



REQUEST FOR PROPOSALS

Enterprise Asset Management (EAM) System

Rend Lake Conservancy District

RFP Issue Date: July 14, 2026
Proposals Due: 2:00 PM CST, August 14, 2026

Issued by:
Rend Lake Conservancy District
PO Box 907, Benton, IL 62812
Attn: Tony Furlow, Water / Sewer Manager
tfurlow@rendlake.org

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Definitions

The following terms are used throughout this RFP and its Appendices. Terms not defined below are intended to have their plain, ordinary meaning. Additional terms specific to the sample vendor Agreement are defined separately in Appendix C.

“Addendum” means a written modification, clarification, or supplement to this RFP issued by the District prior to the proposal due date, as described in Section 7.2.

“Authorized User” means a District employee, or an authorized agent or contractor of the District, who is permitted to access and use the System.

“Business Day” means Monday through Friday, excluding holidays observed by the District.

“District” means the Rend Lake Conservancy District.

“District Data” means all data, content, and information submitted to, or generated within, the System by or on behalf of the District, including asset, GIS, work order, inventory, and customer/billing cross-reference data.

“Go-Live” means the date on which the System becomes available for the District's day-to-day production use, following completion of configuration, data conversion, and required training.

“Meets / Partial / Does Not Meet” means the three ratings a vendor may select for each requirement in the Functional and Technical Requirements Matrix (Section 5 / Appendix B). “Meets” means the proposed System provides the described functionality natively, as of the proposal due date, without required custom development or a paid third-party add-on. “Partial” means the described functionality exists but requires a third-party add-on, custom development, or configuration beyond standard setup, or otherwise does not fully satisfy the requirement as written — the vendor must explain the gap in the “Vendor Comments” column. “Does Not Meet” means the described functionality does not exist in the proposed System and is not committed to the vendor's publicly available product roadmap.

“Proposal” means a vendor's complete written response to this RFP, submitted in accordance with Section 7 and Appendix A.

“Responsive Proposal” means a Proposal that complies with the mandatory submission, format, and content requirements of this RFP, including Appendix A, and that does not take exception to a mandatory requirement in Section 3 without District approval.

“RFP” means this Request for Proposals, including all Sections, Exhibits, and Appendices, together with any Addenda issued by the District.

“Role-Appropriate Training” means training content, format, and depth tailored to the specific duties of each user role identified in Section 6 and Appendix A (at minimum, System Administrator, Supervisor, and Field/Mobile User), rather than a single, identical training session delivered to all users regardless of role. Specific staff roles and responsibilities will be confirmed with the selected vendor during the project kickoff meeting referenced in Section 4.

“Services” means the implementation, configuration, data conversion, integration, training, and support and maintenance services described in Section 4 (Scope of Work).

“System” means the vendor's proposed Enterprise Asset Management software-as-a-service platform, including all associated mobile applications, as described in the vendor's Proposal.

“Total Cost of Ownership or TCO” means the all-in cost to the District over a five (5)-year term, as calculated in the Cost Proposal fee schedule in Section 10.

“Vendor” means the company submitting a Proposal in response to this RFP or, following contract award, the company awarded the resulting Agreement.

1. Introduction

The Rend Lake Conservancy District (“District”) is requesting proposals from qualified vendors to provide a vendor-hosted, cloud-based, GIS-centric Enterprise Asset Management (EAM) system (the “System”) to replace the District’s current work order and asset management processes. The System must be compatible with Esri ArcGIS, must support both office and mobile/field access, and must be provided under a single-vendor arrangement covering the software, implementation services, data conversion, training, and ongoing support.

The District is seeking a solution that will allow it to move from a largely paper-based, on-premise process to a modern, unified system of record for both vertical assets (treatment and pumping facilities, mechanical and electrical equipment, fleet, buildings) and horizontal/linear assets (water mains, valves, hydrants, sanitary sewer collection infrastructure).

1.1 Procurement Schedule

Proposals must be submitted electronically to the District as described in Section 7 no later than 2:00 PM CST on August 14, 2026. The schedule below reflects key milestones and target dates. The District reserves the right to revise this schedule at its sole discretion; any revision will be issued as a written addendum.

