



# **Private Sewer Lateral Software Replacement Project**

**Vendor Conference**

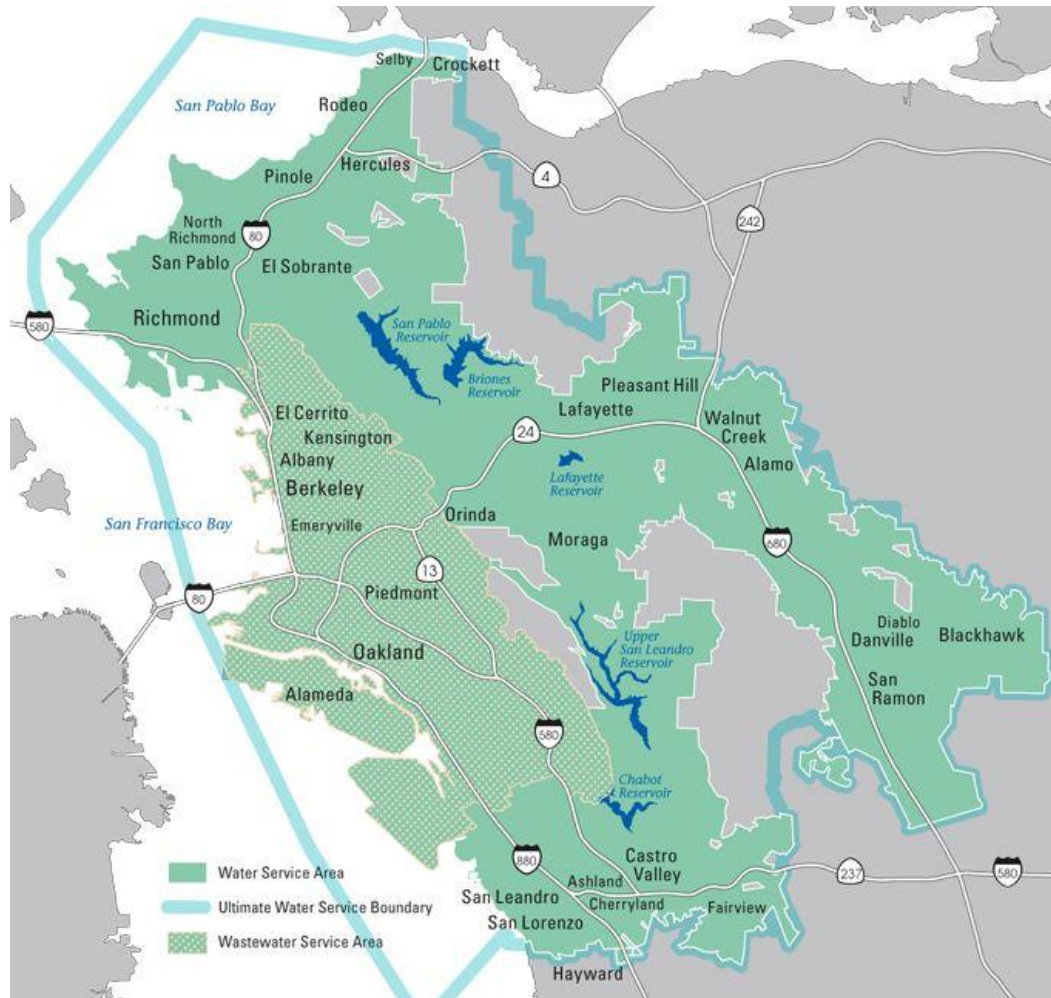
**March 29, 2023**

# Agenda



- EBMUD Overview
- Private Sewer Lateral Program Overview
- Existing Software Overview
  - Overview of Software Components
  - Parcel Data & Self-Service Customer Portal
  - Back-end Scheduling Interface
  - Time Extension Certificates (TEC) Payment System
  - Enforcement
  - Additional Functionality
- Request for Proposal
  - Evaluation Criteria
  - Selection Committee
  - Schedule
- Questions

