



NOVEMBER 3, 2021

**PUBLIC UTILITY DISTRICT #1 OF  
JEFFERSON COUNTY METERING SYSTEM  
UPGRADE PROJECT**

**REQUEST FOR PROPOSAL FOR METER AND ADVANCED METERING  
INFRASTRUCTURE (AMI)**

**RFP# 2021-008**



# PUD#1 of Jefferson County Metering System Upgrade Project

Request for Proposal for Meters and Advanced Metering Infrastructure (AMI)

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# PUD#1 of Jefferson County Metering System Upgrade Project

## Request for Proposal for Meters and Advanced Metering Infrastructure (AMI)

Public Utility District No.1 of Jefferson County (PUD) is requesting proposals for the services of a qualified vendor to help replace the existing legacy remote read electrical metering system with an Advanced Metering Infrastructure System (AMI), including a Meter Data Management System (MDMS). The project will include the purchase of residential electric meters, residential meters with remote shutoff capabilities, and commercial meters, in addition to the AMI system framework to support remote reading and other device communications.

The PUD will be responsible for installation of the new meters. The selected AMI system vendor will work closely with the PUD, including obtaining PUD approval throughout the project. The successful Vendor will provide all necessary network infrastructure, software, meters, and data management services required to support the new system. The PUD will select in its sole discretion the proposal that is most advantageous to the PUD under the authority of RCW 39.04.270. The PUD may in its sole discretion decide to reject all proposals and request new proposals.

The PUD's current Electric Meters include a small population (approximately 2,500) of predominantly Centron R400 ERT Meters read by an Itron Mobile Collector Lite.

The PUD also operates a Water District that currently uses Badger water meters with Itron ERTs that transmit to an Itron Mobile Collector. The PUD is interested in a proposal that includes integration of the Itron water reading system with the electrical system remote reading system.

For Questions about the RFP email Will O'Donnell at [wodonnell@jeffpud.org](mailto:wodonnell@jeffpud.org) with the subject line "Jefferson PUD Meter Upgrade Project" no later than November 29 2021. All questions and responses will be posted on the PUD webpage at <https://www.jeffpud.org/projects-studies>. Potential proposers are encouraged to ask questions rather than submit a proposal based on incomplete or inaccurate information.

## 1. Summary of RFP

1. Project Owner: Public Utility District No. 1 of Jefferson County
  - a. Address: 310 Four Corners Road, Port Townsend, WA 98368
  - b. Phone: (360) 385-5800
2. Project Location: Jefferson County, WA
3. Requested Service: AMI System and Meters
4. Proposal and Selection Schedule:

|                                                                   |                                 |
|-------------------------------------------------------------------|---------------------------------|
| Proposal Due Date                                                 | December 8, 2021 at 3:00 pm PST |
| Selection of Successful Equipment Supplier                        | January 2022                    |
| Notice of Award (projected)                                       | January 2022                    |
| Equipment Supplier Return Signed Agreement                        | January 2022                    |
| Equipment Supplier Received Executed Agreement, Notice to Proceed | January 2022                    |

5. Equipment Supply Delivery Schedule:

| <b>Equipment Supply Delivery Schedule</b> | Maximum Calendar Days Allowed after Notice to Proceed | Projected Date |
|-------------------------------------------|-------------------------------------------------------|----------------|
| Submittals Due                            | 30                                                    | March 2022     |
| Initial Delivery of Meters                | 60                                                    | May 2022       |
| Installation of Network Infrastructure    | 90                                                    | July 2022      |

6. Partial Payment Schedule:

| <b>Partial Payment Schedule</b>             |                                                                                                                                                                             |
|---------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Meters and Hardware Components              |                                                                                                                                                                             |
| Meters Payment as Received (Net 30 Days)    | As Meters are received by PUD                                                                                                                                               |
| Hardware Payment as Deployed by Stage/Phase | As AMI Hardware is installed, started up, and field tested by Stage/Phase                                                                                                   |
| AMI/Network Infrastructure                  |                                                                                                                                                                             |
| First Partial Payment (10%)                 | Upon receipt of the PUD System Architecture, Complete Work Plan, and Project Schedule                                                                                       |
| Second Partial Payment (20%)                | Successful Testing of AMI Network Infrastructure Systems and Components.                                                                                                    |
| Third Partial Payment (20%)                 | Successful Operation and Field Testing of Complete AMI Network System. The AMI System has generated a successful customer billing of a partially deployed meter population. |
| Fourth Partial Payment (20%)                | Successful operation and completed training on all systems by PUD Personnel                                                                                                 |
| Fifth Payment (20%)                         | Receipt of all; System Documentation, Licenses, Continuing Training Plan, System Support Agreements, Written Warranties                                                     |
| Final Payment (10%)                         | 90 days of Satisfactory AMI System Operation                                                                                                                                |

## 2. Proposal Information

The objective of this Request for Proposal (RFP) is to specify the requirements for replacement of the PUD's current electric meters with an AMI system. The replacement process will be done in phases to facilitate availability of manpower and meet contractual requirements. This document outlines the services to be provided by the selected service provider (hereafter referred to as the "Vendor"). The words "bid" and "proposal" may be used interchangeably, as well as the words "bidder" and "vendor" throughout this RFP.

The PUD encourages women and minority contractors to submit proposals and the use of women and minority subcontractors is encouraged.

The PUD intends to contract with a qualified Vendor that submits a responsive Bid for Meters and Advance Metering Infrastructure (Bid Cost Sheet A), and Bids for Annual Technical Support and possibly Managed System Services (Bid Cost Sheet B). The PUD will select the Proposal that it deems most advantageous to the PUD, which will include analysis of the proposal representing the "best value" to the PUD. The PUD has the sole option for awarding an AMI System Agreement for any or all of the components. Vendors may propose contractual terms in writing they deem important for the PUD to consider. The PUD may or may not agree to incorporate any such terms in a final contract.

Vendors are requested to submit a Proposal for all components described in this RFP. Partnering and or subcontracting are encouraged if necessary to meet PUD requirements. Proposals that do not address all components may be considered non-responsive in the PUD's sole discretion.

