

BIG BEAR CITY COMMUNITY SERVICES DISTRICT  
REQUEST FOR PROPOSALS  
for  
PROFESSIONAL ROUTING SOFTWARE



Proposals Due: August 25, 2023

Jon Zamorano  
Solid Waste Superintendent  
Big Bear City Community Services District  
139 E. Big Bear Blvd.  
Big Bear City, CA 92314

# Big Bear City CSD Request for Proposal – Routing and Billing Software

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## I. INTRODUCTION

### A. *General Information*

The Big Bear City Community Services District, hereinafter referred to as the District is requesting proposals from qualified professional routing software vendors in accordance with section II.A, subject to the cancellation provisions of the agreement.

There is no expressed or implied obligation for the District to reimburse responding firms for any expenses incurred in preparing proposals in response to this request. Materials submitted by respondents become the property of the District upon its receipt by the District.

During the evaluation process, the District reserves the right, where it may serve the District's best interest, to request additional information or clarification from Proposers, or to allow corrections of errors or omissions. At the discretion of the District, vendors submitting proposals may be requested to make oral and online demonstration presentations as part of the evaluation process.

The District reserves the right to retain all proposals submitted and to use any idea(s) in a proposal regardless of whether that proposal is selected. Submission of a proposal indicates acceptance by the firm of the conditions contained in the request for proposals, unless clearly and specifically noted in the proposal submitted and confirmed in the contract between the District and the firm selected.

The District's website can be located at, <http://www.bbccsd.org> .

The selection of a vendor is anticipated to be completed by **September 2022**. Following the notification of the selected vendor, a recommendation and proposed contract will be prepared for consideration and approval by the District's Board of Directors at its **October 2, 2023** meeting. The District reserves the right to reject any or all proposals, to waive any non-material irregularities or information in any proposal, and to accept or reject any items or combination of items.

The proposal should be marked "Big Bear City CSD Routing Software RFP." Facsimile proposals will not be accepted. Proposals are due by four o'clock in the afternoon, PST (4:00 p.m., PST) on Friday, August 19, 2023. Proposals received after four o'clock in the afternoon, PST (4:00 p.m., PST) on Friday, August 18, 2023, will be disqualified and shall be returned, unopened, to the Proposer. Additionally, please email an electronic copy of your proposal to [mszabad@bbccsd.org](mailto:mszabad@bbccsd.org) or submit one original and copy of the proposal to:

Morgan Szabad  
Big Bear City CSD  
139 E. Big Bear Blvd.  
P.O. Box 558  
Big Bear City, CA 92314  
(909) 584-4021  
[mszabad@bbccsd.org](mailto:mszabad@bbccsd.org)

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Any proposal may be withdrawn or modified by a written request signed by the vendor and received by the District prior to the final time and date for the receipt of proposals. Once the deadline is past, vendors are obligated to fulfill the terms of their proposal. The District further reserves the right to accept the proposal that it considers to be in the best interest of the District.

All inquiries relating to the technical aspects of the proposal should be directed to:

Jon Zamorano, Solid Waste Superintendent  
Big Bear City CSD  
139 E. Big Bear Blvd.  
P.O. Box 558  
Big Bear City, CA 92314  
(909) 584-4030  
[izamorano@bbccsd.org](mailto:izamorano@bbccsd.org)

### ***B. Term of Engagement***

It is the intent of the District to contract for the services presented herein until a successful go-live of the software. Thereafter, subscription agreements will be evaluated annually.

## **II. SCOPE OF WORK**

### ***A. Project Description***

The District is seeking proposals for a Waste Route Management System that will provide the tools to run the Solid Waste Department in a more efficient and timely fashion. Our goal is to reduce direct costs, improve safety, improve driver & back-office efficiency, and improve customer service for our residents. We anticipate that the project will provide data that will lead to better forecasts for budgets, assist in identifying current and future routing and equipment needs, and simplify the production of monthly, quarterly, and annual reports.

The selected Route Management System and software must provide real-time mapping of GPS location and direction and speed of all vehicles to allow work tracking and route status by customer service staff and management. The system must allow for reporting key information to management, drivers and customer service staff and for importing and exporting information with the enterprise applications in use at the District. Software should also focus on invoice and payment features as well as asset management. It would allow customers the ability to make pre-payment or payment to a quoted amount given by staff. Assets could be tracked for purposes of location and inventory levels. Staff would be able to track damaged assets due for replacement or warranty claim and have to the ability to manage deployed and available assets. The District seeks to address several challenges in the current environment, including, but not limited to:

1. Residential routes are currently “untraceable,” causing customer issues whether Solid Waste routes are complete or not.
2. The Solid Waste Department is currently using billing software utilized for water billing. This limits how a customer can pay for services rendered and the lengths and type of service the Department is able to perform.

