entered into the electronic work order system, written down on the installation log, and a digital picture is taken of the registers reading upon removal. All the data for that account is sent in real time to our server that identifies every step of the process with a time and date stamp for that account.

At the end of the day, the project manager verifies each installer's installation log sheet with the handheld and the old meter registers reading. The information is sent to our corporate office where the data is reviewed by one of our project coordinators to ensure the log sheet, electronic information and photo of the old meter reading correspond on every account. Data is automatically compared to the original meter numbers that were issued for the project and locked out to ensure that there is no duplication. Provided old meter readings are compared to make sure they are in line with what was provided.

The following day, the field supervisor goes out and Field QC's the installations in a second WOMS project. They compare address and meter number, take pictures of the setting meters numbers and the conditions as found. They inspect the work site to ensure that everything meets standards. If issues are discovered, the supervisor may correct the deficiencies or call the installer to return while he is there and correct. Deficiencies are tracked and can be reported weekly or monthly as desired.

Errors discovered in the office are sent to the project manager and they investigate that day. Data is then reviewed by our IT department and then sent to the City billing system to be updated.

Vanguard has a secondary verification in every step of the installation process to ensure that the City's data is accurate and correct prior to integration into the CIS system.

Our Project Support Team will access the installation data within three days of the installation and verify the account is transmitting and all meter and endpoint numbers correspond. This insures that the accounts are up and functional in the Billing system and that the integration process was successful.



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Standard Operating Procedures for Outdoor Meters Installations Similar to the City of Deltona Project

Step 1- Confirm Service Location

- Using work order data, confirm service address. Verify the pit located is for the service address the work order refers to.
- Notify the customer that their water will be shut off for meter replacement and restored after the meter replacement has been completed.
- Please ask the customer not to open any water valves or flush any toilets until their water has been restored.

Step 2- Inspect Meter Pit

- Determine area is safe to work in.
- Knock on the door and inform homeowner of your arrival/ about the replacement. Let them know water will be off for a few minutes.
- Select the address in the handheld and click Install, Exchange
- Take picture of meter and meter setting
- Record old meter usage reading in handheld data collector.
- Record old meter, register or transmitter serial number.
- Does the pit have the correct pit lid in place to mount transmitter? If yes, proceed with installation. If no, note in handheld data collector. If the pit requires a lid, stop installation, and note in handheld data collector; note type of lid required.
- If flooded pump out water to a level below meter.
- If buried remove soil to a depth at least 2 inches below meter base and couplings.
- Inspect valve. Does valve appear faulty? – If yes, record in handheld data collector and stop installation. If applicable call appropriate the City contact to gain approval for work.
- Is valve operational? If no, record in handheld data collector and stop installation.
- If meter is inaccessible, unsafe, leaking or otherwise not able to be installed record category of reason (inaccessible, unsafe, bad plumbing) along with description in note section.
- If valve breaks during install or does not turn back on, record in handheld data collector and notify Supervisor.

Step 3- Install New Meter or Meter Retrofit

- Look to see if water is flowing, wait until water stops. If water does not stop, verify valve is closed and customer is not using water.
- Loosen meter couplings and remove old meter.
- Install new meter using contractor supplied connector sets, nuts, studs, and rubber gaskets.
- Turn on water. Flush line using outside spigot if available.
 - NOTE: If water flow does not stop or slow down and the customer is not home, shut water off and leave WATER OFF notice. Inform Supervisor that water was left off and give property address. Supervisor will inform the City.
- Mount transmitter through hole in pit lid or under lid with proper mounting hardware.
- Program and test transmitter (if applicable).
- Secure pit lid and cleanup around meter pit.



City of Deltona, FL

- Visually inspect installation.
- Confirm water is on
- Look for leaks
- Verify flow direction is correct
- Verify meter is plumb
- Verify register is secure w/tamper proof torx
- Seal the meter with seal wire & seal (if applicable)

Step 4 – Data Collection - Old Meter

- Verify serial number matches the one in the City database. If not, note in data collector.
- Write Contractor's work order ID on meter tag and attach to meter or register.
- Collect old meter, old register, and old transmitter for storage.

Step 5 – Data Collection - New Meter

- Enter new meter size and type into data collector using checkboxes.
- Enter new meter (register) and transmitter IDs into data collector using barcode scanning.
- Collect GPS coordinate using handheld data collector and save readings.
- Note pit condition using check boxes.
- Use pull down menu or check boxes with custom description.
- Type in description of any unusual issue associated with the installation.
- Perform QC check by answering questions in data collector and visually inspecting installation.
- Place end caps on old meter.

Step 6 – Post Installation

- Use wand, IR port, or RF to turn on transmitter prior to leaving. (If applicable)
- Notify customer that the water service has been restored.
- Leave door hanger or business card with Contact information, installer name, time of install and service performed.
- Upon old meter return to Contractor warehouse a picture must be taken of all meter / register serial number and final read. Picture(s) must then be associated with the specific installation record.
- Sync handheld data collector with work order system nightly.
- Correct data errors daily.
- Submit scrubbed install data on weekly basis to the City
- Take picture of old meter and / or register and include serial number and final read. Associate the picture with the respective account.

Emergency Procedures

- In the event of a plumbing problem resulting in a leak (major), attempt to stop the leak by use of a B-box, freeze it, or other means to minimize damage.
- If unable to stop leak or contain drainage, contact the Field Supervisor
- If damage occurs, notify Field Supervisor, and document all issues regarding the incident (photographs should be taken).
- If complaint or claim for damages occurs, the City will be notified.



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Notes

- The installer performs the initial quality check prior to any work being performed for all installations.
- All installations are checked again after the completion of all work.