The PUD reserves the right and has the sole discretion to:

- Reject any and all Proposals considered by the PUD to be non-responsive or not in the best interest of the PUD.
- Supplement, amend, or otherwise modify this RFP or cancel this RFP without substitution.
- Waive any or all informalities in the Vendor's Proposal or failures to comply with the RFP requirements.
- Request further information, presentations, demonstrations, and interviews from Vendors as needed to support the PUD's selection process of a preferred Vendor.
- Select any Proposal, or elements of any Proposal, that in the opinion of the PUD, represents the best value to the PUD, or otherwise is deemed to be in the PUD's best interest.
- Modify the procurement schedule.
- Award the AMI System Agreement without additional Proposal discussions with unsuccessful Vendors.
- If proposed by the Vendor, the PUD is willing to purchase some or all hardware and software under the Washington State contract pricing.

The AMI System RFP is available on the PUD website at [jeffpud.org/projects-studies](http://jeffpud.org/projects-studies) under the "Open RFPs heading. Interested Vendors that wish to receive official PUD communication in reference to the RFP shall sign and return the PUD Non-Disclosure Agreement attached to this RFP to Annette Johnson, Records Administrator, via e-mail at [ajohnson@jeffpud.org](mailto:ajohnson@jeffpud.org) at least 14 days before the RFP due date.

### **3. Overview of the PUD Electric and Water Utilities**

The PUD is a Washington State Public Utility District serving Eastern Jefferson County in Washington State. The System is located on the Quimper Peninsula and encompasses approximately 475 square miles, including the City of Port Townsend.

#### **3.1. Electric Utility**

The PUD purchased the electrical utility and its infrastructure in April of 2013. The electrical system serves approximately 19,000 industrial, commercial and residential customers using 30 miles of transmission, 350 miles of overhead distribution and roughly the same amount of underground distribution. The PUD has seven substations within its service area. The following is an approximate breakdown on the quantity and type of meters currently in service.

Form 2S: 17,500 meters

Form 4S: 400 meters

Form 9S: 100 meters

Form 12S: 300 meters

Form 16S: 150 meters

The electric utility purchases its bulk power from Bonneville Power Administration (BPA). BPA maintains a 115 kV substation and switch yard in Jefferson County.

The PUD does not own the current remote metering system only the individual meters. The PUD contracts with an outside vendor to read the meter system on a daily basis. This contractor owns the meter data transmission and collection system and the Cellnet modules in the meters. The existing system is generally older mechanical meters with one-way read capability.

The PUD has replaced a number of the Cellnet meters with its own Itron Centron R400 meters and are read on a monthly basis by an Itron Mobile Collector Lite and Itron FC300 handheld.

The successful vendor must provide a solution that seamlessly allows the PUD billing system to maintain full functionality as the meter reading input data transitions from these legacy systems to the new AMI System.

As a safeguard against a significant number of nonreporting endpoints by the new AMI System, the successful vendor must also provide the PUD with a secondary means to remotely read the meters. At a minimum, that equipment must be capable of reading 10% of the total deployed AMI Meter Population in one eight-hour day.

#### **3.2. Water Utility**

The PUD owns and manages its water system for typical purposes that include residential, commercial, industrial, and government uses. The PUD's water utility currently has more than 4,000 commercial and residential Meters. The water meters are Badger with an Itron ERT (50W, 60W, and 100W) that is read by an Itron mobile collection unit. A PUD owned Itron MVRS System processes all of the Itron Meter Data (electricity and water).

#### **3.3. Fiber Optic Network**

The PUD owns and operates a Survalent SCADA system comprised of approximately 45 miles of fiber optic cables that runs between the various PUD Substations and the Electric Service Center. The fiber optic network may be utilized for data transmission by a Vendor supplied two-way communication system

The PUD is working on a project that will bring fiber to the home in the Quilcene and Discovery Bay areas. Options that will utilize this fiber are encouraged.

#### **3.4. PUD Verizon Private Network**

The PUD is deploying a Verizon Private Network to serve the SCADA system that may be used for data transmission by a Vendor.

#### **3.5. PUD Customer Information System and Meter Reading Interface System**

The PUD's Customer Information System, Meter Reading/Billing Interface System, Geographic Information System, and Outage Management System are components of its National Information Solutions Cooperative (NISC) software. The AMI system shall interface with the PUD NISC software. Details and NISC contact information are available to Vendors upon request. MultiSpeak interfaces are acceptable.

### **4. Scope of Products and Services**

The following section defines the scope of products and services required for the procurement, installation, and implementation of the AMI System, which will be carried out in several phases as described in Section 4.4.

#### **4.1. Nondisclosure Agreement**

As a condition of the RFP, the PUD requires Vendor acceptance of the Nondisclosure Agreement (NDA) to gain any confidential information required by the Vendor to prepare a responsible proposal and bid sheet.

#### **4.2. Installation and Integration Requirements**

##### **4.2.1. General Installation and Integration Responsibilities**

The selected Vendor will provide the PUD with the required meters for installation by the PUD, or a PUD contractor. Due to the availability of funds and personnel, this period could extend over a two to three year period.

The selected Vendor shall coordinate with the PUD to develop a detailed implementation plan and schedule. The schedule should include any required outages and interruption to customer service and provide a description of the implications to the Electric or Water System functionality.

It is envisioned that the PUD will install all of the new meters in a regional approach, requiring the collection system to be designed to expand coincidentally or preceding the regional meter installations.

The Vendor shall be responsible for all other equipment required for the AMI system. The Vendor may propose an approach, utilizing the PUD equipment, crews, or PUD employed and approved Contractors, for field installation of devices that require mounting locations throughout the PUD System. In all cases the work shall be done only with the approval of the PUD.

##### **4.2.1.1. Site Surveys**

The Vendors may survey the PUD service area, information technology facilities and fiber optic network for use in preparing their Proposal and Bid Documents. If desired, the Vendor may conduct a RF propagation field study. GIS drawings are available upon request, once the NDA has been executed.



#### 4.2.1.2. **Meter Data Management System**

The Vendor is to provide a meter data management system (MDMS) to meet the PUD requirements and integrate with the PUD NISC and Survalent systems. The Vendor shall gain the approval of the PUD regarding the location and capacity of data storage requirements.

The MDMS must be able to output the appropriate billing determinates to the PUD existing customer information system and meter reading interface system allowing for future rate designs including, but not limited to, metered consumption, flat rates, tiered rates, time-of-use rates, prepayment and demand rates. A sample copy of the proposed MDMS System reports, along with any user defined reporting capabilities, shall be provided with the Vendor's Technical Proposal.

