


CITY OF MARYSVILLE AGENDA BILL

EXECUTIVE SUMMARY FOR ACTION

CITY COUNCIL MEETING DATE: 12/8/2014

AGENDA ITEM: SCADA & Telemetry System Upgrade	
PREPARED BY: Roy A. Alderman DEPARTMENT: Finance/Information Services	DIRECTOR APPROVAL: 
ATTACHMENTS: PSA, Exhibit A (Scope of Work), Exhibit B (Proposal)	
BUDGET CODE: 40220594.563000 W1407	AMOUNT: \$53,675.00

SUMMARY:

The City needs the assistance of K2 Data Systems to migrate our current Supervisory Control and Data Acquisition (SCADA) system to a more modern architecture. This will afford the City's Utilities and Water Resources departments better access to their operational data, while in the field or in their offices. For the Information Systems department, this will provide increased operational and data redundancy, in support of our Emergency Disaster Recovery goals. Existing complexity, of on-going maintenance tasks and other enhancement projects, will be reduced, allowing increased productivity of the SCADA/Telemetry Administrator and more time to focus on other aspects of supporting Operations and Maintenance personnel.

The selection process was a competitive RFP, based initially on MRSC listing under the Consultant sub-category of SCADA/Telemetry, and secondarily listed by Wonderware as a Certified Integrator. The proposal was scored by five knowledgeable personnel within the City. K2 Data received the highest score based on qualifications, experience, and price.

RECOMMENDED ACTION:

Staff recommends that Council Authorize the Mayor to sign the Professional Services Agreement

**PROFESSIONAL SERVICES AGREEMENT BETWEEN
CITY OF MARYSVILLE
AND K2 DATA SYSTEMS
FOR CONSULTANT SERVICES**

THIS AGREEMENT (“Agreement”) is made and entered into by and between the City of Marysville, a Washington State municipal corporation (“City”), and K2 Data Systems, a Washington State corporation (“Consultant”).

NOW, THEREFORE, in consideration of the terms, conditions, covenants and performances contained herein, the parties hereto agree as follows:

ARTICLE I. PURPOSE

The purpose of this Agreement is to provide the City with consultant services regarding **UPGRADE AND CONSOLIDATION OF THE CITY’S SCADA SOFTWARE, APPLICATIONS AND HISTORICAL DATA COLLECTION** as described in Article II. The general terms and conditions of the relationship between the City and the Consultant are specified in this Agreement.

ARTICLE II. SCOPE OF SERVICES

The Scope of Services is attached hereto as **Exhibit “A”** and incorporated herein by this reference (“Scope of Services”). All services and materials necessary to accomplish the tasks outlined in the Scope of Services shall be provided by the Consultant unless noted otherwise in the Scope of Services or this Agreement. All such services shall be provided in accordance with the standards of the Consultant’s profession.

ARTICLE III. OBLIGATIONS OF THE CONSULTANT

III.1 MINOR CHANGES IN SCOPE. The Consultant shall accept minor changes, amendments, or revision in the detail of the Scope of Services as may be required by the City when such changes will not have any impact on the service costs or proposed delivery schedule. Extra work, if any, involving substantial changes and/or changes in cost or schedules will be addressed as follows:

Extra Work. The City may desire to have the Consultant perform work or render services in connection with each project in addition to or other than work provided for by the expressed intent of the Scope of Services in the scope of services. Such work will be considered as extra work and will be specified in a written supplement to the scope of services, to be signed by both parties, which will set forth the nature and the scope thereof. All proposals for extra work or services shall be prepared by the Consultant at no

cost to the City. Work under a supplemental agreement shall not proceed until executed in writing by the parties.

III.2 WORK PRODUCT AND DOCUMENTS. The work product and all documents produced under this Agreement shall be furnished by the Consultant to the City, and upon completion of the work shall become the property of the City, except that the Consultant may retain one copy of the work product and documents for its records. The Consultant will be responsible for the accuracy of the work, even though the work has been accepted by the City.

In the event that the Consultant shall default on this Agreement or in the event that this Agreement shall be terminated prior to its completion as herein provided, all work product of the Consultant, along with a summary of work as of the date of default or termination, shall become the property of the City. Upon request, the Consultant shall tender the work product and summary to the City. Tender of said work product shall be a prerequisite to final payment under this Agreement. The summary of work done shall be prepared at no additional cost to the City.

