

**CONTRACT FOR SERVICES**

THIS AGREEMENT (referred to as "Agreement" or "Contract" herein) is made and entered into this \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_, by and between the CITY OF MANTECA, a municipal corporation of the State of California (hereinafter referred to as "CITY"), and

**Concord Utility Services**

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Consultant

**24619 Washington Avenue, Suite 202 Murrieta CA 92562**

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MAILING ADDRESS CITY STATE ZIP

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CONSULTANT'S STATE LICENSE CLASSIFICATION & NUMBER (if required) hereinafter referred to as "Consultant". "Parties" as used herein refers to the City and Consultant, collectively.

WITNESSETH:

A. WHEREAS, CITY desires to enter into this Agreement for services for Water Meter and Endpoint Replacement.

B. WHEREAS, CITY desires to retain CONSULTANT to provide these services by reason of its qualifications, applicable license(s), and experience for performing such services, and CONSULTANT has offered to provide the required services on the terms and in the manner set forth herein.

NOW, THEREFORE, in consideration of their mutual covenants, the parties hereto agree as follows:

**AGREEMENT**

**1. SCOPE OF SERVICES:**

A. Consultant shall do all work, attend all meetings, produce all reports and carry out all activities necessary to completion of the services described in **Exhibit "A"**. This Contract and its exhibits shall be known as the "Contract Documents." Terms set forth in any Contract Document shall be deemed to be incorporated in all Contract Documents as if set forth in full therein. In the event of conflict between terms contained in these Contract Documents, the more specific term shall control. If any portion of the Contract Documents shall be in conflict with any other portion, provisions contained in the Contract shall govern over conflicting provisions contained in the exhibits to the Contract.

To eliminate doubt, in the case of conflict between Consultant's proposal or Consultant's attachment and the City's Contract and attachments, the City's Contract and attachments shall take precedence over Consultant's proposal and attachments.

B. Consultant enters into this Contract as an independent contractor and not as an employee of the City. The Consultant shall have no power or authority by this Contract to bind the City in any respect. Nothing in this Contract shall be construed to be inconsistent with this relationship or status. All employees, agents, contractors or subcontractors hired or retained by the Consultant are employees, agents, contractors or subcontractors of the Consultant and not of the City. The City shall not be obligated in any way to pay any wage claims or other claims made against Consultant by any such employees, agents, contractors or subcontractors, or any other person resulting from performance of this Contract.

C. The Consultant agrees it has satisfied itself by its own investigation and research regarding the conditions affecting the work to be done and labor and materials needed, and that its decision to execute this Contract is based on such independent investigation and research.

**2. TERM OF CONTRACT**

A. The services of Consultant are to commence upon execution of this Agreement and shall be completed and this Contract terminated on **December 31, 2026**, unless otherwise extended in writing by the mutual agreement of both parties.

B. The City Manager or his or her designee may, by written instrument signed by both Parties, extend the duration of this Contract in the manner provided in Section 5, provided that the extension does not require the payment of compensation in excess of the maximum compensation set forth in Section 3, Compensation.

**3. COMPENSATION:**

A. The Consultant shall be paid in accordance to the attached Payment Schedule in **Exhibit "C"**. Consultant charges separately for certain costs incurred in the representation, as well as for any disbursements to third parties made on City's behalf. Such costs and disbursements include, for example, the following: mileage (at the IRS rate in effect at the time the travel occurs), overnight delivery and messenger services. Consultant shall be reimbursed for expenses related to travel, for example (flights, hotels, meals). However, Consultant shall not make travel arrangements or incur costs on behalf of City without prior written authorization to incur said expenses, and in no event shall total compensation under this Contract exceed **Eight Hundred Twenty-Nine Thousand Nine Hundred Fifty Dollars (\$829,950.00)** without City's prior written approval unless Consultant incurs any additional costs resulting from delays caused by the City.

B. Said amount shall be paid upon submittal of weekly invoices showing completion of the tasks performed during that week. Consultant shall furnish City with invoices for all expenses as well as for all materials authorized by this Contract. The invoices shall be submitted on a weekly basis and shall be paid within thirty (30) days from date of the City's receipt of each invoice. If City disputes an invoice, City must give written notice of the dispute to Consultant within ten (10) days of the invoice date. If City gives written notice of the dispute within the required ten (10) days, it shall, at such time as the notice is given, pay the undisputed amount of the invoice and the disputed portion shall be resolved by the Parties in good faith and accordance with the dispute resolution requirements in Section 17.

**ATTACHMENT 1**

C. If the work is halted at the request of the City, compensation shall be based upon the proportion that the work performed bears to the total work required by this Contract, subject to Section 4.

**4. TERMINATION:**

A. This Contract may be terminated by either party, provided that the other party is given not less than thirty (30) calendar days' written notice (delivered by registered mail) of intent to terminate

B. The City may temporarily suspend this Contract, provided that the Consultant is given written notice (delivered by certified mail, return receipt requested) of temporary suspension. If City gives such notice of temporary suspension, Consultant shall immediately suspend its activities under this Contract

C. Notwithstanding any provisions of this Contract, Consultant shall not be relieved of liability to the City for damages sustained by the City by virtue of any breach of this Contract by Consultant, and the City may withhold any payments due to Consultant until such time as the exact amount of damages, if any, due the City from Consultant is determined

D. In the event of termination, the Consultant shall be compensated as provided for in this Contract, except as provided in Section 4C. Upon termination, the City shall be entitled to all work, including but not limited to, appraisals, inventories, studies, analyses, drawings and data estimates performed to that date in accordance with Section 7 hereof.

**5. AMENDMENTS, CHANGES OR MODIFICATIONS:**

Amendments, changes or modifications in the terms of this Contract may be made at any time by mutual written agreement between the parties hereto and shall be signed by the persons authorized to bind the parties hereto.

**6. EXTENSIONS OF TIME:**

Consultant may, for good cause, request extensions of time to perform the services required hereunder. Such extensions shall be authorized in advance by the City in writing and shall be incorporated in written amendments to this Contract in the manner provided in Section 5.

**7. PROPERTY OF CITY:**

A. It is mutually agreed that all materials prepared by the Consultant under this Contract shall become the property of the City, and the Consultant shall have no property right therein whatsoever. Immediately upon termination, the City shall be entitled to, and the Consultant shall deliver to the City, all data, drawings, specifications, reports, estimates, summaries and other such materials as may have been prepared or accumulated to date by the Consultant in performing this Contract which is not Consultant's privileged information, as defined by law, or Consultant's personnel information, along with all other property belonging exclusively to the City which is in the Consultant's possession.

B. Additionally, it is agreed that the parties intend this to be a contract for services and each considers the products and results of the services to be rendered by Consultant hereunder (the "Work") to be a work made for hire. Consultant acknowledges and agrees that the Work (and all rights therein, including, without limitation, copyright) belongs to and shall be the sole and exclusive property of the City.

**8. COMPLIANCE WITH ALL LAWS:**

A. Consultant shall comply with all applicable laws, ordinances, and codes of federal, State and local governments, and shall commit no trespass on any public or private property in performing any of the work authorized by this Contract. It shall be City's responsibility to obtain all rights of way and easements to enable Consultant to perform its services hereunder. Consultant shall assist City in providing the same.

B. Consultant warrants to the City that it is licensed by all applicable governmental bodies to perform this Contract and will remain so licensed throughout the progress of the Work, and that it has, and will have, throughout the progress of the Work, the necessary experience, skill and financial resources to enable it to perform this Contract.

**9. WARRANTIES AND RESPONSIBILITIES - CONSULTANT:**

A. Consultant agrees and represents that it is qualified to properly provide the services set forth in **Exhibit "A"** in a manner which is consistent with the generally accepted standards of Consultant's profession.

B. Consultant agrees and represents that the work performed under this Contract shall be in accordance with applicable federal, State and local law in accordance with Section 17A hereof.

C. Consultant shall designate a project manager who at all times shall represent the Consultant before the City on all matters relating to this Contract. The project manager shall continue in such capacity unless and until he or she is removed at the request of the City, is no longer employed by Consultant, or is replaced with the written approval of the City, which approval shall not be unreasonably withheld.

D. Consultant shall provide corrective services without charge to the City for services which fail to meet the above professional and legal standards and which are reported to Consultant in writing within sixty (60) days of discovery. Should Consultant fail or refuse to perform promptly its obligations, the City may render or undertake performance thereof and the Consultant shall be liable for any expenses thereby incurred.

**10. SUBCONTRACTING:**

None of the services covered by this Contract shall be subcontracted without the prior written consent of the City, which will not be unreasonably withheld. Consultant shall be as fully responsible to the City for the negligent acts and omissions of its contractors and subcontractors, and of persons either directly or indirectly employed by them, as it is for the negligent acts and omissions of persons directly employed by Consultant.

**11. ASSIGNABILITY:**

Consultant shall not assign or transfer any interest in this Contract whether by assignment or novation, without the prior written consent of the City which will not be unreasonably withheld. However, claims for money due or to become due Consultant from the City under this Contract may be assigned to a financial institution, or to a trustee in bankruptcy, without such approval. Notice of any assignment or transfer whether voluntary or involuntary shall be furnished promptly to the City.

**12. INTEREST IN CONTRACT:**

Consultant covenants that neither it, nor any of its employees, agents, contractors, subcontractors has any interest, nor shall they acquire any interest, direct or indirect, in the subject of the Contract, nor any other interest which would conflict in any manner or degree with the performance of its services hereunder. Consultant shall make all disclosures required by the City's conflict of interest code in accordance with the category designated by the City, unless the City Manager determines in writing that Consultant's duties are more limited in scope than is warranted by the category designated by the City code and that a narrower disclosure category should apply. Consultant also agrees to make disclosure in compliance with the City conflict of interest code if, at any time after the execution of this Contract, City determines and notifies Consultant in writing that Consultant's duties under this Contract warrant greater disclosure by Consultant than was originally contemplated. Consultant shall make disclosures in the time, place and manner set forth in the conflict of interest code and as directed by the City.