The MDMS is required to provide data validation, editing, storage, archiving, retrieval, and will interface with a large variety of critical utility business systems. The MDMS will provide the meter data storage and management platform, allow links to business applications and analysis tools to enable staff to make use of the AMI data and will supply available data to Customer Information Systems. The minimum services the MDMS will provide are collection, storage, management, and validation of meter readings (including estimations and data editing), meter asset management functions, support for virtual connects and disconnects (through the electric meters), load-limiting, on-demand reads, high/low usage monitoring, and coordination of service orders, and support for rate design and analysis.

The MDMS shall also provide support for customer service representatives, customer bill inquiries, real-time customer support via phone, e-mail, and online web access, data transfer to outage management system (OMS), enhanced customer support and information, electric system planning and design, system loss detection/estimation and other advanced applications.

#### 4.3. **Electric Meter and AMI Requirements**

The successful bidder shall supply all meters described in this specification and an Advanced Metering Infrastructure System (AMI) that is fully and completely compatible with the supplied meters.

The AMI system must interface with the PUD Survalent SCADA system, NISC customer information meter reading system that may include additional future customer information system modules.

The AMI system will provide near real time data to the PUD office for power and water consumption measured by each of the respective meters in the system hourly. The AMI system should also be capable of transporting data from third party devices for use by the Survalent SCADA System.

The Vendor must provide, and integrate all required information technology network hardware and software. The primary hardware and software are to be suggested by the Vendor and may be located at the PUD Irondale electric service center communications room with PUD approval.

All Software licenses shall be provided in the PUD's name.

The minimum AMI System requirements are outlined below. This list is not intended to limit innovative solutions and other options that meet or exceed the PUD requirements.

##### 4.3.1. **Electric Meter Requirements**

The following types of meters shall be provided:

- 
- Residential Meters with remote disconnect: Form 2S CL200 240V, or approved equal
- Small Business Meters: Form 2S Demand CL320 240V, Form 2S Demand CL200 240V, and Form 4S Demand CL20 120 to 480V, Form 12S Demand CL 200 120V, or approved equal
- Large Business/Commercial: Form 9S (8S) Demand CL20 120 to 480V, and Form 16S (15S, 14S) Demand CL200 120 to 480V, or approved equal

- Bidirectional Meters (for small distributed generation): Form 2S Net CL200 240V and Form 9S (8S) Meter CL 20 120 to 480V, or approved equal
- Residential Network Meters Form 12S CL200 120V, or equal
- Residential Network Meters with remote disconnect: Form 12S CL200 120V, or approved equal

#### 4.3.1.1. **Compatibility**

All new meters shall have the AMI Module installed as a factory component.

All new meters shall be fully compatible with the AMI specifications as stated below.

#### 4.3.1.2. **Functionality**

The following list is a set of minimum requirements for the meters used for the AMI system. This list is not intended to limit innovative solutions and options that meet or exceed the PUD requirements.

- All AMI Systems shall maintain time synchronization for all meters, nodes, and other devices connected to the network.
- Programable broadcast time setting.
- All AMI meters shall provide time-stamp capabilities.
- All AMI meters shall be uniquely identified in the network.
- All alarm, fatal and nonfatal errors, and consumption information shall be “pushed” as events occur or consumption periods end from the AMI module to the AMI server.
- All residential electric meters shall be capable of reporting meter reads hourly.
- All commercial electric AMI meters shall be capable of reporting meter reads every 15 minutes.
- All AMI meters shall have the ability to monitor and report voltage in a time frame that allows the utility to respond proactively to the information.
- All meters shall have remote programming capability, including firmware updates.
- All meters shall be able configurable for time of use (TOU), critical peak pricing (CPP) and real-time clock.
- All meters shall be capable of two-way communications.
- All meters shall support outage detection, restoration and reporting.
- All residential meters shall support tamper detection.
- All commercial meters shall have a minimum of 45 days of data storage capability (4 channels 15 minute intervals).
- All meters shall have near real-time on demand reading capability.
- All meters shall provide near real-time voltage quality data (outage alarms, restoration notices, and voltage alarms) to support system operations, and other distribution system applications.
- Remote disconnect meters must report disconnect status.
- All meters shall have consistent accuracy throughout the 20-year expected life of the meter of at least 0.5%.
- All meters to have compatibility and optional Power Quality functions available that can be communicated to the PUD electric SCADA system.
- All meters shall have a power outage carryover feature (battery or super capacitor).

- All meters shall be solid state digital.
- All meters to have upgradeability for advanced features.
- All demand meters shall be configurable for rolling 5-minute interval data (T=15 or T=60).
- All Meters shall have a Bidirectional metering feature option.
- All meters shall have field communication and reconfiguration capability.
- All Meters shall include Hot Socket detection
- Any special tools, communication hardware, or software required for field communication and configuration of the meter shall be supplied to the PUD.

#### 4.3.1.3. Data to Transmit

The meters shall have the functionality and ability to transmit the data elements listed below. The Bidder shall indicate to the PUD at the time of the bid if there are additional costs or fees above and beyond the cost included in the bid for specific data elements on the list below. The PUD shall then select the data elements to include prior to the awarding of the contract.

1. Consumption View for Single Phase Meters
  - a. Meter ID:
  - b. Meter Type:
  - c. Product:
  - d. Disconnect Status:
  - e. Meter Form:
2. Consumption Information
  - a. kWh:
  - b. kW:
  - c. kVAh:
  - d. kVA:
3. VQM
  - a. Last VQM Time:
  - b. Last Min Voltage:
  - c. Last Max Voltage:
  - d. Events:
  - e. Last Outage:
  - f. Last Sag:
  - g. Last Swell:
  - h. Date/Time:
  - i. Blink Count:
  - j. Last Blink Count:
  - k. Number of Blinks:
  - l. Minimum Voltage:
  - m. Maximum Voltage:
  - n. VQM Status Reports per interval:
4. For Poly-phase meters
  - a. Meter ID:
  - b. Meter Type:
  - c. Product:
  - d. Firmware Version:
  - e. Meter Form
5. Transformer
  - a. CT Ratio: if programed into meter
  - b. Transformer Ratio: if programed into meter
  - c. PT Ratio: if programed into meter
  - d. Installed Switches:
  - e. Device Selected:
  - f. Device Type:

