

# TXShare

Your Public Sector Solutions Center

REQUEST FOR PROPOSALS  
For  
**Advanced Metering Infrastructure (AMI) Solutions**  
RFP # 2025-002

Sealed proposals will be accepted until 2:00 PM CT, **January 10, 2025**, and then publicly opened and read aloud thereafter.

**TMG Utility Advisory Services, Inc. dba TMG Consulting, Inc.**

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Acknowledgment of Addenda (initial): #1 ☒ #2 ☐ #3 ☐ #4 ☐ #5 ☐

**NOTE: Any confidential/proprietary information must be clearly labeled as “confidential/proprietary”. All proposals are subject to the Texas Public Information Act.**

**COVER SHEET**

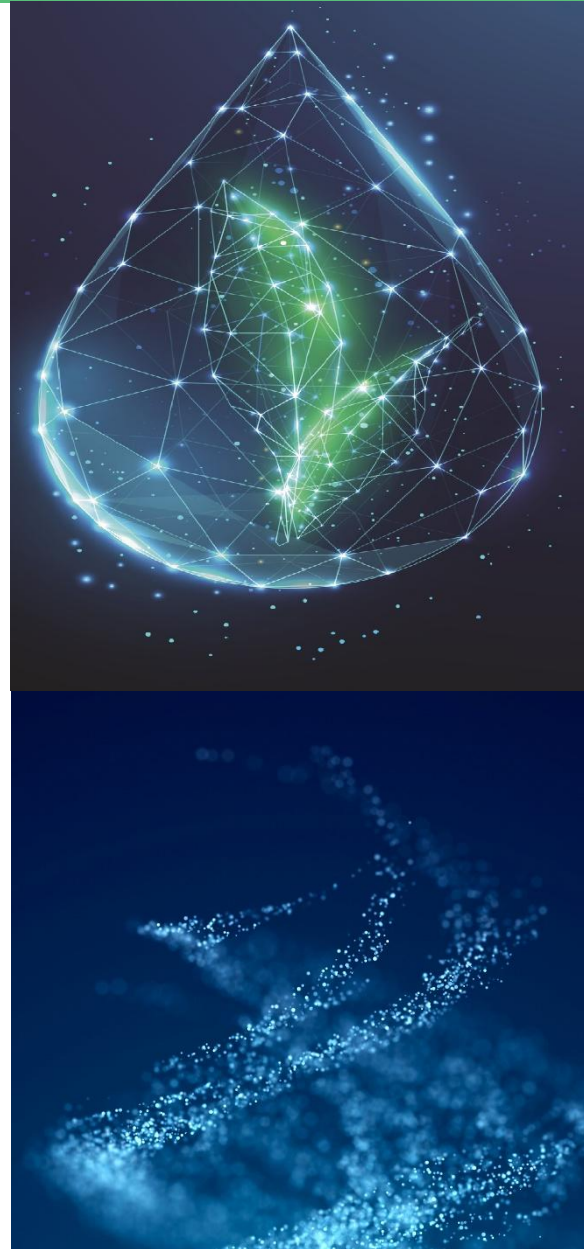


# TMG Advisory Services Technical Proposal

**Advanced Metering Infrastructure  
("AMI") Consulting and Program  
Management Services**

**The North Central Texas  
Council of Governments  
("NCTCOG")**

January 10, 2025



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## 1. Certificate of Offeror and Statement of Understanding

### 1.1 Cover Page

Dear North Central Texas Council of Governments Evaluation Team:

TMG Utility Advisory Services, Inc., an RIA Company ("TMG Consulting" and/or "TMG"), is pleased to provide the North Central Texas Council of Governments ("NCTCOG") with our proposal for your Advanced Metering Infrastructure (AMI) solution project. TMG is excited to submit our Professional Services response, reflecting our credentials and capabilities to deliver the best-in-class AMI Implementation services to assist NCTCOG in supporting the members of its TXShare Cooperative Purchasing Program ("TXShare").

TMG brings over 32 years of industry-specific focus on **Utilities and AMI / Smart Metering Transformation** and a client-centric team steeped in hands-on, real-world experience. We put the client's interests first, we go above and beyond the words written in the contract, and we adhere to the highest ethical standards in our work while preserving client confidence and transparency in our communications and all our activities on your behalf. We also diligently maintain an independent, objective perspective in all our work so that NCTCOG and its TXShare members receive the best, unbiased recommendations and solutions that **align with each member's AMI Program Business Objectives**.

Today, TMG is actively involved in AMI implementation and deployment projects at numerous utilities, providing professional meter-to-cash, AMI, MDM, and edge systems consulting services to electric, gas, and water utilities of all sizes. This includes developing and preparing AMI roadmaps, conducting existing AMI system performance assessments, creating and delivering procurement strategies and plans, and providing project management oversight and implementation services throughout the entire deployment phase of these programs. Leveraging our expertise, proven methods, and hands-on industry knowledge from prior engagements in this space has enabled our clients to implement solutions for the first time, propelling them beyond initial deployments to harness more "beyond the meter" capabilities.

In the following pages, we describe our overall approach to NCTCOG's preliminary scope and the TMG Team's unique credentials and differentiators that support our fully responsive proposal to partner with you and TXShare members on their engagements. Our approach is comprehensive, supported by robust prior experience, empirical data, detailed analysis based on similar real-world programs, and TMG's disciplined delivery methodology, **TMG VAST™** (Value Added Services & Tools) for **Strategic Program Management Office (SPMO)**. These elements and disciplines have been successfully leveraged by other municipal utility clients that have faced similar challenges with technology elements that must be judiciously procured, risk-managed, and continuously extended and enhanced to support an ever-changing business landscape, all with a constant lens focused on customer experience and customer benefits.

TMG prides itself on predictable, fixed-price engagement constructs, a "whatever it takes" approach to each client relationship, superior visibility, and transparency through our constant "high-touch" communications approach and industry-leading customer service. In addition, we remain flexible in optimizing our proposal and approach to suit NCTCOG's and TXShare member's needs, and we look forward to further discussions with your team on how we can align. As CEO of TMG, I am authorized to serve as your primary point of contact for all communications regarding this proposal. We thank you for your consideration.

Sincerely,

**Supriya Mukhapadhyay**

CEO, TMG Utility Advisory Services, Inc., an RIA Company [D&B Number: 95 9569781]

Mobile: +1.773.294.1931

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2000 Ponce de Leon Boulevard, #600, Coral Gables, FL 33134 | Tel: 512-993-6331

## 1.2 Statement of Understanding

Today, TMG is actively involved in AMI projects at several utilities, providing unbiased meter-to-cash, AMI, and edge systems consulting services to electric, gas, and water utilities of all sizes. This includes a roster of TMG clients that are municipal-owned and run utilities, and each and every one is highly referenceable.

TMG's work includes planning, implementing, supporting, training, and managing water-only AMI projects. This also includes providing strategic advice, communication initiatives, technical expertise, and project oversight to ensure successful deployments and integrations of AMI technologies to the members of NCTCOG's TXShare Cooperative Purchasing Program.

TMG understands that NCTCOG is seeking highly qualified, extensively experienced consultants with a verifiable track record to assist in planning, implementing, supporting, training, and managing AMI projects. TMG has optimized our engagement approach to address NCTCOG's needs precisely. TMG's streamlined implementation approach and plan will be fully compliant, compatible, flexible, and scalable to meet the diverse needs of TXShare's member entities, ranging from small towns to large cities.

As part of Service Category #3: Professional Services, TMG will detail how our proven, repeatable implementation methodologies can assist NCTCOG in attaining its third program goal: Goal 3 - Achieve Cost-Effective and Scalable Implementation.

## 2. Key Personnel

### 2.1 Project Organization and Staffing

At TMG, we employ the industry's leading talent, including seasoned consultants with exemplary track records and substantial experience working within the walls of municipal utility companies. TMG will adjust and optimize our staffing based on each TXShare member's requirements and needs, to achieve cost-effective and scalable implementations on every project. Below is a sample project organizational structure for reference.

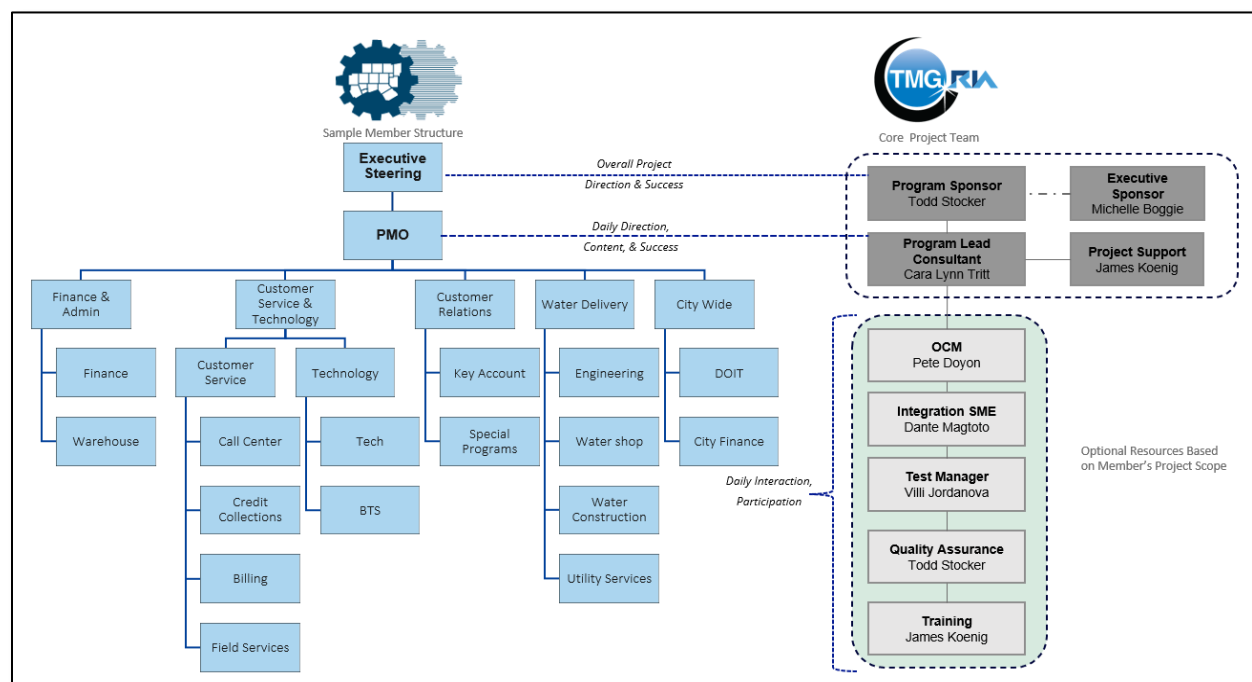


Figure 1: TMG's AMI Sample Project Organizational Structure

## 2.2 TMG Staffing Bios

Team member profile summary information is provided below for NCTCOG's reference. In addition, detailed resumes have also been attached in Section 9 - Resumes.

### Todd Stocker – VP, AMI Services - Program Sponsor



Todd Stocker has over **twenty-five (25) years of experience** in the utility, industrial automation, test and measurement, and semiconductor industries. He is a strategic leader of advanced technical products with acute expertise in Advanced Metering Infrastructure (AMI). With extensive experience supporting municipalities and investor-owned utilities in North America, he specializes in identifying utility needs, defining new solutions, and extending the reach of existing solutions in the "meter to cash" and distribution automation arena, including various edge systems such as CIS, MDM, EAM/WAM, FSM/MWM, GIS, OMS, and SCADA. Before TMG Consulting, he served as the **Director of Water and Gas industry** and P&L Manager at a major AMI vendor. In this role, he developed and brought to market a fixed-network leak detection solution that was deployed by American Water, San Francisco PUC, New Orleans SWBNO, and the City of Houston. Todd is a technical and commercial problem solver and has worked on AMI projects of all sizes, totaling more than 12 million endpoints deployed. Todd is an electrical engineer with a master's degree in business administration. He brings a unique combination of technical skills and commercial aptitude. Todd's notable utility experience includes:

#### Education & Certifications

- Case Western Reserve University, Cleveland, OH – Master of Business Administration
- Grove City College, Grove City, PA – Bachelor of Science in Electrical Engineering

#### SJI Industries (Folsom, NJ) – PMO Services

- Providing PMO consulting services to support the AMI Implementation project of over 450,000 natural gas meters.

#### Lubbock Power and Light (Lubbock, TX) - Project Manager

- Led the AMI Implementation project of 110,000 electric meters and 90,000 water meters.

#### Riviera Utilities (Foley, AL) - Project Manager

- Led the contract negotiations with the selected vendor(s).

#### Southern California Gas (Los Angeles, CA) - Technical Lead

- Provided technical oversight throughout the implementation of the AMI solution at SoCal Gas for over 6 million gas meters.

#### San Francisco PUC (San Francisco, CA) - Technical and Commercial Lead

- Managed the triage and resolution of post-implementation performance problems with the AMI solution for SFPUC, which serves over 250,000 water customers.

### Cara Lynn Tritt – Senior Manager, AMI Services - Program Lead



Cara Lynn Tritt is an experienced senior manager, strategic leader, and project management professional with a long history of helping deliver insight and new technologies to global utility technology partners. Cara Lynn has over **twenty-five (25) years of experience** in the energy industry planning, directing, and implementing end-to-end complex integrated Advanced Metering Infrastructure (AMI) hardware, SaaS software, advanced network solutions, and services at investor-owned, cooperatives, and municipal utilities.

#### Education & Certifications

- University of Dayton, Dayton, OH – Master of Business Administration
- Greenville Tech, Greenville, SC – PMP Core
- The University of Akron, Akron, OH – Bachelor of Science, Public Policy Management



### **The City of Cedar Hill (Cedar Hill, TX) – Project Manager**

- Conducting a system performance assessment and root cause analysis of the City’s existing AMI system that services ~16,000 customers.

### **CoServ (Denton, TX) – Project Manager**

- Conducting an alternative analysis study for the AMI 2.0 replacement project and managing the entire procurement process.

### **Rivera Utilities (Foley, AL) – Project Manager**

- Leading the AMI implementation of 50,000 electric, 15,000 water, and 5,000 natural gas accounts.

### **SJI Industries (Folsom, NJ) – PMO Services**

- Providing PMO consulting services to support the AMI Implementation project of over 450,000 natural gas meters.

### **First Energy (OH/PA/NJ/WV/MD) – Project Manager**

- Managed PJM Interconnect RTO integration with FirstEnergy to support automated Demand Response messages.

### **Southern California Gas (Los Angeles, CA) - Project Stakeholder**

- Steering committee member providing support, guidance, and oversight of behavioral and analytical energy programs.

### **San Diego Gas & Electric (San Diego, CA) – Technical Lead**

- Technical lead providing rate engine oversight and requirements identification to ensure regulatory rate calculation compliance.

### **James Koenig – Senior Consultant – Project Support & Training**



James is a veteran of the utility industry, working with investor-owned, municipal, and cooperative utilities to identify needs, develop strategic solutions, and lead system implementations. His experience includes leading Smart Grid, AMI, CIS, and ERP initiatives with a focus on business change management and system operations to meet utility objectives. He has led systems delivery and support teams across key utility business areas, including customer services, metering, engineering, distribution, field services, supply chain, work management, finance, and administrative systems. His experience includes SaaS/cloud-based implementations, management of offshore development resources, and overseeing datacenter, telecommunications, and field infrastructure installations. For the past 15 years his primary focus has been the implementation of electric, water, and gas AMI and smart grid projects. James’ notable utility experience includes:

#### **Education & Certifications**

- Abilene Christian University, Abilene TX -BBA/ Information Systems
- Amberton University, Garland, TX – MBA
- Project Management Professional – PMI

### **Pasadena Water & Power (Pasadena, CA) – Lead Consultant**

- Conducted a needs assessment and developed the business case and roadmap for an electric and water AMI solution.

### **Kansas City BPU (Kansas City, KS) – Lead Consultant**

- Evaluated an existing electric and water AMI system and provided options for replacing versus upgrading the system. The analysis included cost comparisons and action plans for each option.

### **Maritime Electric (Prince Edward Island, Canada) – Lead Consultant**

- Facilitated the AMI vendor contract negotiations to replace the existing AMR system and integrate with the CIS/MDM systems.



### **Entergy (New Orleans, LA) – Consulting Manager**

- Managed the deployment of automated distribution technology consisting of over 9,000 distribution devices as part of a 1.3B grid modernization initiative over a five-state service territory.

### **Lubbock Power & Light (Lubbock, TX) – Delivery Manager**

- Managed the delivery of AMI implementation and deployment services for a large electric and water municipal utility.

### **South Central Connecticut Regional Water Authority (New Haven, CT) – Project Manager**

- Responsible for a \$17 million implementation and integration of AMI, SAP CIS, and MDM systems and field network technology.