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Meter Installation Warranty

Vanguard Utility Service, Inc. warrants all water meter work for a period of one (1) year from the date of install against any defects in company supplied materials and faulty workmanship resulting from water meter installations. Any problems related to the installation typically is seen within the first month after installation. This warranty covers replacement of any property or material damaged by Vanguard Utility Service, Inc.'s employees during the course of installation.

Subcontracting

Vanguard will not be using subcontractors on this Project. The work to be performed will be completed entirely with our employees. We require our employees to undergo testing and education programs specific to the electronic solution to be installed. All of our employees hold OSHA 10 and Confined Space Certification and some require a State certification by Weights and Measures. The work to be done requires learned technical skills to install, which we provide each employee.

There is no subcontractor's work to be let or done on this contract.



City of Deltona, FL

PROPOSAL AFFIDAVIT

STATE OF Kentucky

COUNTY OF Daviess

Kathryn F. Kolter, being duly sworn, deposes and says that she is
(Name of Secretary)

Secretary of Vanguard Utility Service, Inc., a corporation organized and existing
(Name of Corporation)

under and by virtue of the laws of the State of Kentucky, and having its
principal office at: (address)

1421 W. 9th Street

Owensboro, KY 42301

Affiant further says that it is familiar with the records, minutes, books, and by-laws of

Vanguard Utility Service, Inc.
(Name of Corporation)

Affiant further says that Robert A. Bates President/Owner
(Name of Officer) (Title)

of the corporation is duly authorized to sign the Proposal for

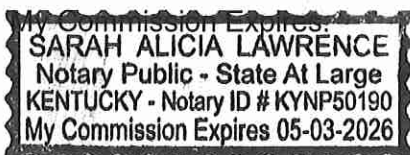
INSTALLATION OF WATER METERS BID# 23009

Kathryn F. Kolter
Kathryn F. Kolter



Sworn to before me and subscribed in my presence this 30th day of March 2023

Sarah Alicia Lawrence
Notary Public #KYNP50190



March 30, 2023
Date

Daviess
County

Kentucky
State

INSTALLATION OF WATER METERS
BID# 23009

Vanguard Utility Service, Inc.



City of Deltona, FL



Ron DeSantis, Governor

Melanie S. Griffin, Secretary



STATE OF FLORIDA
DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION

CONSTRUCTION INDUSTRY LICENSING BOARD

THE UNDERGROUND UTILITY & EXCAVATION CO HEREIN IS CERTIFIED UNDER THE
PROVISIONS OF CHAPTER 489, FLORIDA STATUTES

SHELTON, ROBERT EDGAR

VANGUARD UTILITY SERVICE, INC.
1421 W 9TH STREET
OWENSBORO KY 42301

LICENSE NUMBER: CUC1225083

EXPIRATION DATE: AUGUST 31, 2024

Always verify licenses online at MyFloridaLicense.com



Do not alter this document in any form.

This is your license. It is unlawful for anyone other than the licensee to use this document.

ACORD™

CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

3/31/2022

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer any rights to the certificate holder in lieu of such endorsement(s).

PRODUCER McGriff Insurance Services 2600 Eastpoint Parkway Louisville, KY 40223 502 489-5900	CONTACT NAME: PHONE (A/C, No, Ext): 502 489-5900 FAX (A/C, No): 8668812184 E-MAIL ADDRESS:														
INSURED Vanguard Utility Service Inc P.O. Box 21595 Owensboro, KY 42304	<table border="1"> <thead> <tr> <th data-bbox="812 451 1404 483">INSURER(S) AFFORDING COVERAGE</th> <th data-bbox="1404 451 1531 483">NAIC #</th> </tr> </thead> <tbody> <tr> <td data-bbox="812 483 1404 514">INSURER A: Amerisure Insurance Company</td> <td data-bbox="1404 483 1531 514">19488</td> </tr> <tr> <td data-bbox="812 514 1404 546">INSURER B: Travelers Property Casualty Co of Amer</td> <td data-bbox="1404 514 1531 546">25674</td> </tr> <tr> <td data-bbox="812 546 1404 577">INSURER C: Amerisure Mutual Insurance Co.</td> <td data-bbox="1404 546 1531 577">23396</td> </tr> <tr> <td data-bbox="812 577 1404 609">INSURER D:</td> <td data-bbox="1404 577 1531 609"></td> </tr> <tr> <td data-bbox="812 609 1404 640">INSURER E:</td> <td data-bbox="1404 609 1531 640"></td> </tr> <tr> <td data-bbox="812 640 1404 663">INSURER F:</td> <td data-bbox="1404 640 1531 663"></td> </tr> </tbody> </table>	INSURER(S) AFFORDING COVERAGE	NAIC #	INSURER A: Amerisure Insurance Company	19488	INSURER B: Travelers Property Casualty Co of Amer	25674	INSURER C: Amerisure Mutual Insurance Co.	23396	INSURER D:		INSURER E:		INSURER F:	
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INSURER F:															

COVERAGES

CERTIFICATE NUMBER:

REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL SUBR INSR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR <input checked="" type="checkbox"/> PD Ded:5,000 GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:		CPP20686861401	04/01/2022	04/01/2023	EACH OCCURRENCE \$1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$1,000,000 MED EXP (Any one person) \$5,000 PERSONAL & ADV INJURY \$1,000,000 GENERAL AGGREGATE \$2,000,000 PRODUCTS - COMP/OP AGG \$2,000,000 \$
C	AUTOMOBILE LIABILITY <input checked="" type="checkbox"/> ANY AUTO OWNED AUTOS ONLY <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS NON-OWNED AUTOS ONLY		CA20686881202	04/01/2022	04/01/2023	COMBINED SINGLE LIMIT (Ea accident) \$1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
B	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> EXCESS LIAB <input type="checkbox"/> RETENTION \$10000		ZUP51M9753121NF	04/01/2022	04/01/2023	EACH OCCURRENCE \$5,000,000 AGGREGATE \$5,000,000 \$
C	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N Y N/A	WC20686841202	04/01/2022	04/01/2023	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTHER E.L. EACH ACCIDENT \$1,000,000 E.L. DISEASE - EA EMPLOYEE \$1,000,000 E.L. DISEASE - POLICY LIMIT \$1,000,000
C	Rent/Leased Equip		IM20762721102	04/01/2022	04/01/2023	\$155,000 Lim; \$1,000 Ded
C	Installation Floate		IM20923420802	04/01/2022	04/01/2023	\$1,500,000 One Location

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

Proprietors/Partners/Executive Officers/Members Excluded:

Donald R. Howell, Officer/ Manager; Bret A. Bates, Officer/ Manager; Robert E. Bates, Officer/Chairman

Robert A. Bates, Owner/ President;

CERTIFICATE HOLDER

CANCELLATION

SAMPLE

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

Robert E. Bates



City of Deltona, FL

WATER METER INSTALLATION MANUAL 2019

Version 5.0



City of Deltona, FL

*AMI/AMR Installers'
Manual*



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1. Right from the Start

1.1 Our Goal for Service

Every customer will receive high quality service, no matter whom they come in contact with. Thus all of us -office staff, administrators, and installers- will consistently do our jobs professionally, competently, and with utmost decorum. All of our customers will be treated well, and all of our service will be provided with excellence.

We have high standards for customer service. And those standards are what we believe separate us from others in our industry. Our competitors, like us, offer very good installation services. And, like us, they employ some very competent people to provide it. But what distinguishes us is the customers' realization that our people genuinely care about doing a first rate job when they come onto their property.

What's in it for us?

Does high quality service actually create more value to Vanguard? Yes it does. There is no doubt that it will distinguish us from other companies offering similar products. People may not be fully aware of the differences between our products and someone else's, but they will certainly remember how well they were treated when our representative came into their home or talked with them over the phone. And that is an advantage that we should *never* underestimate. The better our advantage, the more business we do.

1.2 How To Enjoy Your Job - Advice From The Experts

In truth, being good at service is easier, less stressful, and gives you much more satisfaction at the end of the day. Price Pritchett, a well-known trainer on business relationships, wrote, "Doing quality work is emotionally gratifying. Success feeds the heart. The better you make people feel while you are doing your job, the better you feel about yourself. On the other hand, the weaker your personal commitment to the job, the more your spirits starts to sag. The fun fades out of what you do for a living if you give it only a halfhearted effort. That's important to remember, because work that isn't enjoyable requires a lot more emotional labor."

"Form a Good Relationship"

Pritchett asserts *"The first and highest priority in customer service work is to build good relationships with your customers."* He lists three simple reasons to back this up:

"If your customers don't like you, the odds are 100 to 1 they're not going to like your service."



"Problems are a lot easier to solve when you're on good terms with the customer."

"If the basic relationship doesn't go well, it not only complicates the basic problem, but also creates new headaches."

Is it hard to build a good relationship with your customer? Not at all. He suggests that you practice these steps to make it happen.

Take the initiative

Be positive

Make the customer feel special

Form the good relationship you want with your customer. *Work on it from the moment they greet you at the door.* It will make life better for the both of you.

"Manage the Transaction"

Pritchett wrote, "After setting the stage for a good relationship with the customer, you still have to conduct the business. You have to serve the client's needs or take care of the problem. If you don't manage this business transaction effectively, sooner or later it will damage the relationship.

"There are three key steps in managing the transaction:

Listen and understand.

Be helpful.

Deal with the uniqueness of the situation.

It sounds simple enough, but you have to put it into practice every time you contact a customer. You have to repeat it, and be patient with it. And above all, you have to *own* it.

1.3 Being a High Quality Service Provider

Being a high quality service provider makes your job easier, less stressful, and more satisfying. Being a high quality service provider is easy – it just takes a little discipline. Following these two easy steps will help to ensure that you deliver high quality service every time.

1.4 Build a Good Relationship – Right from the Start

Building a good relationship with our customer starts the moment they come into contact with us.

- Be on time for appointments
- Be courteous and professional
- Be conscientious of your surroundings – watch where you walk, don't litter, eat, drink or smoke on or around customer property – treat the property as if it were your own.
- Move objects with care, and when in doubt, check with the customer
- Refer to the working safe section for guidelines to protect against dog hazards.

"Doing quality work is emotionally gratifying.

Success feeds the heart. The better you do your job, the better you feel about yourself. On the other hand, the weaker your personal commitment to the job, the more your spirits starts to sag. The fun fades out of what you do for a living if you give it only a halfhearted effort. That's important to remember, because work that isn't enjoyable requires a lot more emotional labor."

~Price Pritchett, author.

1.5 Team Members

The success of the project requires that Team members understand each other and work together smoothly.

- Always be willing to provide support or assistance to another Team member. A Team typically consists of a Supervisor and up to ten installers.
- Teams may be changed, to maximize the skill and effectiveness of the Team members and the project.



2. Getting Organized



2.1 ID Cards:

Required for work

Always have your ID badge available if requested. If for any reason you lose or damage your ID, notify your Field Supervisor immediately to get a replacement, because you are not allowed to work in the field without one.

