City of Monterey Park

ADDENDUM No.2 to REQUEST FOR PROPOSAL No. 841

for Utility Billing Software Application

August 25, 2026

Addendum No. 2 includes all questions and answers pertaining to RFP No. 841:

1. Would the City accept an electronic proposal submitted by email as the complete official submission, without requiring a hard-copy proposal? **No. A hard-copy proposal is required. Proposers should also provide an electronic submission in accordance with the RFP requirements.**

2. If a hard-copy proposal is required, would the City kindly consider extending the proposal deadline by one week? **Yes. The City will extend the proposal deadline by two weeks. The revised deadline will be issued through an official RFP addendum.**

3. Which AMI platform is currently deployed, such as Neptune, Sensus, Badger, or Itron? **The City is currently completing a full citywide AMI upgrade using Neptune Technology Group equipment and software, including Neptune Mach 10 ultrasonic meters, the R900 communications environment, and Neptune 360.**

4. Which GIS platform does the City currently use? **The city uses ArcGIS (by Esri) as its GIS platform.**

5. What cash register hardware is currently in use? Receipt Printer: **TM-S9000MJ**

6. What OCR or barcode scanning equipment is currently in use? **There are no barcodes currently in use.**

7. Is integration with InvoiceCloud mandatory, or would the City consider an equivalent payment and customer portal solution? **The integration with Invoice Cloud is not mandatory but is preferred. The City will not be replacing Invoice Cloud.**

8. Please clarify the requirement for “live data backup to the keystroke.” **The utility billing system should continuously protect/replicate data as it is being entered or changed, with essentially no meaningful gap between the live system and its backup.**

9. Please clarify the expectation for a “non-ticket-based support system. **The City wants a more direct and accessible way to contact technical support, such as:**

    1. **Phone support where staff can speak directly with a technician**
    2. **Live support/chat**
    3. **Direct email to support personnel**
    4. **Ability to contact a designated support representative**
    5. **Immediate assistance for urgent issues rather than waiting for a ticket to be processed**

10. Is CASS certification a mandatory requirement, or is it preferred? **The CASS certificate is preferred.**

11. Can the City provide the number of unique utility billing accounts by service type for both residential and commercial/industrial customer types?

    1. **Active Accounts 12,695**
    2. **Meters 13,367**
    3. **Residential (single family) 10,341**
    4. **Residential (multi- family) 1,685**
    5. **Commercial 1,085**
    6. **City meter 92**
    7. **Institution 13**
    8. **Landscaping 151**

12. Would the City be open to allowing electronic-only submissions for this RFP (as opposed to printed and shipped)? **The city is requesting hard copies to be shipped.**

13. Does the City have a preferred timeline for project start and solution go-live? **The City anticipates beginning implementation as soon as practicable following contract award, with the goal of completing implementation and going live before the end of the City's fiscal year in June 2027.**

14. Would the City be open to replacing its existing payment processing provider (Invoice Cloud) in favor of a respondent's native payment processing solution (may result in discount considerations if yes). **The City will not be replacing Invoice Cloud.**

15. For Service Order Management, is the City open to a respondent's native application for managing field work / service orders? Or is it requesting the respondent to integrate with an existing field work application? **The Water Division currently uses SEW.AI's Smart Mobile Workforce (SMW/SmartWX) platform for work order management. Finance/Utility Billing creates and dispatches work orders, and Water staff receive, update, complete, and track them in the field. The City is open to either integrating the new CIS with the existing SEW platform or considering a respondent's native work order solution if it improves functionality, efficiency, integration, and/or cost.**

16. Can the City provide a list of expected integrations and the name of such applications (i.e. General Ledger, Bill Print Vendor, GIS, AMI/headend system provider, etc.)

The City currently anticipates integration with Tyler Munis (ERP/General Ledger), InfoSend (bill print), ESRI ArcGIS (GIS), Neptune 360/AMI, SEW.AI Smart Mobile Workforce/SmartWX, InvoiceCloud, VertexOne, and Aquatic Informatics Tokay. Additional integrations may be identified during implementation.