Consultant will not be held liable for reuse of documents produced under this Agreement or modifications thereof for any purpose other than those authorized under this Agreement without the written authorization of Consultant.

III.3 TERM. The term of this Agreement shall commence on on DECEMBER 22ND, 2014 and shall terminate at midnight, JULY 3RD, 2015. The parties may extend the term of this Agreement by written mutual agreement.

III.4 NONASSIGNABLE. The services to be provided by the Consultant shall not be assigned or subcontracted without the express written consent of the City.

III.5 EMPLOYMENT.

a. The term “employee” or “employees” as used herein shall mean any officers, agents, or employee of the of the Consultant.

b. Any and all employees of the Consultant, while engaged in the performance of any work or services required by the Consultant under this Agreement, shall be considered employees of the Consultant only and not of the City, and any and all claims that may or might arise under the Workman's Compensation Act on behalf of any said employees while so engaged, and any and all claims made by any third party as a consequence of any negligent act or omission on the part of the Consultant or its employees while so engaged in any of the work or services provided herein shall be the sole obligation of the Consultant.

c. Consultant represents, unless otherwise indicated below, that all employees of Consultant that will provide any of the work under this Agreement have not ever been retired from a Washington State retirement system, including but not limited to Teacher (TRS), School District (SERS), Public Employee (PERS), Public Safety

(PSERS), law enforcement and fire fighters (LEOFF), Washington State Patrol (WSPRS), Judicial Retirement System (JRS), or otherwise. *(Please indicate No or Yes below)*

_____ No employees supplying work have ever been retired from a Washington state retirement system.

_____ Yes employees supplying work have been retired from a Washington state retirement system.

In the event the Consultant indicates “no”, but an employee in fact was a retiree of a Washington State retirement system, and because of the misrepresentation the City is required to defend a claim by the Washington State retirement system, or to make contributions for or on account of the employee, or reimbursement to the Washington State retirement system for benefits paid, Consultant hereby agrees to save, indemnify, defend and hold City harmless from and against all expenses and costs, including reasonable attorney’s fees incurred in defending the claim of the Washington State retirement system and from all contributions paid or required to be paid, and for all reimbursement required to the Washington State retirement system. In the event Consultant affirms that an employee providing work has ever retired from a Washington State retirement system, said employee shall be identified by Consultant, and such retirees shall provide City with all information required by City to report the employment with Consultant to the Department of Retirement Services of the State of Washington.

III.6 INDEMNITY.

a. **Indemnification / Hold Harmless.** Consultant shall defend, indemnify and hold the City, its officers, officials, employees and volunteers harmless from any and all claims, injuries, damages, losses or suits including attorney fees, arising out of or resulting from the acts, errors or omissions of the Consultant in performance of this Agreement, except for injuries and damages caused by the sole negligence of the City.

b. Should a court of competent jurisdiction determine that this Agreement is subject to RCW 4.24.115, then, in the event of liability for damages arising out of bodily injury to persons or damages to property caused by or resulting from the concurrent negligence of the Consultant and the City, its officers, officials, employees, and volunteers, the Consultant's liability, including the duty and cost to defend, hereunder shall be only to the extent of the Consultant's negligence.

c. The provisions of this section shall survive the expiration or termination of this agreement.

d. For the purposes of the indemnity contained in subpart “A” of this paragraph 3.6, Consultant hereby knowing, intentionally, and voluntarily waives the immunity of the Industrial Insurance Act, Title 51 RCW, solely for the purposes of this

indemnification. This waiver has been mutually negotiated by the parties.

