CITY OF HIGH POINT AGENDA ITEM



TITLE: Meter Installation Vendor (MIV) Contract	
FROM: Jeremy Coble – Customer Service Director	MEETING DATE: June 3, 2024
PUBLIC HEARING: n/a	ADVERTISED DATE/BY: n/a
ATTACHMENTS: Scope Of Work	·
MIV Price Proposal	
Recommendation Form	

PURPOSE: The purpose of hiring a Meter Installation Vendor (MIV) for AMI is to ensure efficient inventory management and deployment of City-owned meters, utilizing the contractor's expertise in logistics and warehousing. This partnership aims to achieve comprehensive installation and service excellence, adhering to strict safety standards while proactively addressing on-site issues and validating installation integrity.

BACKGROUND: The city is currently making a strategic upgrade to its Utility services through the implementation of Advanced Metering Infrastructure (AMI). This comprehensive initiative entails the systematic replacement of all electric meters within the city's electrical grid. To ensure the project's success and adherence to the projected timeline, Allegiant has been selected as the vendor of choice. Leveraging Allegiant's extensive experience in meter installations, the city is poised to efficiently complete the AMI deployment, enhancing service delivery and operational efficiency.

BUDGET IMPACT: Funding is available in the Electric Capital Projects Fund.

RECOMMENDATION/ACTION REQUESTED: Staff are recommending that City Council approve, and the department be given the ability to award Allegiant with a contract for meter installation services for the amount of \$1,009,800.84. They were the selected vendor after an RFP process.



EXHIBIT A SCOPE OF SERVICES

Scope of Work

Contractor will be managing a project to provide inventory management and logistics for City owned meters in a Contractor's provided facility while providing the service for deploying such meters across the City distribution system.

Contractor shall make a viable attempt to install 100% of the active meters, other than any pre-agreed upon excluded meters before proceeding to the next metered location installations. Contractor will work with the City to make 3 attempts to exchange a meter before turning it back to the City (all three attempts are included in the pricing set forth below). The City will provide all new meters, endpoints, seals, and rings. Contractor will provide warehousing and material logistic support. All National Electric Safety Code, American National Standards Institute (ANSI), and OSHA guidelines will be observed and followed by the Contractor. Any problems found on site by the Contractor's employees will be reported immediately to the City. A review of services will be conducted at the end of the initial deployment area for installation validation.

Sections of the SOW

- I. Overview of Meter Installation
- II. Solution Technology and Methodology for Data Collection
- III. Customer Communication/Public Relations
- IV. Project Management and City Support
- V. Quality Assurance
- VI. Inventory, Warehouse, and Meter Testing
- VII. Pricing Assumptions
 - I. Overview of Meter Installation

1. Electric Meter installation services:

- a. Initiate contact with each customer (if at premise) to alert them of the electric meter change out to occur.
- b. If the premise contains more than 4 tenants, Allegiant will work with the facility to schedule a meter exchange time that is coordinated with the tenants for all meters to be exchanged at once.
- c. Inspection of each socket to verify suitability for purpose to support the new AMI meter. Specifically, this inspection is intended to verify that the socket and its internal connections will support the expected load without damage to the meter or socket.
- d. Remove and replace existing electric meter.
- e. Includes Standard GPS 3-5 meters
- f. Five photos will be provided:
 - i. As Found Site Photo
 - ii. Original meter in socket to clearly display the last meter reading.
 - iii. Empty socket (prior to installation of the new meter) to provide information about the condition of the socket.
 - iv. New meter installed to clearly show the meter serial number.
 - v. As Left site photo.

- vi. Additional photos will be taken for any meter's type that supports additional billing parameters or required evidence photo if available
- g. Meter socket to be sealed in accordance with project City's accepted practice.
- h. A door hanger will be left at every location indicating the meter was installed.

2. Polyphase meters

- a. Assume approximately 80% of the commercial meters have heavy bypass or test switches.
 - i. In the event a bypass isn't present then an outage appointment will be made with the business.
- b. All three phase installers use a full-face shield.
- c. Capture the readings
- d. Disconnect the load
 - i. If there is a bypass lever, we will engage the bypass
 - ii. Note: If we can't disconnect the load with a breaker or disconnect Allegiant will work with the City to fuse down the services or Return the Work Order to the City.
- e. Inspect the socket and service area
- f. We will remove the old meters
- g. Take voltage readings
- h. Inspect the socket again
- i. Install the new meter
- j. Seal the meter base
- k. Reconnect the load
- I. A door hanger will be left at every location indicating the meter was installed.

For additional meter installation procedures, please see the SOP Electric Meter Exchange Exhibit.

