



110 SE Watula Avenue, Third Floor
Ocala, Florida 34471
Main Number: (352) 629-8402
www.bidocala.com

The City of Ocala is accepting sealed electronic submissions for:

REQUEST FOR LETTERS OF INTEREST (“LOI”) #: ELE/241091 FOR SUPERVISORY CONTROL AND DATA ACQUISITION (SCADA)

Official copies of all solicitation documents may be obtained via electronic download from the City of Ocala’s e-procurement portal located at: <https://www.bidocala.com>

**** Copies of documents obtained from any other source are not considered official copies. ****

- Pre-Proposal Conference:** **Tuesday, June 11, 2025 at 9:00 A.M. (EST)**
**Ocala Electric Utilities, 1805 NE 30th Avenue, Building 400,
Ocala, FL 34470**
Proposers are required to attend this conference to obtain important information relative to this Solicitation. All attendees will be required to sign in. Failure to attend and sign-in will result in a Proposer’s response being rejected as non-responsive.
- Deadline for Questions:** **06/18/2025 at 5:00 p.m. (EST)**
All questions or inquiries regarding this solicitation must be submitted via e-mail to the Buyer Contact identified below or via the e-procurement portal no later than the Deadline for Questions noted above. Any questions received after the deadline will not be considered.
- Where to Submit Proposals:** **City of Ocala’s E-Procurement Portal:**
<https://www.bidocala.com>
- Submission Deadline:** **06/27/2025 at 2:00 p.m. (EST)**
Sealed electronic submissions shall be accepted up to the Submission Deadline. Submissions received after the deadline and/or transmitted to the City of Ocala outside of the e-procurement portal shall be rejected. The e-procurement portal’s timestamp shall be conclusive as to the timeliness of filing.
- Vendor Registration:** Proposers must be a registered Vendor within the ProRFx e-procurement portal in order to submit a response to this Solicitation. **There is no charge to register, simply follow the registration path for “New Vendor Registration” at <https://www.bidocala.com>.**
- Buyer Contact/
Direct All Inquiries To:** **EILEEN MARQUEZ, SENIOR BUYER**
E-Mail: emarquez@ocalafl.gov
Phone: (352) 629-8362
- Notice to Proposers:** The point of contact for all questions and issues relating to this Solicitation shall be the Buyer Contact identified above.
To ensure that your submission is deemed responsive, you are urged to request clarification or guidance regarding any issues involving this solicitation **prior to submitting** your response.

THE CITY OF OCALA RESERVES THE RIGHT TO REJECT ANY AND ALL SUBMISSIONS

SECTION 1

INTRODUCTION AND GENERAL INFORMATION

1.1. MANDATORY PRE-SUBMITTAL CONFERENCE.

- (a) The City of Ocala ("City") has scheduled a mandatory Pre-Submittal Conference and Site Visit for this Solicitation for **Tuesday, June 11, 2025 at 9:00 A.M.**, at Ocala Electric Utilities, 1805 NE 30th Avenue, Bldg. 400, Ocala, FL 34470. Interested Proposers are required to attend this conference to obtain important information relative to this Solicitation.
- (b) All attendees will be required to sign-in and will be asked to execute a Non-Disclosure Agreement in order to protect certain confidential data or information relating to the security of the technology processes and/or practices of Ocala Electric Utility that is proprietary to the City, not generally known to the public, and exempt from Florida's Sunshine Law under section 119.0713(4)(a) and (5)(a), Florida Statutes.
- (c) Failure to attend the Pre-Submittal Conference, sign-in, and execute the City's Non-Disclosure Agreement will result in the Proposer's response being rejected as non-responsive.

1.2. EXHIBITS. The following Exhibits and Attachments are incorporated into and made a part of this Solicitation as if fully set forth herein.

- (a) **EXHIBIT A:** Price Proposal Form
- (b) **ATTACHMENT 1** – Reference Form
- (c) **ATTACHMENT 2** – Optional Additional Features Form

1.3. LOCAL VENDORS. The City of Ocala encourages active participation by local vendors. In accordance with Section 22-2 of the City's Code of Ordinances, this Solicitation **DOES NOT QUALIFY** for Local Vendor Preference.

1.4. QUESTIONS AND CLARIFICATIONS.

- (a) Proposers are responsible for verifying all listing information prior to submitting a response to the Solicitation.
- (b) Proposers must communicate any questions regarding this Solicitation by the deadline set forth above.
- (c) Any and all questions must be submitted to the Procurement Department electronically via www.bidocala.com. Responses will be made electronically and posted online. It is the responsibility of the proposers to check for updates.
- (d) If necessary, any addenda shall be posted to the www.bidocala.com website.
- (e) It is our standard policy that no addendum will be issued less than three (3) calendar days prior to the deadline established for receipt of proposals, except for an addendum withdrawing the solicitation or one which includes postponement of the date for receipt of proposals.
- (f) No verbal or written information obtained by means other than those set forth in this Solicitation, or by addendum thereto, shall be binding upon the City.

1.5. AMENDMENTS TO SOLICITATION.

- (a) Should it become necessary for the City to revise or amend any part of a solicitation, Procurement and Contracting Department staff shall furnish the revision or amendment via written addendum, comment, and/or question and answer posted in the City's e-procurement system under the appropriate solicitation.
- (b) Addenda, comments, questions, and answers should be reviewed by interested parties. Lack of review will not excuse Proposers from adherence to any requirements set forth therein.

- (c) If there is a discrepancy with the scope of work that City determines, in its sole discretion, to be unfair to the Proposers, City may postpone the bid opening at any time in order to make corrections. City further reserves the right to extend the bid opening at any time during the bid process.

- 1.6. **ADA NEEDS/ACCOMMODATIONS.** If reasonable accommodations are needed in order for an interested Proposer to participate in this solicitation, please contact the Buyer Contact identified above at least forty-eight (48) hours in advance so that arrangements can be made.
- 1.7. **MINORITY/DISADVANTAGED BUSINESS ENTERPRISE PARTICIPATION.** The City of Ocala encourages the active participation of minority businesses, women's businesses, and labor surplus area firms whenever possible as either prime contractors or subcontractors. If subcontracts are to be let through a prime subcontractor, the prime contractor is required to take the following affirmative steps:
 - (a) placing qualified small and minority businesses and women's business enterprises on solicitation lists;
 - (b) assuring that small and minority businesses and women's business enterprises are solicited whenever they are potential sources;
 - (c) when economically feasible, dividing total requirements into smaller tasks or quantities to permit maximum participation by small and minority businesses and women's business enterprises;
 - (d) establishing delivery schedules, where the requirement permits, which encourage participation by small and minority businesses and women's business enterprises; and
 - (e) using the services and assistance, as appropriate, of such organizations as the Small Business Administration and the Minority Business Development Agency of the Department of Commerce.
- 1.8. **CERTIFICATION OF ACCEPTANCE.** By responding to this solicitation, Proposer certifies that he/she has carefully read the solicitation documents, including any addenda, exhibits, attachments, and/or appendices in their entirety and agrees that to the best of his/her knowledge no pages or parts of the documents appear to have been omitted and that he/she fully understands, accepts, and agrees to fully comply with the requirements and conditions set forth therein.
- 1.9. **COST INCURRED IN RESPONDING.** All costs directly or indirectly related to proposal preparation, representation or clarification shall be the sole responsibility of and be borne by the Proposer.
- 1.10. **INDULGENCE.** Indulgence by the City on any non-compliance by the Proposer does not constitute a waiver of any rights under this request.
- 1.11. **FEDERAL DEBARMENT.** By submitting a proposal, the Proposer certifies that no principal (which includes officers, directors, or executives) is presently suspended, proposed for debarment, declared ineligible or voluntarily excluded from participation in this transaction by any Federal department or agency.
- 1.12. **PUBLIC ENTITY CRIMES.** A person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a bid, proposal, or reply on a contract to provide any goods or services to a public entity; may not submit a bid, proposal, or reply on a contract with a public entity for the construction or repair of a public building or public work; may not submit bids, proposals, or replies on leases of real property to a public entity; may not be awarded or perform work as a consultant, supplier, sub-consultant, or consultant under a contract with any public entity; and may not transact business with any public entity in excess of the threshold amount provided in s. 287.017 for CATEGORY TWO(\$35,000) for a period of 36 months following the date of being placed on the convicted vendor list.
- 1.13. **E-VERIFY.** The Proposer shall utilize the U.S. Department of Homeland Security's E-Verify system to verify the employment eligibility of all new employees hired by the Proposer during the term of the contract and shall expressly require any sub-consultants performing work or providing services pursuant to the state contract to likewise utilize the U.S. Department of Homeland Security's E-Verify system to verify the employment eligibility of all new employees hired by the sub-consultant during the contract term.
- 1.14. **MATERIALS.** All materials submitted in response to this solicitation shall become the property of the City.