### **Michelle Boggie – Vice President - Executive Sponsor**



Michelle has over eighteen years of operational and implementation experience, with a strong aptitude for business integration, change management and organizational readiness, across multiple technologies within the energy industry. She offers a keen understanding of leading practices for full lifecycle Utility Systems implementations for customer information, customer experience, and enterprise resource planning platforms as well as for supply chain management and business transformation initiatives. Michelle is Prosci-certified and collaborates effectively across all levels within an organization. She possesses strong leadership, teambuilding, presentation, and written communication skills, along with extensive functional and business process expertise.

### **Education & Certifications**

- Kellogg School of University of Colorado- MBA, Business Administration
- Michigan State University- BA, Supply Chain Management
- Prosci Change Management
- Six Sigma

### **Salt River Project (SRP) – CIS Quality Assurance**

- QA Engagement Executive

### **SoCalGas Company – CIS Procurement Project & Workforce Management QA Support**

- Industry SME and Business Integration (BI) Lead

### **Seattle Public Utilities – Enterprise Roadmap**

- Engagement Executive & OCM Lead

### **Salt River Project (SRP) – CIS Procurement**

- Industry SME and BI Lead

### **Centuri Group – ERP Quality Assurance Health Assessment**

- Quality Assurance Subject Matter Expert

### **Southwest Gas Corporation**

- Program Lead, Business Integration

### **Madison Gas & Electric – OCM Transformation Project**

- Change Management Office Lead

### **Arizona Public Service**

- Program Lead, Business Integration

### **Alectra Utilities**

- Learning & Proficiency Lead

### **City of Hamilton**

- Change Management, Learning & Proficiency Lead

## Pete Doyon - Organizational Change Management



Pete Doyon is Innovative, agile and results driven business improvement and organizational behavior executive specializing in directing organizational change in structure and culture, technology implementation, leadership and organizational renewal. Highly effective at leading large-scale restructuring and organizational effectiveness initiatives resulting in 15-30% productivity/cost improvements. Pete Doyon brings over 25 years of expertise in the utility industry, specializing in collaborative leadership and organizational transformation. Known for his stabilizing influence, Pete excels in building momentum within organizations, mitigating conflicts, and mentoring teams to leverage their full potential. His track record of success spans across key areas including organizational change leadership, business transformation, change management, leadership coaching, and corporate restructuring. Pete is adept at guiding companies through technology-driven changes, ensuring effective outcomes while fostering growth and resilience.

### Education & Certifications

- Kellogg School of Management – Strategic Change Management Certified
- Institute of Organizational Science and Mindfulness – Organizational Mindfulness Certified
- St. Thomas University -MBA

### OCM/PMO/Steering Committee - Pasadena Water and Power

- OCM/PMO for Oracle C2M Implementation
- Successful On-Time On Budget Implementation
- Leadership Coaching and Alignment

### OCM/PMO/Steering Committee - Louisville Water Company

- OCM/PMO/Steering Committee Oracle CCB, Oracle WAM, Kloudgin Field Service
- Leadership Coaching and Alignment
- All projects CS Week Award winners

### OCM -City of Lubbock Utilities

- Design of initial OCM Strategy and Approach

### OCM/PMO - Lansing Bureau of Water and Light

- Develop OCM Strategy and Approach for implementation of multiple systems including AMI/CIS/Field Service/Outage Management/Asset Management
- Mentored internal OCM Staff
- Leadership Coaching

### OCM– Central Hudson Utilities

- Revitalized Enterprise Asset Management/Content Management project
- Coached Executive leadership in the role of project sponsorship

### OCM/QA - Idaho Power

- Assessment and redesign of failing OCM for CIS Implementation
- Scaled approach and resources to better meet needs of the project

### OCM/QA– Newfoundland Power

- Assess and advise CIS implementation

### Northwestern Corporation

- Business transformation initiative supporting newly appointed CEO with organizational restructuring, restaffing and cultural development.

### Xcel Energy/Northern States Power Company

- Business process re-engineering project focusing on Corporate Operations

- Led IT Outsourcing analysis and selection
- Directed enterprise-wide consulting team focusing on process improvement, cost reduction, customer service
- Led initiative consolidating 5 walk in sites to centralized customer service center

#### **Dante Magtoto - Integration SME**



Over 15 years leading Oracle Customer Care & Billing (CC&B), ancillary products, and Web Self Service implementations in the Utility sector. Specializing in software development life cycle (SDLC) methodologies to guide customers through software and business transformation. Proven track record of successful delivery, managing cross functional teams across multiple time zones.

#### **Education & Certifications**

- George Mason University, Fairfax, VA – Bachelor of Science in Finance

**Orlando Utilities Commission – MDM Load Interval Read Project - Project Manager**

**Nashville Electric Service (NES) – Transformation Services - Project Manager**

**Tucson Electric Power – BI & Time of Use Billing Implementation - Project Manager**

- Led the implementation of a Business Intelligence (BI) Data Warehouse for Interval Data and Bill Presentment information, specifically in preparation for Time of Use (TOU) Billing.

**Colorado Springs Utilities – Managed Services Application Support - Project Manager**

- Managed a services project focused on providing development and application support.

**Modesto Irrigation District – Implementation of Oracle CC&B 2.5 - Project Manager**

- Successfully implemented Oracle CC&B 2.5, MDM 2.1, CSS 2.1, and Origin's MobileLite.
- Implementation of Oracle CC&B 2.5, MDM 2.1, CSS 2.1 and Origin's MobileLite.

**Orlando Utilities Commission – MDM Assessment & Reconfiguration - Project Manager**

- Provided application support for ongoing operations and ensured the smooth functioning of the system. Successfully delivered major projects related to sustainability, products and services, and MDM assessment and reconfiguration.

**City of Jackson – Implementation of Oracle CC&B 2.5 - Project Manager**

- Led the implementation of CC&B 2.5, ensuring a smooth transition and successful adoption of the system. Implemented the Stranded Bill Recovery feature, addressing and resolving billing issues and improving revenue recovery processes.

**South Jersey Gas – Implementation of Oracle CC&B 2.4 - Solution Architect**

- Successfully implemented CC&B 2.4, enabling efficient management of customer billing and related processes. Implemented the Market Transaction Messaging (MTM) feature, facilitating seamless communication and data exchange between market participants.

**Puerto Rico Electric Power Authority – Implementation of Oracle CC&B 2.3 - Solution Architect**

**Artesian Water Company (AWC) – Oracle CC&B & MWM Upgrade Project - Project Manager**

## Villi Jordanova - Test Manager



Villi is known for her passion and expertise in testing, for crafting the testing processes to suit the specific needs of the projects or organization for all things QA and Testing. Twenty+ years of industry experience; with exceptional analytical skills and demonstrated success in information technology, requirements analysis, business analysis, application testing leadership, quality assurance, and application support. Extensive knowledge of System Testing Standards and Methodology and SQA procedures, including successful experience in testing various utility software using testing methodology standards. Proven track record of managing all phases of implementation and upgrade test cycles to successful completion. She has extensive experience in multiple technology domains, having led large scale testing programs for Oracle CCS (Lubbock Power and Light, Hillsborough County, Grand PUD, ATCO GAS), as well as previous work in Itineris UMAX and Hansen Banner CIS.

### Education & Certifications

- Master of Science in Mechanical Engineering and Management
- Foundation Level (CTFL)

### Grant County Public Utility District - Oracle Cloud CCS Test Manager

- Plan, schedule and estimate testing project – Oracle Cloud C2M/CCS
- Work with Client's Test Manager on as needed basis.

### ATCO Gas - CC&B Test Manager

- Work with Client's Test Manager on managing ATCO's Testing team.
- Supported System Integration Testing and Lead User Acceptance Testing.
- Created UAT Test Plan and identified test cases.

### Hillsborough County Florida - Oracle Cloud C2M/CCS Test Manager

- Plan, schedule and estimate testing project – Oracle Cloud C2M/CCS
- Work with Client's Test Manager on as needed basis.

### City of Lubbock - System Integration Testing and User Acceptance Testing Lead

- Plan, schedule, estimate and implement testing project – Oracle Cloud C2M/CCS/AMI
- Lead System Integration Testing and User Acceptance Testing
- Created master test approach, test plans and identified test cases.

### Test Manager for Various Utility Client Projects

- Managed testing on all UMAX North America Projects implementations, including Baltimore City Water, MD; Dakota
- Electric, MN; Georgetown Utilities, TX; and Boston Water and Sewer District, ME.
- Planned, scheduled, estimated, and implemented testing projects.
- Experienced in writing the master test approach, test plans, and test cases.

### Vertex Business Services - Various Utility Client Projects

- Senior Consultant on Banner product @ Seattle Gas and Electric, Fort Collins, City of Longmont to name a few.
- Performed complex testing and led tasks on complex projects, including Banner upgrades to 4.2 and client support.

### Hansen Technologies - Various Utility Client Projects

- Senior QA Analyst/Tester @ PGE, MLGW, Sierra Pacific and Nevada Power, ATMOS Energy, Virginia Beach, Charlotte
- Water to name a few. Then moved to Test Manager for Banner product.



- Performed complex testing and led tasks on complex projects, including new releases and service packs.
- Planned, scheduled, estimated, and implemented testing projects.

### 3. References

TMG has been singularly focused only on utilities and has 100% reference ability across the board. A client has never litigated against TMG, and we have never walked away from any utility project or engagement in our 32+ year history. TMG is providing NCTCOG with the client contact information below (from 4 references) to discuss TMG's performance or any matters related to providing implementation services. NCTCOG is free to reach out to any/all of these TMG customers, or any other TMG customer you may be aware of. We have an un-blemished customer performance record that dates back to the beginning of our company, over 32 years ago.

#### Riviera Utilities

| Riviera Utilities         |  |
|---------------------------|--|
| Project Name              | Riviera Utilities Advanced Metering Infrastructure (AMI) Planning, Procurement, & Implementation Consulting Services Project   |
| Contract Dates / Duration | Current partnership and TMG customer for over 8 years  |
| Client Name               | Riviera Utilities<br>413 East Laurel Avenue - Foley, Alabama 36535   |
| Contact Info              | Trever Reaves<br>Operations Technology Superintendent<br>(251) 504-6518<br><a href="mailto:treaves@rivierautilities.com">treaves@rivierautilities.com</a>  |
| Project Scope             | Riviera Utilities had a strategic initiative to replace/update its IT infrastructure and business applications. The scope of this effort began with the development of a Technology and Application Plan (IT Strategic Plan). The result was the decision to move forward with a multi-year program to install a new ERP, CIS, and work management system. As well as replacing their AMR system with a modern AMI solution.   |
| Role and Major Activities | <p>Riviera Utilities, located in the City of Foley, Alabama, is a municipal-owned utility serving over 79,000 customers with electric, water, gas, cable, and internet service.</p> <p><b><u>CIS, Work Management, ERP</u></b></p> <p>TMG led the initial procurement process that resulted in the selection of the Cayenta suite of products. TMG now oversees and is still supporting the multi-year implementation of the Cayenta family of products, and provides client-side implementation services, including project management, business process reengineering, test management, and quality assurance.</p> <p>The initial project was the implementation of the Cayenta ERP solution, which was completed in 2016. The CIS project included the full implementation of the Cayenta version 9 and the work order management system's implementation. The CIS project is complete and in support mode.</p> <p><b><u>AMI</u></b></p> <p>Riviera historically used ITRON AMR solutions for water, gas, and electric meter reading applications.</p> <p>Riviera engaged TMG in 2016 to provide an <b>AMI Study and Business Case</b> for all three utility commodities. TMG managed the acquisition of an AMI solution provided by a single vendor and implemented by a prime vendor. Riviera chose Core and Main, Sensus, and Harris' SmartWorks MDM as their AMI Solution</p> |



| Riviera Utilities |   |
|-------------------|---|
|                   | primary components. Comparing to the final, negotiated contracts, project costs are within the original budget established by TMG's AMI Study and Business Case. During the current implementation, TMG is providing project management, quality assurance, and testing management roles, in addition to and complementary with the existing roles it provides/provided to Riviera's CIS project. |
| Project Outcomes  | ERP was successfully completed in 2016, and CIS was successfully completed in 2022. The AMI implementation is ongoing.  |

## Lubbock Utilities

| Lubbock Utilities         |  |
|---------------------------|--|
| Project Name              | Lubbock Utilities AMI Procurement Consulting Services Project  |
| Client Name               | Lubbock Utilities [Lubbock Power & Light and City of Lubbock Water]<br>1301 Broadway - Lubbock, TX 79401   |
| Contract Dates / Duration | Ongoing relationship since 2015. TMG's initial engagement in 2015 was to manage the procurement of a customer self-service and EBPP solution. The delivery of the services described below began in 2016.  |
| Contact Info              | <div>Michelle Cook<br/>Lubbock Power &amp; Light,<br/>Collections &amp; Field Services Manager<br/>Office: (806) 775-2509<br/><a href="mailto:mcCook@mail.ci.lubbock.tx.us">mcCook@mail.ci.lubbock.tx.us</a></div> <div>Aubrey Spear<br/>City of Lubbock, Director of Water<br/>Utils.<br/>(806) 775-2585<br/><a href="mailto:aspear@mylubbock.us">aspear@mylubbock.us</a></div>   |
| Project Scope             | LP&L and the City of Lubbock Water Department (collectively Lubbock Utilities) engaged TMG to provide strategic planning, procurement, and implementation services for their Customer Service Information Systems Program. The program's scope included AMI, MDM, CIS, and Mobile Workforce Management solutions. The meter reading was performed manually, paper-based methods were used to perform field work and dispatch, and their CIS was 15 years old. LP&L and the City provide electric and water services to 107,000 and 90,000 customers, respectively. The service area served by the water department incorporates the footprint of the electric service area but has an additional meter outside of the electric service area.   |
| Role and Major Activities | <p>TMG has provided leadership throughout the program. <b>The following focuses on AMI</b>, although the same services were delivered for all components in the program scope, with TMG providing oversight of the entire program:</p> <p><b>Planning:</b> Lubbock instructed TMG to focus entirely on AMI fixed network technologies for both electric and water services. TMG examined several deployment options for AMI, considering the complication of possible concurrency with a CIS and/or MDM implementation.</p> <p><b>Procurement:</b> TMG led the procurement of all program components. More than 4,000 requirements were reviewed, weighted, and adjusted. Two RFPs were issued for AMI and MDM/CIS/MWM; RFPs were evaluated, scored, and vendors shortlisted. Before final selection, oral interviews, product demonstrations, reference checks, and site visits were conducted. Finally, contracts were negotiated for all solutions.</p> <p><b>Deployment:</b> TMG provided Project Management, Quality Assurance oversight, Test Management services, Technical Integration services, and data conversion services from legacy systems.</p> |
| Project Outcomes          | <b>Planning:</b> Lubbock chose to implement the AMI pilot phase prior to the start of CIS and MDM implementations, with the AMI full deployment running concurrently with those implementations.   |





### Lubbock Utilities

**Procurement:** Procurements were conducted concurrently with two RFPs issued. Itron's solution was selected with Itron playing the role of Prime vendor with multiple subcontractors for equipment supply, installation services, etc. Contracts signed were within 5% of the budget estimated in the Planning phase.