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3. Because of current limitations to functionality, the Solid Waste Department personnel have developed manual work-around processes that impact District business and limits potential income or different services the Solid Waste Department could provide and bill for.
4. Any inventory tracking that is completed is done manually. This leads to problems in product availability and communication issues between departments.

### **B. On Board Computers and Hardware**

The District requires hardware options for the vehicle on board computers and cameras with price ranges and levels of ruggedness. The vendor may provide product specifications for vendor's primary hardware option. Completion of the following items by the route management vendor in a reasonable agreed upon timeframe:

1. Onboard computer with a description of memory, processor, and power system (battery, AC adapters, vehicle cradle).
2. Dimensions and screen resolution with characteristics of the viewing area. The display should be readable in direct sunlight.
3. Touch screen that is pressure-sensitive and can be activated by a gloved finger.
4. The hardware should come with manuals that cover temperature extremes for storage and operation. The District requires that the equipment installed withstand fluctuations in temperature, humidity and terrain.
5. The onboard computer is required to be ruggedized with durable mounting hardware.
6. Any equipment mounted in a vehicle must be mounted in a way that does not interfere with vehicle operation or driver visibility and safety.
7. A detailed description of the methods and equipment needed to support communication between the vehicles and the office-based system.
8. Other – Is there other information the District should consider when evaluating the proposed on-board computers and hardware?
9. User licenses for seven (7) Administration Staff and Solid Waste department users.

### **C. Communication and Cameras**

The District requires communication between the vehicles and the office-based system. Camera systems should capture and transmit a digital image from the vehicle to the office-based system. Installed cameras, should be able to complete the following items:

1. Mounted cameras should capture and transmit digital images from vehicles on-site and send those images back to Administrative staff.
2. Images should be stamped with date and time and provide Administrative staff with account information.

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3. Cameras would be able to take photos and capture video.
4. Images could be stored for archival purposes.
5. Mounted cameras would be installed in a way that does not interfere with vehicle operation or driver visibility and safety.
6. RFID data is collected from the vehicle and transmitted to the office system.
7. Other – Is there other information the District should consider when evaluating the proposed communication and cameras?

### **D. Software**

The District requires software to better serve not only staff but the customers of the District. Software should allow Administration staff to verify service, to track vehicle location, the ability to track assets and finally set-up software dedicated to better serve the Solid Waste Department with accounting, invoicing, and payment features. Software should be able to complete the following:

1. Asset management that tracks service, damaged assets, asset types that are deployed and available.
2. Track vehicles on routes in real time and verify service.
3. Account management should focus on the property location rather than the customer.
4. Billing with and without an invoice and the ability to accept payment electronically or with cash or check.
5. Provide daily updated financial information to District financial software.
6. Provide detailed transactional reporting for all online payments including but not limited to date, dollar amount, payee name, account number, method of payment.
7. Other – Is there other information the District should consider when evaluating the proposed software?

### **E. Training**

1. Provide hands on training for District's Solid Waste crew as well as Administration staff.
  2. Provide customer service support during the District's normal business operating hours.
  3. Provide ongoing software updates automatically via cloud, not server based.
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## **D. *Extended Services***

No extended services will be performed unless authorized in the contractual agreement or in an amendment to this agreement.

## **E. *References***

The vendor must be able to provide at least three professional references that can attest to the software as well as the implementation process.

### **III. DESCRIPTION OF THE GOVERNMENT**

#### **A. *Background Information***

Located in the San Bernardino mountains, the Big Bear City Community Services District was formed in 1966 by a formation and consolidation election. The District encompasses 11 square miles and serves a population of approximately 13,500. The District provides water, sewer, and solid waste collection services in an overlapping area of 21.1 square miles. The District is operated by a Board of Directors, General Manager, administrative staff, and field personnel totaling 38 full time employees and approximately 1 temporary employee. The General Manager is appointed by a five-member Board of Directors. Directors of the Board are elected by the public and serve staggered four-year terms. The Board of Directors meets on the first and third Mondays of each month.