1.15. INTELLECTUAL PROPERTY RIGHTS. The Proposer will indemnify and hold harmless, the City from liability of any nature or kind, including costs and expenses for or on account of any copyrighted, service marked, trademarked, patented or un-patented invention, process, article or work manufactured or used in the performance of the contract, including its use by the City. If the Proposer uses any design, device, materials or works covered by letters, service mark, trademark, patent, copyright, or any other intellectual property right, it is mutually agreed and understood without exception that the proposal prices will include all royalties of costs arising from the use of such design, device, or materials in any way involved in the work. This article will survive the termination of any contract with the City.

1.16. CONFLICTS OF INTEREST

- (a) The award hereunder is subject to the provisions of Chapter 112, Florida Statutes, as amended, governing conflict of interest.
- (b) All Proposers are required to disclose the name(s) of any employee(s), officer(s), director(s), shareholder(s), or other agent(s) of their firm that are also employee(s) or public official(s) of the City of Ocala concurrently with the submission of their Proposal.
- (c) All Proposers are required to disclose the name(s) of any City of Ocala employee(s) or public official(s) who either directly or indirectly owns or holds a five percent (5%) or more interest in Proposer's firm, corporation, or other business entity.
- (d) City of Ocala employees appointed persons, and elected officials (herein referred to as "employees") may engage in outside activities and hold financial interests subject to state and federal laws and regulations and the City of Ocala Employee Handbook, as applicable.
- (e) Every employee who is an officer, director, agent, employee, or owner of a substantial interest in any business entity which does or anticipates doing business with the City must complete and submit an "Officer and Employee Disclosure Statement" with every submission. This statement is available at <http://www.bidocala.com/wp-content/uploads/Officer-and-Employee-Disclosure-Statement-and-Intro.pdf>. **Failure to disclose known conflicts of interest shall result in Proposal rejection and/or contract termination, if awarded.**

1.17. ANTI-LOBBYING/COMMUNICATION WITH CITY STAFF AND OFFICIALS.

- (a) Lobbying is defined as any action taken by an individual, firm, association, joint venture, partnership, syndicate, corporation, or any other group who seeks to influence the decision of City Council member or City personnel after the advertisement of a solicitation and prior to the vote of City Council on the award of a contract.
- (b) To ensure fair consideration for all Proposers, the City strictly prohibits Proposer communication relative to this solicitation with any employee, department, City official, or City Council member, regardless of whether written, verbal, or through a third party, except for those inquiries made directly to the Procurement and Contracting Department through the assigned Buyer Contact, the City's Procurement Manager, or the City's Procurement and Contracting Officer ("Assigned Procurement Personnel").
- (c) Proposers (including their agents or other third parties on their behalf) are prohibited from initiating any communication with any employee, department, City official or City Council member that will evaluate or consider the Proposal prior to and up to the time that award is made at a scheduled City Council meeting.
- (d) Proposers (including their agents or other third parties on their behalf) are prohibited from discussing this Solicitation, or their submittals thereto, with competing firms under this Solicitation. All oral and written inquiries must be directed through Assigned Procurement Personnel.
- (e) **Proposers (or any third-party on their behalf) who lobby or initiate otherwise prohibited communications shall be disqualified from consideration for award; AND may be subject to a three (3) year debarment from doing business with the City of Ocala.**

1.18. PUBLIC RECORDS. All written competitive submissions received by the city pursuant to this RFP including all replies, oral presentations, other submissions, correspondence, meetings, and records made

thereof, and any other records concerning this solicitation shall be handled in accordance with Chapter 119, Florida Statutes, and Article 1, Section 24, of the Florida Constitution.

- (a) Sealed proposal responses or replies received by the City in response to its solicitations are exempt from public disclosure until such time as the City provides notice of an intended decision or until thirty (30) days after the opening of the proposals, whichever is earlier. If the City rejects all proposals or replies pursuant to this solicitation and provides notice of its intent to reissue the solicitation, then the rejected proposals or replies remain exempt from public disclosure until such time that the City provides notice of an intended decision concerning the reissued solicitation or until the City withdraws the reissued solicitation. A proposal or reply shall not be exempt from public disclosure longer than twelve (12) months after the City's initial notice rejecting all proposals or replies.
- (b) Upon award recommendation or ten (10) days after opening, bids become "public records" and shall be subject to public disclosure consistent with Chapter 119 (Public Records) and Section 815.045 (Trade Secret Information), Florida Statutes. Should bidders/proposers consider any information related to their proposal or the services to be provided to City to be proprietary, a trade secret, or otherwise constitute confidential material under Florida or federal law, bidder/proposer shall designate such portion of the material as such by clearly marking it as CONFIDENTIAL, PROPRIETARY, or TRADE SECRET and submit both a non-redacted and redacted copy of their submission. The redacted copy shall only exclude or obliterate the exact portions claimed to be confidential, proprietary, or trade secret. Additionally, bidder/proposer shall state the basis for the exemption that it contends is applicable to the record, to include the statutory citation to an exemption created or afforded by statute.
- (c) **THE CITY WILL MAKE NO EFFORT TO VERIFY WHETHER OR NOT THE REDACTED MATERIAL IS EXEMPT FROM CHAPTER 119, FLORIDA STATUTES. THAT DETERMINATION IS TOTALLY THE RESPONSIBILITY OF THE BIDDER/PROPOSER AND THE BIDDER/PROPOSER SHALL BE SOLELY RESPONSIBLE FOR DEFENDING ITS DETERMINATION THAT THE REDACTED PORTIONS OF ITS RESPONSE ARE CONFIDENTIAL, TRADE SECRET, OR NOT OTHERWISE SUBJECT TO DISCLOSURE. PROPOSER SHALL PROTECT, DEFEND, AND INDEMNIFY THE CITY FOR ANY AND ALL CLAIMS ARISING FROM OR RELATING TO PROPOSER'S DETERMINATION THAT THE REDACTED PORTIONS ARE NOT SUBJECT TO DISCLOSURE. IF THE PROPOSER FAILS TO SUBMIT A REDACTED COPY OF ITS SUBMISSION, ANY CLAIM OF CONFIDENTIALITY IS WAIVED, AND THE CITY SHALL BE AUTHORIZED AND REQUIRED TO PRODUCE THE ENTIRE DOCUMENT OR RECORD IN ITS ANSWER TO A PUBLIC RECORDS REQUEST FOR SAID RECORDS.**

1.19. CERTIFICATION OF INDEPENDENT PRICE DETERMINATION/NON-COLLUSION. By responding to this Solicitation, Vendor certifies that the following statements are true:

- (a) Proposer's submission is made without prior understanding agreement, or connection with any person, firm, or corporation submitting a bid for the same work, labor, or service to be done or supplies, materials, or equipment to be furnished and is in all respects fair and without collusion or fraud. Proposer understands that collusive bidding is a violation of state and federal law and may result in fines, prison sentences and civil penalties.
- (b) Proposer's submission has been arrived at independently and without consultation, communication, or agreement, or for the purpose of restricting competition, as to any matter relating to such prices with any other Proposer or competitor.
- (c) Unless otherwise required by law, the prices which have been (or will be) quoted by Proposer in this submission have not been knowingly disclosed by Proposer and will not be knowingly disclosed by Proposer, either directly or indirectly, to any other bidder or competitor prior to the Solicitation opening date.