Always visible

2.2 Your Team

Provides back-up

A Team consists of a Supervisor and up to ten installers. Ordinarily you'll be working independently of the others in your Team. But sometimes one Team member may be called upon to assist another. For that reason it is important to the success of the project that Team members understand each other and work together smoothly. Teams may change from time to time; depending upon what best suits the Team members and the project.

2.3 Handheld

Handle carefully

The handheld are rugged but they still should always be handled carefully. If the unit fails to operate in the field, call your Supervisor for help. If possible, the Supervisor will bring a working unit out to you.

Required for work

Important: You cannot continue your route unless you have a working handheld. Customer information must be collected *electronically* and always one account address at a time.

2.4 Tools and Safety Equipment

Responsibility is yours

All tools and safety equipment issued to you for this job by Vanguard remain the property of Vanguard. Your Supervisor or Install Supervisor can ask to inspect the tools and equipment at any time. Tools and equipment that you have misused or intentionally damaged may be replaced at your expense.

Everything signed for

MUST be used for work

Installers must sign a *receipt form* whenever they are issued any tools or equipment.



City of Deltona, FL

All safety equipment issued is in compliance with the latest O.S.H.A. regulations, and must be used and/or worn in the proper manner, and at all times when the installer is performing his job.

Important: Any installer found not wearing the proper Personal



Protection Equipment (PPE) is subject to immediate disciplinary action up to and including termination!

2.5 Water Meter Change Out Tool List



Note that tools and equipment may vary depending on the installation type

- | | |
|--------------------------------------|---|
| 1. Customer Action Forms | 16. #1 Philips screw driver |
| 2. Pay Sheets | 17. Screw driver – narrow end standard |
| 3. Contact List | 18. Hammer |
| 4. Meters & RF change-out equipment | 19. Tapered dowel (stop for open pipe) |
| 5. Cordless drill & spare battery | 20. 18" meter seals |
| 6. Drill Bits | 21. 12" wire ties |
| 7. Flashlight | 22. 9/16" T-25 staples |
| 8. Staple gun, T-25 | 23. 2 1/4" hex head screws |
| 9. Wire strippers | 24. Masonry anchors 12 x 1" plastic |
| 10. Wire snake 25' | 25. Masonry anchors 10 x 1" Philip screws |
| 11. 14" Pipe wrench | 26. Step Ladder |
| 12. 10" Pipe wrench | 27. Gaskets @ 2 per meter |
| 13. 14" Channel locks 14" curve jaws | 28. Electrical Tester |
| 14. Pliers – general purpose | 29. Map(s) |
| 15. Pliers – needle nose | 30. I.D. Badge |
| | 31. Door Hangers |
| | 32. Cell Phone |

2.6 Maps

Available from your
Supervisor

Vanguard will supply the street routes for the new meter installations. Your Install Supervisor will supply you with an atlas of streets so that you can easily locate each assignment.



3. Working Safely

3.1 Is Safety Being Over Emphasized?

No.

Working safely is crucial to your good health. Working safely will ensure that property is not harmed, will ensure that your customers are confident about your work, and will ensure our success as a company.

Unfortunately, it is easy to let your guard down; you might install hundreds of meters without incident and begin to feel like all this safety stuff is overrated. But *KEEP YOUR GUARD UP*. Accidents will happen when you become complacent or over-confident.

We have developed the safety rules below for everyone who goes to work in the field for this project. *They are an important part of how you are evaluated by your Supervisor.* If you are doing your job well, working safely and complying with these rules will simply be a routine, and an integrated part of your work.

1. You must have the approved PPE with you and in use whenever you are working in the field.
2. Maintaining your PPE is your responsibility. If it needs repair or replacement, it is up to you to contact your Supervisor.
3. Your Supervisor will periodically check the condition of your safety gear in the field.
4. You must wear your PPE the moment you remove the meter seal to the moment you clip the new seal into place.
5. Installations requiring ladders must be forwarded to your Supervisor for the appropriate action.

3.2 Basic Installation Safety

Quickly inspect the meter and setting for damage or leaks. Call your Supervisor for advice if the meter or setting appears to be defective.

Make sure area around the meter is clear.

3.3 Safety Around Vehicles

No horseplay	Our requirements for safety around vehicles are spelled out in your safety manual. We ask that you ensure your own safety and the safety of those with you by avoiding horseplay, avoiding behaviors that jeopardize the driver's abilities, securing your equipment and stock before driving, and correcting or repairing unsafe operating conditions like malfunctioning lights, low tire air pressure, etc. And of course, wear your seat belts while driving. Magnetic contractor signs must be displayed on the vehicle at all times.
Stock and equipment are secure	
Everything works	
Buckle up	
Magnetic vehicle signs	

3.4 Safety On Private Property

Extra caution on drives and walks	Installers must always be conscientious of their surroundings. For example, they should use driveways and walkways and avoid walking on lawns. Courtesy is extremely important with homeowners and leaves the customer with a good impression.
Move objects with care	
Ask owners to secure their dog	If an installer finds a hostile customer notation in the hand held they are to skip the installation and notate in the hand held to set aside for an appointment.
Hostile customer	



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Guidelines for Minimizing Dog Hazards

- Look for signs of a dog such as a doghouse, bowl, chain, droppings, sign on gate, trail around fence, etc.
- Look for places where a dog can hide, such as under a porch.
- All dogs should be treated as potential hazards.
- Do not try to pass in front of a sleeping dog.
- Call out to a sleeping dog to make it aware of you before you enter the yard.
- Have tools handy. Tools and hardhat can be used to defend yourself.
- Do not trust the words, "He won't bite."