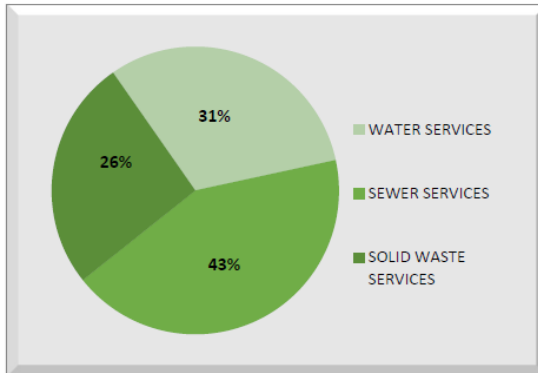
The Water Department's major facilities include 82 miles of pipeline ranging from 1.5 to 20 inches in diameter, 11 vertical wells, 2 slant wells, 2 springs, 4 tank reservoirs which store a total of 6.25 million gallons of water, and 6 water booster stations. The Sewer Department maintains a system consisting of approximately 115 lineal miles of sewer pipeline, 2,842 manholes, and 7 sewer lift stations. The Solid Waste Department collects household and commercial refuse and transports it to a transfer station. The Solid Waste Department also collects household and commercial recyclable materials and transports them to a recyclable materials processor.

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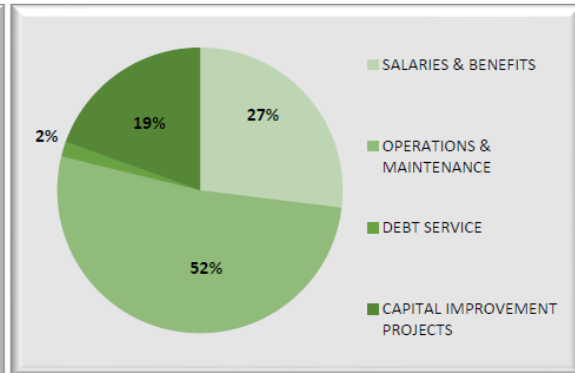
## FY 2022/23 BUDGET SUMMARY

	FY 21-22	FY 22-23	Percentage Change
<b>REVENUES and RESERVE TRANSFERS</b>			
WATER SERVICES	\$ 3,989,580	\$ 4,247,170	6.5%
SEWER SERVICES	\$ 5,450,038	\$ 5,791,594	6.3%
SOLID WASTE SERVICES	\$ 3,419,562	\$ 3,521,985	3.0%
TOTAL REVENUES	12,859,180	13,560,749	5.5%
RESERVE TRANSFERS - IN	2,348,500	3,164,500	34.7%
<b>TOTAL REVENUES/RESERVE TRANSFERS</b>	<b>\$ 15,207,680</b>	<b>\$ 16,725,249</b>	<b>10.0%</b>
<b>EXPENDITURES</b>			
SALARIES & BENEFITS	\$ 3,894,124	\$ 4,325,410	11.1%
OPERATIONS & MAINTENANCE	7,786,115	8,332,996	7.0%
DEBT SERVICE	255,465	270,627	5.9%
CAPITAL IMPROVEMENT PROJECTS	2,310,500	3,126,001	35.3%
<b>TOTAL APPROPRIATIONS</b>	<b>\$ 14,246,204</b>	<b>\$ 16,055,034</b>	<b>12.7%</b>
<b>CASH TO RESERVES</b>	<b>\$ 961,476</b>	<b>\$ 670,215</b>	<b>-30.3%</b>

Where The Money Comes From



Where The Money is Spent



More information can be found on the District's website: [www.bbccsd.org](http://www.bbccsd.org).

### B. Proposal Requirements

Any Proposer interested in providing necessary implementation services, must submit a written proposal. Each proposal must meet all the criteria set forth in this RFP. Please submit all requested information, documents, and applicable licenses with your proposal. Submittal of the proposal is solely at the cost of the Proposer and the District is in no way liable or obligates itself for any cost incurred to the Proposer in preparing the proposal. The proposal should include product capabilities, services to be performed, and pricing.

Proposer must:

1. Have experience and knowledge installing and operating a professional accounting software system in the municipal environment.