_____(initials) _____(initials)

III.7 INSURANCE.

a. **Minimum Limits of Insurance.** The Consultant shall procure, and maintain for the duration of the Agreement, insurance against claims for injuries to persons or damage to property which may arise from or in connection with the performance of the work and services hereunder by the Consultant, its agents, representatives, employees or subcontractors. The Consultant shall, before commencing work under this agreement, file with the City certificates of insurance coverage and the policy endorsement to be kept in force continuously during this Agreement, in a form acceptable to the City. Said certificates and policy endorsement shall name the City, its officers, elected officials, agents and/or employees as an additional named insured with respect to all coverages except professional liability insurance and workers' compensation.

b. **Minimum Scope of Insurance - Consultant shall obtain insurance of the types described below:**

- (1). Automobile Liability insurance covering all owned, non-owned, hired and leased vehicles. Coverage shall be written on Insurance Services Office (ISO) form CA 00 01 or a substitute form providing equivalent liability coverage. If necessary, the policy shall be endorsed to provide contractual liability coverage.
- (2). Commercial General Liability insurance shall be written on ISO occurrence form CG 00 01 and shall cover liability arising from premises, operations, independent contractors and personal injury and advertising injury. The City shall be named as an insured under the Consultant's Commercial General Liability insurance policy with respect to the work performed for the City.
- (3). Workers' Compensation coverage as required by the Industrial Insurance laws of the State of Washington.
- (4). Professional Liability insurance appropriate to the Consultant's profession.

c. **The minimum insurance limits shall be as follows:**

- (1) Comprehensive General Liability. \$1,000,000 combined single limit per occurrence for bodily injury personal injury and property damage; \$2,000,000 general aggregate.

(2) Automobile Liability. \$1,000,000 combined single limit per accident for bodily injury and property damage.

(3) Workers' Compensation. Workers' compensation limits as required by the Workers' Compensation Act of Washington.

(4) Professional Liability/Consultant's Errors and Omissions Liability. \$1,000,000 per claim and \$1,000,000 as an annual aggregate.

d. **Notice of Cancellation.** In the event that the Consultant receives notice (written, electronic or otherwise) that any of the above required insurance coverage is being cancelled and/or terminated, the Consultant shall immediately (within forty-eight (48) hours) provide written notification of such cancellation/termination to the City.

e. **Acceptability of Insurers.** Insurance to be provided by Consultant shall be with a current A.M.Bests rating of no less than A:VII, or if not rated by Bests, with minimum surpluses the equivalent of Bests' VII rating.

f. **Verification of Coverage.** In signing this agreement, the Consultant is acknowledging and representing that required insurance is active and current. Consultant shall furnish the City with original certificates and a copy of the amendatory endorsements, including but not necessarily limited to the additional insured endorsement, evidencing the insurance requirements of the Consultant before commencement of the work. Further, throughout the term of this Agreement, the Consultant shall provide the City with proof of insurance upon request by the City.

g. **Insurance shall be Primary.** The Consultant's insurance coverage shall be primary insurance as respect the City. Any insurance, self-insurance, or insurance pool coverage maintained by the City shall be excess of the Consultant's insurance and shall not contribute with it.

h. **No Limitation.** Consultant's maintenance of insurance as required by this Agreement shall not be construed to limit the liability of the Consultant to the coverage provided by such insurance or otherwise limit the recourse to any remedy available at law or in equity.

i. **Claims-made Basis.** Unless approved by the City all insurance policies shall be written on an "Occurrence" policy as opposed to a "Claims-made" policy. The City may require an extended reporting endorsement on any approved "Claims-made" policy.

j. **Failure to Maintain Insurance** Failure on the part of the Consultant to maintain the insurance as required shall constitute a material breach of contract, upon which the City may, after giving five business days' notice to the Consultant to correct

the breach, immediately terminate the contract or, at its discretion, procure or renew such insurance and pay any and all premiums in connection therewith, with any sums so expended to be repaid to the City on demand, or at the sole discretion of the City, offset against funds due the Consultant from the City.

III.8 DISCRIMINATION PROHIBITED AND COMPLIANCE WITH EQUAL OPPORTUNITY LEGISLATION. The Consultant agrees to comply with equal opportunity employment and not to discriminate against client, employee, or applicant for employment or for services because of race, creed, color, religion, national origin, marital status, sex, sexual orientation, age or handicap except for a bona fide occupational qualification with regard, but not limited to, the following: employment upgrading; demotion or transfer; recruitment or any recruitment advertising; layoff or terminations; rates of pay or other forms of compensation; selection for training, rendition of services. The Consultant further agrees to maintain (as appropriate) notices, posted in conspicuous places, setting forth the provisions of this nondiscrimination clause. The Consultant understands and agrees that if it violates this nondiscrimination provision, this Agreement may be terminated by the City, and further that the Consultant will be barred from performing any services for the City now or in the future, unless a showing is made satisfactory to the City that discriminatory practices have been terminated and that recurrence of such action is unlikely.