Milestone	Target Date
Request for Proposals Advertised	July 14, 2026
Deadline for Questions / Clarification Requests	9:00 AM CST, July 22, 2026
District Response to Questions / Addenda Issued	July 29, 2026
Proposals Due	2:00 PM CST, August 14, 2026
Notification of Selection for Interview / Demonstration	August 21, 2026
Board Meeting — Presentation of Finalists and Approval to Proceed	August 24, 2026
Reference Checks	August 21 – August 28, 2026
Vendor Demonstrations and Interviews	Week of September 7, 2026 (Monday – Thursday)
Proposal Evaluation Complete and Selected Vendor Notified	On or about September 11, 2026
Anticipated Contract Execution	On or about September 25, 2026
Anticipated Notice to Proceed	October 2026

2. General Information and Background

The Rend Lake Conservancy District operates a 27 MGD water treatment plant providing wholesale water service to communities across several counties in southern Illinois. The District’s infrastructure includes over 200 miles of water mains, booster pump stations, a sanitary sewer treatment plant, and associated collection and distribution assets. The District also owns and maintains a fleet of work vehicles — including passenger trucks, semi-trucks, heavy construction equipment, and specialized equipment — along with an extensive materials inventory to support rapid response and repair. In addition to its municipal wholesale customers, the District serves more than 1,300 retail water and sanitary sewer customers, primarily in rural areas, with all monthly billing performed by internal staff.

The District operates through three primary funds, overseen by the General Manager with the support of executive staff and department managers:

1. General — Administration, General & Building Maintenance.
2. Water / Sewer — Water Treatment, Water Distribution & Sewage Treatment / Collections

3. Recreation — Lodge, Golf Course, Restaurant and Leasing

The District currently manages maintenance activity in the Water / Sewer Department using a legacy, on-premise Computerized Maintenance Management System (CMMS) that is largely paper-based and requires significant manual effort for data extraction, validation, and reconciliation. The scale and complexity of District operations have outgrown the capabilities of this system.

The District intends to implement a new EAM system to better manage its assets, track work activity, and support capital planning and expenditure decisions. The initial scope of this project is limited to the Water / Sewer Department, with the expectation that the platform will expand to additional District departments (General, Recreation) in future years. Proposed solutions should be priced and architected with this phased expansion in mind, without requiring the District to purchase enterprise-wide licensing before it is needed.

2.1 Existing and Planned Systems

The District uses several existing technology platforms to support daily operations. The proposed System must interface with the systems identified below, either natively or through a documented, supportable API/integration method.

System	Purpose	Integration Need
Esri ArcGIS Online	Cloud-based GIS mapping and spatial analysis	Required — bi-directional sync of asset location and attribute data
CUSI UB ⁴	Browser-based utility billing platform	Required — bi-directional sync of customer/service address, account & meter information
AMI Meter Reading System (future)	Advanced meter infrastructure and reading	Desired — not required for go-live; see integration architecture criteria below
Compliance / Water Quality Management Software (future)	Regulatory compliance and water quality data management	Desired — not required for go-live; see integration architecture criteria below

For the two items marked “Desired” above (AMI meter reading system and compliance/water quality management platform), the District does not require a working integration at the time of proposal or Go-Live. Instead, the vendor must demonstrate that the System's architecture would support adding such an integration in a future phase, by confirming the following in its proposal: (a) the System provides an open, documented API or equivalent standard integration method that a future AMI or water quality platform vendor could reasonably build against; (b) the System's core data model is not proprietary or closed in a way that would require a full system replacement, or custom development available only through the vendor, to exchange data with a future AMI or water quality platform; and (c) at least one example of a comparable integration the vendor has completed for another water or wastewater utility client. Vendor responses to this item are addressed further in Section 5.7 (Integration & Interoperability) and Appendix B, Section B.7.

3. Minimum System Requirements

The following are minimum, non-negotiable requirements of the proposed System. Proposals that do not clearly demonstrate how the proposed solution meets each requirement below may be deemed non-responsive.

- GIS-centric and natively compatible with Esri ArcGIS Online and ArcGIS Enterprise products currently in use by the District's Engineering/GIS staff, without requiring a separate parallel asset database that must be manually reconciled with GIS.
- A single, unified database of record for all District vertical and horizontal (linear) assets, accessible to authorized users across departments.