END OF SECTION

SECTION 2

MINIMUM REQUIREMENTS, PROJECT OVERVIEW AND OBJECTIVES, AND PROJECT REQUIREMENTS AND SPECIFICATIONS

(a) **BACKGROUND INFORMATION**

The City of Ocala is the largest municipality located in Marion County located in North Central Florida. It also serves as the County seat and serves a population of 65,478 full-time residents. The City of Ocala encompasses approximately 44 square miles.

The City of Ocala is soliciting proposals on behalf of its electric utility, Ocala Electric Utility ("OEU"), for a Supervisory Control and Data Acquisition (SCADA) Solution ("SCADA Solution") that best addresses the requirements and objectives of the City as more fully set forth in this Solicitation. The City of Ocala uses Milsoft's Interactive Voice Response (IVR) System and Outage Management System (OMS).

(b) **MINIMUM QUALIFICATIONS/EXPERIENCE REQUIREMENTS.** As part of the selection process, firms must first demonstrate they are qualified to participate in the solicitation process by clearly showing they meet the minimum qualification requirements set forth herein. Proposals submitted by firms that do not meet the qualification requirements will not be accepted:

- (a) Proposers must have no less than five (5) years' documented experience providing SCADA Solutions to governmental agencies, electric companies, and/or utility services providers.
- (b) Proposers must provide no less than three (3) verifiable references from governmental agencies, electric companies, and/or utility services providers that are capable of attesting to Proposer's SCADA solicitation implementation, service delivery, and contractual performance.
- (c) The SCADA Solution offered must be compatible with the City's existing equipment (e.g. remote terminal units (RTUs) and real time automation controllers (RTACs), etc.).
- (d) The SCADA Solution offered must be capable of running concurrently with the City's existing system for a period of not less than six (6) months.
- (e) Proposers must have attended the Mandatory Pre-Submittal Conference prior to submitting a response to this Request for Letters of Interest ("LOI" or "Solicitation").

(c) **PROJECT OVERVIEW AND OBJECTIVES**

The City of Ocala seeks a SCADA Solution for OEU. The offered solution must specify all required software, professional services, and additional hardware.

- (a) The selected SCADA Solution must be composed of a set of integrated modules offered by a single service provider.
- (b) The selected SCADA Solution must be a turn-key solution that has been successfully implemented in other organizations with similar in requirements and function.
- (c) The City would prefer to limit the number of third-party modules as part of the Systems Provider's solution.
- (d) The City prefers solutions that require no modifications to base code but are highly configurable to meet OEU needs.
- (e) The City prefers to contract with the awarded Proposer as the prime contractor. If the Proposer wishes to use an integration partner, the City requires the integration partner to be a subcontractor to the awarded Proposer. The City reserves the right to accept or reject any proposed integration partners. Acceptance will not be unreasonably withheld.
- (f) The City, to the fullest extent possible, will rely upon product configuration rather than product modifications and will make cost effective business process modifications to fit the technology workflow.
- (g) The successful Proposer must provide a Graphical User Interface (GUI) or Browser/Portal Based User Interface (BUI) for system use.

- (h) The City requires a solution (and Vendor) capable of compliance with North American Electric Reliability Corporation (NERC) current Critical Infrastructure Protection (CIP) requirements.

(d) **PROJECT REQUIREMENTS AND SPECIFICATIONS**

(a) **Hardware and Software Requirements**

- (1) The installation should utilize the latest general release of the SCADA software.
- (2) Vendor must use the City's existing equipment, servers, RTAC's, and RTU's via Distributed Network Protocol (DNP3).
- (3) The SCADA solution must be accessible from the existing workstations and repurposed to connect to the new SCADA system by installing the most recent version of the SCADA software to allow parallel monitoring.
- (4) Vendor's implementation team shall come on-site to install and test the new system, as well as to provide training for the new system.

(b) **SCADA Solution Software Requirements:**

- (1) Software maintenance and support
- (2) Software upgrades
- (3) Software license(s) - Up to 20 licenses, site license is preferred.
- (4) Software warranties
- (5) Software portals

(c) **Professional Services Requirements for Implementation of the SCADA Solution:**

- (1) Project management
- (2) Software installation and configuration
- (3) Hardware configuration support
- (4) Interface/integration design, development, and implementation
- (5) Forms design
- (6) Ocala Electric Utility staff training
- (7) Cut-over support
- (8) Post-implementation support
- (9) Period-ending support

- (d) **Functional Processes:** Table 1 identifies the City's desired core functional requirements for the selected SCADA Solution. The functional processes are either required or optional as noted below and must, at a minimum, meet the City's required components.

Table 1 – Core Requirements			
System Functions	Required	Optional	Notes
Switching	X		This describes a System Operator's ability to create and execute switching orders via SCADA either by manual interaction or automation at the click of a button.
Simulation System		X	This describes the ability to mirror data from production system to train System Operators on SCADA drawings, graphs, etc. without affecting the production system.

Table 1 – Core Requirements			
System Functions	Required	Optional	Notes
Web & Application/Interface	X		The system must have the ability to provide personnel external to the Control Center access to view SCADA drawings, graphs, etc. Permissions must be read/view only.
NERC Security Standards	X		All software/hardware modules provided as part of the vendor-provided solution must be capable of meeting currently enforceable NERC CIP standards, and future updates must be capable of full compliance with enforceable standards at that time. The vendor support/services contract must include provisions necessary for OEU to meet any NERC CIP requirements.
Data Collection & Storage	X		This describes the function of the system, which will allow personnel to review and report on historical SCADA information with ease-of-use advanced filtering options.
Software Operated Server Redundancy	X		This describes the function of failing over to a secondary server in the event of a primary server failure. This must be executed in the software.
Communication Protocol	X		This describes the required use of DNP3 protocol to allow the SCADA system to communicate to field RTAC's and RTU's.
No Third-Party Software		X	This describes the proposed SCADA system's ability to operate without third-party software requirements.
Honeywell/Elster MAS Integration		X	This describes the ability to integrate APIs with Honeywell/Elster (Automated meter reading system) into the SCADA Solution.
MilSoft OMS Integration		X	This describes the ability for the SCADA Solution to integrate with MilSoft APIs to send and receive live metering and fault data.
Milsoft Windmil Integration		X	This describes the ability for the SCADA Solution to integrate with MilSoft APIs to send and receive live data.
Exceleron MDM Integration		X	The ability for the SCADA Solution to integrate with third party system; Exceleron MDM.
Windows Server Compatibility	X		SCADA Solution must be compatible with latest versions of Windows server.
Virtualization Compatibility	X		This describes the ability for the SCADA Solution to be compatible with Virtualized OS/Hypervisor environments.

Table 1 – Core Requirements			
System Functions	Required	Optional	Notes
Internal OMS Feature		X	The system may have its own internal OMS application.
GIS Integration Capability	X		The proposed SCADA system has ability to integrate with 3 rd party GIS software.
GIS Internal Feature		X	The proposed SCADA Solution has an internal self-supported GIS application.
LDAP Authentication Integration	X		The ability to integrate with existing LDAP authentication methods for user sign on.
MFA		X	Ability to integrate Multi-Factor Authentication with current LDAP configuration.