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2. Be licensed and insured to provide service in the State of California.
3. Proposer response to this RFP must include a configured demonstration that allows District staff to better manage this project by understanding the extent to which the software will meet our desired needs and changes for process flow.
4. Software usability is a vital component of software value. Issues related to transaction speed, professional and easy to use interfaces, and productive administrative tools are difficult to assess unless a comprehensive evaluation demonstration of the software can be performed.
5. A description of deliverables and results required for this undertaking.
6. Detailed work plan and schedule showing the scope of work for the completion of the project and indicating commencement and completion dates, and significant activities/ milestones showing a time/ task breakdown with estimated person-hours (or days) for members of the project team required to complete the various components of the assignment. This plan should demonstrate and describe the Proposer's understanding of the project scope, goals, and objectives. This plan must include Go-Live Support and Post Go-Live Support until final system acceptance.
7. Security – The vendor shall describe the security tools included. Describe how the system restricts access to the following:
  - a. Application access
  - b. Menu access
  - c. Record access
  - d. Field access
  - e. Querying/reporting access
  - f. Administrative tool access

### **C. General Terms and Conditions**

District reserves the right to reject any or all submittals or portions thereof. District makes no guarantee of any minimum or maximum number of products/services to be procured; and reserves the right to award any agreement based upon the source selection criteria identified below. District reserves the right to make no award under this solicitation, and the right to cancel this request or any portion thereof. This is a right of the District and not a prerogative of the Vendor.

ISSUANCE OF THIS REQUEST FOR PROPOSAL BY BIG BEAR CITY COMMUNITY SERVICES DISTRICT DOES NOT CONSTITUTE A COMMITMENT BY THE DISTRICT TO AWARD A CONTRACT.

All material submitted in response to this RFP will become the property of the District and may be returned only at the option of the District and at the expense of the vendor. In any case, the Master Copy shall be retained by the District. Successful and unsuccessful vendors will be notified by letter. The District will not be obligated to detail any of the results of the evaluation.

To ensure an ethical evaluation process, all inquiries or other communications regarding this proposal shall be exclusively directed to the District's Authorized Purchasing representative.



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Pursuant to the California Public (Open) Records Act, any proposal submitted in response to this RFP may be public records. If the vendor believes that any information submitted in response to this Request for Proposal (RFP) is confidential, trade secret, privilege information, or confidential commercial, financial, geological data, or is protected from disclosure for any other reason, the vendor should clearly indicate in writing, which information so provided is protected from disclosure and the reason for that protection.

All costs, terms, and conditions contained in a proposal shall remain fixed and valid for one year from the date of the submittal.

The costs of developing and submitting a proposal are entirely the responsibility of the vendor and no cost shall be reimbursed by the District.

The District reserves the right to reject any or all proposals or portions thereof received in response to this Request for Proposal and to waive minor irregularities and informalities in proposal received or to cancel this RFP, if it is the best interest of the District to do so.

If a contract is awarded for the goods and/or services requested, the successful vendor should be prepared to negotiate an agreement with the District, which will at a minimum contain the contents of the successful vendor's proposal and the terms and provisions of the agreement.

The purpose of the proposal is to demonstrate the qualifications, competence and capacity of the vendor seeking to undertake a professional routing software implementation with the District in conformity with the requirements of this request for proposals. As such, the substance of proposals will carry more weight than the form or manner of presentation. The Proposal should demonstrate the qualifications of the vendor and of the particular staff to be assigned to this implementation. It should also specify a conversion/ implementation approach that will meet the request for proposals requirements.

Proposals shall be organized and numbered in the following order:

### **1. Executive Summary**

- a. The summary should state the prime vendor's name submitting the proposal, their mailing address, telephone number, contact name, and email address.
- b. The letter shall address the vendor's understanding of the project based on this RFP and any other information the vendor has gathered.
- c. Include a statement discussing the vendor's interest and qualifications for this type of work.
- d. Certify that the person signing the proposal is entitled to represent the vendor, empowered to submit the bid, and authorized to sign a contract with the District.

### **2. Vendor Qualifications and Experience**

**To qualify the firm must have extensive experience in software implementations for mid-size local governments, an exceptional history of implementation with special districts, as well as experience with on-going support.** The Proposer should state the size of the firm, the size of the vendor's implementation staff, the location of the

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office from which the work on this engagement is to be performed, and the number and nature of the professional staff to be employed in this engagement on a full-time basis and the number and nature of the staff to be so employed on a part-time basis. Staff consistency is an important consideration.

The Proposer should provide the range of activities performed by the local office, e.g., implementation, report writing, enhancements, customer service/ support.

The Proposer must provide a list of all current municipal clients.

The Proposer shall provide information on the circumstances and status of any disciplinary action taken or pending against the vendor during the past three (3) years with State regulatory bodies or professional organizations.