17. Does the City have a projected budget range for 1) one-time implementation costs and 2) ongoing subscription fees? **No specific budget range has been established at this time. Proposers should provide a complete and transparent cost proposal that separates one-time implementation costs from ongoing subscription, licensing, support, and other recurring fees.**

18. Is a bid bond mandated for this response, or would the City be willing to waive that requirement until down selection or contracting? **The bond can be waived until the contract is awarded and before the execution of the contract.**

19. Would the City be open to please accepting electronic submissions without a hardcopy mail-in submission? **Hard copy is required.**

20. Would the City consider extending the deadline by two weeks to allow us sufficient time to digest and analyze responses to Q&A and print and ship the response? **The proposal deadline has been extended by two weeks.**

21. Does the City have a not-to-exceed budget or target annual contract value for this engagement? **No not-to-exceed budget or target annual contract value has been established at this time. Proposers should provide their best-value pricing based on the requirements outlined in the RFP.**

22. Should the cost proposal distinguish between one-time implementation/conversion fees and recurring annual SaaS subscription fees, or present a single total cost? **The cost proposal should clearly distinguish between one-time implementation and conversion costs and recurring annual SaaS subscription, licensing, support, and other ongoing fees.**

23. Can the City confirm the name and version of the incumbent utility billing/CIS system being replaced, and approximately how long it has been in service? **BillMaster/service have been in place for over 20 years.**

24. Please provide more detail regarding why the city is looking to move off of its current system. If possible, provide information relating to issues with the current system and benefits that the city expects from moving to a new and modern billing platform? **BillMaster has been in service for more than 20 years and no longer supports the City's needs as efficiently as a modern CIS. Staff experience limitations with usability, reporting, system integration, data access, and manual/repetitive processes. The City is seeking a modern platform that improves billing and customer service workflows, reporting and analytics, integrations, account and service-order management, and overall data accessibility. The goal is not simply a like-for-like replacement; the City wants vendors to identify practical improvements that reduce manual work, improve service, support current systems such as AMI/GIS/ERP, and provide flexibility for future needs.**

25. How many years of billing history does the City require to be converted into the new system, and will the City provide a data dictionary or export schema for the current system? **BillMaster contains more than 20 years of parcel and account-related history. The City prefers to migrate as much historical information as is reasonably available and technically feasible. The practical limitation is expected to be the period required for financial reconciliation rather than the availability of older parcel/account information.**

26. Beyond customer accounts and billing history, what additional data sets does the City expect converted — for example, service order history, deposit records, delinquency history, or custom report templates? **The City prefers to convert all reasonably available historical data needed for continuity of operations, including customer/account records, billing and payment history, consumption history, meter information, service order history, deposits, delinquency/collection history, account notes, transaction history, and other relevant records. Custom reports and templates should be converted or recreated where practical. Final conversion scope will depend on the availability, format, and quality of the source data.**

27. Can the City specify the make and model of the Water AMI Meter system referenced in the RFP, and whether an existing API or standard data export format is available from that system? **The City is completing a citywide AMI upgrade using Neptune Mach 10 ultrasonic meters within the Neptune R900 communications environment and Neptune 360. Neptune 360 is currently connected to BillMaster through an established interface/API. The replacement CIS will be expected to support automated integration with Neptune 360 for the exchange of meter, consumption, account, service-location, and billing-related data.**

28. Please describe the City's current Mobile Field Service and Workorder Management System and whether this is currently integrated to your CIS and what level of visibility is required. If possible, please provide the number of field service technicians including dispatch and management personnel. We currently have 12 concurrent but in need for me. **The City currently uses SEW.AI's Smart Mobile Workforce (SMW/SmartWX) platform. Finance/Utility Billing creates and dispatches work orders, and Water Department field staff receive, update, complete, and track the work in the system. The City is open to continued integration with SEW or a comparable native solution if it provides a clear operational benefit. The City is not aware of a current user limitation in the existing platform.**

29. Section 1.j requires a 'True-Cloud based SaaS solution.' Can the City clarify whether solutions offered as cloud-hosted versions of traditional on-premise software will be considered compliant, or is the City specifically seeking software architected natively for the cloud from inception? **Billmaster currently hosts information.**