**Deployment:** AMI is 100% complete. The proof-of-concept phase (pilot) and full deployment will be completed in 24 months (on schedule). The **AMI program came in around 5% under the budget amount.**

### South Jersey Industries (SJI)

#### South Jersey Industries

|                           |  |  |
|---------------------------|--|--|
| Project Name              | SJI AMI Project Advisory and Program Support   |  |
| Client Name               | South Jersey Industries (SJI)  |  |
| Contract Dates / Duration | Ongoing TMG customer relationship since 2022.  |  |
| Contact Info              | Brian Ritz<br>South Jersey Gas<br>Sr. Director   AMI Project Sponsor<br>(609) 351-7436<br><a href="mailto:britz@sjindustries.com">britz@sjindustries.com</a>   | Renee Stanton<br>South Jersey Industries<br>Change Management Portfolio Lead<br>(609) 504-0718<br><a href="mailto:rstanton@sjindustries.com">rstanton@sjindustries.com</a> |
| Project Scope             | SJI engaged TMG to provide strategic planning, procurement, and implementation services for their AMI Project.<br>SJI's South Jersey Gas (SJG) business had an immediate need to upgrade its approach to meter reading its 420,000 gas meters due to a change to an existing partnership with another utility.<br>South Jersey Gas had solicited and evaluated proposals for an AMI solution when it initially engaged TMG to step in and provide consulting services and program oversight.   |  |
| Role and Major Activities | <b>Planning:</b> TMG evaluated the selected AMI vendor's solution, identified any gaps in the proposed solution, and assessed the strategic alignment of the solution to an overall meter-to-cash solution and cross-utility harmonization.<br><b>Procurement:</b> TMG provided contracting services and advised SJI on the contract master service agreement and scope of work documents provided by the AMI vendor.<br><b>Deployment:</b> TMG is currently providing Project Management, Organizational Change Management (OCM), Vendor Governance, AMI Advisory, AMI Installation Support, and Steering Committee membership services to support the SJI AMI Project. |  |
| Project Outcomes          | <b>Planning:</b> This portion of the project was completed successfully with key areas of focus identified. The result was delivery of a strategic alignment assessment and gap analysis of the AMI program.<br><b>Procurement:</b> This portion of the project was completed successfully with a final Master Services Agreement and Statement of Work executed to deliver a Cellular AMI solution with approximately—420,000 cellular modules.<br><b>Deployment:</b> SJI Sprint 1 and Sprint 2 were completed successfully in Fall 2023. Full deployment began in January 2024 and is currently ongoing.   |  |

### Burbank Water & Power

#### Burbank Water & Power

|              |   |
|--------------|---|
| Project Name | Burbank Water & Power AMI Procurement Consulting Services Project |
|--------------|---|

| Burbank Water & Power     |   |
|---------------------------|---|
| Client Name               | Burbank Water & Power<br>164 W Magnolia Blvd., Burbank, CA 91502  |
| Contract Dates / Duration | Current partnership and TMG customer for over 19 years.   |
| Contact Info              | <div> Osvaldo Hernandez<br/>Assistant Manager<br/>Customer Service and Marketing<br/>(818) 238-3648<br/><a href="mailto:OHernandez@burbankca.gov">OHernandez@burbankca.gov</a> </div> <div> Richard Wilson<br/>Assistant General Manager, Water<br/>(818) 238-3550<br/><a href="mailto:rwilson@burbankca.gov">rwilson@burbankca.gov</a> </div>  |
| Project Scope             | Burbank Water & Power (BWP) is a municipal utility serving 55,000 customers in the Greater Los Angeles area. Burbank uses ITRON and Trilliant AMI solutions for water and electric applications. Customer Services are provided by a centralized department that manages front and back-office operations for both BWP and for sewer and solid waste services on behalf of the City of Burbank.   |
| Role and Major Activities | <p>BWP originally engaged TMG in 2000 to provide professional services in acquiring and implementing a CIS solution. Since our original engagement TMG has provided continuous service for procurement and implementation of the following projects:</p> <ul style="list-style-type: none"> <li>Contract negotiation during the 2008 procurement of MDM;</li> <li>Feasibility study for the replacement/upgrade of CIS;</li> <li>Procurement and implementation services (PM, QA, Testing and Integration) for the replacement of CIS;</li> <li>Procurement and implementation services (PM, QA, Testing and Integration) for the upgrade of Siemens MDM;</li> <li>Integration services for the interface from SEW's products to Oracle CC&amp;B and Siemens/eMeter MDM.</li> </ul> <p>BWP again engaged TMG in 2019 to perform a <b>root cause analysis of the failure of their Itron SaveSource Water AMI solution and make recommendations</b> for ways in which BWP could (a) address the immediate risks and issues caused by this failure and (b) implement measures to mitigate the long-term risk (i.e., examine the options open to the utility to replace or upgrade the system).</p> |
| Project Outcomes          | <p>All projects have been successfully implemented. <b><u>Burbank won two awards</u></b> for these projects in 2004 and 2015.</p> <p>TMG's final report submitted to BWP in December 2019.</p>  |

#### 4. Project-Related Experience and Qualifications

TMG has been singularly focused only on utilities with 370+ utility clients, approximately 700 successful projects, and 100% reference-ability, dating all the way back to the founding of the company in 1992. Through these projects, TMG clearly understands what utilities require to fully select, implement, utilize, and optimize their solutions and deliver them with a budget, timeline, scope, outcome, and risk certainty. TMG is the recognized leader in strategic planning, risk management, understanding market drivers, and recommending the adoption of industry best practices and solutions - all of which readily stand up to regulatory, leadership/executive, and 3rd party scrutiny.

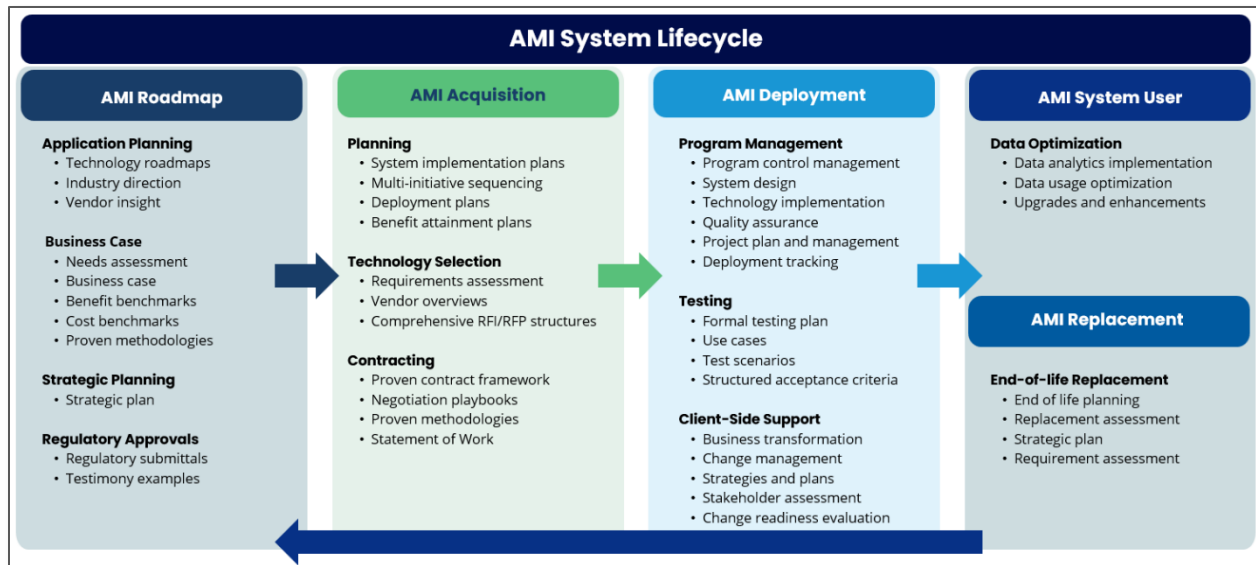


Figure 2: AMI Program Path

TMG's **Advanced Metering Services** provides Utilities with end-to-end solutions for planning, roadmapping, optimizing, and implementing AMI investments in a way that minimizes risks, accelerates implementation, and helps monetize downstream benefits. TMG's AMI professionals and robust methodology provide the industry with a proven, structured approach that has helped hundreds of utilities avoid costly mistakes and strengthen the efficacy of their technology investments. This is true regardless of where the utility is in their AMR/AMI/Advanced Metering Lifecycle journey. When contemplating a system enhancement/extension or replacement, TMG can help you understand engineering standards, communications protocols, contemporary integration approaches, and the evolution/progression of industry standards in an effective, efficient way that will improve resiliency, avoid risk, and/or imprudent investments.

TMG's AMI practice is focused on enabling the utility client to harvest benefits in four (4) main areas, including operational, financial, customer, and security benefits.

- **Operational Benefits** – AMI benefits operationally by improving meter read accuracy (elimination of human error and reduction of turnaround time associated with meter data collection, transcription, and bill creation), and response to outages eliminating the need for onsite meter reading. AMI also provides unprecedented visibility and measurement opportunities for usage. Further, reduced customer calls and field investigations are material operational outcomes associated with AMI.
- **Financial Benefits** – AMI brings financial gains to utility companies by reducing equipment and maintenance costs, enabling faster service restoration during outages/main breaks, etc., and streamlining the billing process. Other financial benefits include monthly, and off-cycle billing based on actual meter readings without the expense of deploying field staff. AMI information also helps enhance the utility's ability to plan, engineer, and update its electric system and infrastructure as needed or planned.
- **Customer Benefits** – AMI benefits customers by detecting meter failures early, promoting faster service restoration, enabling alerting, and improving meter reading and billing accuracy and flexibility. Further, AMI allows for time-based rate options that can help customers save money and manage their consumption. AMI also enables automatic bill pay and budget billing opportunities for customers.
- **Security Benefits** – AMI technology enables enhanced monitoring of system resources and performance and mitigates potential cyber threats when implemented with appropriate security and resiliency protocols. It also allows for monitoring and visibility into entire smart electric networks and provides instant alerts of security breaches.

TMG also has extensive experience and familiarity with all the solutions that could be focused on in this engagement. The adjacent graphic shows this experience by vendor, whether we evaluated that vendor's product on behalf of a client and/or provided a significant role to our utility client in its AMI implementation.

TMG is currently providing or has recently completed implementation services at several utilities with a similar scope for the Professional Services task requested by the NTCOG. Examples are projects at Riviera Utilities in Alabama, South Jersey Industries (SJI) in New Jersey, and Lubbock Utilities in Texas. While TMG has provided summary/overview information on the customers above in the "References" section of this response, we have also included additional details below.

| System Evaluation, Integration & Implementation Experience   |   |  |
|--|---|--|
| AMI  | MDM   | CIS  |
| Aclara<br>Badger<br>Elster/Honeywell<br><u>Itron</u><br>Landis+Gyr<br>Neptune<br>Sensus<br>Tantalus<br>Trilliant | Aclara<br>Harris<br><u>Itron</u><br>Landis+Gyr<br>Oracle<br>Siemens | Banner<br>Harris<br>Oracle<br>SAP<br>Siemens |

Figure 3: Vendor Experience

#### Riviera Utilities (Foley, AL) – Serving 56,000 electric, 16,000 natural gas, and 7,000 water meters

Riviera Utilities had a strategic initiative to replace/update its IT infrastructure and business applications. The scope of this effort began with the development of a Technology and Application Plan (IT Strategic Plan). The result was the decision to move forward with a multi-year program to install a new ERP, CIS, and work management system. As well as replacing their AMR system with a modern AMI solution. Riviera Utilities engaged with TMG to support a full lifecycle AMI project to include AMI, MDM, and CIS. TMG performed an AMI Study and Business Case for all three utility commodities. TMG managed the acquisition of an AMI solution provided by a single vendor and implemented by a prime vendor. Riviera chose Core and Main, Sensus, and Harris' SmartWorks MDM as their AMI Solution's primary components. According to the negotiated contracts, project costs are within the original budget established by TMG's AMI Study and Business Case. During the current implementation, TMG is providing project management, quality assurance, and testing management roles, in addition to and complementary with the existing roles it provides to Riviera's CIS project.

#### South Jersey Industries (Folsom, NJ) – Serving 56,000 electric, 16,000 natural gas, and 7,000 water meters

SJI's South Jersey Gas (SJG) business had an immediate need to upgrade its approach to meter reading its 420,000 gas meters, due to a change to an existing shared meter reading partnership with another utility that was planned for discontinuance. South Jersey Gas was mid-stream through solicitations and proposal evaluation for an AMI solution and engaged TMG to provide consulting services and program oversight. This engagement started with TMG supporting pricing analysis and contract negotiation with SJG's chosen AMI solution vendor(s) and is continuing presently with TMG providing Oversight and Risk Management to the implementation/deployment phase of the infrastructure installation.

#### Lubbock Utilities (Lubbock Power & Light and City of Lubbock Water, Lubbock, TX) – Serving 107,000 electric and 90,000 water meters

Lubbock Utilities engaged with TMG to support a full lifecycle AMI project to include the following components: AMI, MDM, MWM & CIS. More specifically, TMG facilitated the evaluation and selection of a replacement solution for their legacy CIS and Mobile Workforce Management systems. In addition, TMG was engaged to guide City of Lubbock Utilities through the selection of an AMI solution. A Steering Committee was identified before the program began to supply guidance and strategic oversight. For the first phase, TMG gathered information regarding the needs and strategic direction for the utility. TMG completed an analysis of the current systems and found there to be a significant number of individualized



business processes and personal databases of information. This fed directly into identifying the alternative solutions as well as the sequence and timing for implementation. The scope of this phase included option analysis for systems, the timing, and business process needs. The second phase included all activities to generate the RFP. Consultants from TMG, along with a selection committee and subject matter experts from COLU and City of Lubbock, both business and technical personnel, participated in the effort. The scope included a full request for proposal, evaluation, and vendor selection for each system. All the operational areas were reviewed as part of the business case analysis including Customer Service, Meter Reading, Field Services and Maintenance and Back Office Billing. This phase was initiated and the request for proposal was sent to vendors for response. After careful review, a final recommendation was presented to the executive management.

TMG was subsequently engaged to assist Lubbock with the implementation project. Specifically, TMG provided Project Management, Test Management and Quality Assurance (QA) for the ITRON implementation which began first with a goal of 500 electric and 500 water meters in the initial go live. Once AMI go-live was achieved, TMG provided Project Management for the mass deployment which began in April 2019. Simultaneously, TMG provided Project Management, Test Management, Organizational Change Management (OCM), Data Conversion and QA for the CCS / OFSC project.

The table lists recent successful AMI projects that TMG has conducted and/or participated in. Many of these were preceded by procurements that TMG participated in with the utility. **Of the 35 projects, 80% focused on public, municipal, county, and government deployments.**

| #  | Utility Type | Metered Services | TMG Customer                          | State    | Services        | Project Description        |
|----|--------------|------------------|---------------------------------------|----------|-----------------|----------------------------|
| 1  | Public       | 78,528           | Burbank Water & Pwr                   | CA       | E,W,WW,SW       | Contract Negotiation       |
| 2  | Public       | 78,528           | Burbank Water & Pwr                   | CA       | E,W,WW,SW       | Procurement                |
| 3  | Public       | 78,528           | Burbank Water & Pwr                   | CA       | E,W,WW,SW       | Implementation Services    |
| 4  | Public       | 78,528           | Burbank Water & Pwr                   | CA       | E,W,WW,SW       | Implementation Services    |
| 5  | Public       | 78,528           | Burbank Water & Pwr                   | CA       | E,W,WW,SW       | Quality Assurance          |
| 6  | Public       | 241,300          | City of Long Beach                    | CA       | G,W,WW,SW       | Industry Perspective       |
| 7  | Public       | 241,300          | City of Long Beach                    | CA       | G,W,WW,SW       | Procurement                |
| 8  | Municipality | 15,000           | City of San Luis Obispo               | CA       | W,WW            | Competitive Assessment     |
| 9  | Municipality | 1,722,810        | City of Seattle                       | WA       | D,E,SW,W,WW     | Quality Assurance          |
| 10 | Municipality | 1,722,810        | City of Seattle                       | WA       | D,E,SW,W,WW     | Quality Assurance          |
| 11 | Municipality | 1,722,810        | City of Seattle                       | CA       | D,E,SW,W,WW     | Quality Assurance          |
| 12 | Municipality | 450,000          | Denton County Electric Cooperative    | TX       | E, G            | Procurement                |
| 13 | IOU          | 2,600,000        | Dominion Energy                       | Multiple | E               | Managed Services           |
| 14 | Municipality | 60,000           | Indian River County Utilities         | FL       | W,WW            | Strategic App Roadmap      |
| 15 | Municipality | 318,000          | Kansas City Board of Public Utilities | KS       | E, W            | Replacement Analysis       |
| 16 | Municipality | 190,000          | Lubbock Power & Light                 | TX       | D,E,SW,W,WW     | Contract Negotiation       |
| 17 | Municipality | 190,000          | Lubbock Power & Light                 | TX       | D,E,SW,W,WW     | Other                      |
| 18 | Municipality | 190,000          | Lubbock Power & Light                 | TX       | D,E,SW,W,WW     | Implementation Services    |
| 19 | Municipality | 190,000          | Lubbock Power & Light                 | TX       | D,E,SW,W,WW     | Procurement                |
| 20 | IOU          | 81,887           | Maritime Electric                     | CAN      | E               | Program Governance,        |
| 21 | Agency       | ~                | Northern California Power Agency      | CA       |                 | Implementation Services    |
| 22 | County       | 120,000          | Orange County Utilities, FL           | FL       | SW,W,WW         | Strategic App Roadmap      |
| 23 | County       | 120,000          | Orange County Utilities, FL           | FL       | SW,W,WW         | Implementation Services    |
| 24 | Municipality | 105,000          | City of Pasadena                      | CA       | E, W            | Needs Assessment, Business |
| 25 | Municipality | 475,000          | Philadelphia Gas Works                | PA       | G               | Stategic Plan              |
| 26 | Municipality | 78,000           | Riviera Utilities                     | AL       | E, G, W, WW, SW | Strategic Roadmap          |
| 27 | Municipality | 78,000           | Riviera Utilities                     | AL       | E, G, W, WW, SW | Procurement                |
| 28 | Municipality | 78,000           | Riviera Utilities                     | AL       | E, G, W, WW, SW | Implementation Services    |
| 29 | IOU          | 420,000          | SJI                                   | NJ       | G               | Gap Analysis               |
| 30 | IOU          | 420,000          | SJI                                   | NJ       | G               | Contract Negotiation       |
| 31 | IOU          | 420,000          | SJI                                   | NJ       | G               | Program Management         |
| 32 | IOU          | 765,000          | Tampa Electric Co. - People's Gas     | FL       | E               | Procurement                |
| 33 | Authority    | 150,000          | Toho Water Authority                  | FL       | W,WW            | Implementation Services    |
| 34 | Authority    | 150,000          | Toho Water Authority                  | FL       | W,WW            | Procurement                |
| 35 | Authority    | 150,000          | Toho Water Authority                  | FL       | W,WW            | Strategic Roadmap          |