3. Meters that cannot be installed

- a. There are two classifications of Work Order types that cannot be installed:
 - i. Could Not Complete (CNC)
 - These are Work Orders where Allegiant has made at least one attempt to exchange the meter but could not successfully complete the exchange. Allegiant will make three attempts to exchange each meter. Reasons for not completing a Work Order can be as follows: Work order issue, obstruction, no access, no meter stock, requires an appointment, or unsafe animal. Allegiant will work with the City to define additional criteria if required.
 - ii. Return to Utility (RTU)
 - These are Work Orders where Allegiant attempted to exchange the meter but could not successfully complete the exchange and Allegiant is returning the responsibility for the meter exchange back to the City. Reason for not completing a Work Order and returning the Work Order to the City can be as follows: Customer Refusal, Site Obstruction, No Access, Meter/Socket Damage, De-Energized Service, Work Order Problem, Exchanged by the City, Tamper, and Other. Allegiant will work with the City to define additional criteria if required.

4. Specialty Meters

a. Allegiants Work Order Management system supports various specialty Work Orders: Work Orders can be flagged for medical alert, identifiers for form/class/voltage and City defined specialty services. In addition, any Work Order can be flagged designating that it has a required appointment.

5. Meters requiring support from City for meter exchange.

a. From time-to-time Allegiant may come across work orders and meters that require City support to accomplish the exchange. These requests can be for Work Orders that: may have incomplete/incorrect information, cannot locate, require supervision/escort, and/or require keys.

6. Make Safe or Tamper

- a. Allegiants personnel will wait onsite up to 45 min if a make safe event occurs where the City personnel is needed.
- b. Should Allegiant come across a suspect tamper location, Allegiant will follow the designated process as defined in the mutually agreed upon project plan.

II. Solution Technology and Methodology for Data Collection

1. Work Order and Data Integration

Allegiant Utility Services proprietary WMS, Peak Workflow[™], is purpose-built platform for mass deployment and exchange projects in the electric, water, gas and clean energy markets.

Digital data is captured in real-time, as a technician captures data and photos, it's uploaded to our cloud instantly, allowing full role-based visibility to everyone on the project including City staff, Program Managers, Project members and affiliate team members. Our digital platform reduces human error that can occur during large scale projects, ties seamlessly into standard operating procedures and provides a managed workflow. All information captured in the field can be efficiently reviewed and approved with the quality assurance features. We know you are not always connected, so our mobile app is smart about managing data allowing Technicians to work even in the remotest areas throughout the day.

Allegiant's project team will work with your staff to develop and manage the transfer of data throughout the course of the project. On average, it takes 3-4 weeks to set up all the files and build out our work order system for your project. Project start up and WMS configuration can be condensed to as little as 2 weeks as Allegiant's team has capability execute testing and setup quickly.

Key Peak Workflow Features

Project Management

- Track and visualize production across services installed vs. not installed
- Overall status of all work orders
- Understand all current activities in the field
- Quality assurance tools
- Customer Service
 - Searchable data and photos
 - Determine technician locations, view badges

Data Management

- Completion Reports
- Technician Performance Reports
- Inventory Control Reports
- Daily Activity Emails
- Customized, Managed and Detailed Workflow
 - Enables in-field quality controls
 - Enforce SOP per project
 - Flexible per project requirements

- Capture data, photos and GPS
- Data validation on save



2. Workflow Status Overview

Information flows from the City's CIS into our Service Delivery and Quality Assurance processes then exchange data is delivered back to the City CIS system.



3. Primary Data Transfer File requirements:

a. Location File

- b. Post Meter Change Out export File
- c. Meter Manufacturing File
- d. Blackout Dates
- e. Damaged Meter
- f. 3 Strike File



4. Location File

Allegiant will work with the City to create a CSV file that contains the following representative data elements or similar to load into our "Peak Workflow" program conducting the meter exchanges in the field.

Sample:

Allegiant	Allegiant Utility Services Template - Existing Meter Location File CSV Preferred File Format									
Instructions: Update column headers, column positions, and length constraints as appropriate to Utility's CIS.										
	Column Header		Column Positio							
Required	from Utility CIS	Length	n	Notes						
х	Account	50	1	Customer account number						
х	Old Meter Number	20	2	Old meter serial number (Primary Key)						
х	Last kWh Reading	10	3	Typical KWH reading						
x	Meter Form	15	4	i.e. 2S, 2S-SD, etc.						
х	Read Notes	100	5	Notes regarding service location, gate codes, etc.						
х	SubArea	50	6	i.e. Substation						
x	Circuit Number	50	7	i.e. Feeder						
х	Billing Cycle	50	8	Code or name of cycle						
х	Route	50	9	Code or name of route						
х	Old Latitude	15	10	Can be 18 if needed for NISC						
х	Old Longitude	15	11	Can be 19 if needed for NISC						
	-									

Account	Old Meter Number	Last kWh Reading	Meter Form	Read Notes	SubArea	Circuit Number	Billing Cycle	Route	Old Latitude	Old Longitude
34534534	TS3242353	3425	2S	Gate Code:1234	02	04	03	01	44.9453656	-93.3358785
64645456	TS329546	4203	25		01	03	02	02	43.5403388	-109.6520657

- a. Location files are typically loaded daily to Allegiant during the course of the project to keep the data up to date.
- b. Files are typically sent across Allegiant's SFTP Hosted site.