- A demonstrated track record in the public water/wastewater utility sector, including a minimum of 600 completed or active deployments and a minimum of 20 years of continuous operating history providing the proposed product (or its direct predecessor product line under continuous corporate ownership).
- A configurable platform that can be tailored to the District's current business processes and adapted as those processes evolve, without requiring vendor professional services for routine configuration changes (e.g., new work order types, inspection forms, or PM schedules).
- Delivered as Software-as-a-Service (SaaS) in a dedicated or logically isolated environment, with an open, documented API architecture, and independently audited under SOC 2 Type II (or equivalent, such as ISO/IEC 27001).
- Purpose-built for use by public agencies to support and track the full asset management lifecycle — from asset creation/inventory through inspection, maintenance, repair, renewal, and replacement/disposal.
- Licensed for a minimum of thirty (30) named or concurrent District employee users across office and field roles, with room to scale as the platform expands to additional departments.
- Documented, proven security controls appropriate for a system that will contain data related to critical water/wastewater infrastructure, including encryption in transit and at rest, role-based access control, and multi-factor authentication for all user accounts.
- Developed, maintained, and supported by the same vendor responsible for the proposal and contract — the District will not accept a reseller arrangement in which development and support responsibility is unclear or divided without a clearly documented support escalation path to the product's developer.
- Native offline-capable mobile application(s) for field data collection, inspection, and work order management, usable on District-standard mobile devices (iOS and Android).

4. Scope of Work

The intent of this RFP is to enable the District to acquire the most appropriate and cost-effective EAM solution from a qualified vendor. At minimum, the proposed solution must replace the functionality of the District's current CMMS while adding the GIS-centric, mobile, and reporting capabilities described throughout this RFP. Proposals should address, at minimum, the following scope of work:

- Provide and implement a new, cloud-hosted Enterprise Asset Management software system for the District's Water / Sewer Department, structured to support future expansion to additional District departments.
- Provide project management services throughout the full implementation lifecycle, including a written project plan, schedule, and identified points of contact.
- Provide data conversion and migration services from the District's existing GIS (Esri) data and Microsoft Office/Excel-based tracking tools into the new System.
- Provide system configuration services, including asset hierarchy setup, work order types and workflows, preventive maintenance schedules, and inspection/data collection forms.
- Provide role-appropriate training for administrators, supervisors, and field personnel, including both live (on-site or virtual, as mutually agreed) and self-paced/on-demand training resources. Specific staff roles and responsibilities will be confirmed with the selected vendor during the project kickoff meeting referenced in Section 4.
- Provide complete System documentation, including administrator guides, end-user guides, and API/integration documentation, in both digital and (upon request) hard-copy format.
- Provide ongoing technical support, maintenance, and software updates for the life of the contract, as detailed in the vendor's proposal and Service Level commitments.

- Identify and document all integration work needed to connect the System with the District's existing ArcGIS Online environment and CUSI UB⁴ billing platform, and describe the vendor's approach to supporting future integration with an AMI meter reading system and a compliance/water quality management platform.

5. Detailed Functional and Technical Requirements

Vendors must complete the “Meets / Partial / Does Not Meet” and “Vendor Comments” columns for every requirement below as part of their proposal (see Appendix B for a standalone copy of this matrix). Where a requirement is only partially met, or met through a third-party add-on rather than natively, the vendor must clearly explain the gap and any associated cost.

5.1 Asset Registry & GIS

Requirement	Meets / Partial / Does Not Meet	Vendor Comments
Maintain a hierarchical asset registry for both vertical (facility/equipment) and horizontal/linear (main, valve, hydrant, sewer) assets, linked to GIS geometry.		
Store asset attributes including install date, manufacturer, model, material, size, criticality, condition rating, warranty, and replacement cost.		
Support asset condition assessment workflows and configurable criticality/risk scoring to support capital planning.		
Maintain complete asset history, including all associated work orders, inspections, and costs over the asset's lifecycle.		
Support parent/child and network relationships between assets (e.g., a pump station and its individual pumps, motors, and valves).		