- (e) **Additional Optional Features:** Using [Attachment 2 – Additional Optional Features Form](#), Proposer will be asked to identify any additional features Proposer feels would be beneficial to the City’s SCADA environment in light of the foregoing requirements.
- (f) **Interfaces:** The new SCADA Solution will require interaction with other City of Ocala systems and will send and receive data. These interfaces may be one-way or bi-directional. Some systems may only be required to send information to the proposed solution. Others will require data going both ways, to and from the proposed solution. Others will only receive data from the proposed solution. The interface requirements will identify the interfaces between the SCADA Solution and other systems maintained by City of Ocala. Those vendors include but are not limited to:

Table 2—Interface Definition	
Interface	Description
Honeywell/Elster MAS	Automated Meter Reading Systems.
Milsoft DisSPatch OMS	The City of Ocala’s current Outage Management System.
Milsoft WindMil EA	The City of Ocala’s current Engineering Analysis System.
Exceleron MDM	The City of Ocala’s current Meter Data Management System.
Esri	The City of Ocala’s current Geographic Information System

- (g) **Implementation Requirements:** The City requires each Proposer to prepare, in sufficient detail, an Implementation Plan outlining the required tasks, estimated hours, responsibilities and major deliverables for both Proposer and the City of Ocala, level of resources required, and timing. At a minimum, Proposer’s Implementation Plan shall discuss the following areas:
- (1) Project management.
 - (2) System set-up and configuration (Minimum one week on-site required).
 - (3) Application(s) installation (If any).

- (4) Interfaces.
- (5) Testing—unit, system, process, and interface (Minimum one week on-site required).
- (6) Process changes.
- (7) Forms changes and design.
- (8) Reports.
- (9) Training—administrator and end-user.
- (10) System acceptance testing.
- (11) Transition to full operations (cut-over) including parallel processing with current system.
- (12) Period ending reporting.
- (13) Backup and recovery.

(h) **Database Points:** Ocala Electric Utility Database Points totals:

	<i>Analogue Points</i>	<i>Status Points</i>
<i>Total</i>	7529	2728

(i) **Archiving:** Historical data on the existing system must be migrated to the new system.

(j) **Alarms:**

- (1) The SCADA system must possess the capability to transmit alarms through text messages and emails.
- (2) Alarms must have the ability for individual audible and color for a minimum 10 stages of priority.
- (3) Additionally, the SCADA system shall allow for editable alarm formats to facilitate clear and unambiguous communication.
- (4) Acknowledgment of alarms via text must be supported as well. Text alarms should be transmitted without relying on sending an email to a phone number, as that may result in carrier delays and introduces the City SMTP server as a point of failure.
- (5) The existing alarms should be configured and tested in the new system and should repeat if left unacknowledged at a frequency and on points defined by the City of Ocala.

(k) **Training Requirements:**

- (1) The City of Ocala will require no less than five (5) days of comprehensive training and availability to become proficient in using the new system and RTUs, as well as understanding how to maintain them.
- (2) The training will encompass the following topics:
 - a. Basic system training detailing how to navigate and use the system.
 - b. How to perform administrative and cybersecurity tasks such as patching, database maintenance, backups, etc.
 - c. Adding New Points to the SCADA System and RTUs:
 - i. Instruction on adding analog, binary, and counter points to the SCADA system and RTUs.
 - ii. Guidance on configuring point properties and setting appropriate limits and thresholds.
 - d. Adding New Screens to the SCADA System:
 - i. Training on creating new screens within the SCADA system to display relevant data.

- ii. Explanation on best practices to be followed when modifying or creating a screen.
- e. Adding a New Site to the SCADA System:
 - i. Detailed steps on integrating a new site into the SCADA system.
 - ii. Understanding the necessary configurations to ensure seamless communication with the new site
- (2) Proposer will be responsible for training the City's team of fifteen (15) to twenty (20) staff members in all aspects of product utilization and functionality. This training is required to allow City staff to understand system capabilities before set-up and configuration activities begin.
 - a. The staff member group will be responsible for performing and documenting system testing, documenting business processes and procedures, and for training end-users.
 - b. Throughout the training, hands-on exercises and practical examples must be provided. The aim of the training is to equip City of Ocala personnel with the necessary skills to operate, maintain, and expand the SCADA system and RTUs effectively.
- (3) The Proposer will develop an end-user training plan (preferably computer-based) for current and new employees. End-user training should be specific to the way the City's system has been configured and set up to operate.
- (4) Additionally, a complete installation and operating instruction manual must be included for all aspects of the software capabilities.
- (5) The City requires comprehensive documentation covering the training topics described above. The training documentation should include step-by-step instructions, screenshots, and detailed explanations for each aspect of training.
- (6) This documentation should include clear explanations, methodologies, and rationale behind the calculations and processes to ensure easy understanding and future reference.

(I) **Support and Maintenance:**

- (1) The City of Ocala requires the selected Vendor to provide ongoing support and maintenance needs throughout the life of the product. As such, Proposer's submittal must include information and defined pricing associated with all ongoing support and maintenance activities and fees including, but not limited to: onsite software maintenance, annual site visits, 24/7 product help desk, product fixes, product enhancements, and regular product releases.
- (2) Vendor must have the ability to connect to the City's system, in compliance with the City's security policies and procedures and all NERC CIP standards, to diagnose and correct problems real-time.
- (3) Proposer should also have a troubleshooting plan during implementation and configuration to ensure the project stays operational 24 hours a day, seven days a week.
- (4) If multiple support plans are available, Vendor should provide the City with all available options.
- (5) Vendor should describe the process for the City of Ocala to request future product enhancements.
- (6) Installation and operations manual and a troubleshooting plan shall be submitted electronically in PDF format and also one bound paper copy.
- (7) 24x7 post-implementation technical support must be provided along with a technical support on-call telephone number that can be called to assist in resolving issues that may arise, regardless of urgency.

- (8) The City will also require the option to utilize 40 hours of post-implementation system management support services. Price quotes for this service should be provided as both a three-year (3-Year) and five-year (5-Year) option.

(m) **Additional Requirements:**

- (1) The new SCADA system should include a secure view-only mobile client compatible with Apple and Android phones and tablets, enabling operators and users to securely access and monitor live and historical data across multiple devices. The client should provide intuitive navigation and interaction capabilities, adapting its layout, font sizes, and functionality to accommodate various screen sizes and resolutions.
- (2) Employing responsive design and mobile optimization techniques, the screens of the view-only client will offer an optimal and seamless viewing experience across desktop computers, tablets, and mobile phones, promoting enhanced usability and accessibility.
- (3) The view-only client in the SCADA system should prioritize cybersecurity and not introduce any additional risks to Ocala Electric Utility. It should employ secure communication protocols, strong authentication mechanisms, and adhere to cybersecurity best practices to protect against unauthorized access and data breaches. Regular security updates and testing should be conducted to address vulnerabilities promptly and ensure the system's integrity, confidentiality, and availability.

- (n) **Implementation Schedule:** For planning purposes, the City of Ocala has identified a projected total installation timeframe of six (6) to nine (9) months for the successful completion of the SCADA Solution implementation activities. The successful Vendor will be expected to review and either (1) confirm this timeframe is appropriate; or (2) suggest other optimum timelines that more readily support the Vendor's solutions and associated resource requirement.