# EBMUD Overview



**2,000** Total Employees

Drinking Water

**1.4** Million People

**332** Square Mile Area

Wastewater

**740** Thousand People

**88** Square Mile Area



The map displays the EBMUD Wastewater Service Area, which includes the following cities and areas:

- El Cerrito**
- Richmond Annex**
- (Stege Sanitary District)**
- Kensington**
- Albany**
- Berkeley**
- Emeryville**
- Piedmont**
- Alameda**
- Oakland**

The map also includes a legend for the wastewater treatment plants:

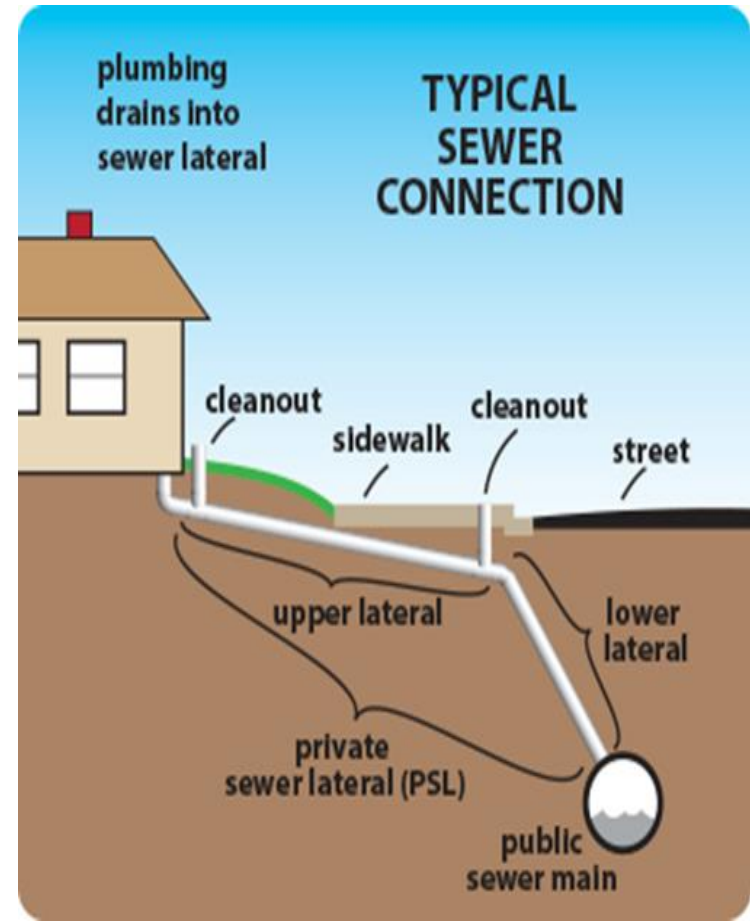
- EBMUD Wastewater Service Area** (indicated by a green outline)
- Areas affected by EBMUD's PSL Ordinance (Use this guide)** (indicated by a light green fill)
- Area affected by Berkeley's municipal PSL ordinance (consult City of Berkeley)** (indicated by a grey fill)
- Areas not affected** (indicated by a white fill)

# Regional PSL Program Overview (Cont'd)



## What is a Private Sewer Lateral?

A PSL is the pipe that carries waste from a home or business to the public sanitary sewer main. The PSL Program requires property owners to rehabilitate their sewer connections.



# Regional PSL Program Overview (Cont'd)



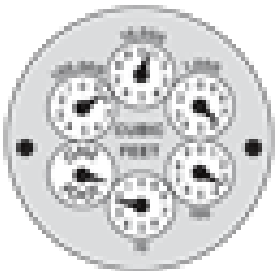
## What are the Regional PSL Ordinance Triggers?



**Buying or selling a property**



**Building or remodeling  $\geq$ \$100k**



**Changing the size of your water meter**

# Existing Software Overview



## Background

- In 2008, EBMUD worked with a vendor to develop custom software
- Developed under contract at a cost of \$1 million.