5.2 Work Order Management

Requirement	Meets / Partial / Does Not Meet	Vendor Comments
Generate, assign, schedule, and track work orders from request through completion, with configurable status workflows and approval steps.		
Support multiple work order types (corrective, preventive, predictive, inspection, emergency/unplanned) with configurable templates per asset class.		
Capture labor hours, materials/parts used, equipment/fleet usage, and vendor/contractor costs against each work order.		
Support service request intake (from staff or, optionally, the public) with routing to the appropriate work order queue.		
Provide crew scheduling and dispatch tools, including calendar/board views of assigned and unassigned work.		

5.3 Preventive & Predictive Maintenance

Requirement	Meets / Partial / Does Not Meet	Vendor Comments
Support time-based, meter/usage-based, and condition-based preventive maintenance scheduling.		
Automatically generate PM work orders on a defined schedule and notify responsible staff/supervisors of upcoming and overdue PMs.		
Provide PM compliance reporting (percentage of PMs completed on time, backlog of overdue PMs, by asset class and by crew).		
Support checklists/inspection templates tied to PM work orders, including pass/fail criteria and required corrective-action follow-up.		

5.4 Inventory, Parts, Procurement & Fleet

Requirement	Meets / Partial / Does Not Meet	Vendor Comments
Track parts and materials inventory, including quantity on hand, reorder points, unit cost, and storage location across multiple warehouses/stock locations.		
Automatically decrement inventory when parts are consumed against a work order, and support purchase order/reorder workflows when stock falls below threshold.		
Support vendor/supplier records and purchase history for procurement planning.		
Track fleet and equipment assets (vehicles, heavy equipment) including fuel/usage, maintenance history, and licensing/inspection due dates.		

5.5 Mobile & Field Operations

Requirement	Meets / Partial / Does Not Meet	Vendor Comments
Provide a native mobile application (iOS and Android) supporting full offline functionality with automatic sync when connectivity is restored.		
Allow field staff to view, complete, and close work orders; capture photos, GPS location, notes, and signatures; and create new work requests from the field.		
Allow field staff to view relevant GIS layers (mains, valves, hydrants, service connections) in the field, including on District-issued and BYOD devices.		
Support barcode/QR code or RFID scanning of assets and inventory where applicable.		

5.6 Reporting, Dashboards & Analytics

Requirement	Meets / Partial / Does Not Meet	Vendor Comments
Provide configurable, role-based dashboards for management, supervisors, and field crews.		
Provide standard and ad hoc/custom reporting with export to PDF, Excel, and CSV.		
Support regulatory and compliance reporting needs relevant to Illinois water/wastewater utilities (e.g., asset inventory reporting, capital planning documentation).		
Provide key performance indicators out of the box (e.g., work order backlog, PM compliance, mean time to repair, cost per asset/asset class).		

5.7 Integration & Interoperability

Requirement	Meets / Partial / Does Not Meet	Vendor Comments
Provide a documented, open API (REST or equivalent) to support integration with third-party systems.		
Provide native or supported integration with Esri ArcGIS Online, including bi-directional sync of asset location and attribute updates.		
Provide or support integration with the District's CUSI UB ⁴ billing platform for bi-directional sync of customer/service address, account & meter information updates.		
Describe the vendor's experience and technical approach to a future integration with an AMI meter reading system and a water quality/compliance management platform. At minimum, confirm: (a) the System provides an open, documented API or equivalent standard integration method; (b) the System's core data model would not require a full system replacement or vendor-exclusive custom development to support the integration; and (c) at least one example of a comparable integration completed for another water/wastewater utility client.		

5.8 Hosting, Security & Data Ownership

Requirement	Meets / Partial / Does Not Meet	Vendor Comments
Provide role-based access control with configurable permission levels by user, group, and module.		
Support single sign-on (SSO) / integration with the District's identity provider, and multi-factor authentication.		
Encrypt data at rest and in transit; maintain current SOC 2 Type II (or equivalent) audit certification, provided upon request.		
Provide a documented data backup, disaster recovery, and business continuity plan, including recovery point/time objectives (RPO/RTO).		

Clearly document data ownership — District data remains the property of the District at all times — and provide a defined process and format for full data export upon contract termination or expiration.		
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5.9 Implementation, Data Conversion & Training

Requirement	Meets / Partial / Does Not Meet	Vendor Comments
Provide a detailed implementation project plan including phases, milestones, staffing, and District responsibilities/dependencies.		
Provide data conversion services from existing Esri GIS data and Microsoft Office/Excel-based asset and maintenance tracking data.		
Provide role-based training (administrator, supervisor, field/mobile user) delivered both live and via self-paced/on-demand resources.		
Provide a defined post-go-live support/hypercare period and a standard ongoing support model with documented response-time SLAs by issue severity.		