30. Section 1.k states 'Real-time integration has already been built to Invoice Cloud.' Is this language a vendor requirement (the selected vendor must already have a pre-built InvoiceCloud integration in production), or is it describing a capability the City's current system has today? **This is not a current system capability. It's the city's preference to have real time integration.**

31. Since the City has been live on InvoiceCloud since August 2024, will the InvoiceCloud relationship and contract continue independently of the selected CIS vendor, or is the new vendor expected to own, replace, or renegotiate that relationship? **Invoice Cloud will continue independently of the new billing vendor.**

32. Section 1.l references an interface to 'mapping and web application.' Is the City expecting GIS integration with its existing ESRI ArcGIS environment — and if so, what is the nature of that integration (read-only map display, bi-directional account/parcel data sync, or other)? **The City currently uses ESRI ArcGIS and expects the new CIS to support GIS integration in a way that keeps customer, account, parcel, meter, and service-location information current while minimizing duplicate data entry. Where appropriate, support bi-directional exchange or other automated synchronization.**

33. The RFP requires an API to work with 'other internal systems within Monterey Park, such as asset management systems.' Can the City identify which specific internal systems it anticipates integrating with via API (e.g., GoGov/GoMPK for service requests, Tyler Munis for GL posting, Tyler Payment Central for cashier)? **The City anticipates API-based or other automated integration with Tyler Munis, Neptune 360/AMI, ESRI ArcGIS, SEW.AI Smart Mobile Workforce/SmartWX, InvoiceCloud, InfoSend, VertexOne, and Aquatic Informatics Tokay. The goal is to keep information current across systems and reduce duplicate data entry and manual reconciliation. The City is open to importing files.**

34. Section 1.t requires a 'non-ticket-based support system.' Can the City describe what this means in practice — for example, dedicated account management, direct phone access to support engineers, or a specific SLA-based response model or “in-app” support capabilities?
The City wants a more direct and accessible way to contact technical support, such as:

    1. **Phone support where staff can speak directly with a technician**
    2. **Live support/chat**
    3. **Direct email to support personnel**
    4. **Ability to contact a designated support representative**
    5. **Immediate assistance for urgent issues rather than waiting for a ticket to be processed.**

35. Section 1.v requires 'live data backup to the keystroke.' Can the City clarify the intended technical standard — for example, real-time continuous replication (near-zero RPO), point-in-time recovery capability, or a specific RTO/RPO target? **The utility billing system should continuously protect/replicate data as it is being entered or changed, with essentially no meaningful gap between the live system and its backup.**

36. Will the City be conducting vendor demonstrations or oral presentations as part of the evaluation process? If so, when are demonstrations anticipated, how much time will each vendor be allocated, and will vendors be provided with a demonstration script or scenario in advance? Will vendors be able to conduct demonstrations with the City on-

site? **The City will allow the top 3 vendors to demo their system This will occur after the RFP deadline and all proposals have been received and reviewed by the City.**

37. The RFP lists evaluation factors 'not in priority order.' Does the City assign relative weights to any of these factors, or will all factors be evaluated on an equal basis? **All evaluation factors will be considered equally. The City has not assigned separate numerical weights or priority rankings to the listed evaluation criteria.**

38. Are there any page limits, font size requirements, or file format requirements for the electronic submission? If PDFs are acceptable, is a combined single PDF or separate files per section preferred? **Specific proposal page limits, font size requirements, and electronic file organization have not yet been confirmed. Separately, the selected solution should support City-facing reports, notices, correspondence, forms, templates, and outreach materials that can follow the City of Monterey Park's adopted branding standards, including approved fonts, colors, and logos.**

39. Section E (References) asks for 'local governmental references of similar size.' Does 'local' mean California-based, or is any U.S. municipal utility reference acceptable? **'Local' refers primarily to Southern California governmental agencies. The City prefers references from governmental utilities or agencies of similar size and operational complexity in Southern California; however, comparable governmental references from elsewhere in California or the United States will be accepted if Southern California references are not available.**

40. Can the City confirm its fiscal year (e.g., July 1 – June 30 or January – December) for implementation planning and cost proposal purposes. **The City's fiscal year is July1 to June 30.**

41. Is there a target go-live date for the new system, or will the implementation timeline be defined collaboratively with the selected vendor following contract award on October 21, 2026? **The City's goal is to implement and go live with the new system before fiscal year end June 2027**.