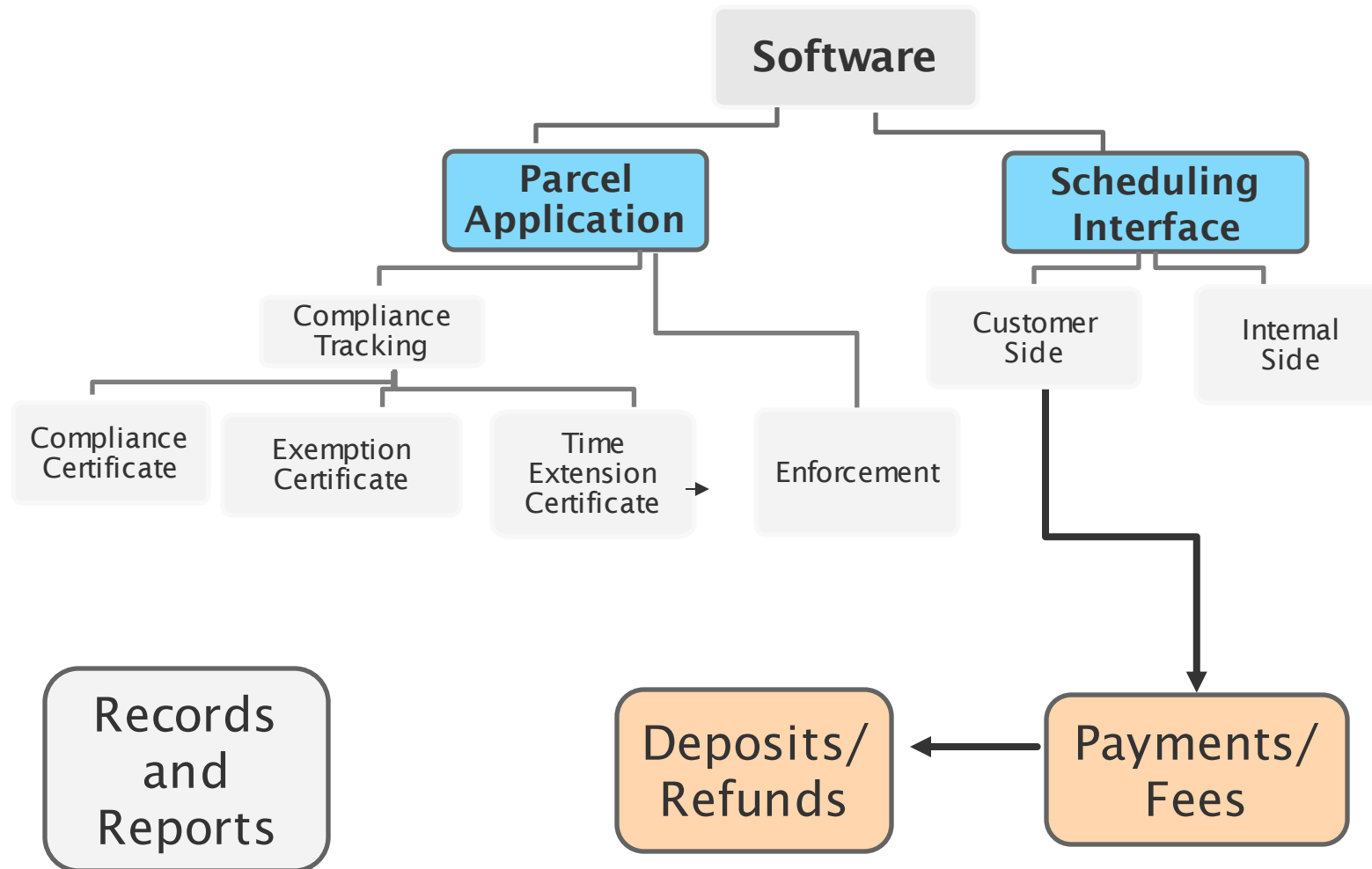
## Current Functionality

- Data associated with Parcel to track compliance
- Scheduling interface for front and backend appointment scheduling
- Credit card payment portal for fees

## Limitations

- Complex inspections may not be scheduled
- Clunky front-end that is inefficient for customers
- Does not integrate deposits or more complex processes

# Overview of Software Components



# Parcel Information & Self-Service Customer Portal



## Current Functionality

- Parcel Number (look up by address)
- Provides compliance status (any current certificate in system can be downloaded)
- Pay and schedule an inspection
- Purchase a time extension
- Request an exemption

## Additional Requirements

- Parcel Data would be linked to GIS
- Allow auto-populating based on user credentials (e.g., name, address)
- Incorporate required data entry
- Display available appointments
- Integrate with [www.ebmud.com](http://www.ebmud.com)

### Start Here

East Bay Regional PSL Program uses your address and parcel number to track your property.