6. Vendor Qualifications

Proposals must demonstrate the vendor's qualifications to deliver and support the proposed System, including:

- Corporate history, ownership structure, financial stability, and number of years providing the proposed product to public water/wastewater utilities.
- Total number of active deployments of the proposed product, with specific detail on deployments of comparable size and scope to the District (wholesale/retail water and sewer utilities in the 150,000–200,000 population-equivalent range).
- A minimum of three (3) reference clients, preferably public water/wastewater utilities in Illinois or neighboring states, that have used the proposed System for at least two (2) years, including contact name, title, phone, email, and a brief description of their deployment.
- Resumes and relevant experience of the specific implementation, training, and support personnel proposed to be assigned to the District's project, including an organizational chart.
- A description of the vendor's product roadmap and release cadence, and how the District will be notified of and involved in major upgrades.

7. Instructions to Vendors

7.1 Preparation of Proposals

Proposals that contain omissions, erasures, alterations, or additions not called for, or that contain conditional or alternate terms not specifically requested, may be rejected at the District's sole discretion. Proposals must include a complete cost proposal as described in Section 10. District staff will review all proposals received, may interview or request demonstrations from any or all vendors, and may enter into negotiations with a preferred vendor to finalize project scope, implementation schedule, and final cost prior to contract execution.

7.2 Questions and Clarifications

The District reserves the right to make clarifications, corrections, or changes to this RFP at any time prior to the proposal due date. Questions and requests for information must be submitted by email no later than 9:00 AM CST on July 22, 2026, to:

Tony Furlow, Water / Sewer Managertfurlow@rendlake.org

The District will post addenda and responses to questions on the District's website at <http://www.rendlake.org/bid-specifications/>. It is each vendor's sole responsibility to monitor the website for addenda prior to submitting a proposal. All proposals must acknowledge receipt of every addendum issued.

7.3 Submission of Proposals

Proposals must be submitted electronically in a single PDF file to tfurlow@rendlake.org no later than 2:00 PM CST on Friday, August 14, 2026. Proposals or file transfers that are incomplete, corrupted, or received after the deadline will not be considered. Vendors are responsible for confirming receipt of their submission and should allow adequate time for large file transfers. The District may, at its discretion, request a printed copy from the apparent successful vendor prior to contract execution.

8. Public Records, Confidentiality, and Reserved Rights**8.1 Public Records and Requests for Confidential Treatment**

Proposals become the property of the District and will not be returned, including late submissions. All proposals are subject to disclosure under the Illinois Freedom of Information Act (5 ILCS 140) and other applicable law, unless the vendor requests in its proposal that specific information be treated as confidential. A request for confidential treatment does not supersede the District's legal obligations under FOIA, and the District will not honor requests to treat an entire proposal as confidential. Vendors must identify the specific statutory basis under Illinois law supporting any claim of exemption and provide a detailed justification. Regardless of any confidentiality request, the District will disclose the successful vendor's name, the substance of its proposal, and its price upon final contract award if requested. A vendor requesting confidential treatment must submit an additional redacted copy of its proposal along with a separate listing, by section number, of the provisions for which confidential treatment is sought and the statutory basis for each. The vendor agrees to hold harmless and indemnify the District for all costs and damages associated with defending the vendor's confidentiality request, and agrees the District may copy the proposal to facilitate evaluation or to respond to public records requests.

8.2 Reserved Rights

The District reserves the right to accept the proposal that is, in its judgment, the best and most favorable to the interests of the District and the public it serves; to reject the lowest-priced proposal; to reject any and all proposals; and to waive irregularities and informalities in any proposal submitted.

9. Evaluation of Proposals

The District will evaluate proposals using the weighted criteria below. The District may, at its discretion, shortlist vendors for demonstrations and interviews prior to finalizing its evaluation. Cost is a significant factor but will not be the sole basis for selection; the District intends to select the proposal based on the best value for the District which includes items including but not limited to, the overall cost of the EAM system, simplicity of use, and most robust technical support.

Evaluation Criterion	Weight
Functional and technical fit to the requirements in Sections 3 and 5	20%
Vendor qualifications, experience, and reference feedback (Section 6)	20%
Implementation approach, project plan, data conversion, and training methodology	20%

Total cost of ownership over a five (5)-year term (Section 10)	20%
Vendor demonstration and interview performance	20%

10. Pricing Proposal

Vendors must complete the fee schedule below in full, in U.S. dollars, reflecting all costs to implement and operate the proposed System for a minimum of thirty (30) District users. The District would like pricing for an initial 5-year term. Vendors should clearly state any assumptions (e.g., escalation rate applied in Years 2–5, whether hosting is included in the subscription fee) as footnotes to the table. Pricing must remain valid for at least 120 days following the proposal due date. Vendors should also provide standard hourly/daily rates for any additional professional services not itemized above (e.g., future department expansion, custom report development).

Price Component	Estimate
Software subscription / licensing fees (up to 30 users) – Year 1	
Software subscription / licensing fees (up to 30 users) – Year 2	
Software subscription / licensing fees (up to 30 users) – Year 3	
Software subscription / licensing fees (up to 30 users) – Year 4	
Software subscription / licensing fees (up to 30 users) – Year 5	
Implementation, configuration & training services	
Additional professional services (hourly rate)	
Total Year One:	
Total Five Years:	

11. Agreement / Contract

The District intends to contract on the selected vendor's standard software subscription and services agreement (e.g., master subscription agreement, terms of service, and/or order form), rather than a District-drafted form. Each vendor must include, as part of its proposal, a complete copy of its standard agreement(s) that would govern the System and Services described in this RFP, including all exhibits, order forms, service level agreements, data processing/security addenda, and acceptable use policies that would apply.

The vendor's standard agreement, together with the vendor's Proposal and this RFP, will be reviewed and negotiated as necessary and is subject to final approval by the District's legal counsel prior to execution. Vendors should be prepared to negotiate provisions the District's legal counsel identifies as inconsistent with Illinois law applicable to conservancy districts (including public records, non-appropriation, and tort immunity considerations), the District's data ownership and data export expectations described in Section 5.8, and the insurance requirements in Section 12. The District reserves the right to decline to proceed with any vendor whose standard agreement cannot be brought into a form acceptable to the District's legal counsel within a reasonable negotiation period.

12. Insurance Requirements

Prior to execution of any Agreement, the selected vendor must furnish a Certificate of Insurance evidencing the following minimum coverage, naming the Rend Lake Conservancy District as an additional insured where applicable:

- Commercial General Liability: \$1,000,000 per occurrence / \$2,000,000 aggregate
- Automobile Liability: \$1,000,000 combined single limit

- Workers' Compensation: Statutory limits, and Employer's Liability of \$1,000,000
- Professional Liability / Errors & Omissions: \$1,000,000 per claim / \$2,000,000 aggregate
- Cyber Liability / Technology Errors & Omissions: \$1,000,000 per occurrence / \$2,000,000 aggregate, covering data breach, network security failure, and business interruption, given the System's role in managing data related to critical water/wastewater infrastructure

Full detailed requirements are provided in Appendix D. The District reserves the right to request higher limits or additional coverage types based on the final scope of the selected vendor's engagement.

13. Appendices

- Appendix A: Proposal Contents and Format Requirements
- Appendix B: Detailed Functional and Technical Requirements Matrix (standalone vendor response copy)
- Appendix C: Pricing Proposal Sheet
- Appendix D: Insurance Requirements (detailed)
- Appendix E: Vendor Signature Page

Appendix A: Proposal Contents and Format Requirements

Proposals should be organized in the order below, and should be clear and concise. Marketing material not directly responsive to a requirement below should be avoided or placed in a clearly labeled separate section.