Figure 4: TMG AMI Projects

TMG's core competencies include providing our clients with Strategic Consulting, Research and Analysis, Solution Procurement, Client-Side Delivery Support, and Client-Side Operations Management. We have complete, proven methodologies for each of these competencies. **We have assisted over 65 utilities with assessments and planning; led well over 100+ solution procurements; and provided client-side delivery support and quality assurance services during scores of implementations.**

TMG has also built a market-leading collection of differentiators based on independence, actual projects, and hands-on experience, which will deliver direct benefits to NCTCOG TXShare members, including:

- TMG has led ~700+ meter-to-cash and related projects for 370+ clients, focusing on AMI, AMR, MDM, Self-service, ERP, CIS, EBPP, and MWM applications.
- An increasing number of water utilities are seeking to upgrade and replace their aging water infrastructure to improve operational efficiencies and manage their water systems with more accuracy. TMG consultants have helped several utilities harness AMI to **reduce non-revenue water loss** both beyond the meter and within the distribution system by leveraging AMI system and acoustic leak detection technologies.
- TMG is leading the industry in working with utilities to leverage investments in technology through data and our Strategic Solution Roadmap framework, which employs TMG's Data Solution Model and the development of Data Use Cases to identify how data is utilized across various communication channels, allowing the utility to consolidate servers, eliminate islands of information, and place analytics and insights into the hands of end users, and customers.
- TMG has worked with utilities serving customer bases ranging between 4,000 and 8 million. These utilities provide all types and combinations of services, including electric, natural gas, water, wastewater, solid waste, recycling, drainage, transportation, solar, cable, telecom, and various non—commodity or non-utility-based services.
- TMG is truly vendor-agnostic and independent, and we have no affiliation with any solution vendor or product in the market, so we will deliver unbiased, fact-based advisory solutions to NCTCOG TXShare members.
- TMG has worked with almost every solution vendor (SV) in the market and all system solution (SI) integrators (SI) since our founding in 1992. TMG knows the order forms and bills of materials, the contracts, the vendor strengths and weaknesses, their approach to projects, their negotiation strategies, and their project methodologies. TMG brings unbiased, hands-on insight and expert guidance.
- In 1994, TMG constructed the industry's first formal utility solution requirements list, which today is the Customer Capability Model with 5,000+ Comprehensive Capabilities/ Requirements, including 3,000+ for AMI, Meter Data Management, and related requirements. TMG continually updates this during/after every engagement.
- TMG has achieved SOC 2 Type II compliance in accordance with American Institute of Certified Public Accountants (AICPA) standards for SOC for Service Organizations, also known as SSAE 18. Achieving this standard with an unqualified opinion serves as third-party industry validation that TMG provides enterprise-level security for its customer's data, with improved controls and processes to ensure greater protection.

## 4.1 About TMG

TMG Consulting, Inc. was founded in Austin, TX, in 1992 in response to an industry-wide need for independent advisory services for critical business processes and information technology-based decisions. TMG has been providing Advisory & Consulting services and has become the "Gold Standard" against which all others are measured. Today, TMG has a combined workforce of over 1,200 professionals across the globe and supplements this core employee base with contractors as needed.



TMG is the leading advisory and professional services firm working with Utilities to plan, develop, implement, and manage their ecosystem of customer-focused digital technology solutions and service providers. TMG has been the number one Customer Systems-focused Utility Advisory and Consulting Firm in the industry for **32+ years**. Providing value-added services to the Utility Industry is at the very heart of our company, and everything we do. To date, **TMG has worked with over 370 utilities across nearly 700+ projects**, matching their business needs with digital solutions, systems integrators, and implementation services to maximize the value of their customers and optimize and de-risk their IT investments. TMG's clients include utilities of all sizes that provide gas, electric, water, and municipal services in regulated, competitive, and public power markets.

No clients have ever litigated against TMG, and we have never walked away from any utility project or engagement in our 32-year history.

#### TMG Fast Facts

- **Legal Name:** TMG Utility Advisory Services Inc. dba TMG Consulting, Inc. ("TMG")
- **Website URL:** [www.tmgconsulting.com](http://www.tmgconsulting.com)
- **TMG Utility Advisory Services, Inc. Federal Tax ID:** 74-2699550
- **NAICS Code:** 541519
- **D&B Number:** 95 9569781
- **Unionization:** TMG is NOT unionized
- **RIA Advisory:** In May 2023, RIA Advisory, a leading revenue management solutions provider, and TMG Consulting ("TMG"), a top advisory and professional services firm to the utilities market, announced a merger to create an industry-leading provider of revenue management solutions for clients across the financial services, healthcare payers, utilities, and public sector verticals. Together, the two firms (TMG and RIA) will expand as global leaders in revenue management solutions by combining scalable Revenue Management platforms and Intelligent Systems, proprietary AI-enhanced IP, institutional knowledge of the revenue management space, and deep domain expertise across multiple industries.

TMG is a financially stable, growing Corporation that (as of December 2022) has formally completed SOC 2 Type II compliance in accordance with American Institute of Certified Public Accountants (AICPA) standards for SOC for Service Organizations, also known as SSAE 18. Achieving this standard with an unqualified opinion serves as third-party industry validation that TMG provides enterprise-level security for customer data, with improved controls and processes to ensure greater protection.

#### TMG Financial Status

With over three decades of Utility Industry focus and experience, TMG has grown steadily and deliberately and has notched double-digit growth over each of the most recent five years. We are financially strong, carry no debt as a company, and have access to a healthy line of credit for financing activities if ever needed. TMG's revenues, leading up to the merger with RIA, consistently ran north of \$20 million annually.

With the 2023 RIA merger, the combined companies' revenues are now well over \$60M annually, and the firms are Private Equity-backed backed by **Avance Capital** ( <https://avanceinv.com> ). Avance works in partnership with leaders and management teams, industry executives, and functional experts with the goal of accelerating growth in revenue and profits for its portfolio companies. Avance does this through a disciplined process focused on business expansion and value creation.

## 4.2 TMG Organization and Staffing

With a strategic fusion between RIA and TMG, our newly merged corporate structure embodies our collective commitment to excellence and innovation. Our combined organizational chart below reflects our dedication to maximizing synergies and leveraging our strengths to create unparalleled opportunities for growth and success.

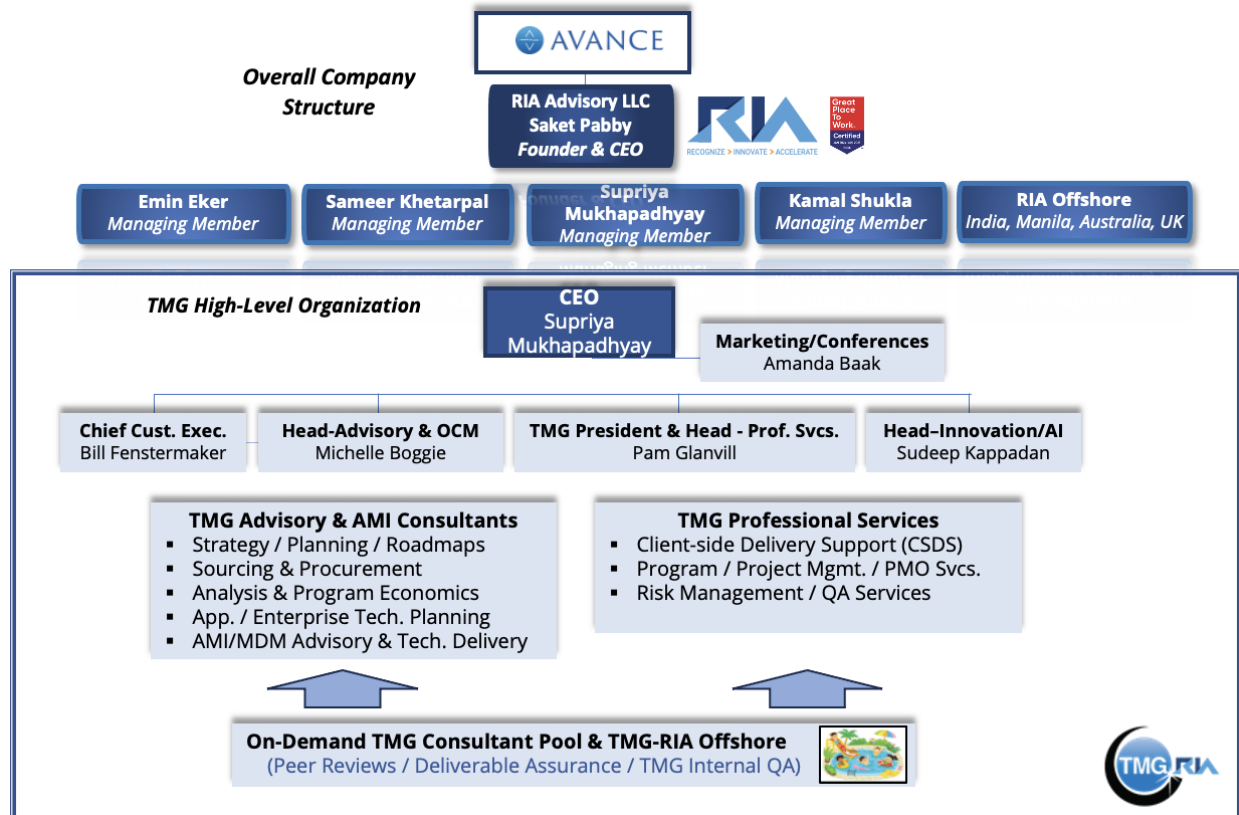


Figure 5: RIA-TMG Company Structure

Today, TMG has a combined workforce of well over 1200 professionals across the globe and supplements this core employee base with contractors as needed. TMG, until the May 2023 merger with RIA, had approximately 180 employees, mainly spread across the US and Canada, with an additional 50 employees internationally (Philippines and India).

Post of the 2023 merger with RIA, the combined companies have already grown to **1200+ employees globally** and are expanding market reach across **Utilities**, Healthcare, and Financial Services, along with a growing portfolio of Intellectual Property, Tools, and Advisory & Professional Services Offerings.



## 5. Technical Proposal

TMG understands that NCTCOG is seeking a highly qualified, extensively experienced consulting partner with a verifiable track record in providing AMI program management services to support the delivery and operational aspects of TXShare member AMI projects.

TMG understands Goal 3 of NTCOG's TXShare Program to achieve a cost-effective and scalable implementation for each member. TMG's proposal will provide a pricing model that supports phased implementation across the cooperative and offers flexibility for entities of different sizes and financial capacities. TMG will optimize our Strategic Program Management (SPMO) approach to accommodate both immediate needs and future scalability as more TXShare members choose to participate in the

program. Each plan will be fully compliant and compatible with each TXShare member's key objectives, deliverables, schedule, and resource constraints.

## 5.1 Approach Overview

TMG is actively involved in AMI projects at several utilities today, providing unbiased meter-to-cash, AMI, and edge systems consulting services to electric, gas, and water utilities of all sizes. This work includes preparing feasibility studies, needs assessments, business cases, technology assessments, and roadmaps, developing procurement strategies and plans, and providing program management and project oversight.

TMG helps utilities develop and modernize all aspects of their delivery platforms and two-way, intelligent metering solutions to better meet the changing needs of their customers as well as the operational and regulatory needs of the broader ecosystem of stakeholders involved in these programs. Next-generation AMI is a key element of future state energy and the resource that each TXShare member is entrusted to deliver to their customers. Together, leveraging our extensive experience and each TXShare members experienced team, we can plan and implement an AMI program that aligns with their business objectives to support their business initiatives, improve customer experience, improve system agility and access, and develop their workforce skills.

For this engagement, TMG will extensively leverage **TMG VAST™** (Value Added Services & Tools), our comprehensive framework of services and associated methodologies, models, accelerators, artifacts, and templates. This consulting framework underpins TMG's approach to getting planning "right" for all aspects of the AMI Program and running a successful deployment project. This framework has been foundational to TMG's engagements for decades now and will both give flexibility to each TXShare member in developing AMI deployment plans and will allow for each TXShare member to finalize a highly granular, detailed deployment schedule and budget outputs - with complete transparency and visibility into and throughout the initiative.

To further explain, this TMG-proposed engagement is underpinned by our **TMG VAST™ Strategic Program Management Office (SPMO)** methodology, which provides strategic planning and guidance through the implementation and deployment of a large-scale AMI solution for each TXShare member's service territory.

TMG's industry-standard methodology is an evolving and constantly improving process anchored in focus, discipline, and attention to detail. In recent years our approach has adapted and matured to address both opportunity and risk as markets and technologies have changed. TMG also continuously updates our methodology to encompass lessons learned in every project to ensure the results we help deliver will continue to meet and exceed the needs of our customers modernization programs.

TMG knows that implementing an AMI solution is expensive, time-consuming, complex, and transformational. From a holistic viewpoint, undertaking an AMI program is more like running five concurrent projects across the organization:

- It's a customer service program (designing and redesigning processes)
- It's a software integration and configuration program (systems integration)
- It's a construction program (meter and network deployment)
- It's a strategic program (digital roadmap, business case, and funding)
- It's an operational program (designing and redesigning processes)

## 5.2 TMG VAST™ SPMO Methodology

TMG follows deliberate, prescribed steps with quality checkpoints and client involvement at every stage to ensure quality pervades our work and that tangible value is rendered to the client from the process. Our **TMG VAST™** SPMO methodology combines the program planning and implementation components into

a proven and comprehensive methodology. The eight primary phases of the methodology are presented in the below diagram:

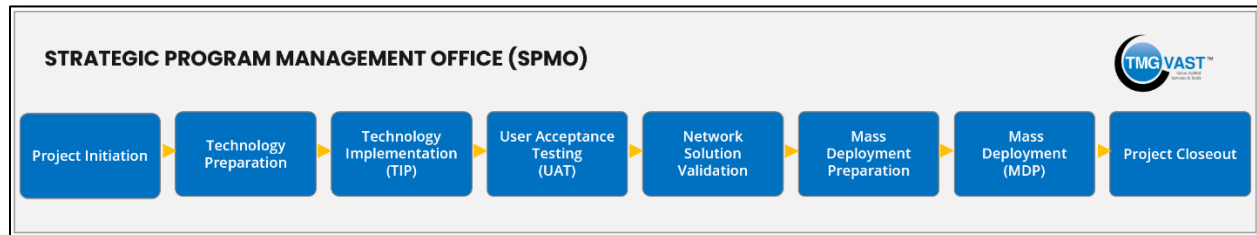


Figure 6: TMG VAST™ SPMO Methodology

The following diagram describes the activities within each of the work phases.

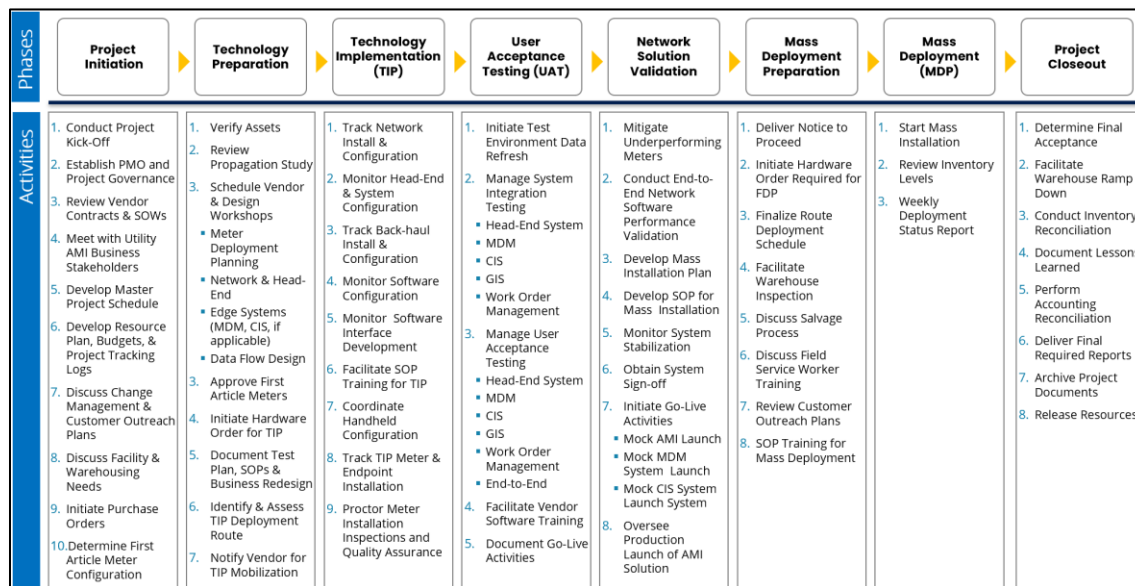


Figure 7: TMG VAST™ SPMO Work Phases

TMG will establish, operate and/or support the AMI SPMO as part of each TXShare member's overall program and project governance structure. Our SPMO will provide project management services for individual projects and oversight across each member's entire program.