- g. Assoc. Status: Associated
- h. Service Status: In Service
- 6. Consumption Readings
  - a. Last Read kWh:
  - b. Last Read kVAh:
  - c. Last Read kVARh:
  - d. Voltage Readings
  - e. Last Read Time:
  - f. Last Read Volts A: Volts
  - g. Last Read Volts B: Volts
  - h. Last Read Volts C: Volts
  - i. Current Readings
  - j. Last Read Time:
  - k. Last Read Current A: Amps
  - l. Last Read Current B: Amps
  - m. Last Read Current C: Amps
- 7. Power Quality
  - a. Last Read Time:
  - b. Power Factor:
  - c. Line Frequency (Hz):
  - d. Voltage Harmonic Content
  - e. Voltage Sag/Swell Qualification Period: (all phases)
  - f. Volts Phase A
  - g. Volts Phase B
  - h. Volts Phase C
  - i. Sag Voltage: Volts
  - j. Swell Voltage: Volts
  - k. Monitor Sag/Swell On/Off
  - l. Outage Monitoring
  - m. Phase A Outage Qualification Period: (1 – 10 sec.)
  - n. Phase B Outage Qualification Period: (1 – 255 sec.)
  - o. Phase C Outage Qualification Period: (1 - 255 sec.)
- 8. Peaks
  - a. Peak kW:
  - b. Peak Time:
  - c. Coincident kVA:
  - d. Reset Time:
  - e. Coincident kVAR:
  - f. Peak kVA:
  - g. Peak Time:
  - h. Coincident kW:
  - i. Reset Time:
  - j. Coincident kVAR:
  - k. Peak kVAR:
  - l. Peak Time:
  - m. Coincident kW:
  - n. Reset Time:
  - o. Coincident kVA:

#### 4.4. Project Scope and Expectations

The PUD goal is to deploy an AMI system covering 99.4% of the metered endpoints in the PUD service territory. The existing meters will be replaced with a solid state electronic meter designed to communicate with an AMI system capable of supporting the features discussed in this RFP. More than one communication technology may be necessary to meet geographic, population density, and availability constraints. Interoperability, therefore is going to be a key consideration in this project and in the selection of the AMI and MDMS systems.

The PUD is planning to implement the AMI system in multiple phases.

#### **4.4.1.Phase I – AMI System and Initial Meter Installations**

Install AMI system to include primary and backup systems.

Install 30 electrical meters for PUD commercial and industrial customers.

Install 500 electric meters for PUD residential customers.

This group shall be set up with final remote reading capability to include daily reads (hourly), ping ability, remote disconnect, demand reads, limited storage.

The Vendor shall begin AMI system training to PUD staff. This will involve two groups. One will be accounting/billing staff and the other will be engineering and operations. This initial training should be sufficient to allow the PUD to operate the Phase I installation.

#### **4.4.2.Other Phases**

The balance of the deployment will be coordinated and scheduled with PUD Operations after the successful completion of Phase I. It is anticipated that the meter deployment will proceed by selecting a number of small manageable geographic areas across the Utility Service District until full coverage is achieved.

### **4.5. AMI System Training**

The Vendor shall provide training to support the implementation and operation of the AMI system through all phases, as part of this proposal. The following is the minimum training the PUD requires, other pertinent training the Vendor suggests as advisable should be included in the proposal.

#### **4.5.1.Overall AMI System Introduction**

This training will be an introduction of the AMI system to include relevant services. This will be a general course and the intended audience will include most of the PUD staff.

#### **4.5.2.Electric Meter Installation**

This training will cover the installation of electric meters and the operations and maintenance. The intended audience of this course will be personnel involved with meter installation and maintenance and will include operations and engineering staff.

#### **4.5.3.AMI System Hardware and Software**

This section of training will include all of the AMI system components but not limited to; hardware, network software. The staff included with this training will be system operators and network personnel. This may include NISC and other Systems Vendors used by the PUD.

#### **4.5.4.Consumer Billing**

This section should include how to import and retrieve data from the AMI system and the PUD's current NISC customer information system. Included in this training specifically must be how to view and interpret near real-time consumer data and proper operation of remote disconnects. This training will include operations, administrative, customer service representatives and network staff. This may include NISC and other Systems Vendors used by the PUD

#### 4.5.5.Operations

The purpose of this training will be to instruct PUD system operators how to effectively use the AMI system and services. This training will include but not limited to; logging into the system, obtaining on demand meter readings, historical data, remote connect/disconnect, , field device operation and programming, configuring for various features and functions, communications with third party devices, any required System or Data maintenance, on site trouble shooting, and the outage management application. This training will include operations, network staff and may include NISC and other Systems Vendors used by the PUD.

### 5. General Proposal Requirements

#### 5.1. Proposal Due Date

Proposals will be due Wednesday, December 8<sup>th</sup> 2021 at the Jefferson PUD Operations Center at 3 pm PST. No late submittals will be accepted.

#### 5.2. Proposal Submittal

Proposals shall be enclosed in a sealed envelope or package and plainly marked on the outside of the envelope or package as:

**Jefferson PUD Metering System Upgrade Project  
Meter and Advanced Metering Infrastructure Proposal**  
Jefferson County PUD  
Attn: Alyson Dean  
310 Four Corners Road  
Port Townsend, WA 98368

If delivered by mail, the sealed envelope containing the proposal must be enclosed in another envelope or package addressed to the address above. Proposals may be submitted electronically per section 5.4 below, as long as received by the PUD on the same date and time. Each proposal, must also be include electronic versions in PDF format.

This RFP includes two separate Proposal sheets (Proposal Sheet A and Bid Sheet B) representing separate contract deliverables.

#### 5.3. Proposal submittal date

The proposals will be publicly opened and accepted Wednesday, December 8, 2021 at 3:30pm PST at 310 Four Corners Road Port Townsend, WA 98368.

#### 5.4. Copies

One (1) hard copy one pdf file (delivered either directly as an email attachment or via a hyperlink to a file sent via email to [adean@jeffpud.org](mailto:adean@jeffpud.org)) of the Bid(s) shall be included in each Bid package submitted.

#### 5.5. Firm Costs

All firm costs associated with the Proposal must be provided on the required Proposal Cost Sheets. Costs for options that the Vendor desires or deems useful to the PUD may be submitted on the Proposal Cost form or provided as attachments with the Bid. Costs must be firm through system startup. In the event circumstances delay the PUD from issuing the "Notice to Proceed" for this Equipment Supply contract by more than 90 days after the Bid Due Date, then all Bidders will be allowed to modify their costs, or the PUD may re-bid the contract. See the Selection Schedules in Part I, Sections 6 and 7 of this RFP.