III.9 UNFAIR EMPLOYMENT PRACTICES. During the performance of this Agreement, the Consultant agrees to comply with RCW 49.60.180, prohibiting unfair employment practices.

III.10 LEGAL RELATIONS. The Consultant shall comply with all federal, state and local laws and ordinances applicable to work to be done under this Agreement. The Consultant represents that the firm and all employees assigned to work on any City project are in full compliance with the statutes of the State of Washington governing activities to be performed and that all personnel to be assigned to the work required under this Agreement are fully qualified and properly licensed to perform the work to which they will be assigned. This Agreement shall be interpreted and construed in accordance with the laws of Washington. Venue for any litigation commenced relating to this Agreement shall be in Snohomish County Superior Court.

III.11 INDEPENDENT CONTRACTOR.

a. The Consultant and the City understand and expressly agree that the Consultant is an independent contractor in the performance of each and every part of this Agreement. The Consultant expressly represents warrants and agrees that his status as an independent contractor in the performance of the work and services required under this Agreement is consistent with and meets the six-part independent contractor test set forth in RCW 51.08.195 or as hereafter amended. The Consultant, as an independent contractor, assumes the entire responsibility for carrying out and accomplishing the services required under this Agreement. The Consultant shall make no claim of City

employment nor shall claim any related employment benefits, social security, and/or retirement benefits.

b. The Consultant shall be solely responsible for paying all taxes, deductions, and assessments, including but not limited to federal income tax, FICA, social security tax, assessments for unemployment and industrial injury, and other deductions from income which may be required by law or assessed against either party as a result of this Agreement. In the event the City is assessed a tax or assessment as a result of this Agreement, the Consultant shall pay the same before it becomes due.

c. The City may, during the term of this Agreement, engage other independent contractors to perform the same or similar work that the Consultant performs hereunder.

d. Prior to commencement of work, the Consultant shall obtain a business license from the City.

III.12 CONFLICTS OF INTEREST. The Consultant agrees to and shall notify the City of any potential conflicts of interest in Consultant's client base and shall obtain written permission from the City prior to providing services to third parties where a conflict or potential conflict of interest is apparent. If the City determines in its sole discretion that a conflict is irreconcilable, the City reserves the right to terminate this Agreement.

III.13 CITY CONFIDENCES. The Consultant agrees to and will keep in strict confidence, and will not disclose, communicate or advertise to third parties without specific prior written consent from the City in each instance, the confidences of the City or any information regarding the City or services provided to the City.

III.14 SUBCONTRACTORS/SUBCONSULTANTS.

a. The Consultant shall is responsible for all work performed by subcontractors/subconsultants pursuant to the terms of this Agreement.

b. The Consultant must verify that any subcontractors/subconsultants they directly hire meet the responsibility criteria for the project. Verification that a subcontractor/subconsultant has proper license and bonding, if required by statute, must be included in the verification process. The Consultant will use the following Subcontractors/Subconsultants or as set forth in Exhibit B:

No Subcontractors/Subconsultants will be used.

c. The Consultant may not substitute or add subcontractors/subconsultants without the written approval of the City.

d. All Subcontractors/Subconsultants shall have the same insurance coverages and limits as set forth in this Agreement and the Consultant shall provide verification of said insurance coverage.

ARTICLE IV. OBLIGATIONS OF THE CITY

IV.1 PAYMENTS.

a. The Consultant shall be paid by the City for services rendered under this Agreement as described in the Scope of Services and as provided in this section. In no event shall the compensation paid to Consultant under this Agreement exceed **\$53,675** without the written agreement of the Consultant and the City. Such payment shall be full compensation for work performed and services rendered and for all labor, materials, supplies, equipment and incidentals necessary to complete the work. In the event the City elects to expand the scope of services from that set forth in Exhibit A, the City shall pay Consultant a mutually agreed amount.

b. The Consultant shall submit a monthly invoice to the City for services performed in the previous calendar month in a format acceptable to the Cities. The Consultant shall maintain time and expense records and provide them to the Cities upon request.

c. The City will pay timely submitted and approved invoices received before the 20th of each month within thirty (30) days of receipt.

