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## **Addendum No. 2**

**March 11, 2024**

This notice comprises Addendum No. 2 to the City of Santa Fe Springs Request for Proposals for Utility Billing Software and Implementation Services. This addendum responds to questions submitted by prospective bidders.

Please note that the deadline for submitting responses has been changed to **Thursday, April 4, 2024, at 2 PM PDT.**

**Question 1 - You mentioned "not too exceed" in terms of cost but have you identified/secured a budget for this project?**

**Response –** No budget has been identified yet; however, it should be noted that planning for this project/purchase is being conducted while we are engaged in the budget process for the upcoming fiscal year.

**Question 2 - At the start of the call, it was mentioned that you would like to better communicate with your customers. Would you talk a little more about what "better communication" looks like, and how you are hoping are a software solution will facilitate that communication?**

**Response –** Below is a list of features that the City is seeking. The City intends to enhance communication and increase customer satisfaction through these methods and channels. Please note that this list is not exhaustive.

### **Multi-Channel Communication**

Utilize the system's capabilities to communicate through various channels like email, SMS, mobile apps, and social media. Ensure customers can choose their preferred communication channels, improving the likelihood of messages being seen and acted upon.

### **Customer Self-Service Portals**

Implement self-service portals that allow customers to view and pay bills, track usage, and manage their accounts without needing to contact customer service. This will empower customers and reduce the volume of routine inquiries to customer support.

**Real-Time Notifications and Alerts**

Send real-time notifications for bill availability, payment confirmations, high usage alerts, and service issues. Keeping customers informed and helping them manage their utility usage more effectively, potentially leading to cost savings.

**Personalized Communication**

Use the data collected by the system to personalize communication. Tailoring messages based on usage patterns, payment history, and preferences can make communication more relevant and engaging to the customer.

**Interactive Billing Statements**

Offer digital, interactive billing statements that allow customers to view detailed usage data, compare their usage with previous periods, and access tips for reducing consumption. Enhancing transparency and engagement can improve customer satisfaction.

**Education and Engagement**

Use the billing system to educate customers about conservation methods and incentive programs.

**Feedback Mechanisms**

Incorporate easy-to-use feedback forms and surveys within the billing system and communication channels. Actively seeking and acting on customer feedback demonstrates a commitment to continuous improvement, which can help increase customer satisfaction.

**Accessible and Inclusive Communication**

Ensure communication is accessible to all customers, including those with disabilities. This might involve offering bills in different formats (e.g., large print, braille) and ensuring digital platforms are designed following web accessibility standards.

**Advanced Payment Options**

Offer various payment options such as mobile payments, automatic bank drafts, and payment plans to help reduce late fees and improve customer satisfaction.

**Question 3 - When will you post answers to these questions on the pre-bid call today and attendance on this call?**

**Response – Yes**

**Question 4 - Does a city business license expose a vendor to any city or state tax liability?**

**Response – No**

**Question 5 - is there a preference to cloud or on-premise deployment?**

**Response – Cloud-based**

**Question 6 - In regards to the noted RFP, does the City wish to convert data from the existing, legacy system? If so, what type of data and how many years' worth?**

**Response –** The City must convert data from the legacy system per the Records Retention Policy. A copy of this policy has been attached for reference. Most items must be retained for seven (7) years. The list of items that will need to be converted include:

Meter Read History – Read Date and Value  
Transaction History – Type, Date, and Amount

During the implementation process, additional items might be added to the list.

**Question 7 - The terminology listed in Appendix C: are terms negotiable if downselected by the city? For example, cancelation and indemnification were areas of concern to our legal. We are always happy to negotiate but wanted to confirm potential flexibility (or not) there.**

**Response –** The City will negotiate terms with the selected vendor after making a tentative award offer.

**Question 8 - City Business License Requirement: is this negotiable also? Springbrook is a national company conducting business across the US so our licensing is more broad than just a specific City. We have over 2,000 customers so our business status is to operate on a national basis within state guidelines and requirements.**

**Response –** Yes, this item can be discussed.

DocuSigned by:  
  
694841E527BA4A1... 3/11/2024  
**Micah Herd, Procurement Manager**

Office of Record	Record Series No.	Records Description	Retention / Disposition						Comments / Reference		
			Active (in office)	Inactive (Off-site, OD or Mfr)	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan		Destroy Paper after Imaged & QC'd?	
(OFR)											
<i>If the record is not listed here, refer to the Retention for City-Wide Standards</i>											
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>											
<i>HOLDS: Litigation, claims, complaints, <a href="#">pending records act requests</a>, audits and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>											
<b>ACCOUNTING / WATER</b>											
Admin. Services / Accounting / Water	FN-30	Bankruptcy Notifications	2 years	3 years	5 years			Mag, Ppr			Department Preference; GC §34090
Admin. Services / Accounting / Water	FN-31	Consumer Agreement Cards	2 years		2 years			Mag, Ppr			Department Preference; GC §34090
Admin. Services / Accounting / Water	FN-32	Direct Debit Registers, Water Cash Receipts, Meter Reads, Turn Ons, Closing Bills, Billing Registers	2 years	<del>5</del> -3 years	<del>7</del> 5 years	Yes: Until Paid		Mag, Mfr, OD, Ppr	S	Yes: After 5 years	Department Preference; <a href="#">Exceeds Meets</a> municipal government auditing standards; Published articles show 3 - 7 years; Statewide guidelines propose audit + 4 years; Published articles show 3 - 7 years; GC §34090
Admin. Services / Lead Div.	FN-33	Direct Debit Agreements / Authorizations	2 years		2 years			Mag, Ppr			Department Preference; GC §34090
Admin. Services / Accounting / Water	FN-34	Meter Change-Out Sheets	2 years		2 years			Mag, Ppr			GC §34090
Admin. Services / Accounting / Water	FN-35	Meter History Cards	P		P			Mag, Mfr, OD, Ppr	S	Yes: After 5 years	GC §34090