## 5.6. Basic Requirements

Responses to this request and contracting for purchase of selected equipment must be made in compliance with the requirements and conditions contained herein.

## 5.7. Equipment Selection

Once the Proposal are opened and evaluated according to the criteria described and contained herein; one Equipment Supplier will be chosen to furnish and supply the equipment and services.

It is anticipated that two separate agreements will be executed relative to this project. The first will be the equipment supply and implementation assistance contract, and the second will be an annual technical support or managed services contract that will be provided by the AMI System Vendor.

## 5.8. Notice of Award

Following the selection of the Equipment Supplier and after approval from the Jefferson County PUD #1 Board of Commissioners, Notice of Award will be given to the successful Vendor.

## 5.9. Execution of Agreement by Vendor

The selected Vendor will be required to execute an Agreement within ten (10) calendar days from the date when the Notice of Award is delivered. The Notice of Award shall be accompanied by the necessary Agreement. In case of failure of the Bidder to execute the Agreement, the PUD may, at its option, consider the Vendor in default.

The Vendor may submit its own form of agreement for consideration by the PUD. The agreement will be reviewed by the PUD, who will then advise the Vendor of the acceptability of the alternate Agreement form or provide a different form of agreement.

## 5.10. Execution of Agreement by the PUD

The PUD upon receipt of the executed Agreements signed by the selected Vendor shall sign the Agreement and return an executed duplicate of the Agreement to the Vendor with a Notice to Proceed.

## 5.11. Familiar with RFP

The Vendor will be responsible for reading and being thoroughly familiar with the RFP Documents and the Scope of Work described in this RFP. Failure or omission to do any of the foregoing shall in no way relieve the Vendor of any obligation in respect to their proposal.

## 5.12. Complete Proposals

All items required to complete a properly operating Advanced Metering Infrastructure system shall be provided, whether specifically called out or not, unless identified in the Proposal to be supplied by others.

## 5.13. Equipment Quality

All materials and equipment incorporated in the Proposal shall be of new manufacture and shall be of the grade and quality required for AMI use and as described by these Specifications. All workmanship incorporated in the Work covered by the Contract is to be of the grade and quality described by these Specifications.

## 5.14. Open Competition

Where a specific brand or manufacturer's equipment, model, system, etc. is specified in these Specifications, no intention is made to be exclusive or limit competition, but rather to set forth the minimum standards for quality and performance.

**5.15. Minor Defects**

The PUD at its sole option reserves the right to waive any informalities or minor defects or reject any and /or all Proposals.

**5.16. Freight Costs Included**

Equipment shall be shipped to the project site. Freight costs to the accessible jobsite shall be included in the bid.

**5.17. General Experience and Quality**

The Vendor shall have experience that includes design, fabrication, and operation of similar equipment installed in systems of a size and complexity similar to that specified. All equipment shall be new, of the highest quality, industrial grade, and shall conform to NEMA, ANSI, the National Electric Code, all applicable industry standards, and to all Local, State, and Federal laws and regulations.

Each Vendor shall disclose in their proposal the Domestic Content (manufacture in the United States) percentage of the meters, critical system hardware, and the system software.

The Vendor shall have installation and startup experience on AMI systems currently in operation in the United States and shall include an experience list with the proposal.

**5.18. Equipment Shipping and Storage**

The Equipment Supplier shall be responsible for coordinating shipment with the PUD. The Equipment Supplier shall prepare and load all material and articles for shipment in such a manner as to protect it from damage in transit. The equipment shall include and be accompanied with a packing list. The Equipment Supplier shall be responsible for any and all damage to the equipment until it is delivered to the PUD. Equipment Supplier shall prepare a comprehensive packing list that includes every discrete assembly/shipping section including hardware. Every crate or skid shall have its own section of the comprehensive packing list that identifies everything in the particular box/crate/skid.

**5.19. Intent of Bidding Documents**

The intent of the technical requirements of the contract documents are to act as a functional specification. Although any standards specified will not be waived, the Bidder may propose alternate cost saving methods for approval. Alternate methods must be fully documented for evaluation in the bid.

**6. Proposal Submission and Evaluation Criteria**

**6.1. Proposal Evaluation Criteria**

Jefferson County PUD will select the proposal that is judged to be in the best interest of the PUD. The criteria for selection will be based on these factors and the overall proposal from vendors. The life expectancy of the Operating Software and Hardware System is to be at least 10 years from installation to obsolescence, and for the Meters 20 years.

1. Availability of equipment
  - a. Lead time for meters
  - b. Critical Replacement parts
  - c. Field Collection Units
  - d. Required Field tools
  - e. Third Party Devices
2. Software support
  - a. AMI System & Third Party Interfaces
  - b. Meter Programming and Operation



- c. Availability windows of the service
3. Hardware support
  - a. Field Collection Units
  - b. Meter
  - c. System Servers
  - d. Related System Communications Devices
  - e. Availability windows of the service
4. Warranty Terms and Duration
  - a. Software
  - b. Hardware
  - c. Meters
  - d. Third Party Devices
5. Schedule for Implementation
6. Maintenance Plan
  - a. Routine scheduled
  - b. Unforeseen Catastrophic Failures
7. Ability to Interface with NISC & Survalent Software Systems
8. System & Equipment Training Proposal
9. System Complexity
  - a. Anticipated mean time between failure of components
  - b. Number of System Hardware Components
  - c. Number of Operating Software critical subsystems
  - d. Ease of upgrade implementation for Software, Hardware, and Meters
  - e. Meets or exceeds Industry Standards for Operational Security
10. Total Installed Cost
  - a. Monthly reoccurring costs
  - b. Utilization of existing equipment and systems
  - c. Additional required infrastructure
  - d. PUD operating costs: Maintaining existing equipment, software and reads
11. Ability to Interface with existing equipment
  - a. Communications paths and interfaces
  - b. Existing Meter Platforms
12. PUD personnel familiarity
  - a. Software
  - b. Hardware
  - c. Programming
13. Communications
  - a. Types
  - b. Reliability expectations
  - c. Redundancy
14. Computer & interfaces
  - a. Error Reporting and System Checks
  - b. Operating System
  - c. Number and technical description of Servers
  - d. Number and type of third-party devices

15. Physical Location of equipment
16. Ability and ease of Onsite Meter Reads
17. Installation ease
18. Proposal Response Overview
  - a. The System meets the requirements and intention of the PUD RFP
  - b. The System Interfaces with PUD Systems
  - c. Review of any innovative unspecified option, service, technique, or capability
  - d. Vendor is capable of fulfilling the service and equipment requirements of the Project
  - e. Domestic Content of the system, meters, and critical hardware components
19. Evaluation of key components
  - a. Expected life span of meters
  - b. Expected life span of network equipment
  - c. Expected like span or batteries and backup systems
  - d. Expected life span or system as a whole

The PUD Review Committee will use the following scoring System to weight and evaluate the Proposals relative Merit based on the listed Criteria. The Review Committee's scored Recommendations will be given to PUD Management for a final decision.