**13. MATERIALS CONFIDENTIAL:**

All of the materials prepared or assembled by Consultant pursuant to performance of this Contract are confidential and Consultant agrees that they shall not be made available to any individual or organization without the prior written approval of the City, except by court order.

**14. LIABILITY OF CONSULTANT-NEGLIGENCE:**

Consultant shall be responsible for performing the work under this Contract in a manner which is consistent with the generally-accepted standards of the Consultant's profession and shall be liable for its own negligence and the negligent acts of its employees, agents, contractors and subcontractors. The City shall have no right of control over the manner in which the work is to be done but only as to its outcome, and shall not be charged with the responsibility of preventing risk to Consultant or its employees, agents, contractors or subcontractors.

**15. INDEMNITY AND LITIGATION COSTS:**

To the fullest extent permitted by law, Consultant shall indemnify, defend, and hold harmless the City, its officers, officials, agents, and employees against all claims, damages, demands, liability, costs, losses and expenses, including without limitation court costs and reasonable attorneys' fees, arising from Consultant's negligent acts or negligent failure to act, errors, omissions or willful misconduct incident to the performance of this Contract except such loss or damage caused solely by the active negligence, sole negligence, or willful misconduct of the City. The provisions of this paragraph shall survive termination or suspension of this Contract.

**16. CONSULTANT TO PROVIDE INSURANCE:**

A. Consultant shall not commence any work before obtaining, and shall maintain in force at all times during the duration and performance of this Contract, the policies of insurance specified in this Section. Such insurance must have the approval of the City as to limit, form, and amount, and shall be placed with insurers with a current A.M. Best's rating of no less than A VII (an NR rating is acceptable for Worker's Compensation insurance written with the State Compensation Insurance Fund of California).

B. Prior to execution of this Contract and prior to commencement of any work, the Consultant shall furnish the City with certificates of insurance and copies of endorsements providing evidence of coverage for all policies required by the Contract. The Consultant and its contractors and subcontractors shall, at their expense, maintain in effect at all times during the performance of work under the Contract not less than the following coverage and limits of insurance, which shall be maintained with insurers and under forms of policy satisfactory to the City. The maintenance by Consultant and its contractors and subcontractors of the following coverage and limits of insurance is a material element of this Contract. The failure of Consultant or of any of its contractors or subcontractors to maintain or renew coverage or to provide evidence of renewal may be treated by the City as a material breach of this Contract. Approval of the insurance by the City shall not relieve or decrease any liability of Consultant.

1. Commercial General Liability Insurance.

a. Consultant shall maintain commercial general liability insurance with coverage at least as broad as Insurance Services Office form CG 00 01, in an amount not less than two million dollars (\$2,000,000) per occurrence and four million dollars (\$4,000,000) minimum limit for general aggregate for bodily injury, personal injury, and property damage, including without limitation, blanket contractual liability. If a general aggregate limit applies, either the general aggregate limit shall apply separately to this project/location or the general aggregate limit shall be twice the required occurrence limit. Consultant's general liability policies shall be primary and shall not seek contribution from the City's coverage, and be endorsed using Insurance Services Office form CG 20 10 (or equivalent) to provide that City and its officers, officials, employees, and agents shall be additional insureds under such policies. For construction projects, an endorsement providing completed operations coverage for the additional insured, ISO form CG 20 37 (or equivalent), is also required.

b. Any failure to comply with reporting provisions of the policies by Consultant shall not affect coverage provided the City.

c. Coverage shall state that Consultant insurance shall apply separately to each insured against whom claim is made or suit is brought, except with respect to the limits of the insurer's liability.

d. Coverage shall contain a waiver of subrogation in favor of the City.

2. *Automobile Liability.* If the vehicles are brought onto city facilities, covering any auto, or of Contractor has no owned autos, hired, and non-owned autos, the Contractor shall maintain automobile liability with limits no less than one million dollars (\$1,000,000) minimum limit per accident for bodily injury and property damage.

3. *Workers' Compensation and Employers' Liability.* Consultant shall maintain Workers' Compensation Insurance and Employer's Liability Insurance with limits of at least one million dollars (\$1,000,000). Consultant shall submit to City, along with the certificate of insurance, a waiver of subrogation endorsement in favor of City, its officers, agents, employees, and volunteers.

4. *Professional Liability.* Consultant shall maintain professional liability insurance, if required, that insures against professional errors and omissions that may be made in performing the Services to be rendered in connection with this Agreement, in the minimum amount of two million dollars (\$2,000,000) per claim and in the aggregate. Any policy inception

date, continuity date, or retroactive date must be before the effective date of this agreement, and Contractor agrees to maintain continuous coverage through a period no less than three years after completion of the services required by this agreement.

5. All Coverages.

a. Each insurance policy required by this Agreement shall be endorsed to state that coverage shall not be suspended, voided, cancelled, or reduced in limits except after thirty (30) days' prior written notice has been given to the City, except that ten (10) days' prior written notice shall apply in the event of cancellation for nonpayment of premium.

b. All self-insurance, self-insured retentions, and deductibles must be declared and approved by the City.

c. Evidence of Insurance - Prior to commencement of work, the Consultant shall furnish the City with certificates, additional insured endorsements, and waivers of subrogation evidencing compliance with the insurance requirements above. The Consultant must agree to provide complete, certified copies of all required insurance policies if requested by the City.

d. Acceptability of Insurers - Insurance shall be placed with insurers admitted in the State of California and with an A.M. Best rating of A- VII or higher.

e. Subcontractors and Consultants - A category of risk and the applicable insurance requirements will be determined on a "per subcontractor" or "per consultant" basis, considering the particular work to be done by the subcontractor or consultant and the interrelationship of that work to other work being conducted by the Consultant.

6. No other provision of this Agreement or any attachment thereto shall reduce the insurance or indemnity obligations imposed under this Section.

C. In addition to any other remedy the City may have, if Consultant fails to maintain the insurance coverage as required in this Section, the City may obtain such insurance coverage as is not being maintained, in form and amount substantially the same as is required herein, and the City may deduct the cost of such insurance from any amounts due or which may become due Consultant under this Contract.

D. No policy required by this Contract shall be suspended, cancelled, terminated by either party, or reduced in coverage or in limits unless Consultant has provided thirty (30) days prior written notice by certified mail, return receipt requested, to the City.

E. Any deductibles or self-insured retentions in excess of \$10,000 must be declared to, and approved by, the City.

F. The requirement as to types, limits, and the City's approval of insurance coverage to be maintained by Consultant are not intended to, and shall not in any manner, limit or qualify the liabilities and obligations assumed by Consultant under the Contract.

**17. MISCELLANEOUS PROVISIONS:**

A. Compliance with Laws. Consultant shall keep itself fully informed of, shall observe and comply with, and shall cause any and all persons, firms or corporations employed by it or under its control to observe and comply with, applicable federal, state, county and municipal laws, ordinances, regulations, orders and decrees which in any manner affect those engaged or employed on the work described by this Contract or the materials used or which in any way affect the conduct of the work.

B. Unlawful Acts. Consultant shall not engage in unlawful employment discrimination. Such unlawful employment discrimination includes, but is not limited to, employment discrimination based upon a person’s race, religious creed, color, national origin, ancestry, physical handicap, medical condition, marital status, gender, citizenship, or sexual orientation.

C. Record Retention. Consultant shall maintain and make available for inspection by the City and its auditors accurate records of all of its costs, disbursements and receipts with respect to any work under this Contract. Such inspections may be made during regular office hours at any time until six (6) months after the final payments under this Contract are made to the Consultant.

D. Notice. All notices that are required to be given by one party to the other under this Contract shall be in writing and shall be deemed to have been given if delivered personally or enclosed in a properly addressed envelope and deposited in a United States Post Office for delivery by registered or certified mail addressed to the parties at the following addresses:

City:

**Danny Lopez  
Water Meter Services Supervisor  
City of Manteca  
1001 W. Center St.  
Manteca, CA 95337**

Consultant:

**Ryan Cooper  
Vice President of Operations  
Concord Utility Services  
24619 Washington Ave, Suite 202  
303.322.3955  
Ryan@concordus-inc.com**

E. Governing Law and Venue. This Contract shall be interpreted and governed by the laws of the State of California, and any legal action relating to this Contract shall take place in the Superior Court, County of San Joaquin.

F. Waiver. Waiver of any breach or default under this Agreement shall not constitute a continuing waiver of a subsequent breach or default of the same or any other provision under this Contract.

G. Severability. If any provision of this Contract is held to be invalid, illegal or otherwise unenforceable by a court of competent jurisdiction, the remaining provisions of this Contract shall continue in full force and effect.

H. Mediation. In the event of any controversy or claim arising out of or relating to this Agreement or the Services provided by Consultant (each referred to as a “Dispute” and all collectively referred to as the “Disputes”), the Parties shall try to resolve all Disputes through good faith, direct discussions involving the representatives of each Party who possess the necessary authority to resolve such Dispute. If direct discussions are unsuccessful in resolving a Dispute, the Parties shall endeavor to resolve the matter by mediation through and

administered by JAMS or its successor in interest. JAMS shall provide the parties with the name of five (5) qualified mediators. Each party shall the option to strike two of the five mediators selected by JAMS, and thereafter the mediator remaining shall hear the dispute. If the dispute remains unresolved after mediation, either party may commence litigation. .

I. Costs and Attorney' Fees. If either party commences any legal action against the other party arising out of this Agreement or the performance thereof, the prevailing party in such action may recover its reasonable litigation expenses, including court costs, expert witness fees, discovery expenses, and attorneys' fees.

J. Entire Agreement. This Contract constitutes the entire agreement between the parties relative to the services specified herein and no modification hereof shall be effective unless and until such modification is evidenced by a writing signed by both parties to this Contract. There are no understandings, agreements, conditions, representations, warranties or promises, with respect to this Contract, except those contained in or referred to in the writing.

K. Execution. This Contract may be executed in several counterparts, each of which shall constitute one and the same instrument and shall become binding upon the parties when at least one copy has been signed by both parties.