42. Section 2 portal requirement states that 'The system should offer a full-service customer portal.' These are focused on payment and account management. Can the City provide information on other portal capabilities for their citizens such as such as water usage data, leak detection/notification, conservation options, etc. **The City has already invested in a customer-facing portal through VertexOne as part of the Neptune AMI implementation. The portal is intended to provide customers with water-use information, usage trends, alerts, leak-related information, conservation tools, and other AMI-based functions. The City is not seeking unnecessary duplication of this existing functionality. The selected CIS should integrate with or complement the VertexOne/Neptune environment so customers have a practical, connected experience between billing/account functions and AMI information. The City is interested in single sign-on, automated data exchange, APIs, direct linking, or other methods that minimize separate credentials and disconnected systems. Vendors may propose alternatives if they clearly identify the impact on the City's existing VertexOne investment, including functionality, transition requirements, costs, and potential savings.**

43. Section 8 of the RFP lists reporting requirements. In addition to financial and operational level reporting how is the City currently managing compliance and regulatory reporting requirements. Will additional capabilities around backflow testing compliance or similar critical operational parameters be required. **The City currently uses Aquatic Informatics' Tokay system to manage the backflow prevention program, including compliance tracking, testing records, notifications, and related information. The City is not looking to duplicate this backflow functionality in the new CIS. The preference is for the CIS to integrate or interface with Tokay so relevant customer, service-location, meter, and backflow information can be transferred and kept current between systems, reducing duplicate entry and inconsistent records.**

44. What is the City's primary operational, billing, customer service, and reporting challenges with the current utility billing environment that the new solution is expected to address? **The City's current utility billing environment is antiquated and is not sufficiently user friendly for modern utility operations. Key challenges include cumbersome reporting, difficulty accessing and using information efficiently, manual/repetitive processes, limited integration with other City systems, and a lack of flexibility compared with modern CIS platforms. The City is seeking a solution that improves staff usability, reporting and analytics, customer service, workflow efficiency, data accessibility, and system integration while reducing duplicate entry and manual reconciliation.**

45. Can the City identify the current utility billing application and underlying database platform that will be replaced? **The City is looking to replace its current system BillMaster. MSSQL 2019 platform**

46. Can the City provide the current number of active accounts, inactive/closed accounts, service locations, and meters to be managed in the new system?

1.	**Active Accounts**	**12,695**
2.	**Meters**	**13,367**
3.	**Residential (single family)**	**10,341**
4.	**Residential (multi- family)**	**1,685**
5.	**Commercial**	**1,085**
6.	**City meter**	**92**
7.	**Institution**	**13**
8.	**Landscaping**	**151**

47. How many years of historical customer, billing, payment, consumption, meter, service order, notes, and transaction data does the City expect to migrate? **BillMaster contains more than 20 years of parcel and account-related information. The City prefers to migrate as much historical customer, account, consumption, meter, service order, notes, and related information as is reasonably available and technically feasible. The City does not want useful historical information discarded simply because it predates the financial reconciliation period.**

48. Can the City provide the approximate volume or record counts for the data to be converted, including accounts, meters, transactions, consumption history, service orders, notes, and related records? **Awarding vendor will receive this information.**

49. Will the City provide database documentation, data dictionaries, file layouts, sample extracts, and other technical documentation required to support data conversion? **It will be the responsibility of awarded vendor to work with current vendor and collect technical documentation, data extracts, file layouts, and other information reasonably accessible from the existing BillMaster environment. The selected vendor will be expected to work with City staff and the existing system provider, as needed, to identify and extract the data required for conversion.**