- 25 points: **Total Cost**, including, but not limited to: System and Equipment, Installation, Field Implementation, New Infrastructure, Maintenance, recurring fees and charges, and ratio of function to cost (value engineering).
- 25 points: **System and Equipment Features**, including but not limited to Third Party Software Interface ability, System Services, Reports, Communication Latency, Upgradeability, Complexity, Reliability, Security, Flexibility
- 25 points: **Vendor Confidence**, including but not limited to past experience with similar Projects, Ability to deliver a fully functional System, Support capabilities long term, Support capabilities for implementation and startup, Compatibility with the PUD implementation Schedule, Equipment and Parts availability, quantity of third-party critical components
- 25 points: **Integration with existing PUD infrastructure**, including but not limited to interfacing with NISC and Survalent, Utilization of existing Communications, Utilization of existing Hardware, Utilization of existing Meters

The PUD may negotiate the AMI System Agreement and any proposed exceptions to the AMI System Agreement with the Vendor that receives the highest ranking in the selection committee's review of its Proposal. If terms cannot be reached, the second-ranked Vendor may be contacted for negotiations. The PUD may continue this process until agreement terms are reached with a successful Vendor, non-responsive Vendors are eliminated from negotiations, or the PUD withdraws the RFP.

## 6.2. RFP Proposal Content Requirements

The proposal shall contain the following information:

### 6.2.1. Cover Letter

The cover letter shall be a letter of interest defining the Vendor's understanding of the RFP and the intent of the AMI System the PUD is seeking. The cover letter shall also contain contact information for the Vendor.

### **6.2.2.Proposal**

The Proposal must outline how the Vendor will deliver the AMI System per the PUD specifications. The description should include metering equipment, two-way communications equipment, communications transmission, software, security, and the infrastructure required.

The Proposal shall indicate how the AMI System communications will incorporate the PUD communications network infrastructure. This will include any PUD responsibilities (i.e. server racks, power supply, expected daily successful communication rates, etc.). A propagation study for two-way wireless communications shall also be included. The following items shall also be included in the Proposal:

- An outline of Vendor's Implementation plan.
- Integration with the PUD NISC software.
- Sample copy of MDMS reports along with any user defined reporting capabilities.
- Other reporting capabilities such as load forecasting, customer usage profiles and transformer load sizing.
- A description of Vendor's ability to meet the functional requirements outlined in the RFP.
- Any features and functions not specified that are included with the proposed AMI System
- Domestic Content of the system, meters, and critical hardware components

The Proposal shall also include an outline of additional costs and duties that will be required by the PUD to operate and maintain the AMI System.

An expected timeline of work to be performed shall be submitted with the proposal. The timeline is to include items such as time periods of work to be performed, major milestones, testing and commissioning, etc. The timeline is to be in Microsoft Project of similar format. Any Vendor required deadlines will be stated in an awarded contract.

The Proposal shall include all Vendor costs to implement and deploy the AMI system including all applicable permits and taxes required to meet or exceed the requirements of this RFP. Any exceptions to the RFP shall be identified in the Proposal with costs listed. Any ongoing costs, such as managed services or system maintenance/support shall be listed with applicable taxes included.

The Vendor shall comply with all applicable prevailing wage requirements of Washington State, Department of Labor and Industries, as set forth in Chapter 39.12 RCW and Chapter 296-127 WAC as applicable.

### **6.2.3.Qualifications and Experience**

The Vendor shall describe their background and history in providing AMI systems and installation services. This should include the number of years of experience in AMI Systems, the services currently provided to other Utilities, contacts at those Utilities, and the Vendor's position in the AMI market. Any experience with integrating the AMI system with NISC, Survalent, or similar software that may be pertinent to this project.

### **6.2.4.Vendor's compatibly and interoperability with existing PUD NISC software and Survalent SCADA system**

The Proposal shall identify the compatibility of the proposed AMI system and the PUD owned NISC and Survalent Systems. This should include the process Vendor proposes to integrate the systems for the use of the PUD.

### **6.2.5.Any proposed exceptions to the RFP or AMI system agreement**

The Vendor shall state any exceptions to this RFP and/or AMI system agreement.

The Vendor must submit a Proposal that conforms to the PUD terms and conditions set forth in this RFP, and the AMI System Agreement. However, the Vendor may also propose exceptions or clarifications to the terms and conditions of the AMI System Agreement that will materially affect the Vendor's charge for services.

For each proposed exception or clarification, the Vendor must provide a description of the proposed exception or clarification that identifies the page number, section number, and paragraph number (if applicable) of the appropriate text and must include a revision of that text that reflects the Vendor's exception or clarification. For each exception the Vendor must state the amount by which the proposed service charge would change should the PUD agree to the proposed exception.

Should the Vendor propose alternative methods not contained in this RFP, or other equipment and system capabilities that will be available in the near future, it must identify in the attachment that the alternative Proposal is unsolicited and describe why it would result in a "better value" to the PUD. The PUD reserves the right to accept or reject any proposed exceptions or clarifications.

#### **6.2.6. Confidential Information**

The Proposal submitted in response to this RFP may contain technical data or other knowledge or materials that Vendors consider to be proprietary information. The Vendor may not propose that its entire Proposal is confidential. However, the Vendor may specifically identify the pages of the Proposal containing such information by marking the applicable pages "CONFIDENTIAL."

The Vendor's Proposal that is related to PUD and/or Vendor computer network security, or is related to the PUD confidential information provided the Vendor through the Non-Disclosure Agreement, shall be included as a separate document that is marked as confidential.