1. Cover Letter — signed by an individual authorized to bind the vendor, identifying the proposed product name and version.
2. Executive Summary — brief overview of the proposed solution and why it fits the District's needs (2 pages maximum).
3. Company Overview — corporate history, ownership, financial stability, and years providing the proposed product (3 pages maximum).
4. Functional and Technical Requirements Response — completed matrix per Section 5 / Appendix B.
5. Vendor Qualifications and References — per Section 6.
6. Proposed Project Team — resumes, roles, and organizational chart for implementation, training, and support staff.
7. Implementation Approach and Project Plan — including phases, milestones, data conversion methodology, and District responsibilities/dependencies.
8. Training Plan — describing live and self-paced training offerings by user role.
9. Support and Maintenance Plan — including support hours, escalation procedures, and response-time SLAs by severity.
10. Security and Hosting Overview — including current SOC 2 Type II (or equivalent) audit report or summary, data backup/DR approach, and data export/exit process.
11. Cost Proposal — completed fee schedule per Section 10, plus standard rates for additional services.
12. Vendor's Complete Standard Agreement(s) — including all exhibits, order forms, SLAs, and data processing/security addenda, per Section 11.
13. Signed Vendor Signature Page — Appendix E.

Appendix B: Detailed Functional and Technical Requirements Matrix

This appendix reproduces the requirements matrix from Section 5 as a standalone document for vendor completion and return with the proposal.

B.1 Asset Registry & GIS

Requirement	Meets / Partial / Does Not Meet	Vendor Comments
Maintain a hierarchical asset registry for both vertical (facility/equipment) and horizontal/linear (main, valve, hydrant, sewer) assets, linked to GIS geometry.		
Store asset attributes including install date, manufacturer, model, material, size, criticality, condition rating, warranty, and replacement cost.		
Support asset condition assessment workflows and configurable criticality/risk scoring to support capital planning.		
Maintain complete asset history, including all associated work orders, inspections, and costs over the asset's lifecycle.		
Support parent/child and network relationships between assets (e.g., a pump station and its individual pumps, motors, and valves).		

B.2 Work Order Management

Requirement	Meets / Partial / Does Not Meet	Vendor Comments
Generate, assign, schedule, and track work orders from request through completion, with configurable status workflows and approval steps.		
Support multiple work order types (corrective, preventive, predictive, inspection, emergency/unplanned) with configurable templates per asset class.		
Capture labor hours, materials/parts used, equipment/fleet usage, and vendor/contractor costs against each work order.		
Support service request intake (from staff or, optionally, the public) with routing to the appropriate work order queue.		
Provide crew scheduling and dispatch tools, including calendar/board views of assigned and unassigned work.		

B.3 Preventive & Predictive Maintenance

Requirement	Meets / Partial / Does Not Meet	Vendor Comments
Support time-based, meter/usage-based, and condition-based preventive maintenance scheduling.		
Automatically generate PM work orders on a defined schedule and notify responsible staff/supervisors of upcoming and overdue PMs.		
Provide PM compliance reporting (percentage of PMs completed on time, backlog of overdue PMs, by asset class and by crew).		

Support checklists/inspection templates tied to PM work orders, including pass/fail criteria and required corrective-action follow-up.		
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B.4 Inventory, Parts, Procurement & Fleet

Requirement	Meets / Partial / Does Not Meet	Vendor Comments
Track parts and materials inventory, including quantity on hand, reorder points, unit cost, and storage location across multiple warehouses/stock locations.		
Automatically decrement inventory when parts are consumed against a work order, and support purchase order/reorder workflows when stock falls below threshold.		
Support vendor/supplier records and purchase history for procurement planning.		
Track fleet and equipment assets (vehicles, heavy equipment) including fuel/usage, maintenance history, and licensing/inspection due dates.		

B.5 Mobile & Field Operations

Requirement	Meets / Partial / Does Not Meet	Vendor Comments
Provide a native mobile application (iOS and Android) supporting full offline functionality with automatic sync when connectivity is restored.		
Allow field staff to view, complete, and close work orders; capture photos, GPS location, notes, and signatures; and create new work requests from the field.		
Allow field staff to view relevant GIS layers (mains, valves, hydrants, service connections) in the field, including on District-issued and BYOD devices.		
Support barcode/QR code or RFID scanning of assets and inventory where applicable.		

B.6 Reporting, Dashboards & Analytics

Requirement	Meets / Partial / Does Not Meet	Vendor Comments
Provide configurable, role-based dashboards for management, supervisors, and field crews.		
Provide standard and ad hoc/custom reporting with export to PDF, Excel, and CSV.		
Support regulatory and compliance reporting needs relevant to Illinois water/wastewater utilities (e.g., asset inventory reporting, capital planning documentation).		
Provide key performance indicators out of the box (e.g., work order backlog, PM compliance, mean time to repair, cost per asset/asset class).		