Our appointed Program Manager will work on the TXShare members' behalf, ensuring their interests are the primary focus throughout the effort. As such, our Program Manager will create and maintain open communications among all stakeholders. Our Program Manager will lead formal, recurring status meetings with the AMI team members to ensure that the project tracks against the milestones outlined in the project plan. In addition, our team constantly communicates with project participants, following up on action items and fielding questions daily. Finally, our team will provide structured oversight of activities to ensure that all program components are executed efficiently and meet program expectations.

Moreover, we will provide vendor contract administration and management services. This includes reviewing all vendor invoices and comparing them to the contracted milestones. In leveraging our SPMO, our mission is to ensure the TXShare member's overall program is a success and that it meets their timeline, budget, customer value and benefit objectives, and materially contributes to the TXShare member's corporate strategy.

## Project Initiation

TMG will coordinate and schedule the project kickoff meeting with the TXShare member's program sponsor or point of contact. During the onsite kickoff, TMG, the TXShare members, and stakeholders will meet to review the project scope, formalize project goals, objectives, and project plans, and solidify the next steps for TMG's involvement.

### *Start-up Activities – Planning*

TMG will participate in the project planning with the selected AMI Solution Vendors, their sub-contractors, the TXShare member, and other third parties (e.g., existing meter vendors and meter installers) to develop the Master Project Plan. This will determine the final staffing expectations, project facility requirements, the project phases with their timelines, and entry and exit criteria for acceptance of each part of the solution. Once established, these plans will be utilized throughout the project and adjusted based on lessons learned.

Planning activities will include but not be limited to:

- Project scope
- Change management planning
- Customer communication planning
- Issue/problem management
- Cost/budget management

TMG will leverage its robust collection of program service accelerators and tools to ensure overall program success. This allows you to hit the ground running and not have to start from a blank page. Our re-usable artifacts, templates, and example deliverables have been refined over the past 2 decades, and they are continually updated to be able to measure up to high quality standards, and to be able to stand up to 3<sup>rd</sup> party scrutiny.

### **Deliverables: Project Schedule, Project Budget, Governance Plan, Resource Plan, Project Tracker, Monthly Status Reports**

### *Start-up Activities – Preparation*

TMG recommends implementing AMI solutions in two phases: a Technology Implementation Phase (TIP) and a Mass Deployment Phase. The TIP phase intends to demonstrate complete AMI network and system functionality through a limited deployment. The TIP will establish the necessary foundation and maximize the learning and training of internal processes that will benefit the TXShare member in a large-scale deployment. Upon successful completion and approval of the TIP phase, the TXShare member will proceed with the Mass Deployment Phase (MDP) to deploy the entire solution using the methods, SOPs, processes, systems, etc., that were implemented during the TIP. As part of this preparation, TMG will review in-depth planning considerations that lead to successful AMI deployments.

| Program Elements  |  |  |  |
|---|--|--|--|
| Project Strategy  | Project Elements   | Project Services   |  |
| AMI Strategy<br>• AMI Technology<br>• Field Deployment of Meters and Assets<br>• Integrations<br>• Schedule<br>• Requirements<br>• Resourcing<br>• Contract Goals | • Equipment<br>• Network Equipment<br>• AMI Endpoints<br>• Meter Replacements<br>• Installation Equipment<br>• Software (AMI / MDM)<br>• Set-up Fees<br>• Licensing<br>• Server Locations<br>• IT Impact Support | • PMO Services<br>• Quality Oversight<br>• AMI Software PM<br>• AMI Field PM<br>• Integrations<br>• Testing<br>• Team Resources<br>• AMI Pilot<br>• AMI Deployment | • Installation<br>• Network Deploy<br>• Mass Meter Install<br>• Installation PM<br>• Fleet Mgmt<br>• Warehousing<br>• Customer Service<br>• Dispute Resolution |

Figure 8: Program Planning Elements



## Technology Preparation

### *Implementation Activities – Project Management, TIP*

Once the Master Project Plan is completed, the Technical Implementation Phase (TIP) deployment will begin. This step will begin the work to execute the project plan. TMG will lead these efforts with the AMI Solution Vendor and facilitate the discussions and decisions that need to be made by the TXShare member's personnel.

Preparation Activities will include but will not be limited to:

- AMI deployment preparation
- Head-End Configuration
- System Acceptance Test (SAT) Planning
- Integration to CIS (and other systems)
- Training

TMG understands the complex integrations that are required between applications and the implications to the business of tactical and strategic decisions that are made during the implementation and will provide coaching to the project team based on years of hands-on, real-world experience of doing so. Our project managers are excellent administrators, equipped with disciplines that enable them to manage the most complex deployments and the ecosystem of client stakeholders and 3rd party delivery partners that are always involved in these engagements. TMG will review the interdependent integrations specific to the TXShare member as part of TIP preparation activities.

### ***Deliverables: Workshop Schedule, Deployment Verification, Testing Plan, Training Plan***

## Technology Implementation (TIP)

TMG will work with the TXShare member's project team, the vendor(s), and the designated systems integrator to execute the work identified during TIP preparation, provide overall Program Management oversight, and subject matter expertise.

The Technology Implementation Phase – (TIP) will consist of the following project tasks:

- Installation of the entire solution network to include data collectors, head-end software, and system integrations
- Installation of a small quantity of AMI meters/endpoints within a specific TXShare member billing route (a representative sample of the meter population)
- Exercise all aspects of the AMI system per the established System Acceptance Testing (SAT) plan
- Assess system performance and stabilization

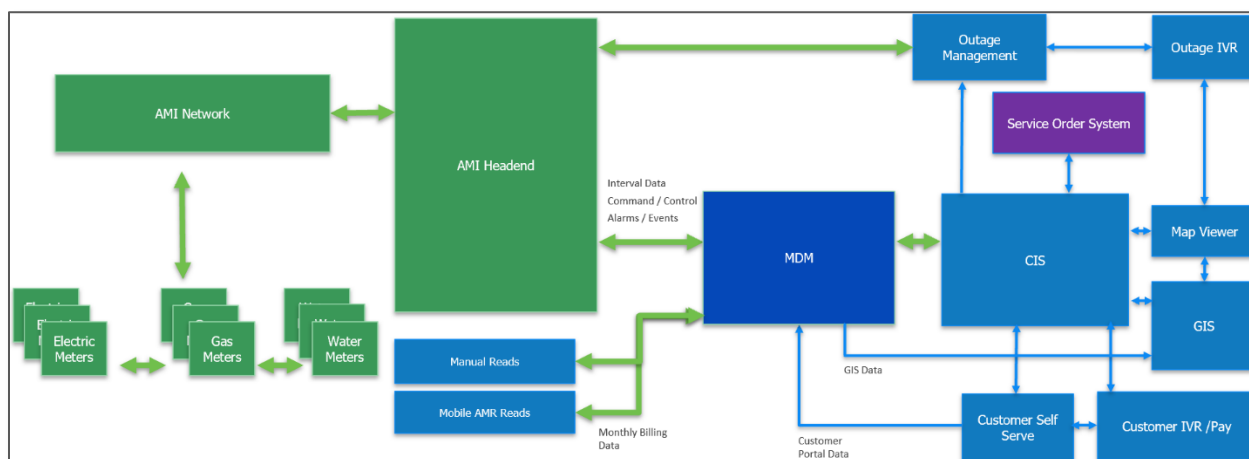


Figure 9: AMI Interdependent Integrations



TMG's PM will provide leadership, management, and industry/product expertise to ensure a successful implementation process for the TXShare member. In addition, TMG will provide project advice and recommendations to the Project Staff, Management, and Steering Committee.

Implementation activities by TMG will include but will not be limited to:

- Onsite visits during the pilot phase
- Detailed project planning and project auditing
- Monitoring progress against deliverables and milestones
- Managing the preparation of plans (e.g., training, cutover, etc.)
- Scheduling
- Progress reports
- Meeting minutes
- Project team management
- Issue tracking between the vendor and the TXShare member
- Formal and informal communication on all relevant events
- Participation in staff meetings to ensure information sharing, problem-solving and decision making
- Manage and document issue resolution activities

## **Deliverables: Project Management during the TIP**

### **User Acceptance Testing (UAT)**

Testing is essential in evaluating the success of the AMI TIP and whether the TXShare member's objectives are met. The AMI vendor is responsible for delivering, installing, and configuring the infrastructure based on the TXShare member's specific requirements. This will include integrating the AMI head-end system (HES) with CIS, GIS, OMS, SCADA, asset management, the work order system, and/or other systems identified during the RFP scope creation phase.

TMG will provide its structured methodology for all aspects of client testing (including functional, system, integration, stress, user acceptance, and parallel testing). Our standard software development lifecycle (SDLC) testing approach follows the steps outlined below:

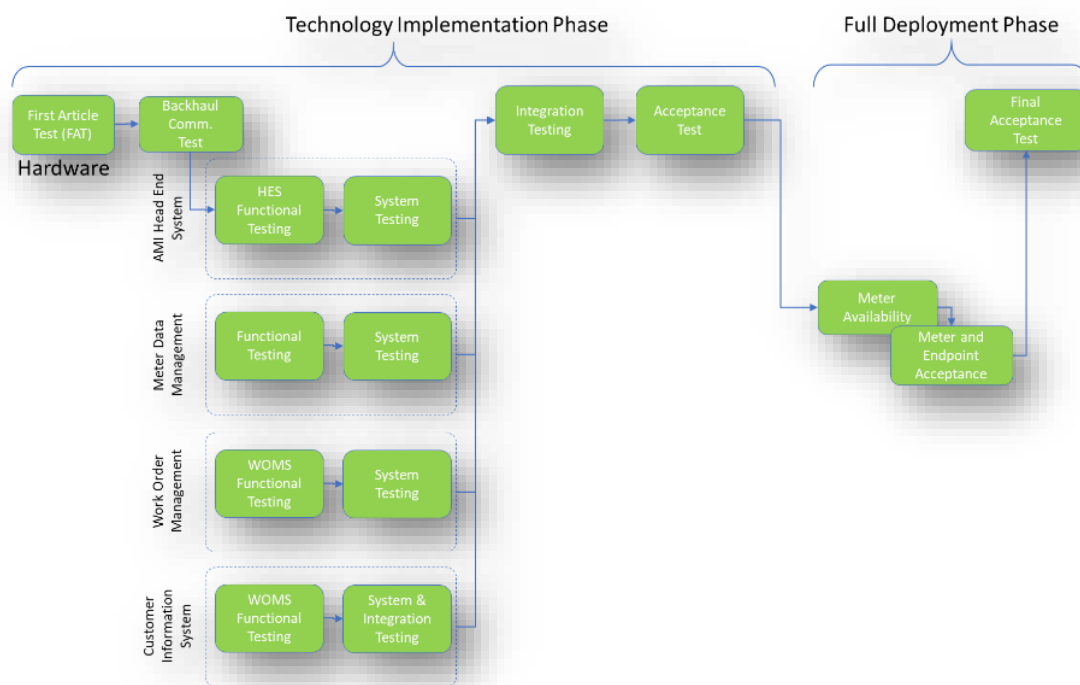


Figure 10: TMG AMI Implementation Testing

Specifically, for the AMI project, TMG will provide:

- Create a test strategy document that describes the entire test process for the project
- Authoring plans for functional tests required during the pilot phase (describing what, when, who, how, where, exit, and entry criteria for each activity)
- Mentoring and management for the creation of test scripts, scenarios, and cases for the AMI team
- Detailed scheduling of test execution (including assignment of work per test resource, per day)
- Management of each test execution phase, including tracking forecast vs. actual progress, issue, and defect resolution, environment control (code and configuration release management)

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## ***Deliverables: Test Management leading to System Acceptance***

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### **Network Solution Validation**

During this phase, the goal is to validate the system on two dimensions. The first dimension will seek to confirm that hourly, nightly, periodic, etc., batch streams execute efficiently and without negatively impacting the system's performance. The second dimension will seek to verify that the system's performance is not negatively impacted when the maximum number of expected users are using the system simultaneously.

TMG will support the TXShare member during the Network Solution Validation phase and initiate go-live activities before the production launch of the AMI system.

### **Mass Deployment Preparation**

#### *Implementation Activities – Project Management, MDP*

Once the Network Solution Validation is completed, the Mass Deployment Phase (MDP) deployment will begin. This step will begin the work to execute the project plan. TMG will lead these efforts with the vendor and facilitate the discussions and decisions that need to be made by the TXShare member's personnel.

Preparation Activities will include but will not be limited to:

- Initiate Hardware Order Required for MDP
- Finalize Route Deployment Schedule
- Facilitate Warehouse Inspection
- Discuss Salvage Process
- Discuss Field Service Worker Training
- Review Customer Outreach Plans
- SOP Training for Mass Deployment

### **Mass Deployment (MDP)**

#### *Implementation Activities – Project Management, MDP*

The Mass Deployment Phase (MDP) will consist of the following project tasks:

- Perform the remainder of the installation of AMI meters/endpoints
- Disposal of used meters
- Quality assurance
- Exercise final testing of the AMI Solution per SAT plan

TMG's Project Manager will provide leadership, management, and industry/product expertise to ensure a successful implementation process for the TXShare members. In addition, TMG will provide project advice and recommendations to the Project Staff, Management, and Steering Committee. Implementation activities during this stage are identical to those exercised during the TIP.

## Deliverables: Project Management during Mass Deployment

### Project Closeout

A review of all deliverables to date will be conducted with the TXShare members to determine final project acceptance. Once all data is compiled, analyzed, and reviewed by TMG and the TXShare member, TMG will document lessons learned (outcomes, challenges, and key insights), perform final project accounting reconciliation, deliver all final project reports and project documents, set-up a support team, and relinquish all program management duties to the TXShare member Project Manager.

### 5.3 Project Schedule / Timeline

TMG is providing a sample schedule to illustrate a 26-month implementation. Actual implementation schedules (whether compressed or extended) will vary based on the individual needs of each TXShare member to ensure a cost-effective and scalable implementation.