2. Post Meter Change out Import File

a. Allegiant will work with the City to create a file for import into CIS for the meter change outs.

Sample:

Allegiant Ut	ility Services Temp	late - C	ompleted	Meter Exchange File (Extended)	CSV Preferred File Format
Instructions: L	Jpdate column headers,	column po	ositions, and	l length constraints as appropriate to Utility's CI	S
	Column Header to		Column		
Exported	Utility CIS	Length	Position	Notes	
х	Account	10	1	Customer account number	
х	Old Meter Number	15	2	Old meter serial number	
х	Old kWh Reading	10	3		
	Old kW Reading	10		Optional based on project	
	Old kVa Reading	10		Optional based on project	
	Old kVar Reading	10		Optional based on project	
х	New Meter	15	4		
х	New kWh Reading	10	5		
	New kW Reading	15			
	New kVa Reading	15			
	New kVar Reading	15			
	New Meter Dial	10			
х	Reading Date	8	6	UTC unless otherwise agreed	
	Meter Set Number	5			
	Demand Code	5			
	Service Location	20			
	Map Number	20			
х	New Latitude	15	7	Can be 18 if needed for NISC	
х	New Longitude	15	8	Can be 19 if needed for NISC	

Account	Old Meter Number	Old kWh Reading	New Meter	New kWh Reading	Reading Date	New Latitude	New Longitude
235345653	T\$3453453	3452	81929392934	0	2019-01-01	43.5403388	-109.6520657

- b. Allegiant will work hand and hand with you to ensure the file formats are correct through the data validation period of the project.
- c. Meter change out files will be provided daily by using our SFTP site.
- d. Photo uploads to the CIS or other applicable are available in batches of 1000 meters which equates to 5000 photos. We use the standard XML format.

5. Meter Manufacture file "MMF"

- a. The MMF is loaded into Allegiant's WMS, Peak Workflow, program and used to validate the new meters going into the field ensuring we have the correct bar coding.
- b. MMF files are typically provided through the course of the project as meter shipments are delivered.

6. Handheld Devices

- a. Allegiant will provide IOS devices that are capable of cellular data and Allegiant's work order management system.
- b. Meters tracked in map interface on your handhelds
- c. Flexible meter reading inputs
- d. New meter numbers scanned in



7. Web Tools

a. Meters install detail screen

Peak Workflow	Test Project - Quality Assurance	08
Project		
Work Orders	Work Order: 234987925 Will OWATTHOURS WILL OWATTHOURS WILL OWATTHOURS	
Ali Assets Assignments	vec.ser 240 server underground 1000000000000000000000000000000000000	
Quality Assurance Meters Network Install Field Test Pole Inspection Site Survey	According Residential Listen 39055 Conv According 200 CL FORM 25 TYPE MS TA30 240 V 24 3 51 255 TA30	
Reporting Project Summary Project Import Project Export	3W Construction of the state of	
	Comments Ex1+8214 Statut (Statut (Statu (Statut (Statut (Statut (Statut (Statut (Statut (Statu	

8. Deployment Progress Tracking

During the project onboarding process, Allegiant Utility Services will align with the City on the desired production schedule. Typically, this is based on cycle and route or substation and circuit depending on the utilities network infrastructure and other considerations. This can be focused on single geographic regions or multiple areas again determined in collaboration with the City.

Allegiant's WMS has two primary views for work order assignment: list view and map view. The same powerful filter and search functionality is available on both views. Filters include status, district, substation, circuit, cycle, route, book, user-defined groups, form factor, technician, and other custom filters. Search includes serial numbers, customer, account, address, and other fields. Filter and search

efficiently locate appropriate record set for analysis and assignment to skilled Technician.

Map views add capabilities to visualize by status including blackouts, district, substation, circuit, cycle, route and assignment. Further shapes can be drawn directly on filtered or unfiltered views on the map to make assignments or save a user-defined group for later quick reference. For example, a program manager may filter the map view down to a specific circuit or route and form factor, then use the geoshape tools to split it into assignments across differently skilled Technicians.

- a. Updated daily
- b. Color coded to track completed and skipped meters.
- c. Organized by Technician and meter type



9. City Access

- a. Unlimited access to web portal included in base contract during the deployment.
- b. Secure login for each user
- c. Custom reporting

10. Application and Support

Allegiant's proprietary WMS, Peak Workflow, offers robust configuration to meet City's requirements. The City will have 24/7 access to the Peak Workflow web portal and related Mobile App. The City staff will be assigned various roles that allow access to appropriate features. The City Admin users will have the broadest access to the web portal with capabilities to view status, view planned progress and dashboards, assign work and inventory to Technician users and report all data. The City Viewer users will have access to the same views/reports as Admin's however, cannot affect change on the data. Technician users will have access to work order maps and data capture features within the Mobile App.