**RECORDS RETENTION SCHEDULE: ADMINISTRATIVE SERVICES**

Office of Record	Record Series No.	Records Description	Retention / Disposition						Comments / Reference
			Active (in office)	Inactive (Off-site, OD or Mfr)	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	
<i>If the record is not listed here, refer to the Retention for City-Wide Standards</i>									
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>									
<i><b>HOLDS:</b> Litigation, claims, complaints, <a href="#">pending records act requests</a>, audits and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>									
Admin. Services / Accounting / Water	FN-36	Senior Citizens Exemptions	Expiration + 2 years		Expiration + 2 years		Mag, Ppr		Department Preference; GC §34090
Admin. Services / Accounting / Water	FN-37	Water Applications	When No Longer Required		When No Longer Required		Mag, Ppr		Preliminary draft / transitory record; GC §34090
<a href="#">Admin. Services / Accounting / Water</a>	<a href="#">FN-37.1</a>	<a href="#">Water Billing: Appeals - Payment Delinquency &amp; Impending Discontinuation</a>	<a href="#">Final Decision + 2 years</a>		<a href="#">Final Decision + 2 years</a>		<a href="#">Mag, Ppr, Mfr, OD</a>	<a href="#">S</a>	<a href="#">Yes: After QC &amp; OD</a> <a href="#">Documented or attached to Customer Record in database GC §34090; H&amp;S §116908</a>
<a href="#">Admin. Services / Accounting / Water</a>	<a href="#">FN-37.2</a>	<a href="#">Water Billing: Non-payment Notices / Notice of Payment Delinquency &amp; Impending Discontinuation (Initial, Final)</a>	<a href="#">When No Longer Required</a>		<a href="#">When No Longer Required</a>		<a href="#">Mag, Ppr, Mfr, OD</a>	<a href="#">S</a>	<a href="#">Yes: After QC &amp; OD</a> <a href="#">Documented or attached to Customer Record in database GC §34090; H&amp;S §116908</a>
<a href="#">Admin. Services / Accounting / Water</a>	<a href="#">FN-37.3</a>	<a href="#">Water Billing: NSF Checks / Adjustments to Customer accounts</a>	<a href="#">When No Longer Required</a>		<a href="#">When No Longer Required</a>		<a href="#">Mag, Ppr, Mfr, OD</a>	<a href="#">S</a>	<a href="#">Yes: After QC &amp; OD</a> <a href="#">Documented or attached to Customer Record in database GC §34090; H&amp;S §116908</a>
<a href="#">Admin. Services / Accounting / Water</a>	<a href="#">FN-37.4</a>	<a href="#">Water Billing: Payment Plans: Amortization, Alternative Payment Plans, Deferrals, etc.</a>	<a href="#">Expiration or Completion of Payment Plan</a>		<a href="#">Expiration or Completion of Payment Plan</a>		<a href="#">Mag, Ppr, Mfr, OD</a>	<a href="#">S</a>	<a href="#">Yes: After QC &amp; OD</a> <a href="#">Documented or attached to Customer Record in database GC §34090; H&amp;S §116910</a>
<a href="#">Admin. Services / Accounting / Water</a>	<a href="#">FN-37.5</a>	<a href="#">Water Billing: Policy on Discontinuation of Residential Service for Nonpayment</a>	<a href="#">When Superseded - Minimum 2 years</a>		<a href="#">When Superseded: Minimum 2 years</a>		<a href="#">Mag, Ppr, Mfr, OD</a>	<a href="#">S</a>	<a href="#">Yes: After QC &amp; OD</a> <a href="#">Must post to Website; H&amp;S §116906; GC §34090</a>

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<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>										
<i><b>HOLDS:</b> Litigation, claims, complaints, <u>pending records act requests</u>, audits and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>										
<a href="#">Admin. Services / Accounting / Water</a>	<a href="#">FN-37.6</a>	<a href="#">Water Billing: Report of Annual Discontinuations of Residential Service</a>	<a href="#">Minimum 2 years</a>		<a href="#">Minimum 2 years</a>		<a href="#">Mag. Ppr, Mfr, OD</a>	<a href="#">S</a>	<a href="#">Yes: After QC &amp; OD</a>	<a href="#">Must post to Website; H&amp;S §116918; GC §34090</a>
Admin. Services / Accounting / Water	FN-38	Water Meter Applications	2 years		2 years		Mag, Ppr			GC §34090