- Do not turn your back on a dog.
- Be firm but calm with aggressive dogs. Give commands such as “**stay**”.
- If you must strike a dog, aim for the nose, throat or rib cage.
- If attacked, drop down and roll. Protect your head and neck.
- If you are bitten, notify your supervisor and seek medical help immediately.

Safety inside the Customer's Home

Double check your grip	Always be vigilant about safety in the customer's home whenever you have to go inside. If you have to move objects aside in order to change the meter, be certain of your grip, your footing, and the temporary location for the objects. Shrewd observations and practical considerations should underscore every movement you make in the home. An installer shall not enter a customer home unless there is an adult present at least 18 years of age.
Watch where you walk or stand	

3.5 If Property Damage Occurs

Call your Field Supervisor	If you have any sort of property accident, <i>call your Supervisor</i> immediately. He or she needs to determine immediately the gravity of the situation, initiate any necessary repairs, and begin the reporting procedure.
Emphasize if emergency repairs are needed.	

3.6 If Fire Occurs

Try to extinguish it	Each Installer will be provided with a fire extinguisher. If you cause a fire or come across a fire, <i>immediately attempt to extinguish it</i> . If you cannot, call 911 and report it. Then call your Supervisor and tell them what is happening. Do not leave the location until assistance arrives. If the situation requires, the area should be secured and any occupants of the home should be evacuated.
Or, call 911	
Call your Field Supervisor	

3.7 If Personal Injury Occurs

If you need it, GET	MEDICAL
---------------------	---------



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ASSISTANCE FIRST.

Notify your
Supervisor.

You should get treatment right away for emergencies. Use your phone to call for assistance if necessary. For less urgent injuries, apply the appropriate first aid or other treatment. In either event, be sure to let your Supervisor know about the accident. Provide your Supervisor with the information he or she needs to complete the required reports.



4. HOW TO READ METERS



4.1 Accuracy

The reading of the water meter is an important part of your job. It ensures proper documentation of the meter change and an accurate bill for the customer. Again, a very important component of your job is the *accurate* reading of the water meter. In fact, it is absolutely vital to the entire billing process. Reading errors are not only costly to correct, but they lower the level of confidence our customers have in our service. In this case, it could potentially impact the public's general receptiveness of the AMI project.

Accuracy is a very important skill that you must develop! A large part of the utility's excellent reputation with the public is a result of the Company policy that our meters be read on an established schedule and read with dependable *accuracy*.

Accurate reading while performing your job will eliminate a great deal of trouble. *Accuracy* is a result of practice, experience, and good training. However, it is not uncommon for a new employee to develop *accuracy* in a very short period of time.

Accuracy cannot be taught. It comes from continuous work and practice. To quote a famous philosopher, "Practice does not make perfect. Perfect practice makes perfect." With sincere effort, you will form a habit of *accuracy*. Care and attention is always required of someone in your position.

Accuracy – There will be an expected read calculated for each account to be exchanged. Any read that an installer enters into the hand held that falls outside of a "high-low" range will be collected on an "exceptions report". These meters will be imaged at the warehouse and the readings verified. Installers that maintain a higher than acceptable error rate will be retrained. If the retraining is not successful further actions may be required. If the installer is prompted for a second confirmation read, make sure that the meter is read again independently from the previous read.

4.2 How to Read Meters Accurately

The first step in reading a meter is to be certain you are at the correct meter location. This is done by comparing the actual meter serial number on the water meter with the meter number in the MiNet system and the Vuss handheld.

A single incorrect digit on meter serial number is cause for immediate STOP to verify you are the correct location. If necessary escalate to Supervisor.

All meter readings should be double checked before leaving the meter change location. Be sure your reading is correct by re-reading the meter.



Also, be sure your reading is reported the same and accurately in both handhelds and on your work order.



4.3 Reading Meters

On regular monthly intervals, customer bills are computed from the readings taken from the meter. The prior month's reading is normally subtracted from the present reading to determine the amount used during the period between these readings.

However, in a meter change scenario it works a little different. Typically the meter will have been read by the Meter Reader within the past month. When you change that meter out, the billing department will take the Meter Reader's read and determine the usage from their last billing read by the reader, the additional usage will be determined from your "set" read to his/her latest read. Those two pieces of information are then combined to determine a total usage and subsequent bill for the customer. Knowing this, you can see how important it is to provide reading to complete this billing process.






5. Installation Details

5.1 The Basic Procedure

The basic procedure for changing meters is as follows:

Know where you are	Verify the address you are at using the hard copy route sheet that you have been provided. It is critical to match the location that you are at with the record on your MiNet handheld and the Vuss handheld. Not doing so can cause a “swapped” account that will cause major billing issue.
Preplanning and Special Instructions	Check the route work orders for any Special Instructions. This field will inform you about the utility's customers, and will indicate special access issues, bad dog, and medical situations, knock before accessing, etc. Plan the route out on the map. Load your vehicle and complete the daily
Hostile Customer	If an installer finds a hostile customer walk away from the location and contact a supervisor. The supervisor will escalate the account to the
PPE Checkout	Verify inventory for all required PPE. Perform daily vehicle check.
Look for hazards	While approaching the residence check for signs of damage or potential safety hazards
Notify the customer	Knock on the door. If the customer is home perform the customer instruction process. Notify them that there will be a short interruption in water service. Ask the customer to refrain from using the water.  Please note if performing a retrofit (register replacement) there will be no interruption in water service.
Verify meter type and ID	If there is no one home leave a door hanger that will notify them that the change-out has taken place. Enter the existing meter serial number in the handheld. Verify the existing meter serial number matches the existing meter serial number in the database. If the existing meter serial number does not match the existing meter serial number in the database contact your supervisor



Confirm meter
operation



For retrofit and or module installation refer to the attached
installation manual.