- a. Administration
 - i. areas including features like quality assurance, user management and multi-project reporting for an Account-level Admin will not be accessible.
- b. Support
 - i. Allegiant provides 24X7 support on the applications.
- c. Validations

- i. In field validation of every data entry ensures accurate information.
- ii. New meter numbers scanned for accuracy and compared to preloaded list of available meters.
- iii. Meter reading dates preloaded to allow City-defined blackout period.
- iv. Meters cannot be changed out during blackout period.
- v. Database post processing ensures data integrity and accurate billing.
- vi. Follow up reporting provided for meters not found in field, or inaccessible for change out after multiple efforts to access site.

11. High Level Security and Architecture



- Modern Technology Stack
- 99.9% Uptime
- Encrypted Web and Mobile access via SSL/TLS
- Data and file-level encryption
- Cloud infrastructure protected within Virtual Private Network
- Redundant backups and clustered database instances
- Allegiant hosted SFTP encrypted site for file sharing with a City secure set of credentials for an SFTP client

III. Customer Communication/Public Relations

With our many years of deployment experience across some the most diverse terrain we understand there will be access issues, customer challenges, and many other dynamics to manage in the field. A proactive communication strategy is key to a successful deployment. As an example, we will collaborate with The City to identify areas in your service territory that may have high sensitivity to the deployment activities. For these areas, Allegiant will be proactive in notifying the local law enforcement to give them a heads up, which will reduce the number of call outs they will have and help us manage the customers.

1. Call Center

- a. Inbound calls are staffed 24/7, outbound calls are daily 7:00 AM 7:00 PM CT.
- b. #800 assigned to City's project
- c. IP-based platform support call forwarding to the City contacts
- d. Call Volume Reporting and Issue tracking
- e. Recording for calls and voicemail provided upon request

f. Allegiant's call center Is capable of warm call transfers as mutually agreed upon in the project planning via defined subject matters

2. Customer Communication and Literature

- a. Post Cards and Door Hangers
 - i. Work collaboratively with the City to design pre-installation postcards and post-installation door hangers that meet City's requirements.
 - ii. Support the City communication strategy for its customers.
- b. Meter Installation FAQ
 - i. Work collaboratively with the City to produce content that meet City's requirements.
 - ii. Suggest media options Allegiant has found successful.

3. Meter Installation Escalation Procedures:

- a. Tamper
 - i. In the event tampering is discovered at meter location the Technician will do the following:
 - 1. Notify the appointed City revenue protection contact.
 - 2. Notify the Allegiant Utility Services Project Manager.
 - 3. Standby onsite until a City representative arrives.
 - 4. Provide a statement if required.
 - 5. Take photo of the evidence
- b. In the event of an unsafe condition at the meter location the Technician will:
 - i. Notify the appointed City service contact.
 - ii. Notify the Allegiant Utility Services Project Manager.
 - iii. Stand by onsite until an Allegiant or City representative arrives.

4. Customer Claim

Allegiant has exchanged millions of meters over the years and customer service issues do arise. As a company charter, Allegiant uses lessons learned and continuous improvement to advance our service offerings. Allegiant categorizes customer claim issues into two groups:

1: "Direct Cause" from the Technician visit to the property:

Some examples are turned a disconnected switch off and did not turn it back on resulting in spoiled food in refrigeration units; drove over or into something causing direct damage to property; damaged something around the meter socket while conducting the meter exchange. These types of issues are quickly resolved with the customer and are paid by Allegiant through either self-funding or our insurance company.

2: "Effect" Issues that arise because of the effect of changing the meter: Examples of these issues of this nature are: TV no longer works after the outage at the residents because of the meter exchange, No one answered the door when knocking and the meter was exchange and the residents lost work on a PC, garage door opener that was linked to the wireless router loses its IP connectivity and the customer does not know how to re-establish a link to the router.

These types of issues are resolved with the customer on a case-by-case basis. It is Allegiant's general position that we do not pay for any claim resulting from power outage due to the meter exchange.

Allegiant tracks all issues and claims in a Service Tracking system. This system allows Allegiant to manage all issues to closure and tracks our Service Level performance.

Allegiant will be responsible for resolving at Allegiant's expense all claims as a result of "Direct Cause" damage by our Technician due to the meter exchange. Allegiant will include all incurred expenses of the City, should they be needed to resolve an Issue.

Allegiant commits to communicating with the customer for all issues/complaints within 24 hours of initial notification for corrective actions or proposed solutions.

IV. Project Management and City Support

1. Project Management

Tentative High-Level Project Milestones

Project schedule is subject to Mutually agreed upon dates and additional City objectives & requirements as defined by the project.