(e) **INSURANCE REQUIREMENTS**

- (a) **COMMERCIAL AUTO LIABILITY.** Awarded Vendor shall procure and maintain for the life of this agreement commercial auto liability insurance with a minimum combined single limit of One Million Dollars (\$1,000,000) per occurrence for bodily injury and property damage arising out of vendor's operations and covering all owned, hired, scheduled, and non-owned automobiles utilized in said operations.
- (b) **COMMERCIAL GENERAL LIABILITY.** Awarded Vendor shall procure and maintain for the life of this agreement commercial liability insurance with minimum coverage limits not less than:
 - (1) One Million Dollars (\$1,000,000) per occurrence and Two Million Dollars (\$2,000,000) aggregate (or project aggregate, if a construction project) for bodily injury, property damage, and personal and advertising injury; and
 - (2) One Million Dollars (\$1,000,000) per occurrence and Two Million Dollars (\$2,000,000) aggregate (or project aggregate, if a construction project) for products and completed operations.
 - (3) Policy must include coverage for contractual liability and independent contractors.
- (c) **WORKERS' COMPENSATION AND EMPLOYER'S LIABILITY.** Awarded Vendor shall procure and maintain for the life of this agreement adequate workers' compensation and employer's liability insurance covering all of its employees in at least such amounts as required by Chapter 440, Florida Statutes, and all other state and federal workers' compensation laws. Vendor shall ensure any and all subcontractors have the required coverage for all of their employees as required by applicable law. Vendor shall waive, and shall ensure that its insurance carrier waives, all subrogation rights against the City of Ocala and its officers, employees, and volunteers for all losses or damages.
- (d) **SPECIAL INSURANCE REQUIREMENTS:**
 - (1) **Professional Liability/Errors and Omissions Insurance.** Awarded Vendor shall procure and maintain, for a period of at least **Five (5) Years** from the date of acceptance

of the work by the City, a policy of professional liability/error and omissions insurance in an amount not less than \$1,000,000 per claim.

(e) **CITY AS ADDITIONAL INSURED AND ENDORSEMENTS.** The City of Ocala shall be named as an Additional Insured and Certificate Holder on all liability policies identified in this section with the exception of Workers' Compensation and Professional Liability policies. Awarded Vendor's Worker's Compensation policy shall be endorsed with WC 00 03 13 Waiver of our Right to Recover from Others or its equivalent. Vendor's Commercial General Liability policy shall be endorsed with a CG 20 26 04 13 Additional Insured – Designated Person or Organization Endorsement or similar endorsement providing equal or broader Additional Insured Coverage with respect to liabilities arising out of activities performed by or on behalf of Vendor.

(f) **FAILURE TO MAINTAIN REQUIRED COVERAGE.** In the event that the Awarded Vendor fails to obtain or maintain in full force and effect any required insurance coverage, the City may procure same from insurance carriers as the City may deem proper, irrespective that a lesser premium for such insurance coverage may be available, and Vendor shall pay, upon demand by City, any and all premiums, costs, charges and expenses incurred or expended by City in obtaining such insurance. Notwithstanding the foregoing, in the event City is forced to procure the required insurance coverage due to awarded Vendor's failure to comply with these Insurance Requirements, City shall in no manner be liable to Awarded Vendor for any insufficiency or failure of coverage with regard to same or any loss to Vendor occasioned thereby. Additionally, the procurement of such insurance coverage shall not relieve Awarded Vendor of its obligation to maintain said coverage in the types and amounts specified herein and Awarded Vendor shall nevertheless hold City harmless from any loss or damage incurred or suffered by City from awarded Vendor's failure to maintain said coverage.

(g) **OTHER MISCELLANEOUS INSURANCE PROVISIONS.**

- (1) These insurance requirements shall not relieve or limit the liability of awarded Vendor. City does not in any way represent that these types or amounts of insurance are sufficient or adequate to protect awarded Vendor's interests or liabilities but are merely minimums. No insurance is provided by the City under any contract to cover awarded Vendor.
- (2) No work shall be commenced under any contract until the required Certificate(s) of Insurance have been provided. Work shall not continue after expiration (or cancellation) of the Certificates of Insurance and shall not resume until new Certificate(s) of Insurance have been provided. Insurance written on a "Claims Made" form is not acceptable without consultation with City of Ocala Risk Management.
- (3) Awarded Vendor shall arrange for its liability insurance to include or be endorsed to include a severability of interests/cross-liability provision so that the "City of Ocala" (where named as an additional insured) will be treated as if a separate policy were in existence, but without increasing the policy limits.

(f) **RFP TIMELINE.** The City will attempt to follow the following schedule in the selection of the successful Proposer. The timeframes set forth below are subject to change at any time in the City's sole discretion.

Milestone	Date*
Deadline for Solicitation Clarification and Questions	06/18/2025
Proposal Submission Deadline	06/27/2025
Administrative Review of Proposals	TBD

*The City reserves the right to make changes or alterations to the Time Schedule at any time as the City, in its sole discretion, deems to be in the best interest of the public. Any extension, change, or update to this schedule prior to project award shall be updated within the listing at www.bidocala.com. Proposers are responsible for verifying all listing information prior to submitting a response to this solicitation.

END OF SECTION

SECTION 3

SUBMISSION INSTRUCTIONS, PROPOSAL ORGANIZATION REQUIREMENTS, AND EVALUATION CRITERIA

Proposers shall follow the submittal requirements set forth herein. Responses that do not adhere to the following format or which fail to include the requested information/documents may be considered non-responsive and therefore ineligible for award. The City reserves the right to seek additional/supplemental information as needed.

3.1. PROPOSAL SUBMISSION INFORMATION AND DEADLINE. All Proposals must be electronically submitted via ProRfx before 2:00 p.m. (EST) on the listing end date/bid close date identified at www.bidocala.com. Proposals received after this time and date will not be considered. **Proposals may not be submitted by any other means.** The City will not accept Proposals sent by U.S. Mail, couriers, fax, or e-mail.

- (a) Sealed electronic Proposals will be received and opened by the City's Procurement and Contracting Department electronically via the City's e-procurement portal. All submitted responses shall be time and date stamped at the time the documents are uploaded and received.
- (b) Any Proposals received after the advertised deadline for submissions will not be considered. It is the sole responsibility of each Proposer to ensure Proposal is submitted via the e-procurement portal on or before the advertised deadline.
- (c) The ProRfx timestamp shall be conclusive proof of the timeliness of submission.
- (d) By submitting a response, the Proposer certifies that neither Proposer nor any principal of Proposer is presently disbarred, suspended, proposed for debarment, declared ineligible, or otherwise excluded from doing business with any government agency (local, state, or federal).
- (e) No Proposer shall be permitted to submit multiple solicitation responses. Only one (1) submission per firm, corporation, or individual Proposer shall be accepted (as corroborated by maintaining distinct financial books, corporate tax filings, and EINs).
- (f) Pricing must be entered on the **Price Proposal Form** attached hereto as **Exhibit A**.
- (g) Proposers shall examine the solicitation and contract documents and before submitting a bid, shall make a written request to City for an interpretation or correction of any ambiguity, inconsistency, or error therein which could have been discovered by a Proposer. At the Proposal opening each Proposer shall be presumed to have read and be familiar with the contract documents.
- (h) Proposals failing to provide sufficient information and assurances of performance so as to permit the City to accurately assess each category of the required services will be deemed non-responsive and will not be given further consideration.

3.2. COVER PAGE, PAGE SIZE, AND FORMAT.

- (a) Proposals shall contain 8 ½" x 11" pages only with a minimum font size of 11 points. Proposals shall be no more than forty (40) pages, excluding the cover page, transmittal letter, and any required attachments, forms, licenses, certifications, sample reports, or resumes.
- (b) The cover page shall include the title of this Solicitation along with the Proposer's firm name, address, contact person, telephone number, and e-mail address.

3.3. ORGANIZATION OF PROPOSAL. Proposers shall organize submittals in the following format with tabs separating each section.

- (a) **TRANSMITTAL LETTER.** A transmittal letter must accompany the submittal and must be signed by an individual legally empowered to represent and bind the proposing firm. The transmittal letter must, at minimum, include the following information:
 - (1) Corporate name, address and telephone number of principal office, number of years in business.