Set up for the
installation

Confirm that the existing meter is operating by opening outside spigot
and confirm flow on the meter and register. If the meter is not

Shut off the
service

functioning correctly contact the Supervisor immediately. The Supervisor
will confirm your assessment and give you direction for completing the
installation or skip in the Hand Held.

Set up the area for installation. Clear an appropriate workspace and

emergency shut-off.

Notify the customer that water service will be interrupted. Manually close the customer's shut off valve. Verify the water is completely off by a visual at the spigot. It is important for you to leave the spigot in the open position to bleed the line for air pockets and any debris that may be dislodged when turning the water back on. If you have any problem closing the valve contact your Supervisor for direction.

Remove the old meter

Using pipe wrench and backup attempt to loosen the meter coupling nuts. Use mild torque building to moderate steady torque until the coupling nut begins to turn. Do not jerk or snap the wrenches or damage could occur. Loosen both coupling nuts and remove the old meter from the tail pieces. If you have any problem loosening the coupling nuts contact your supervisor for direction.

Install the new meter

Remove new meter tag from new meter. Write install date, address, and initials on new meter tag. Place new meter tag on old meter register. Make sure entire old gasket is removed from meter coupling ends. Using appropriate washers for the new meter size lay the new meter into the meter setting. Hand tighten the coupling nuts and adjust the new meter so the register is at 12:00 o'clock. Using the pipe wrench and backup tighten the coupling nuts alternating between them. Do not over tighten.

Restore service

Open the valve very slowly. If you have any problem opening the valve contact your Supervisor for direction. Check the spigot to confirm flow and water pressure. Register at least 5 gallons of usage before closing the spigot. Check the coupling nuts, service and piping for leaks and re-tighten if necessary. Verify meter was installed in correct direction. Confirm that spigot that you have opened is shutoff.

Install the module unit

Connect the meter to the transmitter to the meter and secure in the lid using TTL bracket.

Tag the old meter

Confirm manufacturer's new meter tag is on old meter register.

Perform data collection

Using your MiNet handheld and Vuss handheld perform all required data collection and programming.

Check the site

Double check to ensure that you have gathered up your tools and any debris you might have caused. On your way out, be sure to close any doors or gates that you opened.



5.2 Meter Installation Procedure;

1. Locate the inlet valve and begin to close it. Typical valves close by rotating the shutoff key in a clockwise direction.
2. When the handle stops rotating check the previously opened spigot to see if the water has stopped flowing.
3. If the water does not stop flowing leave the faucet open and slowly and gently open and close the valve several times to try and flush the debris from the valve.
4. If the water still has not stopped flowing call the Team Lead.
5. If the water has stopped then proceed to completing the install.
6. Loosen the outlet-coupling nut on the meter. This will confirm in conjunction with the faucet that the water is turned off.
7. If the water is still confirmed to be off loosen the inlet-coupling nut.
8. Remove both coupling nuts and remove the old meter. Take note as which direction the water is flowing.
There will be no tolerance for meters installed backwards.
9. Remove the old washers from inside the coupling nuts. Be certain that the entire old gasket is removed.
Any leftover material will cause the meter to leak.
10. Install the new washers into the meter coupling nuts.



11. Install the new meter paying close attention to the direction of flow.
 12. Tighten the coupling nuts. Hand tight at first then one quarter turn with a wrench. Be careful not to over tighten the nuts.
 13. Be certain that the spigot that was originally open is still in the open position. Open the inlet valve at the meter just until water can be heard running.
 14. Begin opening the valve slowly about $\frac{1}{4}$ turn per second until fully open.
 15. Return to the spigot to verify pressure and allow the water to run as specified.
 16. Close the spigot.
 17. Check the meter for leaks. Be certain to wipe all the water off the meter as not to confuse water from the installation process for leaks.
-



5.3 Controlling The Risks

Your safety and your customer's safety is always important. Follow the procedures in this section to reduce the hazards and the risks.

Look around the site	As you approach the site, check around you for hazards such as broken glass on the ground, loosely stored or discarded building materials, bicycles, debris, and so on. Move in a way that avoids these hazards.
Look for dogs	
Wear your PPE	Glance around the yard for a dog. Usually, if there is a dog on the property it will see you first. But sleeping dogs could surprise you. Watch the dog for a moment before deciding whether to proceed with the installation.
Inspect the meter	

Make certain that you have all your required PPE.

Inspect the existing meter and setting to assure yourself that you can make the change out without problem. Meters and settings that are deteriorated or broken may be reason to skip the change out until a repair can be made.

5.4 If You Can't Get Access to the Meter

Try again before you leave the route.	If you cannot gain access to a dwelling, finish your route, then try again before returning to the warehouse. If you still can't get to the meter, enter the proper code in your Vuss handheld then leave a door- hanger on the door you think is most likely to be used by the occupant. The door hanger instructs the occupant to call for an appointment. The administrative assistant or scheduler will collect all calls to be scheduled, group them by area and fill in the Daily/Weekly Appointment Schedule.
Leave a "Door Hanger" card	
Code it in Vuss	If your access to the meter is limited or restricted because of locked doors, fences, dogs in the yard and so forth, call your Supervisor. Your Supervisor will help you try to install the meter or give you a descriptive code to enter in the Vuss handheld. Then mark the appropriate box on the door hanger card and hang the card on the door that you think is most likely to be used by the customer.
Leave a door-hanger	

5.5 Broken or Damaged Meters

Call your Supervisor immediately	If you judge that the meter or setting needs to be repaired before the new meter can be installed, or if you inadvertently damage the
Wait at the site	meter or setting while removing the existing meter, call your Supervisor right away to coordinate the repair. Wait at the site until your Supervisor or the repair technician arrives. Depending on the situation, you may leave if you have been given approval to do so.