•	Onsite Kick-off Meeting Milestone						
	• Objectives:						
	 Identify key players and work streams. Establish Timeline and Key Deliverables Establish work groups and follow up meetings. 						
٠	Onsite Operational Review and Material Forecast	TBD					
٠	Initial Data Exchange Milestone						
٠	Data Validation Milestone	TBD					
•	 WOM's Training and Orientation Milestone 						
•	 WOM's Workflow Testing Milestone 						
٠	Initial Deployment Area Start and Field Validation Milestone	TBD					
•	Full Deployment Startup Electric Meters						
•	Meter Installation Completion	TBD					
•	Project Completion	TBD					

2. Project Support for Concepting and Planning (1-2 Months)



<u>Project Team</u> - Project Manager, IT, Metering, Stores and Logistics, Purchasing, Customer Service Representative, Marketing, Safety, Quality, and Smart Grid (AMI) Lead, AMI Vendor

Support Initiatives:

- Charter Project Sponsor, Key Stakeholders, Project Team, Billing, District Leadership, Service Center Support for Make Safe & Tamper
- Project Plan Project Team
- Implementation/Installation/Quality Team Project Team, RF Infrastructure
 District rollout plan
- Data Integration Team Project Manager, IT, CSR/MSR, 3rd Party Billing
- Material Logistics Team Project Team, Warehousing, District Leadership
- Customer Experience Project Manager, Marketing, CSR/MSR, Billing

• Stakeholder updates - Project Team and Select Stakeholders

3. Project Support for Implementation and Closeout (20 Months)



<u>Project Team</u> - Project Manager, IT, Metering, Stores and Logistics, Purchasing, Customer Service Representative, Marketing, Safety, Quality, and Smart Grid (AMI) Lead, AMI Vendor

Support Initiatives:

- Implementation/Installation/Quality Team Project Team, RF Infrastructure
 - Safety & Quality
 - Pre-deployment Plan for district rollout
 - District rollout plan
- Material Logistics Team Project Team, Warehousing, District Leadership
- Customer Experience Project Manager, Marketing, CSR/MSR, Billing
- Stakeholder updates Project Team and Select Stakeholders

4. Allegiant Project Team

Position	Quantity	Responsibilities/Qualifications/Notes				
Executive Lead	1	Allegiant's CEO will be directly responsible for the overall success of City's deployment.				
Project Sponsor/Contract Manager	1	Allegiant's COO will be your project sponsor.				
Project Managers/ Deployment Managers	1	Allegiant will assign an experienced project manager and deployment manager to coordinate execution of field assignments.				
Meter Install Supervisors/ Lead Hands	1	Allegiant will have one experienced individual assign to manage the work crews. The individuals will have experience in running crews of similar size and scope.				
Meter Installers	3	Allegiant will assign three seasoned technicians.				
Trainers	1	Allegiant will assign a trainer to conduct training on any unique requirements specific to City.				
Call Center Supervisors	1	Allegiant's individuals will be responsible for coordinating staff and working with City.				
Call Center Representatives		Allegiant individuals will be combination of AmeriCall and Allegiant staff.				
Health and Safety Manager	1	Allegiant's Director of Operations and Safety will be responsible for the overall program.				

5. Project Charter and Project Plan

The City and Allegiant will work collaboratively to support the development of the Project Charter and Plan with a cross functional group of employees. Allegiant will look for support from the City in the following areas: Project Sponsor, Key Stakeholders, Project Management, Billing, IT, Metering, Service Center Support for Make Safe,

Stores and Logistics, Customer Service Representatives, Safety, Quality, Marketing, and Smart Grid (AMI) group. Only appropriate employee will be required to support each effort by discipline.

The kick-off meetings and Workshops on deployment planning activities will take place prior to the deployment ramp-up period. Workshop and meeting schedules and topics will be finalized and agreed-upon by the City during planning activities. The City will provide its appropriate policies and procedures.

6. City/AMI Vendor/Allegiant will mutually work on the following:

- Within Allegiant's project lifecycle define City/AMI Vendor specific project milestones.
- Define Unique City/AMI Vendor Requirements and Scope
- Organize the project into phases.
- Define desired project schedule including elements of the AMI system.
- Define City specific project deliverables within Allegiant's project timeline.
- Work from Allegiant's standard model to establish City project life cycle elements to drive a consistent process or methodology for conducting the work.
- Identify the stakeholders for communication on project status.
- Establish the City criteria for governance of Employees, Resources, Services, and work performed.
- Identify unique City elements for validity, correctness, and completeness of deliverables.
- Based upon Allegiant's SOP define the additional standards for monitoring and control.
- Identify additional City/AMI requirements to Allegiant's Quality & Safety standards.
- Define additional reporting metrics required based upon Allegiant's established: daily, weekly, and monthly reporting.
- Establish variance action plan for issues.
- Define the City escalation procedures for effective issue resolution.
- Establish the requirements to City's standards for a formal system of change control and change management.
- Establish the City/AMI Vendors resource plan to integrate with Allegiant's services.
- Work from Allegiant's meter exchange SOP to accommodate any City/AMI vendors requirements.
- Review and amend Allegiant's methods, expectations, procedures, and standards such that all work will be completed in compliance with policies.
- Mutually agree with all parties for oversight and instruction on City-specific work practices.
- Allegiant will work hand in hand with City to review and modify our communication protocols to align with City and their project objectives.
- Allegiant will work collaboratively with the City team to monitor progress and make the appropriate adjustments, achieving the overall deployment targets set for each week.
- Allegiant will conduct a Weekly meeting in support of the status of the project. Allegiant will manage and run the meeting.