Enter your address below to:

- Schedule, reschedule or cancel an inspection
- Pay for a certificate
- View, print or download a certificate
- Request a Time Extension
- Request an Exemption
- Check the compliance status of a given property

If you have questions, please call 1-866-40-EBMUD (1-866-403-2683) between 8 a.m. and 4:30 p.m.

Enter your street address and select your city.

**Note:** If the property address is in **Berkeley**, it is **NOT** subject to the East Bay Regional PSL Ordinance. Please contact Berkeley directly for the local requirements at <http://www.ci.berkeley.ca.us/psl/>.

Parcels in HOAs that are responsible for certifying all of the PSLs are not eligible for exemptions. Check with the HOA to provide documentation (either Statement of Responsibility form or compliance certificate) for title transfers.

Street Address:	<input type="text"/>	OR	Parcel Number:	<input type="text"/>
Apt No:	<input type="text"/>			(optional)
Select your City:	<input type="text" value="Alameda"/>			

**Search**

After selecting "Search", select your property from the list returned by the search operation.

# Back-end Scheduling Interface



## Current Functionality

- Schedule appointments to be available
- Weekly schedules by inspector

## Additional Requirement

- Schedule available appointments with flexibility to add more once schedule is “posted”
- Create Inspector schedules based on number and location of inspections
- Direct data entry during Inspections
- Dynamic relationship between application and webpage to allow scheduling with ease

The screenshot displays the 'Special Reservations for Friday November 04, 2022' interface. It features a calendar grid with time slots from 08:00AM to 20:00PM. A 'Reservation Details' pop-up window is open, showing information for a reservation on Friday, 11/04/2022, at 11:00. The details include:

- Parcel: 071-0276-046-00
- Address: 1810 CENTRAL AVE, ALAMEDA, CA 94501
- Land Use Code: 7390
- Owner Name: A Plus Waterworks
- Owner Phone: 707-248-8987
- Contact Email: Same day request, HOA, Window
- Contractor Name:
- Contractor Phone:
- Contractor Cell:
- Inspector Name: Amelia Saville
- Reservation Status: Tentative Special Time
- Special Instructions:

Below the calendar, there is a list of available appointments for various inspectors, including Daniel, David, Gabriela, Jessica, Juraj, Kamara, and Kiley. Each inspector's section shows a list of time slots and their status (e.g., 'Uncommitted', 'Out', 'Available').

# Time Extension Certificates (TEC) Payment System



## Current Functionality

- Customers pay deposit (\$4500) via mailed check
- No current software integration

## Additional Requirements

- Collect fee (credit card via 3<sup>rd</sup> party)
- Collect deposit (ACH via 3<sup>rd</sup> party)
- Issue the TEC to customer (and store with parcel)
- Prepare TEC deposit refund documentation with Supervisor approval
- Issue refund to customer and update system records