5.6 Apartment Meter Banks

Remove and change one meter at a time	The most important thing to do when working at a meter bank is to remove and install meters <i>one at a time</i> and complete the tagging/reading process before moving to the next meter. This will eliminate the possibility of recording incorrect data, or tagging the wrong meter. Before you leave, make sure all the meters are in the correct direction and the area has been cleaned.
---------------------------------------	--

If a meter cannot be changed out, follow the procedures described above.

5.7 End Of The Day

Turn in the old meters	At the end of the day, installers will return to the distribution point with the all equipment, the old meters and any new meters that were not installed. Each installer must account for every meter that he/she signed out for that morning. No installer will be released until this daily reconciliation process has been accomplished. Old seals that have been removed from the field will only be discarded in approved containers. These containers will be marked as such.
Turn in uninstalled new meters	
Sign out with your Supervisor	

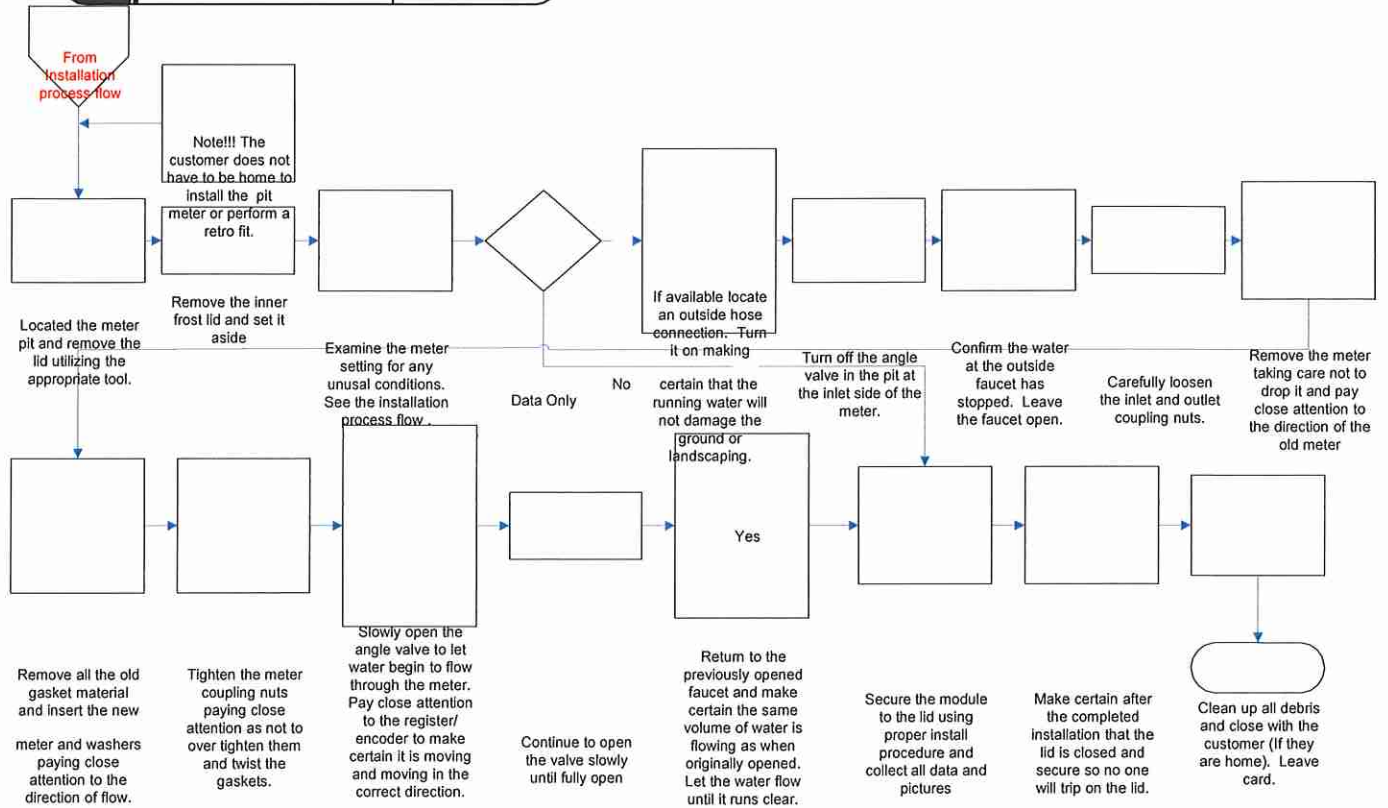


6. Residential Water Meter Installation Process Flows

Vanguard Utility Services

Pit Meter Install Process

4/9/2006



End Process



7. Service Details



7.1 Resolving Complaints in the Field

Supervisors should be involved.

Problems that occur in the field should always involve the Supervisor. He or she will have the authority to decide how the problem should be resolved.

In the event a difficult situation is encountered, please utilize the most professional demeanor possible, leave the worksite and contact your manager / supervisor immediately.

Generally, the Supervisor will go to the house, assess the problem, and determine the appropriate course of action. The customer should be aware of every step being taken to correct the problem.

If the Supervisor determines the need for additional assistance, he or she will contact the office and report the problem. At that point the Install Supervisor will take charge and decide any further course of action. The Utility will be made aware of all customer complaints.

7.2 Being a Professional

Look your best

Keep your uniform neat and clean, and wear it properly on the job. We also ask that hair, beards, mustaches, shoes, and other personal items of clothing be tidy. Personal mannerisms are acceptable as long as they don't undermine your image as a professional. Looking good means a lot to us and it is part of how we evaluate individuals.