7. The City is asked to support the following:

- Participate in the initial Work Order Management design setup, data collection and transfer processes which are key to successfully conducting bulk meter exchanges.
- Obtain Support of the Cayenta Representative to gain access to Cayenta PWF Interface for export and consumption of bulk meter data.
- Participate with the integration with Cayenta PWF Interface to generate a meter location file daily that can transfer data to Allegiant's Work Order system.
- Support the meter exchange data generated from Allegiant's Work Order management system up into Cayenta PWF Interface for a bulk meter exchange.
- Responsible for procuring all meters and other City-supplied hardware & equipment to Allegiant's primary warehouse location.

- Will follow-up with accounts that are documented and reported to be unreachable or un-installable.
- Provide a resource should the Installer identify any risks or issues.
- Support Key access for a given premises.
- Allegiant recommends maintaining a three-month rolling meter inventory. This provides sufficient meter stock for installation variability and delivery delays.

V. Quality Assurance

1. Quality Program overview

- a. Allegiant will conduct a 100% audit on all installations for the initial week of each meter category.
- b. Allegiant will conduct a random in-field sample audit of 2% of all installations throughout the project.
- c. Audit processes include the following:
 - i. Site visits
 - ii. Picture reviews
- iii. Data validation
- d. Allegiant will conduct a 100% record and picture review of electric meters to validate old read, new serial number, Form, Class, Hot Socket, and Seal installation.

2. Return to Utility (RTU) Threshold

Allegiant will periodically issue work orders as RTU to the City as part of the installation services being conducted. If over 3% of all work orders worked result in RTU, not including any meters intentionally exchanged by the City staff, the City reserves the right to temporarily halt work and to reassess the RTU process, including developing a mitigation and change order plan with Allegiant.

3. In Field Audits

Allegiant Utility Services Leads are tasked with performing job observation surveys in the field. These job observations cover the various steps in the installation process both from a safety and quality perspective. There will be two main leads for the City project.

Allegiant's Leads will execute a "Spot It and Stop It" method for critical safety or quality issues identified during the job observation survey. The observer will follow up with the Technician after the completion of the task for minor efficiency or quality issues. Any quality issues will be corrected while on site. If the observed Technician is performing the job outside of the required process, the observer will make an immediate determination if the Technician can continue working without further retraining or stand down activities. Should the observer identify a gap in a process or requirements, the observer will submit a "Near Miss" report which results in Allegiant leadership becoming involved in the situation. If the failure is the result of the Technician who has been trained and re-trained, a determination of Technician's ability to remain on the project will be made by Allegiant's leadership.

4. Record Review

Throughout the day Allegiant conducts a 100% record review of completed work orders as the technician works their assignments. Records will be processed to support a minimum of one file delivery daily encompassing records completed the previous working day. No records will be allowed to move forward until any discrepancy has been resolved.

5. Installation Warranty

Allegiant will provide a 12-month warranty on installation craftsmanship based on installation date.

VI. Inventory, Warehouse, and Meter Testing

1. Warehousing

- a. Allegiant will be responsible for providing warehouse space that meets the following requirements:
 - i. Cubicle for warehouse associate and/or field lead
 - ii. Wi-Fi access
 - iii. Access to the bathroom
 - iv. Sheltered staging area for techs to load/unload their trucks to protect City assets.
 - v. Dedicated dumpster or area for broken-down cardboard
 - vi. Dedicated receptacle for old seals, rings, stretch wrap & trash
 - vii. Forklift to move meter pallets from storage area to staging area
 - viii. Pallet jack or pushcart
 - ix. Staging area in the warehouse for techs to drive/back trucks in to load/unload materials.

2. Inventorying

- a. Allegiant will receive Meter Manufacturing Files (MMF) from the City, or the City may opt to allow manufacturer to grant Allegiant access to the MMF directly, pending further workflow definition during implementation.
- b. Allegiant will land the inbound inventory and store the inventory in an impound location prior to lot acceptance testing.
- c. Upon lot acceptance from the City, Allegiant will release inventory for deployment to its technicians.
- d. Allegiant will deliver completed work orders to the City for reconciliation of meter inventory against its systems.
- e. The City reserves the right to extract as-needed quantities of meters from Allegiant's inventory during implementation.