However, the Vendor understands that the PUD in its sole discretion may determine that disclosure of Proposal information is required under the state public disclosure act, Chapter 42.56 RCW, and the Vendor agrees to hold the PUD harmless with respect to any such disclosure. The PUD will provide the Vendor advance notice of any requests for disclosure of information identified by the Vendor as confidential consistent with its obligations under state law.

## **7. Bid Documents**

## 7.1. Proposal Cost Sheet A

**JEFFERSON PUD METERING SYSTEM UPGRADE PROJECT  
REQUEST FOR PROPOSALS FOR  
METERS AND ADVANCED METERING INFRASTRUCTURE (AMI)**

Proposal of \_\_\_\_\_ (hereinafter called "VENDOR"), organized and existing under the laws of the State of \_\_\_\_\_, doing business as \_\_\_\_\_. To Jefferson PUD (hereinafter called "OWNER").

In compliance with the Request for Proposals for Meters and Advanced Metering Infrastructure (AMI), VENDOR hereby proposes to perform all WORK for the supply of the required meters and the supply, installation, startup of the AMI component in strict accordance with the RFP all documents in The Request for Proposals for Meters and Advanced Metering Infrastructure (AMI), within the time set forth therein, and at the lump sum price stated below.

By submission of this PROPOSAL, each VENDOR certifies that their PROPOSAL has been arrived at independently, without consultation, communication, or agreement as to any matter relating to this PROPOSAL with any other VENDOR or with any competitor.

The undersigned VENDOR, having examined and determined the scope of the Request for Proposals for Meters and Advanced Metering Infrastructure (AMI) including RFP Documents, hereby proposes to perform the work described for the following unit cost amounts. Unit costs will be summed to a total project cost that will be used for evaluation of the RFP.

## Proposal Cost Sheet A

|              | Meas. & Pmt. Reference | Item                                                             | Quantity | Unit | Unit Price | Amount |
|--------------|------------------------|------------------------------------------------------------------|----------|------|------------|--------|
|              |                        |                                                                  |          | EA   |            |        |
| 2            | 16400SP                | Residential Meter W/Remote Disconnect Form #2S CL200 240V        | 17750    | EA   |            |        |
| 3            | 16400SP                | Small Business Meter – Form #2S Demand CL320 240V                | 500      | EA   |            |        |
| 4            | 16400SP                | Small Business Meter – Form #2S Demand CL200 240V                | 500      | EA   |            |        |
| 5            | 16400SP                | Small Business Meter – Form #4S Demand CL20 120-480V             | 400      | EA   |            |        |
|              | 16400Sp                | Small Business Meter – Form #12S Demand CL200 120V               | 100      |      |            |        |
| 6            | 16400SP                | Large Business Meter - Form #9S (8S) Demand CL20 120 -480V       | 80       | EA   |            |        |
| 7            | 16400SP                | Large Business Meter – Form 16S (15S, 14S) Demand CL200 120-480V | 150      | EA   |            |        |
| 8            | 16400SP                | Residential 12S CL200 120V 480V                                  | 200      | EA   |            |        |
| 9            | 16400SP                | Bidirectional Meter – Form #2S meter CL200 240V                  | 250      | EA   |            |        |
| 10           | 16400SP                | Bidirectional Meter – Form #9S (8S) meter CL20 120-480V          | 20       | EA   |            |        |
| 11           | 16400SP                | AMI Network Infrastructure:                                      | 1        | LS   |            |        |
| 11a          | 16400SP                | Local System (servers, software, installation, etcetera)         | 1        | LS   |            |        |
| 11b          | 16400SP                | Field Collection Devices (number to be determined by vendor)     |          | EA   |            |        |
| 11c          | 16400SP                | Other Infrastructure                                             | 1        | LS   |            |        |
| 11d          | 16400SP                | Deduct for removal of Water Meter Reading Requirement            | 1        | LS   |            |        |
|              |                        |                                                                  |          |      |            |        |
|              |                        |                                                                  |          |      |            |        |
| <b>Total</b> |                        |                                                                  |          |      |            |        |

Respectfully Submitted:

Signature: \_\_\_\_\_

Vendor: \_\_\_\_\_

Date: \_\_\_\_\_

## 7.2. Proposal COST SHEET B

### JEFFERSON PUD METERING SYSTEM UPGRADE PROJECT REQUEST FOR PROPOSALS FOR ANNUAL TECHNICAL SUPPORT & HOSTING SERVICES

Proposal of \_\_\_\_\_ (hereinafter called "VENDOR"), organized and existing under the laws of the State of \_\_\_\_\_, doing business as \_\_\_\_\_. To Jefferson PUD (hereinafter called "OWNER").

In compliance with the Request for Proposals for meters and Advanced Metering Infrastructure (AMI), VENDOR hereby proposes to provide technical support and data hosting services in the form of a renewable annual agreement in strict accordance with all documents in The Request for Bids for Meters and Advanced Metering Infrastructure (AMI), within the time set forth therein, and at the annual price stated below.

By submission of this PROPOSAL, each VENDOR certifies that their PROPOSAL has been arrived at independently, without consultation, communication, or agreement as to any matter relating to this PROPOSAL with any other VENDOR or with any competitor.

The undersigned VENDOR, having examined and determined the scope of the Request for Proposals for Meters and Advanced Metering Infrastructure (AMI) including RFP Documents, hereby proposes to perform the work described for the following annual amounts.

| No. | Meas. & Pmt. Reference | Item                                              | Quantity | Unit   | Unit Price | Amount |
|-----|------------------------|---------------------------------------------------|----------|--------|------------|--------|
| 12  | 16400SP                | Annual AMI System Support                         | 1        | Yearly |            |        |
| 13  | 16400SP                | Off Site AMI Systems Processing and Maintenance   | 1        | Yearly |            |        |
| 14  | 16400SP                | Deduct for removal of Water Meter Reading Support | 1        | Yearly |            |        |

Respectfully Submitted:

Signature: \_\_\_\_\_

Vendor: \_\_\_\_\_

Date: \_\_\_\_\_



## 8. NON-DISCLOSURE AGREEMENT

This Agreement, dated this XXth day of YYYY, 2021 by and between the Jefferson County PUD ("PUD") and XXXXXXXXXXX ("XXX").

WHEREAS, the PUD needs to share certain information with XXX to provide support for a meter replacement project for the PUD, which is directly related to the conduct of the utility's interest, and

NOW, THEREFORE, in consideration of the mutual agreements herein contained, the parties agree as follows.