L. Authority to Enter Agreement Consultant warrants that it has all requisite power and authority to conduct its business and to execute, deliver, and perform this Contract. Each party warrants to the other that the signature to this Contract have the legal power, right, and authority to enter into this Contract and to bind each party.

CITY OF MANTECA

By: \_\_\_\_\_  
Toni Lundgren, City Manager

ATTEST:

By: \_\_\_\_\_  
Cassandra Candini-Tilton, City Clerk

APPROVED AS TO FORM:

By: \_\_\_\_\_  
Riana Daniel, City Attorney

CONSULTANT

By: Delia Oberheu  
Title: President

EXHIBIT A

Consultant Proposal/Scope of Work



**City of Manteca, CA**

**Water Meter and Endpoint Replacement Project**

**RFP# 2025-PW119**



Submitted By:

Concord Environmental Energy, Inc.,

dba Concord Utility Services

24619 Washington Ave. Suite 202. Murrieta CA 92562

Phone:949-945-8362



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October 27, 2025

Re: City of Manteca, CA Water Meter and Endpoint Replacement Project

Dear Sir or Madam:

On behalf of Concord Utility Services, I would like to personally thank City of Manteca, CA for its time reviewing our response to the request for Water Meter and Endpoint Replacement Project for RFP # 2025-PW119

Concord has successfully worked with many municipalities in California supporting meter exchanges and AMI upgrades. Allow me to highlight our strengths while aligning with your project goals.

1. **Professionalism:** Concord's team of industry experts strive to be best in class in customer service and performance. To better serve your project values, and to ensure our team members can safely work in your community, our employees are vetted through national crime searches and DMV/DOT. Our team members are in uniforms, our modern fleet of 2022-24 Dodge Ram Tradesman trucks are upfit with corporate logos and DOT compliant amber strobes, and with city approval, City of Manteca, CA magnets, to clearly identify our purpose when in public eyes.
2. **Specialization:** Concord is focused on creating effective and efficient solutions for mass water meter installation projects. Our team members know mass meter installation processes and requirements that benefit our customers during deployment, e.g., adhering to billing cycles, achieving route saturation, customer outreach, professional communication, project status reporting, materials procurement schemes, inventory management, and effective deployment strategies.
3. **Innovation:** We create industry standards. Continuous analysis and innovation with the goal of creating efficiencies that benefit all parties, like data integration, data transfer, 100% QAQC (data and photos), real-time WOMS, managed workflows, and more.
4. **Partnerships:** We are only as good as you say we are. We strive to support the entire project team including Meter, Endpoint, Network and Lid Vendors to solve problems and find solutions. Let us work together to be great.

Concord's proposal is to provide professional installation services including experienced project management, experienced core employees, a systematically trained installation team, data and work orders managed through Peak Workflow work order management system, customized billing integration, tools/equipment, uniformed technicians and company owned fleet vehicles, throughout City of Manteca, CA's service territory. Concord Environmental Energy, Inc. dba Concord Utility Services is an S Corp established in California in 2008.

Sincerely,

A handwritten signature in black ink, appearing to read "Levi Capaci".

Levi Capaci, COO - Concord Utility Services



**COMPLIANCE STATEMENTS**

**Compliance with RFP Terms and Conditions**

The Proposer hereby affirms that, if awarded the contract, it will comply with all terms and conditions set forth in the Request for Proposals (RFP) issued by the City of Manteca.

**City of Manteca Business License**

The Proposer affirms that it will, if not already done, obtain a valid business license with the City of Manteca prior to the commencement of any work, if awarded the contract.

**Proposal Validity Period**

The Proposer affirms that this proposal shall remain valid and binding for a period of ninety (90) days following the deadline for submission of proposals.

**Employee Background Checks**

Prior to hiring, all applicants are vetted through National Crime Search, performing background checks including 7 to 10-year Multi-State Criminal Search, National SSN/Address Locator, National Sex & Violent Offender Search, Terrorist Search (Government Watch List), 7 to 10-year County Criminal History, Motor Vehicle Report (MVR).

**Insurance Compliance Statement**

The Proposer affirms that it will comply with all insurance requirements set forth in the Request for Proposals (RFP). The Proposer maintains all required insurance coverage, with the exception of professional liability insurance, which it does not carry. The Proposer acknowledges this exception and affirms that all other required insurance coverage (including general liability, automobile liability, and workers' compensation) is current and in full compliance with the RFP requirements.



## INTRODUCTION

Concord's proposal for the Water Meter and Endpoint Replacement Projects is to deliver professional installation services for the mass deployment of meters and endpoints.

The optimum strategy is to move contiguously and sequentially through cycles and routes, focusing on efficient production and simultaneous cleanup. The deployment strategy should be developed with open communication and coordination between the Utility and the Installation Team. By leveraging mass deployment best practices and standard operating procedures customized to the City's specific requirements and workshop outcomes, we will develop a project schedule that accounts for key factors such as billing cycles, read routes, blackout dates, field coordination, and material availability-ensuring a successful and streamlined deployment.

Our comprehensive solution encompasses:

- **Experienced Project Management:** Concord offers seasoned project management with expertise in mass meter and endpoint.
- **Highly Skilled Workforce:** We have a systematically trained installation team, including resources local to California, adept at executing installations with precision.
- **Cutting-Edge Technology:** We utilize a proven web-based real-time work management system for efficient data and service management.
- **Customized Billing Integration:** Concord seamlessly integrates our processes with the Utility's CIS for a streamlined approach to integrating mass deployment asset data.
- **Tools and Equipment:** Our team arrives equipped with the necessary tools and equipment for mass AMI meter installations, including GPS accuracy requirements.
- **Uniformed Technicians:** Our technicians are easily recognizable in corporate branded uniform attire.
- **Corporate Branded Fleet Vehicles:** Installation will be conducted using our corporate-branded company-owned fleet vehicles.
- **Warehouse and Staging Area:** Concord manages the warehouse and staging area necessary for efficient project deployment that is provided by the utility.
- **Inventory Management:** We manage inventory to ensure materials are readily available when needed.
- **Workflow and SOP Development:** We develop and implement project-specific workflows and standard operating procedures to ensure seamless execution.
- **Installation Training:** Our team provides comprehensive installation training to ensure consistency and quality.
- **Quality Audits:** Concord conducts rigorous quality audits to verify the accuracy of data and workmanship.



## **QUALIFICATIONS**

Established in 2006, Concord Environmental Energy, Inc. *dba Concord Utility Services*, a California Corporation, headquartered in Murrieta, California, has installed more than 3 million meters and endpoint radios nationwide for local governments, water districts and utilities.

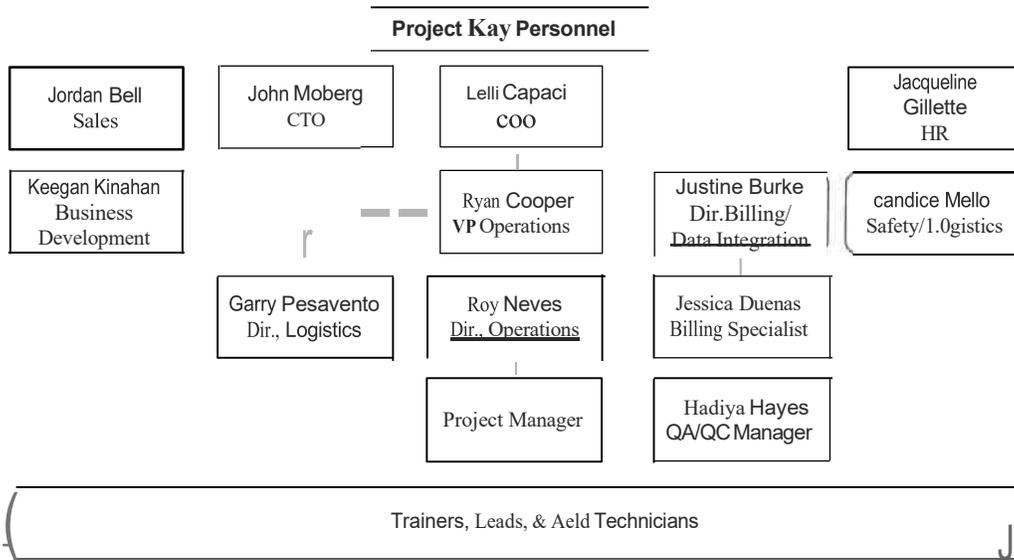
Behind Concord's successes are its many dedicated employees who specialize in meter replacement and AMR/AMI technology. Concord's Project Managers, Leads, and team of qualified Installation Technicians are full-time {W-2} employees. In today's market of customer awareness and social media, it is important to maintain a culture of professionalism in appearance, and practice. Concord's model of W-2 employees are vetted through national criminal background checks and driving records. Concord invests in human resources through training, opportunity, tools, and equipment. Concord Project Managers and Project Leads are promoted from within, gaining experience and knowledge from years of hands-on applicable training, installing for every major meter and AMI manufacturer. On average, each of Concord's Installation Technicians have installed 10,000 meters and endpoints. With their experience and high aptitude for meter and device installation processes, coupled with problem solving skills and professionalism, they are prepared to exceed in performance, customer service and client relations. Operating in corporate branded company owned fleet vehicles and wearing high visibility corporate uniforms, they are trained in customer communication and are setting the standard for the professional requirements of today's market.

A critical part of the installation process is the data collection, data management and data transfer to the Utility's Billing Department and their billing system. Concord prides itself on accurate data collection and efficient data transfer to multiple billing systems, through an electronic work order management system, allowing project managers, administrators, CSRs, and billing personnel to more accurately and efficiently track their project through data, KPIs and custom reporting.