3. Material Handling

- a. City issued keys and barrel lock tools will be tracked per technician.
- b. All meter inventory received by Allegiant will be secured in Allegiant's facility.
 - i. Receive and Log all New Meter Shipments
 - 1. Scan all pallets
 - 2. Physical Count
 - 3. Segregate by form and class
 - 4. Provide BOL and other supporting documentation to the City
 - 5. Register Inventory to an impounded status
- c. Timing
 - i. Technician will log new meter inventory received daily
 - ii. Reconcile installed meter with current new meter inventory weekly
- d. Technician will return old meters daily
 - i. Old meter serial numbers on outside of box
 - ii. Initials of tech and date on outside of box
- e. Old meters will be palletized and shrink-wrapped

4. Meter Disposal

- **a.** Allegiant will hold all removed meters for a quarantine period of at least 30 days. At the end of the quarantine period Allegiant will dispose of all old meters in a safe manner.
- 5. Meter Testing

- a. New Electric Meter Testing
 - i. Upon receipt of new electric meters, perform accuracy tests on a designated test pallet comprising 10% of the shipment, in accordance with ANSI standards
 - ii. Allegiant shall deliver the results of testing in an agreed-upon format to contain at least the meter serial and percentage accuracy at various test conditions
 - iii. The City may opt to defer or stop testing at their sole discretion throughout the project.
- b. Allegiant Utility Services will conduct a sample test on all incoming shipments of new electric meters for this project.
 - i. Test all form factors with the following criteria:
 - 1. 10 Spin Full Load
 - 2. 2 spin Light Load
 - 3. 2 spin Power Factor
 - ii. Test additional criteria on polyphase meters
 - 1. A Element Full Load (Unity Power Factor)
 - 2. B Element Full Load (Unity Power Factor)
 - 3. C Element Full Load (Unity Power Factor)
 - iii. Validate Faceplate
 - iv. Validate Meter Program & Metrology Version
 - v. Validate RF Radio Firmware and DCW
 - vi. Validate T-Seal.
 - vii. Electronic delivery of all test records
 - viii. Reseal all meters
 - ix. Rebox all meters
 - x. Provide pass\fail report per shipment.
 - xi. Test a minimum of a box of 4 meters per form factor for small quantities.
 - xii. Assume one week processing time from date sample meters arrive at Allegiant facility.

VII. Pricing Assumptions

General Pricing Assumptions

- 1. Assume net 30-day payment on completed work bi-monthly.
- 2. Assumes 20 Months of provided Facilities.
- 3. Location Data provided by the City will be accurate.
- 4. Allegiant will provide a 12-month warranty on installation craftmanship based on installation date.
- 5. Assumes Work Order deployment can follow an adjacent meter to meter deployment.
- 6. The project mobilization is assumed for a onetime movement of the installation team for deployment. If demobilization occurs during the project due to reasons beyond Contractor's control (e.g., lack of materials and inventory, lack of data or account information), additional contingency fees may be assessed. These fees are only applicable to be assessed for additional cost of demobilization and remobilization occurring after the start of the project.
- 7. If Allegiant is forced to demobilize due to lack of inventory which delays the program, Allegiant will invoice additional costs for facilities on a month for month basis.
- 8. Any specific requirements not covered under this Exhibit will be reviewed, any additional costs will be a mutually agreed upon change order or revision to the proposal.
- 9. Allegiant will make three attempts per meter before 3 striking.
- 10. Allegiant will not charge for 3 strike meter exchange.

- 11. Standby times of 45 minutes for make safe events are included.
- 12. Meter or endpoint installation unit pricing Includes all labor, tools, vehicles, & fuel.
- 13. Meter installation unit pricing is for standard meter installation assuming meters are "Like for Like" for normal installations, exclusive of repairs to or modification or replacement of service lines, meter boxes.
- 14. Any badging requirements will be done prior to the start of the project provided by Allegiant.
- 15. The City will provide Allegiant safe access, including keys and gate codes (gated communities) to all City accessed locations.
- 16. Work will not be performed at locations where it is reasonable that damage may occur to customer's property. These locations will be considered an RTU.
- 17. Allegiant will not be responsible for replacing meters that are obstructed by landscape or excessive tree/plant roots in the boxes, unless otherwise authorized to conduct box replacements. These locations will be considered an RTU.
- 18. Allegiant will have company branded vehicles. It is understood that the City will provide logoed signage to Allegiant.
- 19. Work provided by Allegiant will not be prevailing wage or Union.