- (2) A statement summarizing any deviations or exceptions to the requirements of the Solicitation, along with a detailed justification for the deviation or exception.
 - (3) A short narrative describing the firm's understanding of the scope of work and a brief statement of why the firm believes itself to be the best qualified to provide the required solution and services.
 - (4) An affirmative statement that the firm has received, read and understands all procedures and criteria associated with the submittal requirements, and understands that all terms and conditions contained herein may be incorporated into a resulting contract.
- (b) **TAB 1 – TECHNICAL PROPOSAL.** *Here, Proposers should provide detailed evidence demonstrating their ability to comply with the technical requirements and specifications set forth in this Solicitation.*
- (1) Proposer's Technical Proposal must individually address the Proposer's ability to satisfy and/or meet the Project Requirements and Specifications identified by the City for the SCADA Solution Implementation Project as described in Section 2.4 of this Solicitation. Failure to address **all** segments (2.4(a) through 2.4(m)) may result in Proposer's submittal being deemed non-responsive and preclude further consideration by City of Ocala.
 - (2) In the event that Proposer has features in addition to what has been identified by the City under Section 2.4 - Project Requirements and Specifications that Proposer feels would be beneficial to the City's SCADA environment, Proposer must complete and upload an executed copy of **Attachment 2 – Optional Additional Features Form** to identify those features.
 - (3) Proposer should discuss its upgrade policies and the upgrade history of the proposed solution. Additionally, Proposer should describe the process for Ocala Electric Utility to request future product enhancements.
- (c) **TAB 2 - PROJECT TEAM COMPOSITION, EXPERIENCE, QUALIFICATIONS, AND PAST PERFORMANCE.** *Here, Proposers should address their specific experience as it relates to the work required for this Project. The successful Vendor must have extensive experience in the implementation and provision of maintenance and support of SCADA solutions to electric providers and/or utility companies.*
- (1) Provide a brief narrative which describes the Project Team, highlights the Team's qualifications and experience as a SCADA Solutions provider, and the Team's ability to provide the solution and services detailed in this Solicitation.
 - (2) Provide an organizational chart depicting the key personnel that Vendor will dedicate to this Project. The personnel identified in the organizational chart are expected by the City to be utilized for the Project. City reserves the right to disallow substitutions without prior City approval.
 - (3) For each key personnel identified, describe their respective role and responsibilities with respect to this Project and provide a resume for each individual depicting education, certifications, professional affiliations, licensure, and experience on similar projects of this size and scope.
 - (4) Provide proof of verifiable experience supplying and delivering products of a similar scope as those outlined in this Solicitation to a governmental agency, electric provider, and/or utility company for a period of no less than five (5) years utilizing **Attachment 1 – Reference Form**.
 - (5) Identify at least three (3) governmental agencies, electric providers, and/or utility companies who have utilized Vendor's SCADA Solution who can attest to Vendor's experience and performance utilizing **Attachment 1 – Reference Form**.
- (d) **TAB 3 – PROJECT UNDERSTANDING, PROPOSED APPROACH AND METHODOLOGY.** *Here, Proposers should demonstrate how the Project will be implemented pursuant to the objectives, requirements, and specifications set forth in this Solicitation. Proposers shall*

demonstrate knowledge of the City's Project objectives and existing conditions, identify potential implementation issues, and present a comprehensive plan for completing the specified work.

- (1) Define what services Vendor's company is proposing that will best serve the City of Ocala's needs. In narrative format, describe Vendor's approach to performing the required services by demonstrating efficient use of manpower, materials, equipment, implementation methodology, and techniques to complete the Project efficiently within the constraints outlined in the Solicitation. Describe how the firm proposes to deliver a top-quality project on time and on budget.
- (2) **Implementation Plan.** The City of Ocala requires that each Proposer prepare, in sufficient detail, an Implementation Plan outlining the required tasks, estimated hours, responsibilities and major deliverables for both Proposer and the City of Ocala, level of resources required, and timing. Your plan should include a list of tasks (including any tasks that you expect for the City of Ocala to perform) segmented in accordance with Vendor's methodology and inclusive of time estimates and staff to be assigned.

At a minimum, Proposer's Implementation Plan shall discuss the following areas:

- a. Project management.
- b. System set-up and configuration (Minimum one week on-site required).
- c. Application(s) installation (If any).
- d. Interfaces.
- e. Testing—unit, system, process, and interface (Minimum one week on-site required).
- f. Process changes.
- g. Forms changes and design.
- h. Reports.
- i. Training—administrator and end-user.
- j. System acceptance testing.
- k. Transition to full operations (cut-over) including parallel processing with current system.
- l. Period ending reporting.
- m. Backup and recovery

Each Implementation Plan subtask should be set forth in the following format:

IMPLEMENTATION PLAN

1. Task One – [TITLE]

- a. Description of Work/Services to be Provided
- b. Level of Resources Required and Timing of Resource Needs
- c. Vendor Deliverables
- d. City of Ocala Deliverables
- e. Level of Effort Plan (Man-Hours Anticipated)

2. Task Two – [TITLE]

- a. Description of Work/Services to be Provided
- b. Level of Resources Required and Timing of Resource Needs
- c. Vendor Deliverables
- d. City of Ocala Deliverables
- e. Level of Effort Plan (Man-Hours Anticipated)

(3) **Project Schedule.**

- a. For planning purposes, the City of Ocala has developed an estimated total installation timeframe spanning up to six to nine months for the successful completion of the SCADA Solution implementation activities. The Proposer must review and confirm this timeframe or suggest other optimum timelines that more readily support the Proposer's solutions and associated resource requirements.
- b. The final Project Schedule will be agreed upon by Vendor and the City for inclusion in the subsequently awarded contract.
- c. For the purpose of this Solicitation, Vendor's Proposal should include a project schedule identifying each Project task and their expected durations. Milestones should be identified and shown on the schedule. The schedule should also include information regarding review times, coordination meetings with stakeholders, and any additional tasks that the Proposer deems beneficial.
- d. Proposer should address the priority of this Project as compared to other projects and discuss staff availability and commitment in ensuring the Project will be diligently completed on time.

(4) **Identification of Anticipated Potential Problems.** Proposers will be required to identify and describe any anticipated potential problems, the firm's approach to resolving these problems, and any special assistance that will be requested from City staff or its agents.

(5) **Implementation Troubleshooting Plan.** Proposer should discuss its troubleshooting plan for Project implementation and configuration and explain how it intends that the solution stays operational 24 hours a day, seven days a week.

(1) **Ongoing Support.** Proposal must also identify all support plans offered for post-implementation support and maintenance. 24x7 post-implementation technical support must be provided along with a technical support on-call telephone number that can be called to assist in resolving issues that may arise, regardless of urgency. The City will also require the option to utilize 40 hours of post-implementation system management support services.

(6) **Additional Services.** Proposers should identify additional services that would be available to the City under the pricing and hourly rates set forth in the Price Proposal. The services included on this list need not be exhaustive but should emphasize those that resonate with the City's strategic objectives and provide added value.

- (e) **TAB 4 – PRICE PROPOSAL.** Proposer's Price Proposal is required to contain all direct and indirect costs associated with Proposer's delivery of the solution and services described in this Solicitation. In order to be deemed responsive, Proposer must submit a complete **Exhibit A - Price Proposal** in the attached format without modification.

- (1) The Price Proposal shall include a list of all costs for hardware, training, warranties, additional licenses, and annual maintenance and support services for software and hardware.
- (2) The Price Proposal must identify each and every cost associated with the resulting contract in U.S. currency. The fee for any unforeseen changes in scope requested by the City will be negotiated and memorialized by contractual amendment if required.
- (3) The Price Proposal must include pricing associated with Vendor's provision of ongoing support and maintenance needs throughout the contract term including onsite software maintenance, annual site visits, 24/7 product help desk, product fixes, product enhancements, and regular product releases.