### **3. Proposer Qualifications and Capability**

The District may obtain information as necessary by following up on the information provided by the Proposer and/or through other sources to determine or verify the ability of the Proposer to perform services under this contract.

After determining that a proposal satisfies the mandatory requirements stated in the Request for Proposal, the evaluator(s) shall use subjective judgment in conducting a comparative assessment. All responses will be reviewed to determine the award based on “Best Value” evaluation method. This RFP will be evaluated on the following:

- Company Qualifications: management of company, staff experience, and financial capacity of company and/or available resources designated for this contract.
- Past Performance: prior experience and references from contracted sources as well as how this experience may relate to Scope of Work in this RFP.
- Proposal: technical content, completeness, and quality of technical proposal, and adherence to solicitation requirements.
- Demonstration of the Vendor’s product
- Pricing

### **4. References – Similar Implementations with Other Government Entities**

- a. For the vendor’s office that will be assigned responsibility for the implementation, list the most significant implementations (minimum – 3) performed in the last three (3) years that are similar to the implementation described in this request for proposals.
- b. These implementations should be ranked on the basis of total staff hours. Indicate the scope of work, date, implementation staff, total hours, and the name, email address, and telephone number of the principal client contact.
- c. The District reserves the right to contact any or all of the listed references regarding the implementation services performed by the Proposer.

### **5. Specific Implementation Approach**

The proposal should set forth a work plan, including an explanation of the methodology to be followed to perform the services required in Section II of this request for proposal.

## 6. Cost Proposal

a. The District will not be responsible for expenses incurred by a vendor in the preparation and/or presentation of a proposal in response to this request.

### b. All-Inclusive Maximum Price

The cost proposal should contain all pricing information relative to performing the implementation (set-up, conversion, and training) as described in this request for proposals. The total all-inclusive maximum price to be bid is to contain all direct and indirect costs including all out-of-pocket expenses.

- i. Software licensing – include Proposer’s best estimate of type of license, number of users, concurrent users, etc. depending on licensing model used.
- ii. Software subscription and support – subscription and support pricing for one year from date of acceptance is to be included as a separate item in the year 1 price. Subscription and support costs must be delineated for years 2 – 5.
- iii. Set-up, conversion, data migration, and configuration will be listed separately from the above.
- iv. All hardware equipment needed to be purchased for two trucks.

### c. Manner of Payment

- i. Progress payment will be made on the basis of hours of work completed during the course of the implementation plus hosting service up to that point and any equipment installed not to exceed the amount specified in the firm’s proposal and subsequent contract.
- ii. Interim billings may be submitted for services performed as costs are incurred. However, the Big Bear City Community Services District will not make final payment of the total amount due under the terms of the contract until it has accepted the final work products.

## 7. Identification Anticipated Potential Implementation Problems

The proposal should identify and describe any anticipated potential implementation problems, the vendor’s approach to resolving these problems and any special assistance that will be requested from the District.

## 8. Professional Insurance

The proposal shall include a copy of the firm’s current certificate of insurance and endorsements for professional liability and worker’s compensation insurance.

## VII. EVALUATION PROCEDURES

### A. *Review of Proposals*

1. Under the terms of this RFP, the District is not obligated to contract with the applicant lowest in cost. The evaluation and review will consider all aspects of the proposals.

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2. The Big Bear City Community Services District may negotiate additional terms and conditions, and will award the contract to the Proposer most responsive to the needs of the District and most capable of providing the services to meet those needs.
3. A selection shall be made solely by the Big Bear City Community Services District Board of Directors upon the recommendation of the Board's Finance Committee.
4. The award of the contract by the Board of Directors will occur by October 2, 2023.
5. District Staff, consisting at a minimum, of the following, will evaluate submitted proposals:
  - i. Solid Waste Superintendent
  - ii. General Manager

### **B. Evaluation Criteria**

After determining that a proposal satisfies the mandatory requirements in the Request for Proposal, the evaluators shall use subjective judgment in conducting a comparative assessment. All responses will be reviewed to determine the award based on "Best Value" evaluation method. This RFP will be evaluated on the following:

- Company Qualifications: management of company, staff experience, and financial capacity of company and/or available resources designated for this contract.
- Past Performance: prior experience and references from contracted sources as well as how this experience may relate to Scope of Work in this RFP.
- Proposal: technical content, completeness, and quality of technical proposal, and adherence to solicitation requirements.
- Demonstration of the Vendor's product
- Pricing