50. Can the City clarify the respective responsibilities of the City and selected vendor for data extraction, cleansing, deduplication, transformation, validation, reconciliation, and final conversion approval? **The selected vendor will lead the technical data conversion process, including extraction support, mapping, transformation, cleansing, deduplication, conversion, testing, and reconciliation. The City will provide available source data, documentation, subject-matter expertise, business rules, and staff access. The City and vendor will work together to resolve data-quality issues and validate converted information. After successful validation, reconciliation, testing, and acceptance, the City will retain final production conversion and go-live approval.**

51. Can the City provide the anticipated number of system users by role, including administrators, billing staff, customer service staff, finance users, supervisors, field users, and read-only users? **The City anticipates 25 users across Utility Billing/Customer Service, Finance, system administration, supervisory/management, Water Division operations, and read-only/reporting roles. Proposers should clearly describe their licensing model, including user-based, role-based, or concurrent-user limitations and associated costs. The City prefers flexibility to add users as operational needs change.**

52. How many City employees will require training, and what delivery methods does the City prefer, such as onsite, remote, train-the-trainer, self-paced, or a blended approach? **The City prefers a blended training approach that may include onsite instructor-led training, and remote sessions, and role-specific user documentation. Training should be tailored to each user group and include hands-on instruction, administrator/power-user training, reference materials, and appropriate post-go-live support.**

53. Can the City confirm the complete list of systems that must integrate with the new utility billing solution at Go-Live? **The City currently anticipates that the new CIS will need to integrate with or interface with Tyler Munis, InfoSend, ESRI ArcGIS, Neptune 360/AMI, SEW.AI Smart Mobile Workforce/SmartWX, InvoiceCloud, VertexOne, and Aquatic Informatics Tokay. The goal is to keep information current across systems, minimize duplicate entry, and preserve existing technology investments where practical.**

54. Can the City identify the current ERP/general ledger system and describe the required financial transactions, journal entries, and reconciliation interfaces with the new utility billing solution? **The City uses Tyler Munis as its ERP; create an import file that has GL The City currently uses Tyler Munis as its ERP/general ledger system. The new CIS will be expected to integrate with Tyler Munis to support appropriate financial activity, including billing, payments, adjustments, deposits, refunds, write-offs, and other applicable utility transactions.**

55. Can the City identify the manufacturer, product, and version of its current AMI system and describe the required data exchange with the new utility billing solution? **The City is currently completing a citywide AMI upgrade using Neptune Technology Group equipment and software. The system includes Neptune Mach 10 ultrasonic meters in the R900 communications environment, network collectors/gateways, and Neptune 360 as the meter-reading/head-end and meter data management platform. Neptune 360 is currently integrated with BillMaster through an established interface/API. The replacement CIS will be required to integrate with Neptune 360 and support automated exchange of the data needed to maintain accurate meter, account, service-location, consumption, and billing records. The City's VertexOne customer portal is also part of the overall AMI/CIS environment and should be considered in the integration design.**

56. For the requirement stating that real-time integration has already been built to InvoiceCloud, can the City confirm whether an existing production-ready integration is mandatory at proposal submission or whether the integration may be configured or completed during implementation? **Integration can wait until the contract is awarded and before the execution of the contract**

57. Will the City and applicable third-party system providers make the required APIs, interface specifications, credentials, technical contacts, test environments, and integration documentation available to the selected vendor? **Integration will be determined after a vendor is selected.**

58. Does the City require separate development, testing, training, UAT, and production environments, and should all required environments be included in the base proposal price? At a minimum city requires **At a minimum, the implementation should provide sufficient separation between testing/UAT and the live production environment so configuration, integration testing, conversion validation, training, and acceptance testing can occur without risking production data or operations. The final environment structure has not yet been confirmed.**

59. What is the City’s desired implementation start date and target production Go-Live date following the anticipated contract award on October 21, 2026? **The City anticipates beginning implementation as soon as practicable following contract award, with the goal of completing implementation and achieving production go-live before the end of the City's fiscal year in June 2027. The detailed schedule will be developed with the selected vendor following award.**

60. Does the City expect a parallel billing or production period between the current and new systems before Go-Live, and if so, how many billing cycles should be included? **Yes, we**

need to test until it's reliable. Parallel billings after go-live maybe needed and up to the city's discretion.