# Enforcement

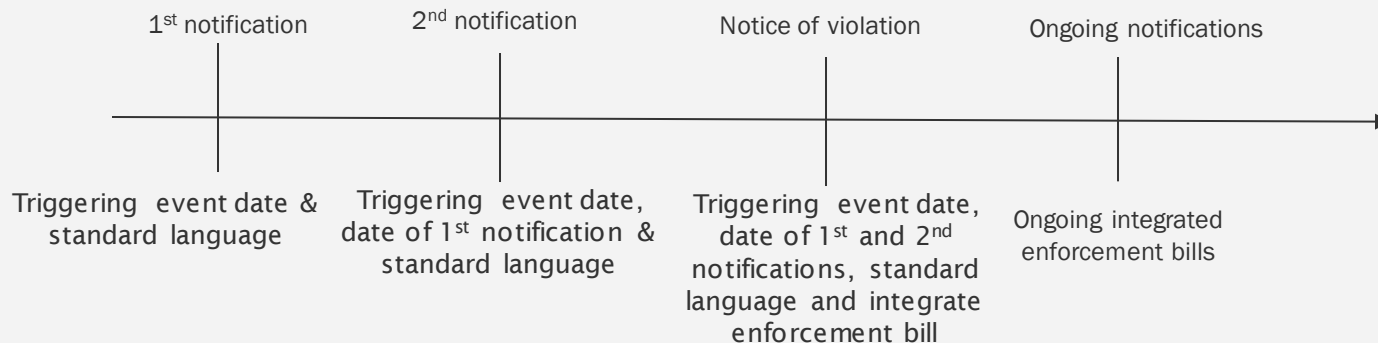


## Current Functionality

- Manually upload data from County, Satellite Agency, or New Business office by parcel
- Manually change enforcement levels
- Application tracks enforcement levels and dates
- No current software integration
- Shows event history, property owner information

## Additional Requirements

- Generate noncompliance notifications to parcels



- Properties need to go into and out of enforcement based on triggers, obtaining compliance, exemptions, Compliance Agreement, etc

# Additional Functionality



- Requesting and issuing exemption certificates
- Appealing decisions and issuing compliance agreements
- Storing information for certain parcel groups:
  - Properties that are part of an HOA
  - Properties with more than 1,000-feet of laterals
  - Properties within Alameda Point
  - Properties within the Port of Oakland
- Robust reporting
  - Compliance statistics (consideration of recertifications, retroactive certifications, etc)
  - Inspection reports and statistics on inspections completed
  - Ability to email data (e.g., appointments scheduled)

# Financial Details



## Fees

- Fees for Compliance Certificate are paid when an appointment is scheduled
- Reschedule, certificate, and enforcement fees automatically assessed to parcel
- Fees update appropriately with date of Board adoption
- Compliance Certificate may not be downloaded and appointments may not be scheduled if there are any unpaid fees attached to parcel

## Deposits

- A deposit is paid to EBMUD and held until compliance is achieved
- It is tracked with the parcel and notes a specific deposit recipient
- It is automatically set up to refund once compliance is achieved
- Deposit may be collected by electronic transfer or check
- Refund is paid by EBMUD by check

# Request for Proposal



- RFP responses will be evaluated by a Selection Committee according to the Evaluation Criteria
- Selection Committee will recommend award to Proposer
- The District reserves the right to award to a single or to multiple General or Professional Service Providers
- The District has the right to decline to award this contract or any part of it for any reason
- Any specifications, terms, or conditions issued by the District, or those included in the Proposer's submission may be incorporated into any PO/contract
- Award of contract

# Evaluation Criteria



- Functional
- Technical
- Security
- Cost
- Implementation Plan & Schedule
- Company & Staff Relevant Experience
- References
- Product presentation and Interview
- Understanding of the project
- Methodology
- Contract Equity Program

# Selection Committee



- Composed of District staff that are subject matter experts in this type of procurement
- All proposals will be evaluated by a Selection Committee
- Selection will be based on the RFP Evaluation Criteria

# Schedule



Event	Date
RFP Issue Date	March 30, 2023
RFP Questions Due	April 7, 2023
RFP Responses Posted By	April 14, 2023
RFP Responses Due	April 28, 2023
Product Demonstrations by Short-listed Proposers	June 2023 and onwards

Submit **questions** via email to [Alicia.Chakrabarti@ebmud.com](mailto:Alicia.Chakrabarti@ebmud.com)

Submit **responses** via email to [Suma.popat@ebmud.com](mailto:Suma.popat@ebmud.com)

# Questions



# Responses to Questions



Questions Received	Response
Will EBMUD allow a subscription model, where an outside company owns/maintains the software but EBMUD pays a subscription (SAAS model)?	Yes. We are looking for a proposed solution. We are not prescribing a particular solution.
Will EBMUD allow a vendor to get the contract on proposal, then build out the remaining requirements to be delivered on a date?	Yes. In the proposal, please mention which requirements are "out-of-box" and are available now.