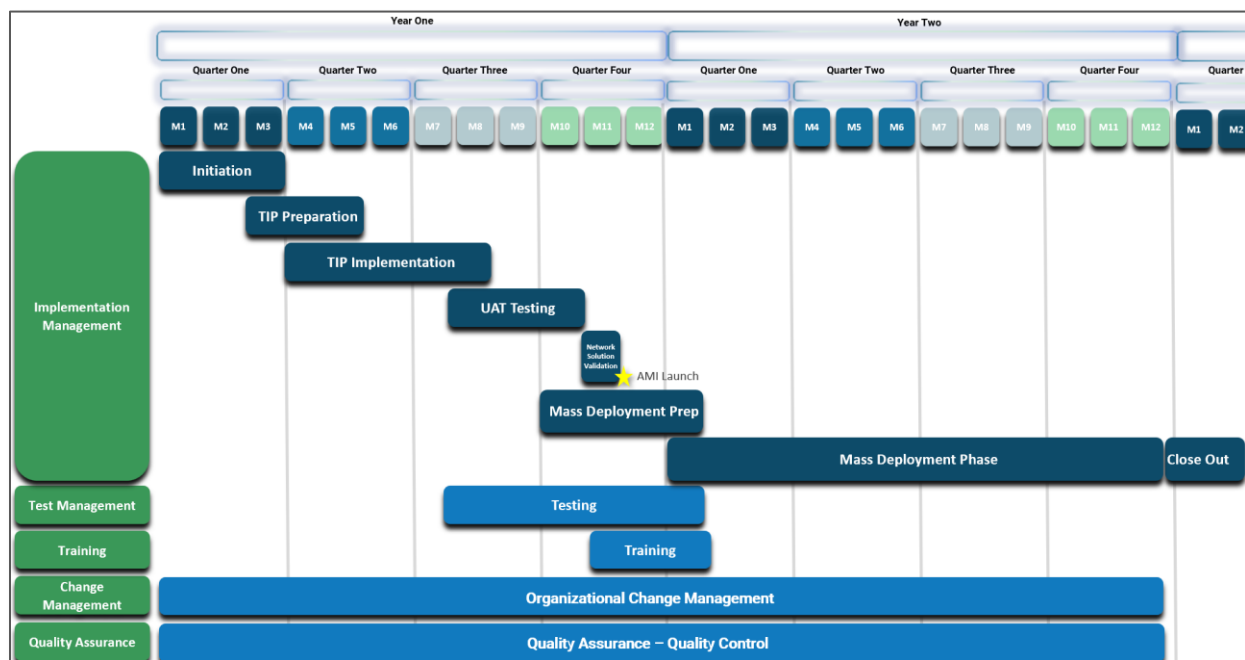


Figure 11: Sample Project Timeline

A sample breakdown for each task is listed below. **Please note** that each task's beginning and end may overlap with a prior or subsequent task, and the GANTT Chart illustrates several overlapping, concurrent activities over the 26-calendar month timeline.

| SPMO Phase                      | Duration  |
|---------------------------------|-----------|
| Project Initiation              | 3 months  |
| Technology Preparation          | 3 months  |
| Technology Implementation (TIP) | 5 months  |
| User Acceptance Testing (UAT)   | 3 months  |
| Network Solution Validation     | 1 months  |
| Mass Deployment Preparation     | 4 months  |
| Mass Deployment                 | 12 months |
| Project Closeout                | 2 months  |

Figure 12: Sample Project Task Durations



## 6. Pricing

TMG will provide our services to each TXShare member on a not-to-exceed basis, billed monthly as incurred plus travel and living expenses. The actual cost per service will vary depending on the project scope and the individual needs of each TXShare member. The table below reflects the hourly rate per role and the discounted price.

| Category 3 - Professional Services |               |                    |                          |  |
|------------------------------------|---------------|--------------------|--------------------------|--|
| Description                        | Rate per Hour | % Discount Catalog | Discounted Rate per Hour | Notes/Comments   |
| Project Management                 |               |                    |                          | Hourly pricing is provided. The number of hours will be determined based on the project scope for each TXShare member. |
| Executive                          | \$240.00      | 5%                 | \$228.00                 | Executive Sponsor, Program Sponsor   |
| Senior Consultant                  | \$235.00      | 5%                 | \$223.25                 | Project Lead, Project Support, OCM, Integration SME  |
| Consultant                         | \$215.00      | 5%                 | \$204.25                 | Test Manager, Training   |

Please note: TMG's policy is to bill expenses based only on actuals incurred. TMG always abides by client expense policies and guidelines.

To support NCTCOG's endeavor, TMG is offering a 4-hour free education and training workshop to your TXShare members, their project sponsors, and/or key business personnel to discuss the key decision points when undertaking an AMI implementation project. This offering to NCTCOG and its TXShare members can be used regardless of the vendor selected. It is our commitment to you and your TXShare members to help ensure that their projects start with a clearer understanding and a stronger foundation as they move forward to the next phase in their AMI lifecycle.

## 7. HUB Bonus

TMG is not a Historically Underutilized Business (HUB), Minority, Women-Owned, or Disadvantaged Business Enterprise. However, we are open to working with one or more of these types of entities should you have a desire for TMG to discuss this with you.

## 8. Proposed Value-Add

### 8.1 TMG Service Offerings

The information below is provided to NCTCOG for consideration as optional, downstream Professional Services and Value-Enablers for TXShare members that you may ask TMG to provide. These are all Client-side services where we engage as advocates of the utility and serve only the utility's best interests.

TMG can offer several high-impact Client-side Delivery Support services to the Utility across various workstreams based on years of Advisory work as well as Implementation Support for utilities. These Roles/Disciplines are all Client Advocacy related, and service the Utility, not the Solution Providers nor the Integrators or 3<sup>rd</sup> Parties that may be involved in the Delivery and Integration effort. They include:

- QA & Risk Management
- Data Quality Assessment
- Conversion Services

- Testing
- Training
- Organizational Change Management (OCM)
- TMG Offshore Delivery (Manilla and/or India)

## **QA & Risk Management**

TMG's Quality Assurance (QA) & Risk Management Services focus on providing an independent perspective in key project areas on a consistent, periodic basis. TMG's QA/Risk Management consultants are very experienced at conducting regular QA/Risk reviews. We have conducted over 40 engagements to date, either in conjunction with our PM services or as a completely independent service. Our clients receive significant value due to the maturity of our QA/Risk processes, templates, and the experience of our people.

The types of QA/Risk Roles TMG provides to these engagements on behalf of the utility includes:

- Program Risk Advisor
- Agile Risk Advisor
- Solution Function/Feature Planning Risk Advisor
- Product Risk Advisor
- Contract & Compliance Manager

## **Data Quality Assessment Services**

TMG, as part of our professional services and data conversion services, offers customers the opportunity for a data quality assessment on existing applications. We typically provide these services to customers seeking a better understanding of the overall health of their data prior to embarking on ambitious implementation projects. With a strategic conversion partner, TMG has developed a robust library of data quality validations. Our 30 years of industry experience has allowed us to be extremely thorough when analyzing data.

Our data quality assessment routines assess data between AMI, MDM, CIS, MWM, WAM, and EAM systems for completeness. Many modern applications require accurate and additional asset/meter information to utilize the robust features available; therefore, data quality is paramount.

These are a few of the important key data points for AMI projects:

- Critical Device / Meter Data - Firmware information, meter identifiers, channel/register data, measurement/reading data, associated equipment, badge numbers, manufacturer/model information, installation and removal history, device testing information, purchase date, retired meter information, meter stock location
- Critical Asset Data - Additional equipment attached to the meter or device, vault data, pole and transformer data, installation/removal data, asset location data, etc.
- Meter Reading Data - Analysis of meter reading activity – missing reads for installation and removal records, analysis of meter reading cycles and routes
- Service Point and Premise Data - Address information, GIS information, demographic information, Service Type information

Deliverables from this Service include Data Quality Assessment Reports, Data Governance Recommendations, Data Cleanup Recommendations, Data Cleanup Plan and Strategy.

## **Conversion Services**

TMG's data conversion services provide customers with best practices for migrating required data from legacy systems to modern applications. TMG provides detailed data analysis and conversion planning to ensure a successful implementation. We have over 30 years of experience executing complex data migration activities and have developed several utility industry best practices. TMG has experience migrating from on-premises applications to IaaS, PaaS, and SaaS solutions.



TMG provides not only exceptional technical know-how, but also critical utility industry knowledge to our projects. We have developed conversion accelerators and tools over the years that allow our conversion teams to begin validating and migrating conversion data early in a project's lifecycle. Our conversion methodology and tools provide a robust set of validation routines, data quality checks, and balancing and reconciliation reporting to ensure the migrated data is accurate and all critical data is migrated successfully to the newly implemented modern applications. TMG's conversion services team also works closely with customers to understand the data requirements of the new applications and provides guidance to customers and long-term data governance and data retention strategies.

Deliverables from this TMG Service include Data Conversion Balancing and Reconciliation Reporting, Data Conversion Design Documents and Mapping Documents, Data Conversion Plan and Strategy Documents, Data Conversion Results, Data Quality, and Validation Reporting.

### Testing Services

TMG provides clients with testing services to ensure proper development and delivery of critical functionality and integrations for implementation projects. TMG has a library of test cases formed from years of experience implementing and advising customers for advanced AMI, MDM, CIS MWM, MDM, and EAM/WAM applications.

Our testing methodology utilizes key entrance and exit criteria before starting or completing a test phase. We also utilize defect tracking tools such as Microsoft Azure DevOps to track defects, issues, and test case progress. We also provide robust testing metrics to measure progress on test cases throughout the project.

TMG's approach to testing focuses on nine (9) key phases of testing for a project as noted below:

**Unit/Functional Test (UT)** is the testing of the initial test of any modification, interface, or report. Unit testing, performed by the developer, demonstrates that his/her program works as an isolated and discrete unit. Upon successful unit testing, a program will be packaged and made available for verification and Functional testing. Unit testing of enhancements focuses on the internal functionality of each module. Tests will be created to force conditions that will simulate how the module should work within the overall system. Unit testing will be highly critical of functionality, performance, ease-of-use, and appearance. Unit testing will start with the same test data identified for the configuration tests and build upon that base. The primary source for the test scenarios and acceptance criteria will be the functional specification for each module. This testing is conducted in the Test environment on contrived data.

**System Testing (ST)** is the testing of the initial configuration and build. During this testing phase new configuration and development is being delivered into the applications as finalized functional and technical design work is completed. The configuration and customization work are unit tested for accuracy and expected behavior.

**System Integration Testing (SIT)** is the testing of the complete and fully integrated software product. During this testing no new code is being introduced to the environment (code freeze), and all to-be process test cases are being executed. All interfaces are also tested (run manually) and sent/received to 3rd party vendors and EDGE applications for verification of data processed.

**Point-To-Point (P2P)** is the test where all interfaces are being tested with 3rd party applications to ensure the successful transfer of files. File transfer security is also tested during this phase. Note: No functionality is being tested here. Just that the file can be sent, received, and processed.

**End-To-End (E2E)** is the testing of the complete and fully integrated software product that verifies business processes. This includes all the interfaces which run as if in production. Considering this, the E2E phase is dependent on a successful P2P for each interface.

**Batch Execution and Schedule Testing** begins in System Integration Testing as batch execution is required for many test cases.

**User Acceptance Test (UAT)** is managed and executed by customers with TMG providing support. This will be conducted in a designated environment. Test cases will be organized in a test calendar to mimic the way the business is conducted.

**Performance Testing** will be conducted in two dimensions. The first dimension will seek to confirm that hourly, nightly, periodic, etc. batch streams execute efficiently and without a negative impact on the system's performance. The second dimension will seek to confirm that the system's performance is not negatively impacted when the maximum number of expected users are using the system at the same time.

**Operational Readiness Testing (ORT)** combines the verification of the solution with the understanding of new business processes. In this test, each tester brings tasks and activities that they have performed the day before. The test calendar is structured in such a way that employees within the organization complete their work in the designated environment as if they were already live. Meter reads are processed via head ends systems and all day over day activities are simulated to ensure proper results. Exception processing is also treated as if it were live to ensure the organization is ready for all possibilities once the system is live. The full nightly and monthly batch schedules and execution windows are fully verified during this testing phase and additional performance of meter read processing is analyzed and verified.

Deliverables of this TMG Service include Test Plan for the System – SIT, UAT, ORT, Test Plan Closure Memos Completed and Signed, Test Results, Test Scenarios and Scripts for SIT and UAT, Test Scripts for System Test, Testing Plan and Strategy Document.

### **Training Services**

For implementations, especially AMI implementations, an appropriate training program is critical to the success of the project as new applications will be utilized to the fullest potential if the users are knowledgeable of the new features, navigation processes and aware of how new activities fit into their job functions.

TMG provides best practices and a proven methodology for training users to ensure users are prepared for success once the project is complete. Using TMG's training methodology outlined below, TMG has successfully transitioned the business and technical resources of multiple clients from being users of legacy/outdated systems, to being efficient users of the target system with minimal disruption. This is particularly important for AMI projects as the traditional way of managing meter reads, meters, and devices becomes more feature rich once AMI projects are completed.

A key to TMG's success is that we view "training" as going beyond just classroom instruction. It includes Knowledge Transfer, and this begins at the onset of the project and continues throughout the engagement. We recommend establishing a Center of Excellence with project champions from each functional area. One of the tasks of this Center of Excellence would be to propagate knowledge and skills throughout the organization after go-live. This Center for Excellence will be involved in the creation and delivery of training and serve as subject matter experts for employees in their respective functional groups. This team will serve as "superusers" of the system and support users as the project comes to completion and during the initial stabilization period of the implementation.

Deliverables from this Service include Training Documentation, Training Plan and Strategy, Training Needs Assessment.

### **TMG Organizational Change Management Services**

When undertaking technical implementations of complex customer and operations-enabling solutions like AMI, often the people side of change is overlooked. Research shows that when we don't focus on the impact that change has on employees, transition takes longer, costs more, and changes aren't sustained. A correctly designed solution is not enough to secure employee support. Effective change management helps us avoid the cost overruns we will incur and mitigate the additional and excessive risks we will take on if we do not adequately manage the people side of change.

Documenting and assessing policies, procedures, and processes that currently exist, will lead to some predictable dynamics that may pose risks to the project. These include communication breakdowns, resistance to change, and a dip in productivity. We would begin by mitigating communication breakdowns, evaluating organization maturity, and assessing change readiness across all impacted areas of the utility. Utilizing Prosci's proven methodology, we would conduct interviews and frequent touchpoints with stakeholders, identifying areas of risk to be addressed.

Our techniques recognize and consider the power of comfort with how things are today and the related resistance to change. Our approach would also include a Business Process review for account and back-office processes. A targeted effort to socialize staff on the differences in legacy policies and resultant changes that will come with a new AMI system (including updated/enhanced Business Processes) will help identify objects that may need more attention during conversion to the target system.

Engaging user groups early and often throughout the process will highlight areas of resistance early so that our mitigation strategies can address. These effectively. This approach will also help flatten the curve that represents the dip in productivity, allowing the utility to move into a business-as-usual state sooner. Research shows that business transformations that include a formal change management strategy are six (6) times more likely to succeed.

During the stakeholder touchpoints, the goal would be to assess the behavioral, cognitive, and emotional energy of the organization and help mobilize that energy toward the single goal of successful conversion, cutover, go-live, and steady state operations of the customer service/operations functions for the utility. Further, we would focus on building change competency to prepare for the many additional and related changes on the roadmap and project plan. Goals for near term TMG-led OCM program:

- Plan to Mitigate risks and unnecessary costs
- Assess change readiness of the organization
- Align stakeholders and building change competency in preparation for the longer-term program
- Training Preparation
- Assistance developing Post integration organization structure
- Roles and responsibilities assessment
- Job descriptions, repurposing

### **Long-Term Change Management**

For the longer term, TMG recommends applying a full change management program. TMG's change management strategy features a holistic view of the utility's operations. Following Prosci's 3-Step methodology: Preparing for Change, Managing Change, and Reinforcing Change, TMG's approach aligns front-line changes with high-level business strategies and goals.

Throughout the project, TMG will:

- Provide a consistent approach to managing change across all affected departments;
- Assess and manage change capacity over the course of the program;
- Develop and assess the operational readiness of impacted departments; and
- Build internal OCM capabilities.

TMG will address the change needs for all impacted personnel including front-office, back-office and field staff. TMG will assist the utility in identifying "change agents" within the organization, typically key frontline leaders, who are critical to the adoption of change and sustained improvement beyond implementation.

### **TMG Offshore Services**

TMG provides offshore development, configuration and integration services specializing in Utilities-related applications. We provide these services from two (2) primary development center locations – the Philippines and India. TMG's offshore services have established a solid reputation for providing quality and competent consultants that have helped our partners, and our clients deliver to meet their commitments.



The TMG technical professionals bring domain knowledge (utility-centric) as well as expertise across the full solution development, architecture, upgrade, integration, testing, deployment and support lifecycles.

Offshoring is an excellent software development, integration, and extended, secure support strategy for many TMG clients today, particularly when it comes to cost management and/or reduction. The benefits to TMG customers include:

- Cost-efficiency
- Specialized Skills
- On-demand Scaling and Technical Redundancy
- Extended Hours of Work Coverage (Follow-the-Sun Model)
- Business Extension
- Focus on Core Competencies

## 9. Required Attachments

**Cover Sheet**

**Attachment I: Instructions for Proposals Compliance and Submittal**

**Attachment II: Certification of Offeror**

**Attachment III: Certification Regarding Debarment**

**Attachment IV: Restrictions on Lobbying**

**Attachment V: Drug-Free Workplace Certification**

**Attachment VI: Certification Regarding Disclosure of Conflict of Interest**

**Attachment VII: Certification of Fair Business Practices**

**Attachment VIII: Certification of Good Standing Texas Corporate Franchise Tax Certification**

**Attachment IX: Historically Underutilized Businesses**

**Attachment X: Federal and State of Texas Required Procurement Provisions**

**Exhibit 1: Pricing Proposal**

**Exhibit 2: Sample Market Basket Form**

**Exhibit 3: Service Area Designation Forms**

## TMG Resumes

Please refer to the attachment: **TMG Key Personnel Resumes.pdf**

## **REQUIRED ATTACHMENT CHECKLIST**

Please utilize this checklist to ensure that all required attachments are included with your proposal. IF AN ATTACHMENT DOES NOT APPLY, PLEASE MARK AS “**NOT APPLICABLE**” AND SUBMIT WITH THE PROPOSAL. FAILURE TO SUBMIT **ALL REQUIRED DOCUMENTS** MAY NEGATIVELY IMPACT YOUR EVALUATION SCORE.