City of High Point, NC									
			Installation Servic	es					
Item/Service	Quantity		Unit Price		Extended Price	Notes/Comments			
Professional Services (add other line items as necessary)									
Mobilization	1	\$	2,500.00	\$	2,500.00				
Flat File Exchange Set-Up	1	\$	6,500.00	\$	6,500.00				
Project Management	1	\$	9,800.00	\$	9,800.00				
	1	\$	4,800.00	\$	4,800.00				
Performance Bond	1	¢	23 265 00	¢ ¢	23 265 00				
Item 7		Ψ	25,205.00	ŝ	-				
Subtotal				\$	46,865.00				
Excilition (add other line items on personal)									
Storage & Equipment Warehousing	20	¢	3 652 00	¢	73 040 00				
Office Space and Facilities	20	¢ ¢	1 000 00	¢	20,000,00				
Heavy Equipment (forklifts, etc.)	20	ŝ	1,000.00	ŝ	20,000.00				
Storage Containers	20	Ψ	1,100.00	ŝ	-				
Restroom Facilities				ŝ	-				
Additional Insurance	20	\$	200.00	\$	4,000.00				
Item 7				\$					
Subtotal				\$	119,040.00				
Meter Replacement Installation									
Electric Meter Replacements	Quantities a	re es	stimate.						
2S CL200 240V	37,960	\$	19.32	\$	733,387.20				
2S CL200 240V Demand	/16	\$	19.32	\$	13,833.12				
2S CL320 240V Demand	152	\$	19.32	\$	2,936.64				
12S CL200 120V / 480V	246	\$	26.89	\$	6,614.94				
16S CL320 120V / 480V	1,346	\$	26.89	\$	36,193.94				
Subtotal	40 420			ې \$	792 965 84				
				- T					
- / · · · · · · · ·									
Other Fees (add other line items as necessary)	Quantities a	rees	stimate.	¢	20 700 00				
New Electric Meter Accuracy (Acceptance) Testing	4,000	¢	7.08	¢	30,720.00				
Itom 3	40,420	φ	0.50	φ	20,210.00				
Item 4									
Item 5				\$	-				
Subtotal				\$	50,930.00				
Total Installation Cost				¢	4 000 000 04				
Total Installation Cost				Þ	1,009,800.84				
Optional Work (add other line items as necessary)									
Electric Work									
A-Base Conversion	1	\$	88.35	\$	88.35				
K-Base Conversion	1	\$	68.12	\$	68.12				

FINANCIAL SERVICES Purchasing Division



BID RECOMMENDATION

DEPARTMENT Customer Service										
COUNCIL AGENDA DATE: 6/3/2024										
BID NO.: 17-01102	24 co	NTRACT NO.:		DATE OPEN:	1/11/2024					
DESCRIPTION:										
The city is currently making a strategic upgrade to its Utility services through the implementation of Advanced Metering Infrastructure (AMI). This comprehensive initiative entails the systematic replacement of all electric meters within the city's electrical grid. To ensure the project's success and adherence to the projected timeline, Allegiant has been selected as the vendor of choice. Leveraging Allegiant's extensive experience in meter installations, the city is poised to efficiently complete the AMI deployment, enhancing service delivery and operational efficiency.										
PURPOSE:										
The purpose of hiring a deployment of City-ow achieve comprehensiv on-site issues and vali	The purpose of hiring a Meter Installation Vendor (MIV) for AMI is to ensure efficient inventory management and deployment of City-owned meters, utilizing the contractor's expertise in logistics and warehousing. This partnership aims to achieve comprehensive installation and service excellence, adhering to strict safety standards while proactively addressing on-site issues and validating installation integrity.									
COMMENTS:										
1										
RECOMMEND AWAR	^{D TO:} Allegiant			AMOUNT: 1,0	09,800.84					
JUSTIFICATION:		5 g.								
Choosing Allegian reasons: Quality, r	t as the Meter Insta eliability, and cost	allation Vendor (MI effectiveness.	✓) is justified	for several o	compelling					
ACCOUNTING UNIT	ACCOUNT	ACTIVITY	CATEGO	DRY BU	DGETED AMOUNT					
631799	533701	631001001905	40202	2	1,009,800.84					
	(
	TOTAL BUDG	ETED AMOUNT								
DEPARTMENT HEAD	Jeremy Co	Digitally signed by Jero Date: 2024.05.16 09:3	emy Coble 5:34 -04'00' DAT	E: 5/16/23						
The Purchasing Division concurs with recommendation submitted by the Customer Service and recommends award to the lowest responsible, responsive bidder Allegiant in the amount of 194 000 900 94										
PURCHASING MANAGER: Digitally signed by Candy E. Harmon Date: 2024.05.16 11:14:28 -04'00' DATE: 5/16/2024										
Approved for Submission to Council										
FINANCIAL SERVICES	S DIRECTOR: Bobb	y Fitzjohn Digitally signed by Date: 2024.05.23 C	Bobby Fitzjohn 8:12:32 -04'00' DATI	≡: 5/23/24						
CITY MANAGER:										