Use your best manners.

Always address your customers courteously and by name when possible. In conversation use good manners and stay away from vulgarities and questionable humor.

Be enthusiastic about your work

Think about it: If you work with enthusiasm two very good things happen. One is that you'll approach your own work with confidence and the satisfaction of a job done well. Working enthusiastically is not just a practice; it's a point of view.

A second advantage is that our customers will develop a positive perception of you, your work and the program. And every program like ours depends upon customer acceptance for its long-term



Be knowledgeable
about your work

Customers will ask numerous questions about the program. Your ability to answer these questions satisfactorily will naturally reflect positively on the program. So stay informed about as many different aspects of the program as possible. We'll provide training from time to time to help meet this need.



8. Our Quality Assurance Program



8.1 The Quality Assurance Program

Supervisors have the responsibility for quality assurance in the field. The QC team will inspect, collect data and pictures of 100% of each installer's work. The QC inspection will be performed the following day of initial install. The corporate QC team will inspect all QC accounts for correct data and pictures to insure the install was performed to contract SOP before moving the account to completed status.

If your installations don't meet our quality assurance standards, your Supervisor will notify you personally and in writing. Generally, after reviewing the situation with your Supervisor you should be able to make corrections or brush up on procedures and perform subsequent installations completely up to standards. But if the problem or problems persist, your Supervisor will initiate a course of training for you that will help you improve. Installers who can't improve their work may unfortunately face disciplinary action, possibly leading to termination.



8.2 Installer Evaluation Form

CUSTOMER FOCUS

1. Does the installer maintain a professional work appearance? _____
2. Does the installer display a courteous attitude toward customers? _____
3. Does the installer respect customer's property (lawns, flower beds, hedges, fences, gates, etc.) and leave the property as it was found? _____
4. Does the installer refer customers to the call center when asked a question that they cannot answer? _____
5. If confronted by a hostile customer, does the installer promptly leave and report it to a Supervisor? _____

Comments on Customer Focus

TIME MANAGEMENT

1. Does the installer report to work on time? _____
2. Does the installer spend a minimum amount of time in the office/yard before starting the daily assignment? _____
3. Does the installer return to the office/yard as soon as their work is finished? _____

Comments on Time Management

HANDHELD OPERATION AND FIELD PERFORMANCE

1. Does the installer "log on" prior to leaving the office? _____
2. Does the installer verify all meter numbers, correctly read the meter and enter the reading? _____
3. Does the installer verify the reading at the meter when the handheld alerts an out-of-range condition? _____
4. Does the installer make a reasonable effort to gain access to all meters (i.e. knocking on the door, returning to the premise, etc.) while making any necessary notes for the Supervisor? _____
5. Does the installer record broken meter glass, noisy meter, incorrect meter number, meter removed, etc.? _____
6. If the installer suspects diversion is this information reported to Supervisor? _____
7. Did the installer notify their Supervisor of all items of importance? _____
8. Did the installer complete the route or assigned work? _____

Comments on handheld Operation and Field Performance

SUPPLIES

1. Is the installer wearing the uniform furnished by the Company? _____
2. Is the uniform clean and in good condition? _____
3. Does the installer have the following Company issued supplies?
 - a. Valid Driver's License Exp. Date _____
 - b. Valid Project Identification Card _____
 - c. Properly stocked First-Aid kit _____
 - d. Flashlight _____
 - e. Accident Prevention Rule Book _____
4. Are all notes and keys for the route obtained before leaving the office and returned at the end of the day? _____

Comments on Supplies

ANALYSIS OF INSTALLER'S PERFORMANCE

1. Strong areas

2. Areas needing improvement

3. Additional comments

I understand my signature does not necessarily mean I agree with this evaluation, but simply that it has been discussed with me.

Employee's Signature _____ Date _____

Date discussed with employee _____

Discussed by _____ Title _____



8.3 Installers' Performance Critique:

Installer's Name _____

Date _____

Evaluation Conducted By _____

Title _____

The purpose of the Semi-Annual Performance is to establish and maintain a consistent set of performance requirements for all installers. This evaluation shall be conducted on a semi-annual/annual basis by an exempt employee. Fill in Y for yes, N for no or N/A for non-applicable.

SAFETY

A. Animals

1. Does the installer show caution when dealing with dogs and other animals? _____
2. Does the installer keep a safe distance between themselves and unfamiliar animals? _____
3. Does the installer rattle gates, make noise, and/or look for signs of animals that may be hidden from view? _____
4. Does the installer knock for access instead of entering a yard with an unfriendly animal? _____
5. Is the installer cautious when going through and under places such as bushes and overhangs that could conceal snakes, spiders, etc.? _____
6. Does the installer carry Halt or other company approved dog protection in a readily available location? _____

B. Driving

1. Does the installer drive the speed limit and observe all traffic laws? _____
2. Does the installer demonstrate a defensive driver attitude? _____
3. Does the installer use a seat belt whenever the vehicle is in motion? _____
4. Does the installer use safety cones when the vehicle is left unattended? _____
5. Is the installer's vehicle clean and free from items that may move around in the cab or distract the driver? _____

General

1. Are the installer's shoes providing support and protection? _____
2. Is the installer's project logo always exposed on the uniform so the customer can easily identify him/her? _____
3. Does the installer record all the reads accurately on either the meter change form or into the handheld device? _____
4. Are hazards & special instructions reviewed before entering customer's premises? _____
5. Does the installer always take the safest route to the meter? _____

Comments on Safety