1. Disclosures. For purpose of the Discussions, each party shall disclose to the other party such Confidential Information as the disclosing party, in its sole discretion, may choose to disclose. All Discussions between the parties shall be deemed to be disclosure of Confidential Information and neither party shall be required to take any further action to identify the information disclosed as Confidential Information. The parties will attempt as reasonably practicable to label as "Confidential" any Confidential Information before disclosure, but all documents exchanged pursuant to this Agreement shall be deemed to be Confidential Information without need for identification as such.

2. Confidentiality and Nonuse. The receiving party shall accept the Confidential Information of the disclosing party for the sole purpose of the Discussions between the parties and any activity of the parties in furtherance thereof and will not, without prior written consent of the disclosing party, use such Confidential Information except for such purpose. Except as provided herein, or as required by law, the receiving party further agrees not to disclose the Confidential Information to persons other than employees, officers, directors, attorneys, consultants, representatives, and agents of the receiving party who will perform all or a portion of the duties of the receiving party and who are obligated to keep such information in confidence (hereinafter designated as such parties' "Representatives"). Prior to disclosing Confidential Information to a party's Representatives, each such Representative will be made aware of the nature of the Confidential Information and will agree to be bound by this Agreement.

The obligation of the receiving party not to use or disclose Confidential Information of the disclosing party shall not apply to information which: (a) at the time of disclosure by the disclosing party is in the possession of the receiving party and was not acquired, directly or indirectly, from the disclosing party with knowledge of its confidential nature; (b) is acquired by the receiving party from third parties which, to the knowledge of the receiving party, have not received such information in confidence from the disclosing party or from other third parties; or (c) is now or hereafter becomes, through no fault of the receiving party, a part of the public domain by publication or otherwise; (d) is independently developed by the receiving party without the use of Confidential Information; (e) is disclosed to any court, regulatory agency, or any other party as required by law; or (f) which, in the receiving party's judgment, it is required or deems it's advisable upon advice of counsel to disclose under the Washington State Public Disclosure Act (RCW 42.56), the Washington Open Public Meetings Act (RCW 42.30, *et seq.*), or any other applicable public disclosure requirement. In connection with any disclosure intended pursuant to exceptions (e) or (f), the receiving party (i.e., the party that initially received the Confidential

Information that it intends to disclose) agrees to provide the disclosing party (i.e., the party that initially disclosed the Confidential Information) seven (7) days written notice of impending release and to cooperate with any legal action which may be initiated by the disclosing party to enjoin or otherwise prevent such release, provided that all expenses of any such litigation shall be borne by the disclosing party, including any damages, penalties, attorneys' fees, or costs awarded by reason of having opposed disclosure, and further provided that the receiving party shall not be liable for any release which is either compelled by process of law, or where notice was provided and the disclosing party took no action to oppose the release of information.

3. Duration of Confidentiality. Unless otherwise agreed to in writing, the party shall continue to have obligations of secrecy under this Agreement beyond the expiration of this Agreement.

4. Documents Remain Property of Disclosing Party. All documents given to the receiving party as Confidential Information pursuant to this Agreement, and all copies thereof, whether whole or partial, shall be and remain the property of the disclosing party. Each party in its capacity as receiving party shall deliver all such documents and all copies or excerpts thereof to the disclosing party promptly upon the request of the disclosing party.

5. No License. Nothing in this Agreement shall be construed as giving either party a license or any other right to sell or use the Confidential Information of the other party under this Agreement. Neither party acquires any patent, copyright, trademark, or other intellectual property rights under this Agreement; neither party has an obligation under this Agreement to purchase any service or item from the other party, or to deal exclusively with the party in any field; and neither party under this Agreement may use the Confidential Information of the other party for marketing purposes, or sell services, assets or products using or incorporating Confidential Information.

6. Remedies and Indemnification. The parties acknowledge that a breach of this Agreement by one party could cause damage to the other party which is irreparable and immeasurable in terms of monetary value. For this reason, the parties agree that this Agreement may be specifically enforced, and they consent to the entry of such restraining orders and injunctions as maybe necessary to prevent a breach of this Agreement and to carry out its terms. This remedy shall not be exclusive, and either party may have such other and further relief as may be permitted by law.

7. Governing Law. This Agreement shall be governed by and construed under the laws of the State of Washington.

8. Venue; Jurisdiction. The parties consent to the personal jurisdiction of the courts of the State of Washington with respect to any lawsuit to interpret or enforce this Agreement. The venue of any such lawsuit shall be Jefferson County, Washington unless otherwise agreed by the parties.

9. Attorneys' Fees. In the event either party to this Agreement finds it necessary to bring any suit, action, or other proceeding at law or in equity to interpret, enforce, or implement any of the terms, covenants, or conditions of this Agreement, the party prevailing in such action or proceeding shall be paid all of its reasonable attorneys' fees and costs by the losing party. If there is no prevailing party, the parties to the dispute shall each bear their own attorneys' fees and costs.

10. Severability. If any term, covenant, or condition of this Agreement is held to be invalid or unenforceable in any respect, such invalidity or unenforceability shall not affect any other provision

hereof and this Agreement shall be construed as if such invalid or unenforceable provision had never been contained in this Agreement.

11. Term. this Agreement shall (unless extended by mutual agreement in writing) terminate two years after completion of the installation of all meters. In no event, however, shall termination of this Agreement affect the rights and obligations arising under this Agreement with respect to Confidential Information.

12. Miscellaneous. Resolution No. 2016-36 in reference to a utility customer data privacy policy is incorporated into this Agreement as Exhibit A. This Agreement constitutes the entire agreement between the parties concerning the subject matter of this Agreement and may not be modified except in writing signed by a duly authorized representative of each party. This agreement may not be assigned by a party without the express written permission of the other party. This Agreement shall be binding upon and inure to the benefit of the successors and assigns of the parties hereto. This Agreement maybe executed in counterparts, each of which, together, shall be considered an original.

IN WITNESS WHEREOF, the parties have caused this Agreement to be executed on their behalf by their respective duly authorized representatives effective as of the day and year first above written.

XXXXXXXXXX

Jefferson County PUD

BY \_\_\_\_\_

BY \_\_\_\_\_

Title: \_\_\_\_\_

Title: General Manager

Date: \_\_\_\_\_

Date: \_\_\_\_\_