61. What implementation, data conversion, testing, UAT, reconciliation, and acceptance criteria must be satisfied before the City approves production Go-Live? **Production go-live will be subject to successful completion of implementation, data conversion, system configuration, integration testing, user acceptance testing, financial reconciliation, training, and parallel billing. Converted customer/account, meter, billing, payment, consumption, service-order, notes, and other required data must be complete and accurate; billing calculations and rates must be validated; required integrations must operate reliably; security/user access must be configured; reporting must be operational; and required City-branded forms, notices, and templates must function as intended. Critical defects must be resolved before go-live, and any remaining non-critical items must have an agreed corrective-action plan. Final go-live approval remains with the City.**

62. Can the City clarify the required support SLAs, including support hours, severity levels, response and resolution targets, escalation procedures, and after-hours support for critical production issues? **At a minimum, the City expects timely access to qualified technical support, clear escalation procedures, and priority response for critical issues affecting billing, payments, customer access, integrations, or other essential operations. Proposers should identify their standard support model, SLA commitments, after-hours support, escalation process, account management, and any added cost for enhanced or 24/7 support.**

63. Can the City clarify the requirement for "live data backup to the keystroke," including the expected backup approach and required RPO and RTO? **The utility billing system should continuously protect/replicate data as it is being entered or changed, with essentially no meaningful gap between the live system and its backup.**

64. Can the City confirm whether the selected vendor is expected to provide any physical hardware or devices, or whether the scope is limited to the SaaS solution, integrations, implementation, training, and ongoing support? **At this time, the City does not anticipate requiring significant physical hardware or devices as part of the base scope. The primary scope is expected to include the SaaS solution, configuration, integrations, data conversion, implementation, testing, training, and ongoing support. Proposers should identify any hardware, appliances, peripherals, or devices that are required or recommended, along with all related purchase, installation, maintenance, replacement, and support costs.**

65. Can the City confirm whether a bid bond is required with the proposal and whether a performance bond will be required from the successful proposer under RFP #841? **The bond can be waived until the contract is awarded and before the execution of the contract.**

66. Which AMI provider does the City currently use for meter reading**? The City is currently completing a citywide AMI upgrade using Neptune Technology Group equipment and software, including Neptune Mach 10 ultrasonic meters, the R900**

communications environment, and Neptune 360 for meter reading and AMI data management.

67. Which financial/ERP solution is the City currently using? **The City currently uses Tyler Munis as its financial/ERP system. The selected CIS will be expected to support the required financial interfaces and reconciliation processes with Tyler Munis.**

68. The RFP identifies compatibility with InvoiceCloud as a preferred capability and also includes functional requirements for a customer web portal. Would the City consider proposals that include a fully integrated native customer portal and payment processing solution in lieu of maintaining a separate third-party payment platform such as InvoiceCloud? **The City currently uses InvoiceCloud for payment processing and has also invested in a VertexOne customer portal as part of the Neptune AMI implementation. The City is open to considering alternative or consolidated solutions where a proposer can demonstrate meaningful improvements in functionality, integration, customer experience, operational efficiency, and/or cost. Any proposed alternative should clearly identify impacts to the City's existing InvoiceCloud and VertexOne investments, including functionality gained or lost, transition requirements, integration impacts, implementation/recurring costs, and potential savings**

69. On pages 32–34, there appears to be differing information regarding the format and inclusions for Part II of the proposal, including references to additional sections. We also noticed that Section C appears to be missing in Part II. Should we assume that the City would like a compilation of all the information outlined in these sections? **Yes. Proposers should include all information requested throughout the applicable Part II sections, even where the section lettering or organization appears inconsistent. The City intends to receive a complete response addressing all requested information and evaluation criteria.**

70. Regarding the submission requirements on page 4, does the City prefer an electronic submission via email, a printed copy mailed to the City, or are both required? **Both are required. Proposers must provide a printed hard-copy submission and an electronic submission in accordance with the RFP requirements.**

VENDOR TO READ SIGN AND RETURN WITH PROPOSAL

_____	_____	_____
Company	Address	Phone No.
_____	_____	
Name (Print)	Signature	
_____		
Title of Person Signing Bid		