- (f) **TAB 5 -OPTIONAL SOLUTION: Outage Management System (OMS) Integration:** While the primary objective of this Solicitation is for the procurement and implementation of a SCADA Solution for the Ocala Electric Utility. Proposers may also offer, as an optional feature, an additional integrated **Outage Management System (OMS)** if such a solution is available within their portfolio.

Optional OMS Requirements: If the proposer elects to include an OMS solution, the proposal should address the following key elements:

(1) **System Overview**

- a. Provide a description of the OMS, including its architecture, functionalities, and how it integrates with the proposed SCADA system.

(2) **Outage Detection and Management Capabilities**

- a. Real-time fault detection and restoration tracking.
- b. Automated outage notifications and estimated restoration time calculations.
- c. Integration with Advanced Metering Infrastructure (AMI) and Geographic Information Systems (GIS) to enhance outage visibility.

(3) **SCADA Integration**

- a. Explain how the OMS will interface with the SCADA system to provide enhanced situational awareness and control.
- b. Describe any additional hardware, software, or configuration requirements.

(4) **Customer Communication Features**

- a. Capabilities for customer outage reporting via web, mobile, or automated phone systems.
- b. Integration with customer information systems (CIS) for automated notifications.

(5) **Implementation Considerations**

- a. Timeline, deployment process, and key milestones for integrating OMS with SCADA.
- b. Additional licensing, hardware, or software costs, if applicable.

(6) **Cost Proposal**

- a. Provide a separate pricing breakdown for the OMS solution, including licensing, implementation, and ongoing maintenance costs.

- a. **The inclusion of an OMS proposal is not a mandatory requirement of this Solicitation but will be considered as a value-added feature during the evaluation process.** Proposers who choose to submit an OMS option should include the proposal as **Tab 5– Optional Outage Management System Proposal** and ensure this proposal clearly delineates the cost and technical requirements **separately** from the core SCADA system proposal.

3.4. EVALUATION PROCESS AND CRITERIA. The City desires to maximize the purchasing value of public funds. It is the intention of the City to award the contract to the most qualified, responsive, responsible firm, which may not necessarily be the lowest-price proposer. Best value evaluation determines the value of products and/or services acquired resulting in the best combinations of quality, service, time, safety, security, and cost considerations over the useful life of the product or service. The emphasis shall be value based more heavily upon qualifications and functionality over price.

- (a) **SELECTION COMMITTEE.** The Selection Committee will convene, review, discuss and rank all responsive and responsible proposals as submitted. The Selection Committee for this Solicitation will be comprised of a minimum of three (3) members, from various and appropriate City departments.
- (b) **ADMINISTRATIVE REVIEW OF PROPOSALS.** Procurement and Contracting staff shall first review all Proposals in detail to make a determination as to the responsiveness of each Proposer:
- (1) A proposal will be deemed responsive where it complies with the requirements as set forth in this solicitation, including the submission of all required documentation in the format outlined by this Solicitation.
 - (2) If a proposal is found to be inadequate with regard to any of the requirements set forth in this solicitation, the City's Procurement and Contracting Officer, in his/her sole discretion, shall make a determination as to whether or not the deficiency can fairly be corrected or if the Proposal should be rejected and found to be non-responsive.
 - (3) If a proposer fails to meet and provide documentation in support of each of the Minimum Qualifications requirements set forth in this Solicitation, the Proposer's proposal will be rejected and removed from consideration.
 - (4) Only responsive proposals from responsible Proposers shall be submitted to the Selection Committee
- (c) **SELECTION COMMITTEE REVIEW AND EVALUATION CRITERIA.** Responsive and timely received proposals from responsible firms will be evaluated by the Selection Committee on a fair and consistent basis according to the evaluation criteria set forth below. If oral interviews and presentations are determined to be necessary, final scoring will be conducted after the interviews.
- (1) The Selection Committee shall review each proposal individually and score each proposal based on the evaluation criteria stated herein.
 - (2) During the formal Selection Committee meeting, Committee members will discuss the proposals and compile individual rankings for each proposal based on the evaluation criteria stated herein to determine a shortlist of the highest-ranking firms. The Selection Committee meeting shall be formally noticed by e-notification and posting on the City of Ocala website.
 - (3) The Selection Committee may schedule oral presentations from the top-ranked firms, and may, at their discretion, obtain guidance from third-party subject matter experts. Dates will be set for conducting interviews or presentations with shortlisted firms, and notification will be sent by e-mail and/or telephone of their assigned date and time, by Procurement staff.
 - (4) Final recommendation will be decided based on a review of scores.
 - (5) The City reserves the right to withdraw this Solicitation and reject any or all proposers at any time and for any reason, and to issue such clarifications, modifications, and/or amendments as it may deem appropriate.

- (6) **Technical Evaluation Criteria.** Technical proposals will initially be evaluated against the following criteria:

STEP ONE TECHNICAL EVALUATION CRITERIA	SCORING (100 POINTS)
Technical Compliance with Specifications. <i>Does the proposal clearly demonstrate that the proposer can meet or exceed the required specifications? Does the proposal identify any exceptions to the City's specifications as set forth in the Solicitation?</i>	40
Experience, Qualifications, and Past Performance. <i>Proposal contains documentation in support of qualification and experience requirements. Proposal clearly sets forth the technical experience of the firm and qualifications of assigned staff with performing quality installation and maintenance of SCADA systems. Firm size and structure are appropriate and adequate. Firm meets independence and licensure requirements. References and firm location are adequate.</i>	40
Support and Maintenance. <i>Does the proposal meet the City's support and maintenance requirements? Does the proposal provide clear and valuable maintenance terms, post-delivery support, and additional services to ensure long-term reliability?</i>	20
Total Maximum Points	100

- (7) **Best Value Evaluation Criteria.** Proposers shortlisted during Step One will be evaluated based upon the following:

STEP TWO BEST VALUE EVALUATION CRITERIA	SCORING (100 POINTS)
Corporate Capabilities. <i>Does the proposer possess the organizational capacity, resources, and expertise to fulfill the requirements and expectations of the City?</i>	50
Approach. <i>Proposal sets forth an adequate plan for the engagement.</i>	5
Methodology. <i>Proposal clearly states an understanding of the work to be performed, including making all required statements and affirmations. Proposed procedures are appropriate and adequate.</i>	5
Project Management. <i>Staffing plan is adequate for the various segments of the engagement. Sampling techniques and analytical procedures are adequate.</i>	5
Implementation. <i>Proposal supports that firm is able to meet timeframes and delivery dates.</i>	5
Total Value. <i>Does the proposal offer a competitive and cost-effective solution for the required items? Does proposal demonstrate a willingness to ensure price firmness, guaranteed lead times, and facility location?</i>	30
Total Maximum Points	100

- (d) **NEGOTIATION AND INTENT TO AWARD.** After the shortlisted firms have been ranked based upon evaluation criteria, the City will issue its Intent to Award and engage in negotiations for the development of a contract starting with the highest-ranked Proposer after the conclusion of the protest period. In the event that City is unable to negotiate a contract with the highest-ranked Proposer, such negotiations will be terminated, and negotiations will commence with the next

highest-ranked Proposer, and so forth, until a contract is negotiated, or the City rejects all Proposals and terminates the solicitation.

- (1) Negotiation meetings will be conducted in Ocala, Florida and the City will distribute instructions and/or agendas in advance of each negotiation session. Representatives for the Proposer should plan to be available, without interruptions, for the entirety of the scheduled negotiation meeting.
- (2) Negotiations will not be open to the public, but will be recorded pursuant to Section 286.0113, Florida Statutes. The recorded sessions and any records presented at the meeting will remain exempt from Florida Public Records until such times as the City provides notice of an intended decision or until thirty (30) days after the final reply, whichever occurs first. Provided, however, if the information provided at the meeting is deemed to be material to the Solicitation, then an addendum will be issued to all responders.
- (3) After the successful negotiation of a professional services contract, the City will present the resulting contract to City Council for approval. City Council may approve the recommended award and negotiated contract or reject the award and contract. The decision of City Council shall be final.