- ☒ Page 1 - Cover Sheet
- ☒ Page 21 - Attachment I: Instructions for Proposals Compliance and Submittal
- ☒ Page 22 - Attachment II: Certification of Offeror
- ☒ Page 23 - Attachment III: Certification Regarding Debarment
- ☒ Page 24 - Attachment IV: Restrictions on Lobbying
- ☒ Page 26 - Attachment V: Drug-Free Workplace Certification
- ☒ Page 27 - Attachment VI: Certification Regarding Disclosure of Conflict of Interest
- ☒ Page 30 - Attachment VII: Certification of Fair Business Practices
- ☒ Page 31 - Attachment VIII: Certification of Good Standing Texas Corporate Franchise Tax Certification
- ☒ Page 32 - Attachment IX: Historically Underutilized Businesses
- ☒ Page 33 - Attachment X: Federal and State of Texas Required Procurement Provisions
- ☒ Page 36 - Exhibit 1: Pricing Proposal
- ☒ Page 38 - Exhibit 2: Sample Market Basket Form
- ☒ Page 39 – Exhibit 3: Service Area Designation Forms

Respondent recognizes that all proposals must be submitted electronically through [Public Purchase](#) by the RFP due date and time. All other forms of submissions will be deemed nonresponsive and will not be opened or considered.



## EXHIBIT 1: CATEGORIES OFFERED AND PRICING PROPOSAL

Place a checkmark next to each category you are offering in your proposal:

☐

**Service Category #1: Water Utility Equipment, Products, and Supplies**

☐

**Service Category #2: Installation and Repair Services**

☒

**Service Category #3: Professional Services**

☐

**Service Category #4: Ancillary Goods and/or Services (List Below)**

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### Pricing Proposal

Respondents are required to submit a comprehensive pricing proposal that outlines their approach to addressing the project goals, key challenges, and minimum solution requirements outlined below. The proposal should not only reflect the costs associated with the proposed water metering solutions but also demonstrate flexibility and innovation in addressing the diverse needs of TXShare's member entities.

#### Project Goals and Desired Outcomes:

The water meter replacement project is designed to achieve the following key goals shared by TXShare members. Vendors are encouraged to propose solutions that effectively tackle these goals:

##### 1. Versatile Water Metering Solution:

Propose a customizable metering system compatible with various environments and infrastructure types across TXShare's member entities.

##### 2. Advanced Data Management and Integration:

Provide a system that supports real-time data access and integrates seamlessly with various billing and customer service platforms, including AMR and AMI capabilities. Please include the names of the billing and customer service platforms your system is compatible with.

##### 3. Cost-Effective and Scalable Implementation:

Present a pricing model that supports phased implementation, allowing flexibility for entities of different sizes and financial capacities.

#### Key Challenges to Address:

Respondents should directly address the following challenges in their proposals:

##### 1. Multi-Environment Compatibility:

Detail how your proposed solution will function across diverse installation conditions, ensuring compliance with regional standards.

##### 2. Standardized Yet Customizable Data Integration:

Describe how your data management system will provide standard functionalities while allowing for the unique integration needs of each member entity.

##### 3. Phased Implementation for Cooperative Scalability:

Outline a flexible implementation plan that facilitates phased rollouts, minimizes disruption, and includes strategies for communication and onboarding.

#### **4. Cost Efficiency and Shared Resource Management:**

Explain your cooperative pricing discount and financing model, emphasizing cost savings and tiered pricing for varying implementation scales.

#### **5. AI-Driven Analytics and Predictive Insights:**

Discuss the capabilities of your AI-based analytics platform in enhancing decision-making, identifying anomalies, and improving customer engagement.

#### **Minimum Solution Requirements:**

Proposals must also meet the following minimum requirements:

- 1. Compatibility:** Support various communication technologies to accommodate different technical conditions across TXShare members.
- 2. Pricing Structure:** Offer a cooperative discount pricing model with tiered pricing and flexible financing options tailored to implementation phases.
- 3. Data System and Security:** Ensure robust security measures for data protection and compliance across jurisdictions.
- 4. Maintenance and Support:** Provide comprehensive maintenance and support services, including system monitoring and technical support.
- 5. Performance Guarantee and Warranty:** Offer warranties that cover all major components of the AMI system for long-term reliability.
- 6. Customer Engagement:** Include a customer portal with tools for usage monitoring, alerts, and engagement features.
- 7. Training:** Present a training and support plan for smooth implementation and ongoing operation.
- 8. Scalability:** Ensure the solution can scale for future growth in meters and data volume.
- 9. Data Analytics and Reporting:** Incorporate advanced analytics capabilities for actionable insights.
- 10. Disaster Recovery and Business Continuity:** Include robust plans to maintain operational continuity during emergencies.

#### **Catalog Pricing for Products & Services:**

Responding Offerors are requested to submit a proposal that will contain a schedule of products and / or service lines that would qualify under Section 5.0 of these specifications. This schedule is commonly referred to as a “catalog”.

Catalogs contain a range of items that are published in either an electronic or hard copy form and are modified from time to time to reflect internal and external changes in the vendor’s marketplace. It is at the vendor’s discretion to propose any limitations of the goods or services offered. A good or service offered must be listed in the catalog to be eligible for sale through the awarded contract.

Catalogs are to be submitted with the proposal and may be provided electronically using either a PDF document or web link. Use a spreadsheet or a searchable document containing the pricing information. A physically delivered hard copy of the catalog is NOT acceptable.

Catalogs may be priced with a percentage discount or a fixed unit price. Pricing may be one or multiple tiers of varying discounts based on purchase quantity. The discount should be applicable to both the initial purchase and any subsequent orders under the terms of this agreement.

The Respondent should clearly outline:

1. The percentage discount off the catalog list price for each category of products and / or services.
2. Any pricing tiers or volume-based discount thresholds.

**Refer to Exhibit 1 – Proposal Price Excel Worksheet Attachment for completion.**

### EXHIBIT 3: SERVICE DESIGNATION AREAS

| <b>Texas Service Area Designation or Identification</b> |  |   |                                |
|---|--|---|--------------------------------|
| <b>Proposing Firm Name:</b>                             |  |   |                                |
| <b>Notes:</b>   | <b>Indicate in the appropriate box whether you are proposing to service the entire state of Texas</b>  |   |                                |
|   | Will service the entire state of Texas   | Will not service the entire state of Texas                                    |                                |
|   | <input checked="checked" type="checkbox"/>   | <input type="checkbox"/>  |                                |
|   |  |   |                                |
|   | <b>If you are not proposing to service the entire state of Texas, designate on the form below the regions that you are proposing to provide goods and/or services to. By designating a region or regions, you are certifying that you are willing and able to provide the proposed goods and services.</b> |   |                                |
| <b>Item</b>   | <b>Region</b>  | <b>Metropolitan Statistical Areas</b>   | <b>Designated Service Area</b> |
| 1.  | North Central Texas  | 16 counties in the Dallas-Fort Worth Metropolitan area                        |                                |
| 2.  | High Plains  | Amarillo<br>Lubbock   |                                |
| 3.  | Northwest  | Abilene<br>Wichita Falls  |                                |
| 4.  | Upper East   | Longview<br>Texarkana, TX-AR Metro Area<br>Tyler                              |                                |
| 5.  | Southeast  | Beaumont-Port Arthur  |                                |
| 6.  | Gulf Coast   | Houston-The Woodlands-Sugar Land  |                                |
| 7.  | Central Texas  | College Station-Bryan<br>Killeen-Temple<br>Waco                               |                                |
| 8.  | Capital Texas  | Austin-Round Rock   |                                |
| 9.  | Alamo  | San Antonio-New Braunfels<br>Victoria   |                                |
| 10.   | South Texas  | Brownsville-Harlingen<br>Corpus Christi<br>Laredo<br>McAllen-Edinburg-Mission |                                |
| 11.   | West Texas   | Midland<br>Odessa<br>San Angelo   |                                |
| 12.   | Upper Rio Grande   | El Paso   |                                |

(Exhibit 3 continued on next page)

| Nationwide Service Area Designation or Identification Form |   |   |   |                                    |                                    |  |                          |
|--|---|---|---|------------------------------------|------------------------------------|--|--------------------------|
| <b>Proposing Firm Name:</b>                                |   |   |   |                                    |                                    |  |                          |
| <b>Notes:</b>  | <p><b>Indicate in the appropriate box whether you are proposing to provide service to all Fifty (50) States.</b></p> <table border="1"> <tr> <td>Will service all fifty (50) states</td> <td>Will not service fifty (50) states</td> </tr> <tr> <td><input checked="checked" type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> </table> <p><b>If you are not proposing to service to all fifty (50) states, then designate on the form below the states that you will provide service to. By designating a state or states, you are certifying that you are willing and able to provide the proposed goods and services in those states.</b></p> <p><b>If you are only proposing to service a specific region, metropolitan statistical area (MSA), or City in a State, then indicate as such in the appropriate column box.</b></p> |   |   | Will service all fifty (50) states | Will not service fifty (50) states | <input checked="checked" type="checkbox"/> | <input type="checkbox"/> |
| Will service all fifty (50) states                         | Will not service fifty (50) states  |   |   |                                    |                                    |  |                          |
| <input checked="checked" type="checkbox"/>                 | <input type="checkbox"/>  |   |   |                                    |                                    |  |                          |
| <b>Item</b>  | <b>State</b>  | <b>Region/MSA/City<br/>(write "ALL" if proposing to service entire state)</b> | <b>Designated<br/>as a<br/>Service<br/>Area</b> |                                    |                                    |  |                          |
| 1.   | Alabama   |   |   |                                    |                                    |  |                          |
| 2.   | Alaska  |   |   |                                    |                                    |  |                          |
| 3.   | Arizona   |   |   |                                    |                                    |  |                          |
| 4.   | Arkansas  |   |   |                                    |                                    |  |                          |
| 5.   | California  |   |   |                                    |                                    |  |                          |
| 6.   | Colorado  |   |   |                                    |                                    |  |                          |
| 7.   | Connecticut   |   |   |                                    |                                    |  |                          |
| 8.   | Delaware  |   |   |                                    |                                    |  |                          |
| 9.   | Florida   |   |   |                                    |                                    |  |                          |
| 10.  | Georgia   |   |   |                                    |                                    |  |                          |
| 11.  | Hawaii  |   |   |                                    |                                    |  |                          |
| 12.  | Idaho   |   |   |                                    |                                    |  |                          |
| 13.  | Illinois  |   |   |                                    |                                    |  |                          |
| 14.  | Indiana   |   |   |                                    |                                    |  |                          |
| 15.  | Iowa  |   |   |                                    |                                    |  |                          |
| 16.  | Kansas  |   |   |                                    |                                    |  |                          |
| 17.  | Kentucky  |   |   |                                    |                                    |  |                          |
| 18.  | Louisiana   |   |   |                                    |                                    |  |                          |
| 19.  | Maine   |   |   |                                    |                                    |  |                          |
| 20.  | Maryland  |   |   |                                    |                                    |  |                          |

|     |                |  |  |
|-----|----------------|--|--|
| 21. | Massachusetts  |  |  |
| 22. | Michigan       |  |  |
| 23. | Minnesota      |  |  |
| 24. | Mississippi    |  |  |
| 25. | Missouri       |  |  |
| 26. | Montana        |  |  |
| 27. | Nebraska       |  |  |
| 28. | Nevada         |  |  |
| 29. | New Hampshire  |  |  |
| 30. | New Jersey     |  |  |
| 31. | New Mexico     |  |  |
| 32. | New York       |  |  |
| 33. | North Carolina |  |  |
| 34. | North Dakota   |  |  |
| 35. | Ohio           |  |  |
| 36. | Oregon         |  |  |
| 37. | Oklahoma       |  |  |
| 38. | Pennsylvania   |  |  |
| 39. | Rhode Island   |  |  |
| 40. | South Carolina |  |  |
| 41. | South Dakota   |  |  |
| 42. | Tennessee      |  |  |
| 43. | Texas          |  |  |
| 44. | Utah           |  |  |
| 45. | Vermont        |  |  |
| 46. | Virginia       |  |  |
| 47. | Washington     |  |  |
| 48. | West Virginia  |  |  |
| 49. | Wisconsin      |  |  |
| 50. | Wyoming        |  |  |

End of Exhibit 3



**ATTACHMENT I: INSTRUCTIONS  
FOR PROPOSALS COMPLIANCE AND SUBMITTAL**

**Compliance with the Solicitation**

Submissions must be in strict compliance with this solicitation. Failure to comply with all provisions of the solicitation may result in disqualification.

**Compliance with the NCTCOG Standard Terms and Conditions**

By signing its submission, Offeror acknowledges that it has read, understands and agrees to comply with the NCTCOG standard terms and conditions.

**Acknowledgment of Insurance Requirements**

By signing its submission, Offeror acknowledges that it has read and understands the insurance requirements for the submission. Offeror also understands that the evidence of required insurance must be submitted within ten (10) working days following notification of its offer being accepted; otherwise, NCTCOG may rescind its acceptance of the Offeror's proposals. The insurance requirements are outlined in the [NCTCOG Procurement Standard Terms and Conditions](#).


Name of Organization/Contractor(s):

TMG Utility Advisory Services, Inc. dba TMG Consulting, Inc.

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Signature of Authorized Representative:



 Digitally signed by Supriya Mukhapadhyay  
Date: 2025.01.09 13:21:13 +05'30'

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Date: 1-9-2025

## ATTACHMENT II: CERTIFICATIONS OF OFFEROR

I hereby certify that the information contained in this proposal and any attachments is true and correct and may be viewed as an accurate representation of proposed services to be provided by this organization. I certify that no employee, board member, or agent of the North Central Texas Council of Governments has assisted in the preparation of this proposal. I acknowledge that I have read and understand the requirements and provisions of the solicitation and that the organization will comply with the regulations and other applicable local, state, and federal regulations and directives in the implementation of this contract.


I also certify that I have read and understood all sections of this solicitation and will comply with all the terms and conditions as stated; and furthermore that I, Supriya Mukhapadhyay (typed or printed name) certify that I am the CEO of TMG Consulting (title) of the corporation, partnership, or sole proprietorship, or other eligible entity named as offeror and respondent herein and that I am legally authorized to sign this offer and to submit it to the North Central Texas Council of Governments, on behalf of said offeror by authority of its governing body.

Name of Organization/Contractor(s):

TMG Utility Advisory Services, Inc. dba TMG Consulting, Inc.

Signature of Authorized Representative:



 Digitally signed by Supriya Mukhapadhyay  
Date: 2025.01.09 13:23:39 +05'30'

Date: 1-9-2025

**ATTACHMENT III: CERTIFICATION  
REGARDING DEBARMENT, SUSPENSION AND OTHER RESPONSIBILITY MATTERS**

This certification is required by the Federal Regulations Implementing Executive Order 12549, Debarment and Suspension, 45 CFR Part 93, Government-wide Debarment and Suspension, for the Department of Agriculture (7 CFR Part 3017), Department of Labor (29 CFR Part 98), Department of Education (34 CFR Parts 85, 668, 682), Department of Health and Human Services (45 CFR Part 76).

The undersigned certifies, to the best of his or her knowledge and belief, that both it and its principals:

1. Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any federal department or agency;
2. Have not within a three-year period preceding this contract been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State, or Local) transaction or contract under a public transaction, violation of federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification, or destruction of records, making false Proposals, or receiving stolen property;
3. Are not presently indicated for or otherwise criminally or civilly charged by a government entity with commission of any of the offense enumerated in Paragraph (2) of this certification; and,
4. Have not within a three-year period preceding this contract had one or more public transactions terminated for cause or default.

Where the prospective recipient of federal assistance funds is unable to certify to any of the qualifications in this certification, such prospective recipient shall attach an explanation to this certification form.

Name of Organization/Contractor(s):

TMG Utility Advisory Services, Inc. dba TMG Consulting, Inc.

Signature of Authorized Representative:



Digitally signed by Supriya Mukhapadhyay  
Date: 2025.01.09 13:24:40 +05'30'

Date: 1-9-2025

#### **ATTACHMENT IV: RESTRICTIONS ON LOBBYING**

Section 319 of Public Law 101-121 prohibits recipients of federal contracts, grants, and loans exceeding \$100,000 at any tier under a federal contract from using appropriated funds for lobbying the Executive or Legislative Branches of the federal government in connection with a specific contract, grant, or loan. Section 319 also requires each person who requests or receives a federal contract or grant in excess of \$100,000 to disclose lobbying.

No appropriated funds may be expended by the recipient of a federal contract, loan, or cooperative agreement to pay any person for influencing or attempting to influence an officer or employee of any federal executive department or agency as well as any independent regulatory commission or government corporation, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with any of the following covered federal actions: the awarding of any federal contract, the making of any federal grant, the making of any federal loan the entering into of any cooperative agreement and the extension, continuation, renewal, amendment, or modification of any federal contract, grant, loan, or cooperative agreement.