PROJECT MANAGEMENT TEAM

**CONCORD AT-A-GLANCE**  
PROJECT KEY MEMBERS



**RESUMES****Ryan Cooper**

[Ryan@concordus-inc.com](mailto:Ryan@concordus-inc.com)

*Vice President of Operations*

**Summary of Qualifications**

Results-driven utility executive with 16+ years of experience in the water, gas, and electric sectors, with deep expertise in Advanced Metering Infrastructure (AMI) and AMR-to-AMI transitions. Proven ability to lead national sales efforts, manage multimillion-dollar deployments, and build strategic partnerships that drive business growth. Strong track record in business development, project management, and cross-functional leadership, with extensive knowledge of utility operations, metering technologies, and enterprise software platforms. Skilled in developing pricing strategies, managing customer relationships, and aligning solutions with client needs to secure long-term success.

**Professional Experience**

Ryan's extensive experience in the construction industry spans design/build, project management, and leadership. Ryan, now with Concord Utility Services, built his career at Aclara, where he advanced through both operational and sales roles. This cross-functional experience has equipped him with a unique skill set that blends production expertise with strong customer-facing capabilities.

Throughout his tenure at Concord, Ryan has been instrumental in promoting the company's culture and vision.

**Education & Associations**

Associates of Applied Science: Electrical, Electronics Engineering Technologies, 6/2007

**Certifications**

Master Certificate in Applied Project Management, Villanova University- 2011

**Roy Neves**

[roy@concordus-inc.com](mailto:roy@concordus-inc.com)

*Director of Operations - West*

Roy Neves is a seasoned professional with extensive experience in managing AMI installation projects. Based in Los Angeles County, he joined Concord Utility Services in 2008. Over the past 18 years, Roy has developed expertise in working with a wide range of manufacturers, making him skilled at handling diverse



meter populations. His extensive experience in the water meter and in the AMI industry gives him unique insight into problem-solving, allowing him to collaborate and offer proven solutions, avoiding pitfalls and delays.

Roy's contributions to process and procedural development have been instrumental in Concord's success and growth, ensuring successful deployments nationwide. He has played a major part in developing work order management systems, planning, scheduling, and overseeing both small and large-scale mass meter and endpoint deployment projects. He has been involved in all aspects of projects, from personnel recruitment and hands-on training to data management and customer relations. Roy is a strong leader with a consistent track record of success, inspiring confidence and trust in others and motivating his team to consistently meet project expectations.

Roy is responsible for developing new generations of project managers and leaders. He earns respect from his colleagues through his integrity and proactive approach to project management. His leadership skills and dedication to excellence ensure that every project is executed flawlessly.

## **Educational Background**

California Water Distribution DI

## **Notable Projects:**

- San Jose Water: 240,000 AMI Survey and Installation Services - Sensus Network/Neptune Meters and Registers
- City of Santa Barbara: 28,000 AMI Survey and Installation Services - Adara
- Suburban Water Systems: 49,000 AMI Installation Services - Master Meter
- City of Santa Monica: 18,000 AMI Survey and Installation Services - Badger Meter
- City of Santa Ana: 45,000 AMI Installation Services -Sensus/Aqua Metric
- Laguna Beach County Water District: 8,900 Meter/AMI Services -Sensus/Aqua Metric

## **Justine Burke**

[Justine@concordus-inc.com](mailto:Justine@concordus-inc.com)

*Director of Billing and Data Operations*

## **Summary of Qualifications**

In her capacity as the Billing, Data, and QC Manager, Ms. Burke plays a pivotal role in overseeing the critical backend operations and data flow that underpin Concord's operations. Her primary focus is on ensuring the precision and quality of project data both inbound and outbound while upholding the highest project standards. This multifaceted role encompasses the direction of various teams within the organization,



encompassing the creation, updating, training, implementation, and enforcement of operational procedures.

Justine is not only dedicated to the inner workings of the organization but also actively supports project managers in their customer-facing roles. She excels in status meetings, customer service, and provides invaluable access and training on Peak Workflow, Concord's Work Order Management System (WOMS), to project partners.

Justine's leadership style shines through her unwavering support for her colleagues, equipping them with the necessary tools and knowledge to excel in their respective roles.

### **Education & Associations**

Azusa Pacific University, Master of Education

Azusa Pacific University, Bachelor of Arts in Liberal Studies with a Concentration in Mathematics



REFERENCES

**Santa Barbara CA**

Contact Name	Gerald Lajoie
Contact Title	Water Services Supervisor
Contact Phone	805-897-2516
Contact email	glajoie@santabarbaraca.com
Description	27,000 Endpoint and lid replacements.
Project Start	10/2021
Project End	11/2023

**Santa Anna, CA**

Contact Name	Leif Lovegren
Contact Title	Public Works Projects Manager
Contact Phone	714-647-3327
Contact email	llovegren@santa-ana.org
Description	45,000 meter exchanges and retrofits
Project Start	10/2021
Project End	6/2025

**Santa Monica, CA**

Contact Name	Ralph Velencia
Contact Title	Water/Wastewater Administrator
Contact Phone	310-901-8413
Contact email	Ralph.Velencia@santamonica.gov
Description	17,205 meters
Project Start	11/2023
Project End	2/2025



## **MANAGEMENT APPROACH**

Concord Utility Services is pleased to propose Peak Workflow, a real-time work order management system (WOMS) and project management solution, utilized for planning and executing, mass meter exchange projects which benefit from an integrated, organized, and transparent platform.

Used as a project management tool, project managers can easily develop and manage a project schedule and manage workflow progress (daily and weekly production), assign work based on inventory availability, forecast inventory requirements, track technicians' activities, monitor technician location status, perform QA, and investigate individual work order data and photos.

Peak Workflow creates visibility into the overall project status for project partners and stakeholders, through the use of the project dashboards key performance indicators, sortable data, live mapping, and customizable reporting. The access allows project efforts to be reviewed in real-time or transparently communicated during status and planning meetings over the duration of the project's timeline.

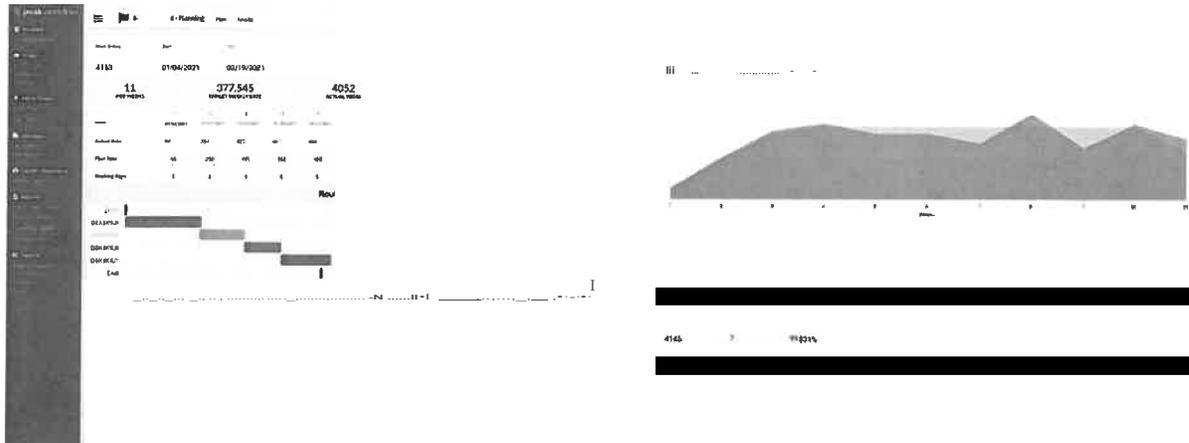
During project deployment, the Utility may utilize Peak Workflow as a customer service tool - via a customer web portal. Access to the project dashboard and map views permits CSRs to provide live updates to inquiring homeowners and utility customers as work is being performed. CSRs utilizing Peak Workflow can view current assigned work, recently performed work and location of contractor personnel (with popup photo ID capability), along with searchable data and work order photos, providing additional insight and information for project updates.

The optimum strategy for field deployment is to move contiguously and sequentially through cycles and routes, focusing on efficient production and simultaneous cleanup. The deployment strategy should be developed on open communication and coordination between the Utility, including the program manager, billing staff, utility field operations, and the Concord team.

The project schedule (and daily production) is developed around the communication of billing cycles, read routes, blackout dates, field coordination, and available material. Peak Workflow's web portal dashboard allows the Utility's team to see real-time installation progress by route, blackout dates, and upcoming route schedules.

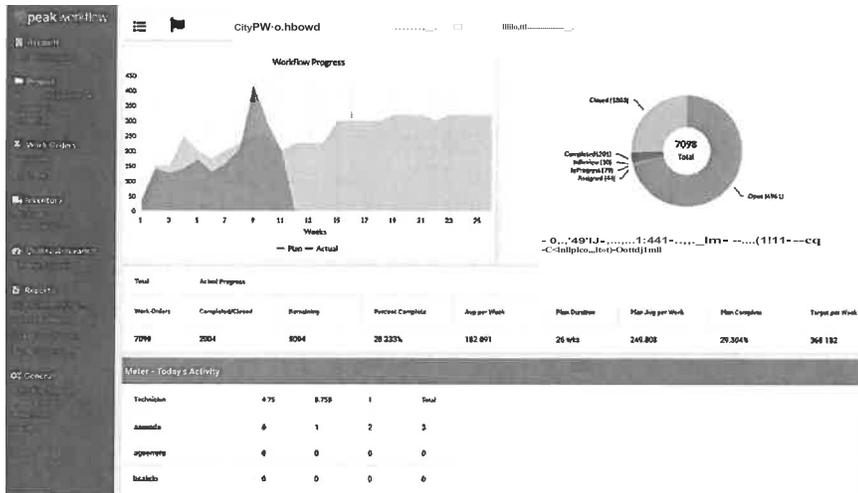
Example: A project schedule is created by route forecasts generated and updated based on start and end dates, route sequencing, understanding inventory availability, blackout windows, capacity, and other factors. These forecasts inform customer communications and allow for foresight into potential inventory issues and more.

*Simplified plan view for reference below.*



Example Deployment Progress Dashboard

- a. Many project metrics are available on the initial dashboard including two primary visuals presenting overall progress against plan and workflow status counts.
- b. Today's activity by technician and form/size. Similarly, a week view includes ability to quickly navigate to recent weeks.



c.