B.7 Integration & Interoperability

Requirement	Meets / Partial / Does Not Meet	Vendor Comments
Provide a documented, open API (REST or equivalent) to support integration with third-party systems.		
Provide native or supported integration with Esri ArcGIS Online, including bi-directional sync of asset location and attribute updates.		
Provide or support integration with the District's CUSI UB4 billing platform for bi-directional sync of customer/service address, account & meter information updates.		
Describe the vendor's experience and technical approach to a future integration with an AMI meter reading system and a water quality/compliance management platform. At minimum, confirm: (a) the System provides an open, documented API or equivalent standard integration method; (b) the System's core data model would not require a full system replacement or vendor-exclusive custom development to support the integration; and (c) at least one example of a comparable integration completed for another water/wastewater utility client.		

B.8 Hosting, Security & Data Ownership

Requirement	Meets / Partial / Does Not Meet	Vendor Comments
Provide role-based access control with configurable permission levels by user, group, and module.		
Support single sign-on (SSO) / integration with the District's identity provider, and multi-factor authentication.		
Encrypt data at rest and in transit; maintain current SOC 2 Type II (or equivalent) audit certification, provided upon request.		
Provide a documented data backup, disaster recovery, and business continuity plan, including recovery point/time objectives (RPO/RTO).		
Clearly document data ownership — District data remains the property of the District at all times — and provide a defined process and format for full data export upon contract termination or expiration.		

B.9 Implementation, Data Conversion & Training

Requirement	Meets / Partial / Does Not Meet	Vendor Comments
Provide a detailed implementation project plan including phases, milestones, staffing, and District responsibilities/dependencies.		
Provide data conversion services from existing Esri GIS data and Microsoft Office/Excel-based asset and maintenance tracking data.		
Provide role-based training (administrator, supervisor, field/mobile user) delivered both live and via self-paced/on-demand resources.		
Provide a defined post-go-live support/hypercare period and a standard ongoing support model with documented response-time SLAs by issue severity.		

Appendix C: Pricing Proposal Sheet

This appendix reproduces the pricing requirements from Section 10 as a standalone document for vendor completion and return with the proposal.

Price Component	Estimate
Software subscription / licensing fees (up to 30 users) – Year 1	
Software subscription / licensing fees (up to 30 users) – Year 2	
Software subscription / licensing fees (up to 30 users) – Year 3	
Software subscription / licensing fees (up to 30 users) – Year 4	
Software subscription / licensing fees (up to 30 users) – Year 5	
Implementation, configuration & training services	
Additional professional services (hourly rate)	
Total Year One:	
Total Five Years:	

Appendix D: Insurance Requirements (Detailed)

Coverage	Minimum Limits	Notes
Commercial General Liability	\$1,000,000 per occurrence / \$2,000,000 aggregate	District named as additional insured
Automobile Liability	\$1,000,000 combined single limit	Applies if vendor personnel travel to District sites
Workers' Compensation	Statutory	Employer's Liability \$1,000,000
Professional Liability / Errors & Omissions	\$1,000,000 per claim / \$2,000,000 aggregate	Covers acts, errors, or omissions in professional services
Cyber Liability / Technology E&O	\$1,000,000 per occurrence / \$2,000,000 aggregate	Covers data breach, network security failure, and business interruption
Umbrella / Excess Liability	\$2,000,000	May be used to meet combined limits above primary coverage

Certificates of Insurance must be provided prior to contract execution and must provide for thirty (30) days' written notice to the District prior to cancellation or material change in coverage. The District reserves the right to request higher limits based on the final scope of work.

Appendix E: Vendor Signature Page

The undersigned, on behalf of the vendor identified below, certifies that this proposal is made without collusion with any other vendor, that the undersigned is authorized to bind the vendor to the terms of this proposal, and that all information provided in this proposal is true and accurate to the best of the undersigned's knowledge.

Vendor / Company Name: _____

Proposed Product Name & Version: _____

Authorized Signature: _____

Printed Name & Title: _____

Date: _____

Phone: _____ Email: _____