3.5. CONTRACT AWARD.

- (a) City anticipates award to the firm who submits a Proposal judged by the Selection Committee to be the most advantageous to the City.
- (b) Proposer understands that by submitting a response to a solicitation does not constitute an agreement or a contract with the City.
- (c) In the event of a default by the Awarded Vendor, City reserves the right to utilize the next highest ranked Proposer meeting specifications as the new Awarded Vendor. In the event of this occurrence, the next highest ranked Proposer meeting specifications shall be required to provide the goods or services at the prices as contained on their Proposal or bid for this specification.
- (d) The contract that the City expects to award as a result of this Solicitation will be based upon the Solicitation documents, Vendor's final response to the Solicitation as accepted by the City, and the City of Ocala's General Terms and Conditions and any Special Terms and Conditions attached to the advertised Solicitation.

3.6. ADDITIONAL INFORMATION.

- (a) **Offer and Binding Authority.** Each Proposal timely received by City at the time advertised for the bid opening shall constitute an offer by the Proposer to sell the goods and/or perform the services in strict accordance with the terms and conditions set forth in the solicitation, all for the bid amount. The individual submitting the Proposal must, and shall be deemed to, have binding authority to submit contracts on behalf of the responding firm.
- (b) **Determination of Responsiveness and Responsibility.** After Proposal opening, but before any award is made, the City shall evaluate (as applicable) the solicitation process, the bid total, any supplements to the Proposal submittal forms, Proposer experience, any proposed subcontractors and/or equipment manufacturers, Proposer's past performance and references, and any other data deemed by the City to be relative to making a determination of Proposer's responsibility and qualifications to perform satisfactorily under the resulting contract.
- (c) **Mistakes.** Proposers are expected to examine the specifications, delivery schedule, bid prices, extensions, and all instruction pertaining to the solicitation. Failure to do so shall be at Proposer's risk and expense. All extensions of the unit prices shown, and the subsequent addition of extended amounts, shall be verified by City. In the event of a discrepancy between the sum of the extended amounts and the bid total, the unit price shall govern (if applicable). The City reserves the right to add to or delete any item from a bid or resulting award when deemed to be in the best interest of the City.

- (d) **Subcontractors and Equipment Manufacturers.** Proposer may be required to submit, in writing, the names and addresses (and other material information) for any proposed subcontractors or equipment manufacturers identified in the Proposal. City reserves the right to disapprove any proposed subcontractor or equipment manufacturers whose technical or financial ability, resources, or experience are deemed (in the City's sole discretion) to be inadequate.
- (e) **Samples.** Samples of items when required, must be furnished free of expense to City and upon request, be returned to the Proposer at the Proposer's expense. Samples of selected items may be retained for comparison purposes.
- (f) **Right to Cancellation, Rejection, Disqualification, and Waiver.** City reserves the right to reject any bid where the prices appear to be unbalanced, and to reject any or all bids, or parts thereof, if it determines, in its sole discretion, that such rejection is in the best interest of the City. City reserves the right to cancel the bid in its entirety or waive any minor irregularity or technicality in bids received.
- (g) **Sole Proposer.** Where only a single responsible and responsive Proposal is received, City may, in its sole discretion, elect to conduct a price or cost analysis of the Proposal. Such Proposer shall cooperate with the City's analysis and provide such supplemental information as may be required. The determination whether to enter into an agreement with a sole Proposer shall be solely within the City's discretion and shall not be conditioned upon the City's performance of a price or cost analysis.
- (h) **Shortlisting and Oral Presentations.** In general, City wishes to avoid the expense (to the City and to proposing firms) of unnecessary presentations. Therefore, City will make every reasonable effort to rank/select firms based on written submittals alone. If no single top-ranked firm can be clearly identified by review of the written submittals alone, the City may shortlist Proposals and require those Proposers to make oral presentations, participate in interviews, or answer questions. These presentations, interviews, and questions will provide Proposers with an opportunity to demonstrate their qualifications, approach to the project, and ability to furnish the required services. City reserves the right in all instances to conduct personal interviews or require presentations of any or all Proposers prior to selection. City shall not be liable for any costs incurred by Proposers in connection with personal interviews or presentations (i.e., travel, accommodations).
- (i) **City's Selection Committee.** City's selection committee may consist of representatives from the City of Ocala, City Council members, and/or the Mayor. City reserves the right to adjust the makeup of the selection committee. Evaluation criteria and selection schedules will be announced either within the solicitation documents or with the posting of a Public Notice.

3.7. CONTRACT TERMS AND CONDITIONS. Please review the City's General Terms and Conditions prior to submitting a response to this Solicitation and expect for them to be included in any award resulting from this Solicitation. By submitting a response, Proposer acknowledges its acceptance of the Solicitation specifications, the City of Ocala's General Terms and Conditions, and any Special Terms and Conditions attached hereto without modification unless expressly stated in the submitted offer. If Proposer takes exception to any provision, Proposer must state the reason for the exception and state the specific contract language it proposes to include in place of the provision and upload said exceptions as part of Proposer's response to this Solicitation.

3.8. RIGHT TO PROTEST. Any actual Proposer or offeror that has submitted a Proposal for a particular procurement and is aggrieved in connection with the solicitation or award of the contract must protest in writing in compliance with the City of Ocala's Procurement Policy found at www.bidocala.com.

END OF SECTION

ATTACHMENT 1 – REFERENCE FORM

Request for Letters of Interest No. ELE/241091 Supervisory Control and Data Acquisition (SCADA) Solution

In order to be deemed responsive and responsible, Proposer must be able to provide: (a) proof of verifiable experience supplying and delivering products of a similar scope as those outlined in this Solicitation to a governmental agency, electric provider, and/or utility company for a period of no less than five (5) years; and (b) at least three (3) governmental agency, electric provider, and/or utility company references who have utilized Proposer's SCADA services and who can attest to proposer's experience and services on similar purchases. For each reference identified, proposer must provide the name of the entity, contact person, phone number, email address.

This **Attachment 1 – Reference Form** should be utilized to provide the foregoing information.

Name of Entity:			
Contact Name:		Title:	
Address:			
Telephone:		E-Mail:	
Length of Business Relationship:			
SYSTEM INTERFACES: As part of this project, what systems did the SCADA system interface with (i.e., API, OMS, GIS, AMI etc.)?			

Name of Entity:			
Contact Name:		Title:	
Address:			
Telephone:		E-Mail:	
Length of Business Relationship:			
SYSTEM INTERFACES: As part of this project, what systems did the SCADA system interface with (i.e., API, OMS, GIS, AMI etc.)?			

Name of Entity:			
Contact Name:		Title:	
Address:			
Telephone:		E-Mail:	
Length of Business Relationship:			
SYSTEM INTERFACES: As part of this project, what systems did the SCADA system interface with (i.e., API, OMS, GIS, AMI etc.)?			

If additional pages are needed, please attach additional sheets to this page.

ATTACHMENT 2 – OPTIONAL ADDITIONAL FEATURES FORM

Request for Letters of Interest No. ELE/241091 Supervisory Control and Data Acquisition (SCADA) Solution

Proposer should complete and upload an executed copy of this **Attachment 2 – Additional Features Form** to indicate whether or not there features in addition to the Project Requirements and Specifications set forth in Section 2 of this Solicitation that Proposer feels would be beneficial to Ocala Electric Utility's SCADA environment. If no additional features are proposed, please check the box marked "No Additional Features Proposed."

Additional Features (Filled Out by Proposer)	
System Functions	Notes

If additional pages are needed, please attach additional sheets to this page.

☐ NO ADDITIONAL FEATURES PROPOSED.

Company Name

Printed Name of Authorized Signatory