- d. Tabs for Assignments, Inventory, Routes, and Blackouts provide insights at a glance.

**ACCEPTANCE TESTING:**

Acceptance testing shall be performed by the technology provider and Owner through the system head end and MOMS, if individual endpoints are identified to require a post installation revisit due to



communication or installation quality. Concord will dispatch a technician to investigate and interrogate the endpoint.

## EMPLOYEE BACKGROUND CHECKS

Prior to hiring, all applicants are vetted through National Crime Search, performing background checks including 7 to 10-year Multi-State Criminal Search, National SSN/Address Locator, National Sex & Violent Offender Search, Terrorist Search (Government Watch List), 7 to 10-year County Criminal History, Motor Vehicle Report (MVR).

## METER/ENDPOINT INSTALLATION STANDARD OPERATING PROCEDURE (SOP)

The following is a typical Standard Operating Procedure for small meters.

1. Exit vehicles wearing ALL required PPE (safety glasses, high visibility shirt, protective gloves, steel toe boots)
2. Place cones adjacent to rear bumper approximately 5' from vehicle and even with driver side mirror.
3. Locate Meter Box and lift lid, checking for hazards, snakes, rodents, sharp protrusions.
4. Validate Location by verifying Old Meter Serial Number and Address matches work order data.
  - a. If location is CORRECT, proceed to Step 5
  - b. If Location is NOT CORRECT and there is mismatched serial numbers, follow appropriate steps for RTC and RTU Review Codes.
    - i. RTC - Return to Concord - Escalate to manager to resolve issue.
    - ii. RTU Review- Return to Utility (city to address an issue prior to performing the installation, e.g., damaged, existing leak, broken stop, cannot locate, etc.)
5. Validate work order Exchange Type: meter Exchange, Register Retrofit, Radio Only, etc.
6. Exchange Meter or Retrofit Register - **IMPORTANT:** Do not attempt to install more than one work order at a time, including scenarios where there are more than one meter in a pit, vault, or bank of meters.
  - a. Customer pre-notification: no customer notification required if Register Retrofit, Endpoint Only, or other work that does not require turning water service off.
  - b. If meter Exchange, notify customer of the work to be performed. If customer is not available, check the meter register for consumption.
    - i. If no consumption at meter, proceed with meter exchange.
    - ii. If register shows consumption, DO NOT proceed with the installation (Attempt 1)
      1. Attempt 2 - Install later that same day.
      2. Attempt 3 - Install the following day
  - c. Take Pre-Site picture of work area 4 to 6 feet in front of meter box showing surrounding area in 'As Found' condition.



- d. Take photo of pit condition (Dirt Level and Valve Position)
  - e. Remove dirt and debris from around the meter and meter connections, place in a spoils bucket.
  - f. Use water meter key to turn the curb stop/angle stop to the off position.
  - g. Remove Old Meter.
  - h. Install New Meter and gaskets.
    - i. Verify direction of flow (embossed arrow points toward the customer side)
  - i. Flush Line
    - i. Before restoring water service, open the hose bib where the water main enters house.
    - ii. Turn water on SLOWLY, at the angle/curb stop valve. Run water through the hose bib, until all air has been evacuated from the service line (approximately 60 seconds). **IMPORTANT: If water was OFF when you arrived - DO NOT TURN BACK ON, DO NOT FLUSH LINE**, there may be an open line or plumbing repair in the house.
    - iii. Once line is flushed, close customer hose bib.
  - j. If meter is still spinning (registering consumption) and there are no visible leaks, confirm with customer that water is being used. If customer is not available turn service OFF at meter, notify project manager and document in the work order management system, "Water left off".
7. Install Endpoint:
- a. Install endpoint into AMI ready lid, ensuring the endpoint is secure to mounting surface in lid.
  - b. Connect endpoint to meter register.
  - c. Activate/Program endpoint if required.
8. Collect Work Order Data following the managed workflow on mobile device.
- a. Input last read.
  - b. Validate old meter number by entering the last 4 digits of serial number.
  - c. Input new meter serial number (bar code scan).
  - d. Input new register serial number (bar code scan).
  - e. Input new endpoint serial number (bar code scan).
  - f. Validate meter size and type.
9. Photos: **IMPORTANT:** For QA uniformity, handhelds must always be in the upright (portrait) position when taking photos.
- a. Photo 1: Per-Site picture of work area 4 to 6 feet in front of meter box showing surrounding area 'As Found' conditions.
  - b. Photo 2: Pit condition (Dirt Level and Valve Position).
  - c. Photo 3: Photo of customer line being bled at hose bib.
  - d. Photo 4: New Meter Serial Number.
  - e. Photo 5: New Transmitter Serial Number.
  - f. Photo 6: Photo of Old Register Read
  - g. Photo 7: Photo of Old Meter Serial Number.
  - h. Photo 8: Completed Installation: Capture Ball Valve and Angle stop in the correct position.
  - i. Photo 9: 'As Left' Site condition.
10. Review all collected data in handheld.



11. Save Data.
12. Clean Site and Meter Pit of all materials, trash, debris, and excess spoils.
13. Install pit lid ensuring the lid is installed properly and completely flush (Watch all wire connections when closing the lid).
14. Move to next Work Order.

#### QUALITY ASSURANCE AND QUALITY CONTROL PROCESS

Quality Control: Concord's quality control process exceeds 5% review standard by reviewing 100% of captured data and photo for each work order performed. The backend QC team concentrates on data integrity and quality of installation through photo and data comparisons. All installers will be subject to targeted field audits when *OA* escalations identify work that does not meet our standard operating procedures. Because this approach is based on non-compliance with established procedures, installers found in violation will be removed from the field and retrained.

1. Data Quality Check: Validate CIS and billing data requirements are correct and complete prior to processing daily work order file to SFTP.
  - a. Location validation by comparing address and old meter number
  - b. Old and new meter number, size and read
  - c. Old and new register and radio numbers
  - d. Lid and box information
  - e. GPS location
  - f. Name of Installer
  - g. Installation comments and condition Assist Codes (issues)
2. Installation Quality Check: Compares As-found versus post-install conditions.
  - a. Meter valve On/Off position ensuring service is restored or match "as-found" condition.
  - b. Direction of meter flow (by indicator arrow).
  - c. Size of meter and register.
  - d. Serial number to actual photo.
  - e. General site conditions, dirt levels, housekeeping, and workmanship.
  - f. Lid and box flush to avoid trip hazard.



## DATA FILE TRANSFER PROCEDURE

Data Flow requirements are developed during the project planning phase through scheduled data integration workshops. The workshops consist of a utility billing representative responsible for data input, a billing software system representative, a Concord Peak Workflow representative, as well as program managers, project managers, and consultants. Workshops are designed to identify the inbound and outbound data requirements for integration between multiple software platforms. Each platform should prepare a requirements document in the form of a data mapping template.

In the integration process the utility's system of records is often referred to as the Host, and the corresponding outbound and inbound files are referred to as From Host and To Host files, respectively. From Host files come from multiple sources to create work orders and to develop a comprehensive program management tool within Peak Workflow.

From Host data file requirements inbound to Peak Workflow (WOMS) are:

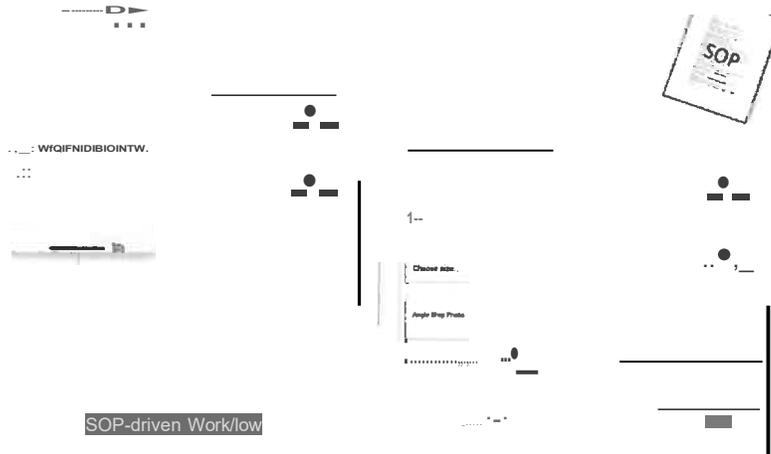
- CIS data file
- GIS including lat and long of parcel or meter
- Billing cycle calendar for blackout days
- Meter Manufacturer File for inventory management, including all new serialized product being implemented into the project.

To Host data file inbound to billing system and exported to hosted SFTP site in a .csv or .xlsx file format.

## FIELD DATA AND MOBILE APP

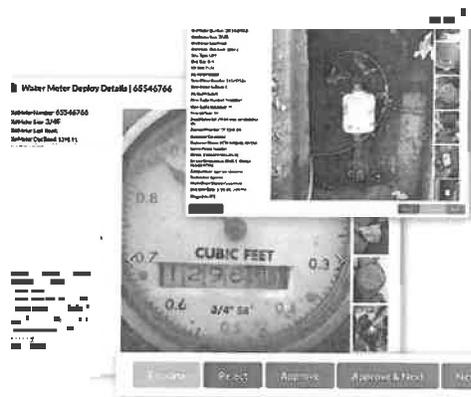
Data collection is managed in the field with a mobile app that is a web based, electronic work order management system (WOMS). All data is collected during the installation process following specific project SOP's installation, data collection, and supporting QA photos.

1. Concord utilizes electronic hand-held devices allowing installers to load and manage work orders, scan barcodes, take photos, capture GPS, and input data with one device.
  - a. Work order information is loaded into the Work Order Management System.
  - b. Workflows ensure required steps are followed and information is being collected to complete installations.
  - c. Bar code scanner collects the new radio transmitter, register and meter serial numbers.
  - d. Camera to take required pictures.
  - e. GPS captures that integrates with the workflow application.
2. Mobile App
  - a. Managed Workflow based on approved standard operating procedures.



3. Quality Assurance:

- a. Side by sided comparison, actual data recorded vs. installation photos.
  - i. Old Read
  - ii. Old Meter Number
  - iii. New Meter Number
  - iv. New Endpoint ID
  - v. Meter Location Photo



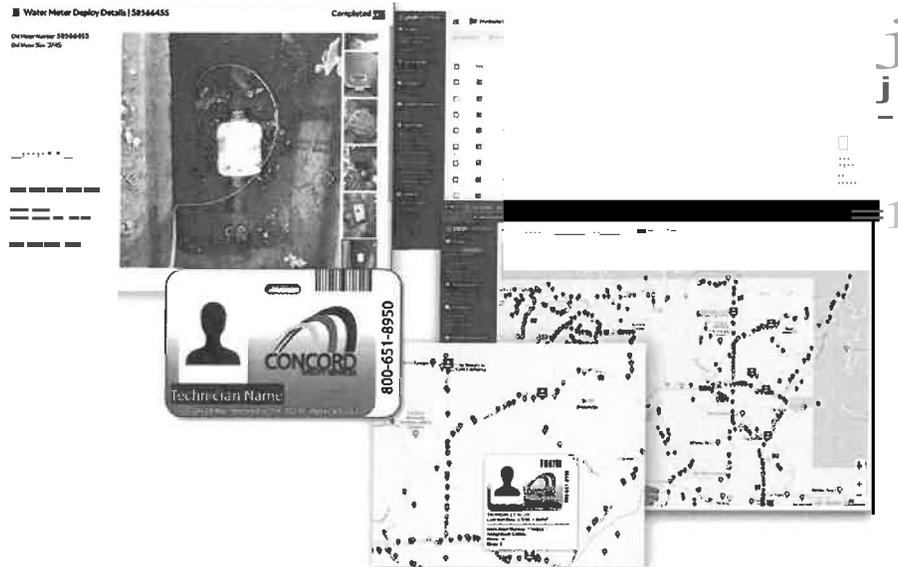
Searchable Content

- b. Work order installation status

c. Data verification



- d. Maps and GPS
- e. Installation technician information



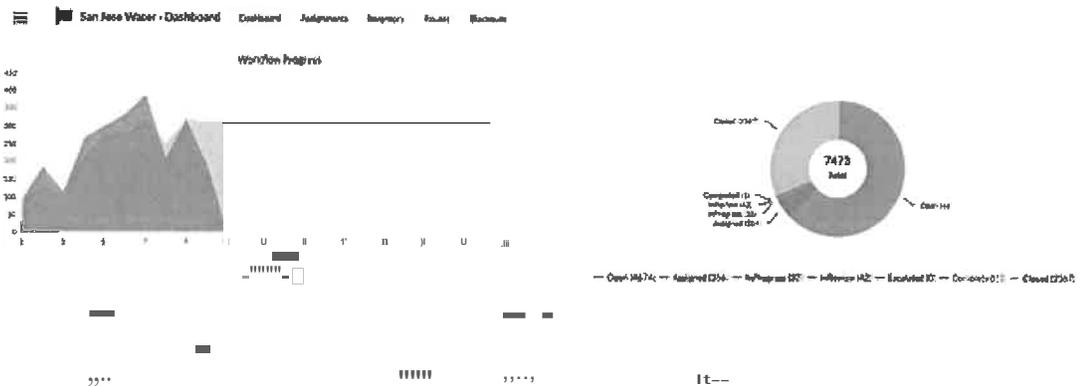
**DATA TRANSFER SOFTWARE**

See Appendix A.

**REPORTING**

**System and Performance Reports**

Actual versus Planned Installs - Weekly, monthly, and cumulative, actual installs versus project plan.



Route Saturation Report- Work order in routes showing opened, assigned, in progress, in review, escalated, completed, closed, and route total.

**Work Order Status by Route**

Route	Open	Assigned	In Progress	In Review	Escalated	Completed	Closed	Route Total
7-1	57		8	2			424	492
1-5			12				682	701
7-2	136		11				367	520
7-3	19	67	11	65			296	589
7-4	522							522

Quality Assurance - Field quality results including audits completed against planned and findings.

Installation and Data Errors - Report listing all imported meter exceptions from the Meter Exchange file. Errors include incorrect out readings, meters set at wrong customers, incorrect meter form installed, or wrong meter number reported.

**Inventory Report**

Inventory Balance - Total Work order per size, remaining work order by size, total assets received, total available assets (in stock), and assets needed (to ship).

- Presents straightforward view on sizes and quantities within the meter location data and the available new meter inventory including actuals in stock and to ship.
- Radios and registers can also be tracked separately.
- Further capabilities include tracking quantities of non-serialized items like pit lids by size.



Meter - Inventory Status

Meter - Inventory Status	Remaining WO per Site	Total Asset Assets (In Stock)	A. Uta NN1811 (0.05g)
2090		■ ■	
		62	
...		..	
0.7.5			

## Customer Service

- Complaints and Claims Reports:
- Customer Appointments:

Call Typ	Address	Reported Issue	Install Technician	Response Date	Resolution Notes	Resolved By	Resolved Date
	3307 Buena Hills	Lid for problem.		4/20/2021	Lifted box so lid will fit Not a trip hazard. Mite, bo, mot in front of house or in	G*Y	
4/19/2021 .mail from Radic				4/19/2021	Customer does hve a new lid Here jneighbor has a new meter already @installed, city and Mantermais (in Stalled in the lid which makes it		4/19/2021
4/15/2021 .moll from Danol	3317 Golfers dr	customer valve, handle bill:			Customer valve was already out, valve I was not stidenot from install but was hitting the meter but valve was fully in		4/15/2021
4/15/2021 L...merciad	2007 Tiffanydr				Customer left water hose on. Turned off		

## Safety

- Installer safety report

## Project Management

- Progress, Problems & Plans
- Action item list(s) - Updated action items.
- Issues and escalations - State, status and expected next steps for ongoing issues and escalated items



ACTION ITEM	NAME	PRIORITY	OWNER	ASSIGNED	DATE	DONE	STATUS	NOTES
CustomerSide installation Issue SOP						<input checked="" type="checkbox"/>	100%	Note in PW all escalations, comments, and action items should be noted in PW.
Mobile App workflow - Completed work. Order, but additional work	Giff		Gary		1/4/BD			add button to "*****" ID H*go, future*****
Meter Shop PW mobile app - Inventory Milt Files	fH	HIGH	Brian/Levi		4/13/1021			-Receivcall InventDryMMF files received in Qunaid@
Meter Shop PW mobile app - Inventory	f9	HIGH	sarrv		4/13/1021			@importOceansideMMFfiles Into Meller Shop @Warehouse
Meter Shop PW mobile app - Onboarding & Traini	iJ	HIGH			4/13/11m			:scheduletrainInJwthGary and meter slop
From Host - Finalize with Oceanside and AUS	1f	HIGH			3/31/111J			/1;ant1Ja ta provide revised filens padding on account # and meter#
o Host testins priorto read cyde 7May 7th Bladout		HIGH	Justine		3/31/1021		4/6/WII	Pending .Waiting on updattd ToHosttemplate
Leaki @AngleStopSOP								Pending Drip or minor leak handled next day. Geysers are to be handled immediately
Oktave Meter SOP - Review			Garry/Nigel		4/26/201J			Pending Garry to review
Exl.5 Bushing - Identify locations? Billable v Non			Gary/Nigel		4/26/Xfil			Pending
Meter First Installs	Ga		'llj" □ fhm					Pending

**Employee Uniforms**

All Concord installers work wearing high visibility corporate uniforms, which include orange shirts, blue pants, blue caps, photo ID badges, work boot and gloves, as well as other required PPE.



**Employee Vehicles**

Concord meter technicians operate in company-owned fleet vehicles permanently branded with corporate logos, fully insured and stocked with necessary tools and materials for completing AMI projects. Concord's fleet trucks undergo regular maintenance and daily inspections. All Concord employees possess valid driver's licenses appropriate for the vehicles they operate.



**Parking and Traffic Laws**

Concord employees are trained to observe and obey all traffic laws and will deploy vehicles to minimize parking problems and avoid blocking any streets



## STATEMENT OF WORK

### SCOPE OF SERVICES

1. Concord Utility Services ("Concord") will provide project management, vehicles, tools, and installation crews for installing approximately 3000 meter installations, for the Utility's Water Meter and Endpoint Replacement Project ("Project").
  - a. Project Planning, Deployment Preparation, and Workshops
2. Customer Outreach - Assist the Utility with developing outreach requirements (if requested).
3. Data Integration - Define integration requirements for inbound and outbound data flow between CIS, Billing Systems and Concord Deployment WOMS.
4. Establish Weekly Status Meetings and Touchpoints
5. Define assistance codes and support conditions needed by the Utility for field support during mass deployment efforts.
  - a. Warehouse Procurement: Utility is to provide a secure warehouse with utilities, communication, security, to accommodate Installation Services Operations including material storage, equipment staging, fleet and employee parking (5 parking places), waste, recycle, and scrap containers, etc.
  - b. Standard Operating Procedures (SOP) - Develop in-field technician procedures for installation services to be reviewed and approved by the Utility prior to implementation.
  - c. Provide Work Order Management Systems for Installation Services
6. Data Flow - Setup data transfer protocols, receive all project data inbound to the Work Order Management System (WOMS).
7. Project setup - Create the project interface.
8. Installation Workflow (Mobile App) - Develop a managed workflow with installation sequence created from the Utility-approved SOP, including data entry, data validation, and photo requirements.
  - a. Quality Assurance (QA)
9. Provide QA/QC of Installation Services.
10. Define QA criteria based on work type and the Utility-approved SOP.
  - a. Deployment Preparation and Mobilization
11. Develop a resource plan that includes travel and lodging throughout the duration of the project.
12. Mobilization - Resources, vehicles, equipment, and tools relocation.
13. Staffing - Provide adequate staff to maintain project schedule and budget
14. Training - Review operational and safety training procedures for field technicians to conform to project requirements.
  - a. Full Deployment - Manage production, inventory, and resources to maintain project scope, schedule, and budget.

**DELIVERABLES**

1. Physical completion of a Meter, Register Retrofit and Endpoint Installation.
  - a. Final quantities of each work order work type will be determined by installation requirements developed by Others (the Utility and Meter Manufacturer)
  
2. Work Order Records: Each transaction will be recorded in Peak Workflow including but not limited to unique ID, address, old meter number, old meter register read, new register number, new register initial read, new endpoint ID, GPS coordinates, name of installer, date and time of installation, installer comments, and installation photos.
  - a. Work Order Record requirements will be defined during the data integration process to ensure alignment with billing needs.
  
3. Software Integration: Inbound and outbound data flow between CIS, the Utility Billing Systems and WOMS.
  
4. Progress Reporting
  - a. Stakeholder view access to Peak Workflow UI for live project tracking.
  - b. Weekly Status Reporting includes Submitted weekly.
  - c. Completed Work Orders Planned versus Actual
  - d. Closed Work Orders
  - e. Open Work Orders
  - f. RTU/RTC Review Work Orders
  - g. RTU Closed Work Orders
  - h. Route Saturation -Work order status by route - Total v. Open v. Closed
  - i. Project Planning
  - j. Blackout Dates
  - k. Field Inspection Summary Report
  - l. Work Order Data QA/QC Summary Report
  - m. Tamper Events
  - n. Switched or Crossed Meters
  - o. Safety Incidents
  - p. Inventory Status Report
  
5. Inventory Management
  - a. Concord Inventory Reporting - Included in weekly status report for all received serialized and non-serialized materials.
    - a. Inventory Status by Size/Type
    - b. Total WO/Size



- c. Remaining WO/ Size
- d. Total Assets Received (size and quantity)
- e. Total Available Assets (In Stock by size and quantity)
- f. Assets Needed (to Ship)
- g. Inventory Availability by Route

## QUALITY CONTROL

1. Concord's primary QC processes consist of Data and Photo Quality Audits performed on 100% of completed work orders, focused on data integrity, workmanship (quality of installation) and standard operating procedures.
2. Audits are performed by a dedicated QA team on 100% of completed work orders, comparing work order data (asset IDs, location, etc., and workmanship quality) to installation photos. All failed Quality Audits shall be identified and scheduled for immediate correction through data validation and/or a field audit performed by qualified personnel.
3. Technicians in training shall have 100% of their fieldwork inspected for the first 5 working days from the date the installer begins work in the field and performed within 24 hours of the work order completion.
4. Safety and customer interaction are communicated in policies and standard operating procedures and reinforced through continuous training and tailgate meetings. All safety incidents and customer interaction issues shall be tracked through reporting logs.

## MILESTONES

1. WOMS setup, data integration, and testing
2. Warehouse/Staging area setup
3. Receipt of Inventory
  - a. Meters, Registers, Endpoints, Lids, and Ancillary Materials
  - b. Twelve weeks of production level requirements for each material type, prior to mobilization and Full Deployment.
4. Mobilization
5. Full Deployment Installation
  - a. Commencement and Ramp Up
  - b. Full Deployment Production
  - c. Ramp Down
6. Close Out and Completion
7. Demobilization



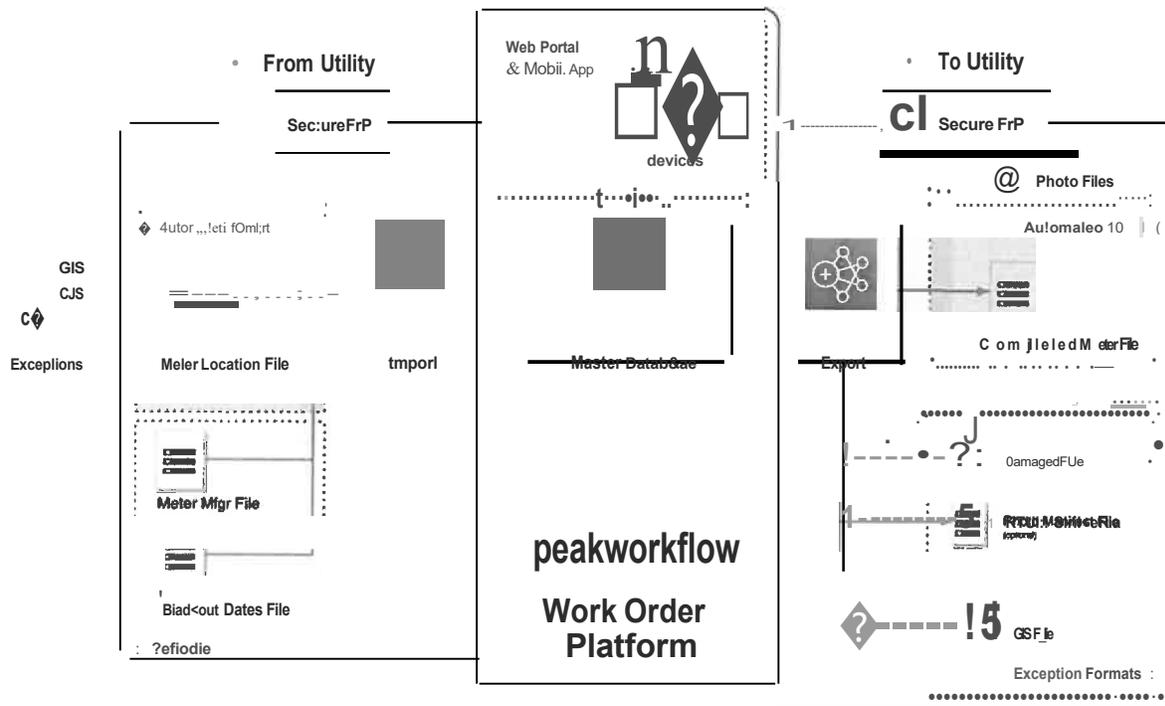
INSTALLATION SCHEDULE

1. A final mutually agreed upon project schedule shall be developed during the planning phase of the project implementation.
2. The draft Meter/Endpoint Installation project schedule (above) represents the anticipated project schedule, provided all materials are available and network systems are in place to meet schedule requirements.



APPENDIX A: WOMS INTERFACE SPECIFICATION

Peak Workflow's standard integration is a CSV-based file integration via SFTP. This integration is the most universal and offers clear separation of security concerns for the 250+ Customer Information Systems across the markets we serve. The diagram below depicts typical data in and out including frequency. During our project planning processes, the work group chartered with the Data Integration Plan will walk through in detail and align on data detail and flow specifications. The Utility's systems will put data inputs and get data outputs via our hosted SFTP with Peak Workflow having no direct access to customer systems for security and separation of concerns.



Inputs to Peak Workflow from Host (CIS):

- **Meter Location File** - contains all remaining meter locations in scope to be exchanged with appropriate metadata. Imported daily to ensure synchronization with SAP and any Utility maintenance activities performed in other systems. **See specification below.**
- **Meter Manufacturer Files** - contains inventory data for new meters to be scanned and validated in the field ensuring data accuracy and enabling inventory management (assignment, tracking and management). Imported ad hoc when shipments are received and released to production. Quarantine status and multiple warehouse management features are included.
- **Blackout Data File** - contains start and end date windows by billing cycle to inform and automate

blackout handling within Peak Workflow. Typically updated annually or quarterly.



## Outputs from Peak Workflow to Host (CIS):

- **Completed Exchange File** - contains reviewed and approved meter data of exchanges occurring in the previous workday. Daily file generation to be retrieved and ingested by CIS or other processes. See specification below.
- **Damaged Display File** - same as structure as complete exchange file, however, contains only records that were flagged with a damaged display, therefore capturing an out read in the field was not possible. Utility will typically update this exception file with estimated reads and ingest in the same manner as the completed file. File is generated only if exception records exist in the reviewed and approved status.
- **RTU/3-strike File** - contains return to utility records with meter number, reason codes, installer, date, and other appropriate information. File is generated only if exception records exist.
- **Photo Manifest File** - contains data for use in importing image files in a CIS image module or other digital asset management system. File is optional and based on data integration meetings. Contains old meter number, account number, new meter number, and filename. Photo files are available to download at any time to the CIS or other applicable systems. Alternatively, the photo filenames include the old meter number and photo type for ease of automated parsing and consumption.
- **GIS File** - contains data for use by GIS teams specifically. File is optional and based on data integration meetings.

## Meter Location File (From Host)

We will work with the Utility to create file structures for each work type (i.e., electric, gas and water) that contain the appropriate data elements to ingest into the Peak Workflow platform.