As a recipient of a federal grant exceeding \$100,000, NCTCOG requires its subcontractors of that grant to file a certification, set forth in Appendix B.1, that neither the agency nor its employees have made, or will make, any payment prohibited by the preceding paragraph.

Subcontractors are also required to file with NCTCOG a disclosure form, set forth in Appendix B.2, if the subcontractor or its employees have made or have agreed to make any payment using nonappropriated funds (to include profits from any federal action), which would be prohibited if paid for with appropriated funds.

**LOBBYING CERTIFICATION  
FOR CONTRACTS, GRANTS, LOANS, AND COOPERATIVE AGREEMENTS**

The undersigned certifies, to the best of his or her knowledge or belief, that:


1. No federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an officer or employee of a Member of Congress in connection with the awarding of any federal contract, the making of any federal loan, the entering into of any cooperative Contract, and the extension, continuation, renewal, amendment, or modification of any federal contract, grant, loan, or cooperative contract; and
2. If any funds other than federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this federal contract, grant, loan, and or cooperative contract, the undersigned shall complete and submit Standard Form – LLL, “Disclosure Form to Report Lobbying”, in accordance with the instructions.
3. The undersigned shall require that the language of this certification be included in the award documents for all sub-awards at all tiers and that all sub-recipients shall certify accordingly.

Name of Organization/Contractor(s):

TMG Utility Advisory Services, Inc., dba TMG Consulting, Inc.

Signature of Authorized Representative:



 Digitally signed by Supriya Mukhapadhyay  
Date: 2025.01.09 13:26:23 +05'30'

Date: 1-9-2025



## ATTACHMENT V: DRUG-FREE WORKPLACE CERTIFICATION

The TMG Utility Advisory Services, Inc. dba TMG Consulting, Inc. (company name) will provide a Drug Free Work Place in compliance with the Drug Free Work Place Act of 1988. The unlawful manufacture, distribution, dispensing, possession or use of a controlled substance is prohibited on the premises of the TMG Utility Advisory Services, Inc. dba TMG Consulting, Inc. (company name) or any of its facilities. Any employee who violates this prohibition will be subject to disciplinary action up to and including termination. All employees, as a condition of employment, will comply with this policy.

### CERTIFICATION REGARDING DRUG-FREE WORKPLACE

This certification is required by the Federal Regulations Implementing Sections 5151-5160 of the Drug-Free Workplace Act, 41 U.S.C. 701, for the Department of Agriculture (7 CFR Part 3017), Department of Labor (29 CFR Part 98), Department of Education (34 CFR Parts 85, 668 and 682), Department of Health and Human Services (45 CFR Part 76).

The undersigned subcontractor certifies it will provide a drug-free workplace by:

Publishing a policy Proposal notifying employees that the unlawful manufacture, distribution, dispensing, possession or use of a controlled substance is prohibited in the workplace and specifying the consequences of any such action by an employee;

Establishing an ongoing drug-free awareness program to inform employees of the dangers of drug abuse in the workplace, the subcontractor's policy of maintaining a drug-free workplace, the availability of counseling, rehabilitation and employee assistance programs, and the penalties that may be imposed on employees for drug violations in the workplace;

Providing each employee with a copy of the subcontractor's policy Proposal;

Notifying the employees in the subcontractor's policy Proposal that as a condition of employment under this subcontract, employees shall abide by the terms of the policy Proposal and notifying the subcontractor in writing within five days after any conviction for a violation by the employee of a criminal drug abuse statute in the workplace;

Notifying the Board within ten (10) days of the subcontractor's receipt of a notice of a conviction of any employee; and,

Taking appropriate personnel action against an employee convicted of violating a criminal drug statute or requires such employee to participate in a drug abuse assistance or rehabilitation program.

Name of Organization/Contractor(s):

TMG Utility Advisory Services, Inc. dba TMG Consulting, Inc.

Signature of Authorized Representative:



Digitally signed by Supriya Mukhapadhyay  
Date: 2025.01.09 13:28:19 +05'30'

Date: 1-9-2025

**ATTACHMENT VI: DISCLOSURE OF CONFLICT OF INTEREST**  
**CERTIFICATION REGARDING DISCLOSURE OF CONFLICT OF INTEREST**

The undersigned certifies that, to the best of his or her knowledge or belief, that:

“No employee of the contractor, no member of the contractor’s governing board or body, and no person who exercises any functions or responsibilities in the review or approval of the undertaking or carrying out of this contract shall participate in any decision relating to this contract which affects his/her personal pecuniary interest.

Executives and employees of contractor shall be particularly aware of the varying degrees of influence that can be exerted by personal friends and associates and, in administering the contract, shall exercise due diligence to avoid situations which give rise to an assertion that favorable treatment is being granted to friends and associates. When it is in the public interest for the contractor to conduct business with a friend or associate of an executive or employee of the contractor, an elected official in the area or a member of the North Central Texas Council of Governments, a permanent record of the transaction shall be retained.

Any executive or employee of the contractor, an elected official in the area or a member of the NCTCOG, shall not solicit or accept money or any other consideration from a third person, for the performance of an act reimbursed in whole or part by contractor or Department. Supplies, tools, materials, equipment or services purchased with contract funds shall be used solely for purposes allowed under this contract. No member of the NCTCOG shall cast a vote on the provision of services by that member (or any organization which that member represents) or vote on any matter which would provide a direct or indirect financial benefit to the member or any business or organization which the member directly represents”.

No officer, employee or paid consultant of the contractor is a member of the NCTCOG.

No officer, manager or paid consultant of the contractor is married to a member of the NCTCOG.

No member of NCTCOG directly owns, controls or has interest in the contractor.

The contractor has disclosed any interest, fact, or circumstance that does or may present a potential conflict of interest.

No member of the NCTCOG receives compensation from the contractor for lobbying activities as defined in Chapter 305 of the Texas Government Code.

Should the contractor fail to abide by the foregoing covenants and affirmations regarding conflict of interest, the contractor shall not be entitled to the recovery of any costs or expenses incurred in relation to the contract and shall immediately refund to the North Central Texas Council of Governments any fees or expenses that may have been paid under this contract and shall further be liable for any other costs incurred or damages sustained by the NCTCOG as it relates to this contract.

Name of Organization/Contractor(s):

TMG Utility Advisory Services, Inc. dba TMG Consulting, Inc.

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Signature of Authorized Representative:



Digitally signed by Supriya Mukhapadhyay  
Date: 2025.01.09 13:30:33 +05'30'

Date: 1-9-2025

## ATTACHMENT VII: CERTIFICATION OF FAIR BUSINESS PRACTICES

That the submitter has not been found guilty of unfair business practices in a judicial or state agency administrative proceeding during the preceding year. The submitter further affirms that no officer of the submitter has served as an officer of any company found guilty of unfair business practices in a judicial or state agency administrative during the preceding year.

Name of Organization/Contractor(s):

TMG Utility Advisory Services, Inc. dba TMG Consulting, Inc.

---

Signature of Authorized Representative:

*Supriya Mukhapadhyay*

Digitally signed by Supriya Mukhapadhyay  
Date: 2025.01.09 16:12:20 +05'30'

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Date: 1-9-2025

**ATTACHMENT VIII: CERTIFICATION OF GOOD STANDING  
TEXAS CORPORATE FRANCHISE TAX CERTIFICATION**

Pursuant to Article 2.45, Texas Business Corporation Act, state agencies may not contract with for profit corporations that are delinquent in making state franchise tax payments. The following certification that the corporation entering into this offer is current in its franchise taxes must be signed by the individual authorized on Form 2031, Corporate Board of Directors Resolution, to sign the contract for the corporation.

The undersigned authorized representative of the corporation making the offer herein certified that the following indicated Proposal is true and correct and that the undersigned understands that making a false Proposal is a material breach of contract and is grounds for contract cancellation.

Indicate the certification that applies to your corporation:

☒

The Corporation is a for-profit corporation and certifies that it is not delinquent in its franchise tax payments to the State of Texas.

☐

The Corporation is a non-profit corporation or is otherwise not subject to payment of franchise taxes to the State of Texas.

Type of Business (if not corporation):

☐

Sole Proprietor

☐

Partnership

☐

Other

Pursuant to Article 2.45, Texas Business Corporation Act, the North Central Texas Council of Governments reserves the right to request information regarding state franchise tax payments.

**TMG Utility Advisory Services, Inc. dba TMG Cons**

(Printed/Typed Name and Title of Authorized Representative)

*Supriya Mukhapadhyay*

Digitally signed by Supriya Mukhapadhyay  
Date: 2025.01.09 16:14:31 +05'30'

Signature

Date: 1/9/25

**ATTACHMENT IX: HISTORICALLY UNDERUTILIZED BUSINESSES,  
MINORITY OR WOMEN-OWNED OR DISADVANTAGED BUSINESS ENTERPRISES**

Historically Underutilized Businesses (HUBs), minority or women-owned or disadvantaged businesses enterprises (M/W/DBE) are encouraged to participate in the solicitation process.

NCTCOG recognizes the certifications of most agencies. HUB vendors must submit a copy of their certification for consideration during the evaluation of their proposal. Please attach the copy to this form. This applies only to the Offeror and not a subcontractor.

Texas vendors who are not currently certified are encouraged to contact either the Texas United Certification Program, State of Texas HUB Program, or the North Central Texas Regional Certification Agency, among others. Contact:

State of Texas HUB Program  
Texas Comptroller of Public Accounts  
Lyndon B. Johnson State Office Building  
111 East 17th Street  
Austin, Texas 78774  
(512) 463-6958  
<http://www.window.state.tx.us/procurement/prog/hub/>

North Central Texas Regional Certification Agency  
624 Six Flags Drive, Suite 100  
Arlington, TX 76011  
(817) 640-0606  
<http://www.nctrca.org/certification.html>

Texas United Certification Program  
USDOT website at  
<https://www.transportation.gov/DBE>

**You must include a copy of your certification document as part of this solicitation to receive points in the evaluation.**

**Vendor to Sign Below to Attest to Validity of Certification:**

\_\_\_\_\_  
Vendor Name

\_\_\_\_\_  
Authorized Signature

\_\_\_\_\_  
Typed Name

\_\_\_\_\_  
Date

☒ Not applicable.

**ATTACHMENT X: NCTCOG FEDERAL AND STATE OF TEXAS  
REQUIRED PROCUREMENT PROVISIONS**

**The following provisions are mandated by Federal and/or State of Texas law. Failure to certify to the following will result in disqualification of consideration for contract. Entities or agencies that are not able to comply with the following will be ineligible for consideration of contract award.**

**PROHIBITED TELECOMMUNICATIONS AND VIDEO SURVEILLANCE SERVICES OR EQUIPMENT  
CERTIFICATION**

This Contract is subject to the Public Law 115-232, Section 889, and 2 Code of Federal Regulations (CFR) Part 200, including §200.216 and §200.471, for prohibition on certain telecommunications and video surveillance or equipment. Public Law 115-232, Section 889, identifies that restricted telecommunications and video surveillance equipment or services (e.g., phones, internet, video surveillance, cloud servers) include the following:

- A) Telecommunications equipment that is produced by Huawei Technologies Company or ZTE Corporation (or any subsidiary or affiliates of such entities).
- B) Video surveillance and telecommunications equipment produced by Hytera Communications Corporations, Hangzhou Hikvision Digital Technology Company, or Dahua Technology Company (or any subsidiary or affiliates of such entities).
- C) Telecommunications or video surveillance services used by such entities or using such equipment.
- D) Telecommunications or video surveillance equipment or services produced or provided by an entity that the Secretary of Defense, Director of the National Intelligence, or the Director of the Federal Bureau of Investigation reasonably believes to be an entity owned or controlled by the government of a covered foreign country. The entity identified below, through its authorized representative, hereby certifies that no funds under this Contract will be obligated or expended to procure or obtain telecommunication or video surveillance services or equipment or systems that use covered telecommunications equipment or services as a substantial or essential component of any system, or as a critical technology as part of any system prohibited by 2 CFR §200.216 and §200.471, or applicable provisions in Public Law 115-232 Section 889.

☒ The Contractor or Subrecipient hereby certifies that it does comply with the requirements of 2 CFR §200.216 and §200.471, or applicable regulations in Public Law 115-232 Section 889.

*Supriya Mukhapadhyay*

Digitally signed by Supriya Mukhapadhyay  
Date: 2025.01.09 16:32:36 +05'30'

**SIGNATURE OF AUTHORIZED PERSON:**

**NAME OF AUTHORIZED PERSON:**

Supriya Mukhapadhyay

**NAME OF COMPANY:**

TMG Utility Advisory Services, Inc. dba TMG 

**DATE:**

1/9/25

-OR-

☐ The Contractor or Subrecipient hereby certifies that it cannot comply with the requirements of 2 CFR §200.216 and §200.471, or applicable regulations in Public Law 115-232 Section 889.

**SIGNATURE OF AUTHORIZED PERSON:**

**NAME OF AUTHORIZED PERSON:**

**NAME OF COMPANY:**

**DATE:**



## DISCRIMINATION AGAINST FIREARMS ENTITIES OR FIREARMS TRADE ASSOCIATIONS

This contract is subject to the Texas Local Government Code chapter 2274, Subtitle F, Title 10, prohibiting contracts with companies who discriminate against firearm and ammunition industries.

TLGC chapter 2274, Subtitle F, Title 10, identifies that “discrimination against a firearm entity or firearm trade association” includes the following:

- A) means, with respect to the entity or association, to:
- I. refuse to engage in the trade of any goods or services with the entity or association based solely on its status as a firearm entity or firearm trade association; and
  - II. refrain from continuing an existing business relationship with the entity or association based solely on its status as a firearm entity or firearm trade association; or
  - III. terminate an existing business relationship with the entity or association based solely on its status as a firearm entity or firearm trade association.
- B) An exception to this provision excludes the following:
- I. contracts with a sole-source provider; or
  - II. the government entity does not receive bids from companies who can provide written verification.

The entity identified below, through its authorized representative, hereby certifies that they have no practice, policy, guidance, or directive that discriminates against a firearm entity or firearm trade association; and that they will not discriminate during the term of the contract against a firearm entity or firearm trade association as prohibited by Chapter 2274, Subtitle F, Title 10 of the Texas Local Government Code.

☒ The Contractor or Subrecipient hereby certifies that it does comply with the requirements of Chapter 2274, Subtitle F, Title 10.

**SIGNATURE OF AUTHORIZED  
PERSON:**

**NAME OF AUTHORIZED PERSON:**

**NAME OF COMPANY:**

**DATE:**

Supriya Mukhapadhyay

TMG Utility Advisory Services, Inc. dba TMG Consulting, Inc.

1/9/25

**-OR-**

☐ The Contractor or Subrecipient hereby certifies that it cannot comply with the requirements of Chapter 2274, Subtitle F, Title 10.

**SIGNATURE OF AUTHORIZED  
PERSON:**

**NAME OF AUTHORIZED PERSON:**

**NAME OF COMPANY:**

**DATE:**

## BOYCOTTING OF CERTAIN ENERGY COMPANIES

This contract is subject to the Texas Local Government Code chapter 809, Subtitle A, Title 8, prohibiting contracts with companies who boycott certain energy companies.

TLGC chapter Code chapter 809, Subtitle A, Title 8, identifies that “boycott energy company” means, without an ordinary business purpose, refusing to deal with, terminating business activities with, or otherwise taking any action that is intended to penalize, inflict economic harm on, or limit commercial relations with a company because the company:

- I. engages in the exploration, production, utilization, transportation, sale, or manufacturing of fossil fuel-based energy and does not commit or pledge to meet environmental standards beyond applicable federal and state law; and
- II. does business with a company described by paragraph (I).

The entity identified below, through its authorized representative, hereby certifies that they do not boycott energy companies, and that they will not boycott energy companies during the term of the contract as prohibited by Chapter 809, Subtitle A, Title 8 of the Texas Local Government Code.

☒ The Contractor or Subrecipient hereby certifies that it does comply with the requirements of Chapter 809, Subtitle A, Title 8.

SIGNATURE OF AUTHORIZED PERSON:

*Supriya Mukhapadhyay*

Digitally signed by Supriya Mukhapadhyay  
Date: 2025.01.09 16:40:52 +05'30'

NAME OF AUTHORIZED PERSON:

Supriya Mukhapadhyay

NAME OF COMPANY:

TMG Utility Advisory Services, Inc. dba TMG Consulting, Inc.

DATE:

1/9/25

**-OR-**

☐ The Contractor or Subrecipient hereby certifies that it cannot comply with the requirements of Chapter 809, Subtitle A, Title 8.

SIGNATURE OF AUTHORIZED PERSON:

NAME OF AUTHORIZED PERSON:

NAME OF COMPANY:

DATE: