



REQUEST FOR PROPOSAL (RFP)

REQUIREMENTS GATHERING AND EVALUATION MATRIX
PROPOSAL FOR CRM/CIS BILLING SOLUTION

Belize Electricity Limited
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1. Summary and Background

Belize Electricity Limited (BEL) is accepting proposals to perform an evaluation and selection of a customer information and billing system that can meet its strategic objectives laid out in the Company's business plan.

The purpose of this Request for Proposals (RFP) is to solicit proposals from organizations that are equipped with the breadth of technical expertise and experience necessary to deliver the required services.

BEL is the primary distributor of electricity in Belize, Central America. In 2021, aggregate annual energy sold was 560.8 gigawatt hours (GWH). The Company served a customer base of 107,000 accounts or 69,348 customers, with a peak power demand of approximately 103.5 megawatts (MW).¹

In 2019, BEL embarked on a new strategic direction whereby the Company moves away from the confines of the traditional grid electricity provider to an energy solutions provider. This shift in focus sees BEL venturing into products and services such as distributed energy resources, electric vehicle charging, and energy services. More importantly, the Company has embraced the principle of being customer focused and customer obsessed.

In pursuit of customer obsession, BEL intends to enhance the customer experience by improving service response time while leveraging data to predict and deliver on customer needs. One of the initiatives in this vein is the implementation of a Customer Information and Billing System buttressed by a Customer Relationship Management (CRM) system. The existing CIS/Billing solution is outdated and lacks the functionalities needed to support BEL's new strategic direction and the quest for Customer Obsession. As a result, BEL has decided to embark on a project to determine the full requirements needed of a CRM and CIS/Billing System. The project will also identify possible vendors capable of delivering on the requirements identified.

¹ Taken from Belize Electricity Limited's Annual Report 2021 - https://www.bel.com.bz/annual_reports/Annual%20Report%202021.pdf

2. Submission Guidelines and Requirements

The following submission guidelines and requirements apply to this RFP:

2.1 Qualifications and Experience

Only qualified persons or entities with prior experience in gathering software system requirements, evaluating, and implementing CRM and CIS/Billing software solutions will be allowed to make submissions. Interested bidders must have the following qualifications and experience:

1. Bachelor's Degree in the IT related field with emphasis on Software Development, Software Engineering, or IT Project Management.
2. Must have individuals on the project team with at least three (3) years of IT project management experience.
3. Experience evaluating or implementing CRM/CIS Billing Solutions of similar nature. Experiencing evaluating or implementing CRM/CIS Billing Solutions in the energy utility space will be a distinct advantage.
4. Experience developing system requirements documentation, use cases, user stories, UML sequence diagrams, and activity diagrams.
5. Experience in gathering functional and non-functional requirements for web-based enterprise systems.

Interested parties will be required to provide evidence of qualifications as well as engagements undertaken as part of the bidding process.

2.2 Submission Deadline

Proposals must be submitted by the deadline defined in section 5 of this RFP. Any submissions received after that time will not be eligible for consideration.

2.3 Outsourcing and Subcontracting

Outsourcing or subcontracting is not permitted for this bid. However, parties can team up and submit a unified bid response.

2.4 RFP Response

An RFP response must be submitted which provides an overview of the proposed solution as well as curriculum vitae of all key personnel that will be involved in the work. This proposal should also include proposed methodologies, schedules, and milestones.

Submissions must be made using the RFP Response Form presented in Schedule A. The use of this document is required to ensure uniformity of responses. Bidding parties are free to submit supplemental information to support the responses made using the supplied response form. Total size of electronic submission should be less than twenty-five megabytes (25 MB).

2.5 Cost Proposal

A cost proposal must be submitted with the complete cost for undertaking the project. It must be itemized and include a thorough explanation of the fees and costs.

Costing provided must remain valid for a period of forty-five (45) days to allow for the evaluation process and potential negotiation of a contract.

2.6 Contract Terms

Specific contract terms and conditions will be negotiated with the successful winner of the bidding process. All contractual terms and conditions will be subject to review by BEL's legal counsel and will include the scope, budget, schedule, and other necessary particulars related to the project. The successful bidder will be required to sign a non-disclosure agreement before gaining access to sensitive information that may be necessary to execute the scope of work detailed in the RFP.

2.7 Limitation of Obligations

This RFP does not commit BEL to award a contract, nor to pay any costs incurred by a bidding party in connection with responding to this request. All costs related to the compilation, preparation, completion, submittal, phone calls, meetings, negotiations, and all other costs related to this bid are the sole responsibility of the bidding party. All proposals and other information are submitted at the bidding party's own free will.

Bidding parties will not be reimbursed for any costs associated with this bid.

2.8 References

The bidding party is required to submit two customer references that can be interviewed by BEL solely with respect to the works of this nature executed by the bidding party. The bidding party must notify each customer reference ahead of

time that they may be contacted by BEL during this time frame. BEL expects to contact references directly to set up any conference calls, meetings and/or site visits to validate responses. BEL also reserves the right to meet references without the bidding party's representatives being present.

In addition, BEL may also conduct independent reference checks with customers not provided by the vendor during this process.

3. Project Purpose and Deliverables

3.1 Purpose and Objective

The purpose of this project is to gather and document the functional and non-functional requirements for BEL's CRM and CIS/Billing Software Solution. The project also includes the identification of possible vendors capable of meeting the requirements.

3.2 Project Deliverables

Coming out of this project, BEL expects the following deliverables:

1. Draft Request for Proposal (RFP) document for the implementation of a Customer Relationship Management and Customer Information/Billing System
2. Final Request for Proposal (RFP) document for the implementation of a Customer Relationship Management and Customer Information/Billing System.
3. List of prospective vendors capable of responding to the Request for Proposal
4. Summary Power Point Presentation to be delivered to stakeholders
5. Evaluation Matrix
6. Selected Vendor
7. Signed Vendor Contract

The format for the request for proposal must be presented to BEL beforehand for review and acceptance. The format is expected to conform to industry standards for such projects. The requirements, both functional and non-functional, are to be obtained through stakeholder interviews and discussions. The consultant is

expected to guide these activities and use their knowledge of the topics to achieve the optimal requirements that will allow BEL to meet its business objectives.

3.3 Expected Project Outcomes

This project represents the critical first step in BEL's goal to implement a modern, responsive Customer Relationship Management and Customer Information and Billing Software Solution.

It is expected that the undertaking of this project will allow BEL to realize the following outcomes:

1. **Comprehensive and Shared Understanding of Requirements:** Through the activities culminating with the development of the RFP that will be sent to vendors, BEL will outline its specific requirements, including functionality, integration capabilities, scalability, security, reporting, and other relevant aspects. These requirements will be shared and agreed upon by all stakeholders so that the Organization will have a singular shared vision of the capabilities of the CRM/CIS. This will also help potential vendors gain a comprehensive understanding of the organization's needs.
2. **Visibility into the CRM and CIS/Billing Solutions Space:** Again, through the activities culminating with the development of the RFP that will be sent to vendors, BEL will be exposed to CRM and CIS/Billing software solutions serving the electric utility eco system. We will get to know the major players in the industry and understand the important trends driving the design of software in this space.
3. **Awareness about areas where BEL can streamline and improve related business processes that will lead to an enhanced customer experience.**

4. Project Scope

4.1 Scope of Requirements Gathering for the CRM and CIS/Billing System

The scope of this project includes all aspects of BEL's Customer Relationship Management System. This includes (but not limited to) the following areas:

4.1.1 Functional Requirements for CRM

Functional requirements to be ascertained include (but are not limited to):

- Customer Lead Data Management
- Customer Lead Sales Projections
- Customer Lead Communication
- Customer Onboarding
- Workflow Automation

4.1.2 Nonfunctional Requirements for CRM

The following are some areas where nonfunctional requirements must be ascertained:

- Technology and System architecture (n-tier, web based, SaaS or on prem)
- Data Security and Privacy
- Scalability
- Integration with other systems and communication channels
- Performance
- Management/maintainability
- AI Integration
- Data reporting and analysis

4.1.3 Functional Requirements for Customer Information and Billing System

The following are some areas where functional requirements of the Customer Information and Billing System must be ascertained:

- Customer Data Management
- Meter Inventory Management
- Service Order Management
- Collections
- Credit and Risk Management
- Customer Loyalty Program
- Distributed Energy Resources

- Electric Vehicle
- Demand Programs
- Data Analytics and Reporting

4.1.3 Nonfunctional Requirements for Customer Information and Billing System

The following are some areas where nonfunctional requirements for the Customer Information and Billing System must be ascertained:

- Technology and System Architecture (n-tier, web based, SaaS or on prem)
- Integration with other systems
- Data Security and Privacy
- Performance
- Scalability
- Management and Maintenance
- Workflow Automation
- AI Integration

4.2 RFP Bid Evaluation

Following the assessment of submissions, a short-list of not less than three and not more than six applicants, subject to a pass mark of 70 points, will be provided with full Terms of Reference and invited to submit technical and financial proposals to undertake the assignment.

4.3 Contract Negotiation

The successful bidder will lead the contract negotiation process.

5. Request for Proposal and Project TimeLine

The RFP timelines are as follows:

Milestone

Timeline / Date

RFP issuance	November 3, 2023
Response to RFP Deadline	November 24, 2023, 5:00 PM GMT - 06:00
Evaluation of proposals ²	December 8, 2023
Selection of winning bid and notification to bidders who were not selected	December 29, 2023
Expected project commencement date	February 12, 2024

6. Proposal Evaluation Criteria

BEL will evaluate all proposals based on the following criteria.

Criteria	Weight
Sustainability, Stability, and Maturity of Organization	10
Technical Strength of Bidder and Project Team	25
Approach and Methodology	35
Experience in Relevant Project Scope	15
Cost	15
Total	100

² If additional information or discussions is needed from any bidder during that two-week window, the bidder(s) will be notified.

This evaluation will be conducted by a team comprised of key BEL personnel.

As part of the evaluation process, BEL reserves the right to request additional information and / or clarification from the participating parties.

7. Point of Contact for Future Correspondence

7.1 Queries regarding the RFP

BEL has appointed an individual to lead this RFP effort. To ensure that there is uniformity in responses to queries / requests for clarifications regarding this RFP, all requests must be made through that RFP Lead.

In cases when other parties are needed to help in providing additional information, the RFP Lead will facilitate that process but must remain a party to all correspondence.

The following is the contact information for the RFP Lead.

Email Address bidboxrequest@bel.com.bz

7.2 Submissions of Proposals

Responding parties must submit the following via email to bidsubmittal@bel.com.bz **no later than 5:00 p.m., on Friday, November 24, 2023.**

1. The completed Schedule A – RFP Response Form linked [here](#), which forms the technical proposal.
2. A cost proposal, detailing the cost of the proposed solution.