*Sample specifications:*





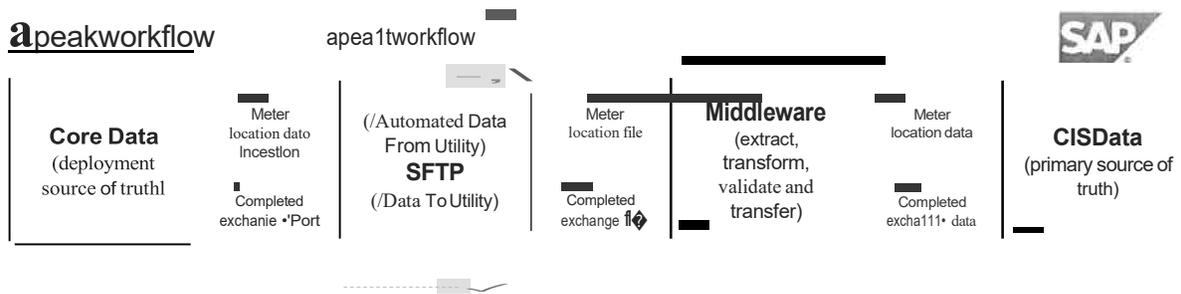
**Completed Meter Exchange File (To Host)**

- a. On a daily-based (or other frequency), this file is generated and posted to SFTP for consumption by the To Host process. Sample fields below are based on electric meters; however the fields are customizable to output any data point available. Water exchanges typically include newRadioSerialNumber, newRegisterNumber, etc. as appropriate to the project scenario.
- b. Effectively the fields available to output to host include any source data field from host originally and any data point collected during the process of executing the work order. Output structure can be normalized or slightly different between water and electric. The export engine supports transformations and conditions.
- c. Sample data fields:

<b>locationId</b> ( <i>unique foreign key between systems</i> )
<b>workType</b> ( <i>if project has multiple</i> )
<b>siteConditions</b> ( <i>codes of observations</i> )
<b>technician</b>
<b>accountNumber</b>
<b>capturedLatitude</b> ( <i>decimal value 14,11</i> )
<b>capturedLongitude</b> ( <i>decimal value 14,11</i> )
<b>oldMeterSerialNumber</b>
<b>oldMeterSize</b> ( <i>form factor and/or class</i> )
<b>oldMeterOutReading</b> ( <i>split out kWh and kW if needed</i> )
<b>meterReadingDate</b>
<b>newMeterSize</b> ( <i>form factor and/or class</i> )
<b>newMeterSerialNumber</b>
<b>newMeterInReading</b>

**1. Data Integration Systems Overview**

- a. The experienced data integration team through a series of work sessions will discover and align on both the data in/out specifications as well as the data flow specifications between systems. Common integrations with Customer Information Systems (CIS) includes having a process to generate a meter location csv file that includes the proper data points and formats to be transferred to the PW SFTP automated data directory. Data to CIS, may require a service order or other change record created to process the exchange event data, typically this involves using a middleware (several clients have used products like MuleSoft or other custom programming for more robust tasks or Move It for simple transfer workflows) to process the daily exchange files from Peak Workflow via the CIS API effectively creating each service order, pushing the completed exchange data into the appropriate values, then instructing the CIS to process/close the service order.



2. Hosted SFTP Site

**Secure Data Transfer (via SFTP)**

- Automated imports from Host (meter location file) during a project are uploaded to the "watched" folder called Automated Data from Utility.
- Daily output files to Host will be placed in Data To Utility. Both completed and exception files.**
- Manually transferred data files from the Utility can be placed in Manual Data From Utility in an appropriate folder. *Securefile sharing location.*
- All photos captured in the field for the project are stored in the Photos To Utility folder.
- All **data** is available 24/7/365 throughout the project

**apeakworkflow**

- Automated Data From Utility
  - Failed Files
  - Processed Files
- Data To Utility
  - Processed by Utility
- Manual Data From Utility
  - Blackout Information Files
  - Meter Location Files
  - Meter Manufacturer Files
- Photos To Utility



Appendix D

Proposal Pricing Sheet

SCHEDULE OF PRICES-WATER METER AND ENDPOINT INSTALLATION PROJECT

The City of Manteca reserves the right to award bid or reject any and all bids.

Description	Quantity	Unit Price/ton	Price
Set up Costs	1	75,000.00	75,000.00
Water Meter & Endpoint Installation Cost	3,000	250.00	750,000.00
New World & Beacon Integration Cost	3,000	1.65	4,950.00
Total Project Cost			829,950.00

**Bidder Information:**



Authorized Bidder Signature

Ryan@concordus-inc.com

e-mail

Ryan Cooper

Name of Authorized Bidder (Printed)

VP of Operations

Title of Authorized Bidder (Printed)

Concord Utility Services

Company Name (Printed)

330-322-3955

Phone Number

24619 Washington Ave., Suite 202

Street Address

Murrieta, CA

City / State

92562

Zip Code

DIR Number: 1000012574

Authorized Person to initial next to the acknowledgement.

NA..... I acknowledge that I have read any addendums to this RFP.

NA..... I acknowledge that I have read the Question and Answers portion of the RFP

Proposal Submitted: 0\_c\_o\_b\_e\_r\_2\_8\_,\_20\_2\_5 (Date)

This will vary depending on RFP Content

Include line for DIR Number

# ATTACHMENT 1

Assumptions/Exclusions	
1	There will be a mutually agreed upon contract upon award of the project.
2	Installation Services are warranted against leaks for a period of 30 days from the work order completion date, as recorded through the work order management system and completed work order installation data. The warranty applies only to the area of work performed by the Contractor, as documented by data and photos within the work order management system, and reasonably attributed to the installation process.
3	Project Manager fees and facility fees are determined according to the estimated schedule (6 months maximum). Should the project extend beyond 6 months for reasons beyond CUS control, additional project management fees will be applied.
4	Demobilization/Remobilization Fees: If CUS is forced to demobilize due to lack of inventory (e.g., meters, registers, endpoint modules, lids, boxes, fittings), CUS will invoice for cost plus 15% to move in and out of the market (i.e., travel fees, cancellation fees, vehicle transportation fees.)
5	Stand Down Time: If CUS is unable to perform due to lack of inventory of materials (e.g., meters, registers, endpoint modules, lids, boxes, fittings), and installation resources remain deployed, CUS will invoice at \$95.00 per hour, per technician for time CUS is stood down.
6	CUS will not be responsible for any community outreach programs or program materials other than leaving a Utility-provided door hanger, post installation.
7	All warehouse and staging space provided by others must have room for secure overnight parking for 5 - 1/2 ton fleet trucks, electricity, restrooms, office space and with watertight storage for CUS tools and equipment.
8	All data for the entire project will be provided at one time prior to mobilization.
9	All data sent from the Utility will be accurate and without duplicate data (addresses, meter numbers, radios, accounts, etc.).
10	If information submitted to CUS is later found to be inconsistent with actual information the price may be adjusted accordingly to account for additional set up and programming.
11	Excludes additional visits to meter locations after the initial installation and programming, for network communication issues during Route Certification.
12	Meter installation unit pricing includes all labor, tools, vehicles, & fuel. All other materials to be provided by the Utility including, but not limited to meters, registers, radios, boxes, lids, box extension rings, meter spuds, extensions, adapters, meter couplers, washers, nuts, bolts, gaskets, flanges, fittings, in-line connectors, compression fittings, PVC fittings, tamper clips, Nicor connectors, backflow prevention devices, etc.
13	Meter installation unit pricing is for standard meter installation assuming meters are "Like for Like" and "Lay Length for Lay Length", for normal installations, exclusive of repairs to or modification or replacement of service lines, meter boxes, valves, or customers' plumbing.
14	Meter installation unit pricing does not include adjusting, resetting, removing, or replacing meter box. If CUS is required to replace setters, risers, valves or fittings, the meter box resetting will be billed separately.

# ATTACHMENT 1

15	Meter installation unit pricing assumes shutoff valve and both meter couplings will be visible and accessible within the meter box.
16	Pipe material survey unit pricing assumes that the service line and customer line can be accessed within the meter box. If potholing outside of the meter box, or meter box removal is required, additional fees shall be assessed. Any service line identification will be visual only, no scratch or magnet testing will be done.
17	CUS is freed from all liability for damage to customer appliances and other devices caused from air and/or debris in the water line where an exterior hose faucet is not accessible to the meter technician to bleed air and sediment from the line.
18	Any badging requirements will be done prior to the start of the project.
19	It is expected that all hard-to-find meters will have location descriptions and assistance (mark service with paint) from the Utility.
20	The Utility will provide CUS safe access, including keys and gate codes (gated communities) to all locations.
21	Work will not be performed at locations where it is reasonable that damage may occur to customer's property.
22	CUS will not be responsible for replacing meters that are obstructed by landscape or excessive tree/plant roots in the boxes.
23	Paving or Hard/Solid Surfaces: Excludes removal and replacement of paving or other hard or solid surface locations (concrete, asphalt, pavers etc.). Any meter box replacement in concrete will be RTU'd
24	CUS will repair to a usable and safe condition any customer side water line break caused by a CUS Employee, up to 30 linear inches from the meter connection, on the customer side only.
25	CUS will not be responsible for maintaining, repairing, or replacing existing customer side setters, backflow preventers, irrigation valves, pressure regulators, unions, ball valves, or customer side valves, unless noted otherwise.
26	CUS will not be responsible for repairing or replacing existing City/Water District service side piping or fittings.
27	CUS will not be held responsible for any existing inoperative, damaged, or leaky valves.
28	CUS will provide minimal traffic control devices (cones) for meter exchanges. Any additional traffic control requirements will be invoiced at cost plus 15%.
29	It is assumed that small and intermediate sized meters will not be in vaults or other confined spaces.
30	Utility to take responsibility for any damage or repair resulting from excessive deflection on either the Utility side or customer side water lines.
31	Excess dewatering will be invoiced on a time & material, and case-by-case basis.
32	Any specific requirements not covered under this quote will be reviewed, any additional costs will be a change order or revision to the proposal.
33	CUS assumes that sub meter GPS collection is not required. Cell phone accuracy will be provided
34	All data will be provided electronically in a spreadsheet format. Pictures and other relevant data will be posted online in the WOMS portal.
35	CUS Assumes no performance bond is needed as none was required in the RFP.
36	CUS assumes that all meter lids provided or approved for use under this contract are verified and approved by Badger for compatibility. CUS shall not be responsible for ensuring that the Endpoint

**Appendix E**

**Addendum Receipt**

**ADDENDUM RECEIPT**

No Addendums presented (PROPOSER) acknowledges it has received and read all of the following Addenda:

Public Works Department, Water Division: **2025-PW119**

Addendum# \_\_\_\_\_

Signature \_\_\_\_\_

Signature  \_\_\_\_\_

Date 10/27/2025

Title VP of Operations

Company Name Concord Utility Services

EXHIBIT B

CERTIFICATE OF COMPLIANCE WITH LABOR CODE § 3700  
[Labor Code § 1861]

I am aware of the provisions of Section 3700 of the Labor Code which require every employer to be insured against liability for workers' compensation or to undertake self-insurance in accordance with the provisions of that code, and I will comply with such provisions before commencing the performance of the work of this contract.

CONSULTANTS

By: \_\_\_\_\_  
[Title]

EXHIBIT C  
Payment Schedule

Appendix D

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