IV.2 CITY APPROVAL. Notwithstanding the Consultant's status as an independent contractor, results of the work performed pursuant to this Agreement must meet the approval of the City, which shall not be unreasonably withheld if work has been completed in compliance with the Scope of Services and City requirements.

IV.3 MAINTENANCE/INSPECTION OF RECORDS. The Consultant shall maintain all books, records, documents and other evidence pertaining to the costs and expenses allowable under this Agreement in accordance with generally accepted accounting practices. All such books and records required to be maintained by this Agreement shall be subject to inspection and audit by representatives of the City and/or the Washington State Auditor at all reasonable times, and the Consultant shall afford the proper facilities for such inspection and audit. Representatives of the City and/or the Washington State Auditor may copy such books, accounts and records where necessary to conduct or document an audit. The Consultant shall preserve and make available all such books of account and records for a period of three (3) years after final payment under this Agreement. In the event that any audit or inspection identifies any discrepancy in such financial records, the Consultant shall provide the City with appropriate clarification and/or financial adjustments within thirty (30) calendar days of notification of the discrepancy.

ARTICLE V. GENERAL

V.1 **NOTICES.** Notices to the City shall be sent to the following address:

CITY OF MARYSVILLE
c/o April O'Brien, Deputy City Clerk
1049 Stave Ave
MARYSVILLE, WA 98270

Notices to the Consultant shall be sent to the following address:

K2 Data Systems
c/o Colin Loader, Regional Manager
2442 NW Market ST, #216
Seattle, WA 98107

Receipt of any notice shall be deemed effective three (3) days after deposit of written notice in the U.S. mail with proper postage and address.

V.2 **TERMINATION.** The right is reserved by the City to terminate this Agreement in whole or in part at any time upon ten (10) calendar days' written notice to the Consultant.

If this Agreement is terminated in its entirety by the City for its convenience, the City shall pay the Consultant for satisfactory services performed through the date of termination in accordance with payment provisions of Section VI.1.

V.3 **DISPUTES.** The parties agree that, following reasonable attempts at negotiation and compromise, any unresolved dispute arising under this Agreement may be resolved by a mutually agreed-upon alternative dispute resolution of arbitration or mediation.

V.4 **EXTENT OF AGREEMENT/MODIFICATION.** This Agreement, together with attachments or addenda, represents the entire and integrated Agreement between the parties and supersedes all prior negotiations, representations, or agreements, either written or oral. This Agreement may be amended, modified or added to only by written instrument properly signed by both parties.

V.5 **SEVERABILITY**

a. If a court of competent jurisdiction holds any part, term or provision of this Agreement to be illegal or invalid, in whole or in part, the validity of the remaining provisions shall not be affected, and the parties' rights and obligations shall be construed and enforced as if the Agreement did not contain the particular provision held to be invalid.

b. If any provision of this Agreement is in direct conflict with any statutory

provision of the State of Washington, that provision which may conflict shall be deemed inoperative and null and void insofar as it may conflict, and shall be deemed modified to conform to such statutory provision.

V.6 **NONWAIVER.** A waiver by either party hereto of a breach by the other party hereto of any covenant or condition of this Agreement shall not impair the right of the party not in default to avail itself of any subsequent breach thereof. Leniency, delay or failure of either party to insist upon strict performance of any agreement, covenant or condition of this Agreement, or to exercise any right herein given in any one or more instances, shall not be construed as a waiver or relinquishment of any such agreement, covenant, condition or right.

V.7 **FAIR MEANING.** The terms of this Agreement shall be given their fair meaning and shall not be construed in favor of or against either party hereto because of authorship. This Agreement shall be deemed to have been drafted by both of the parties.

V.8 **GOVERNING LAW.** This Agreement shall be governed by and construed in accordance with the laws of the State of Washington.

V.9 **VENUE.** The venue for any action to enforce or interpret this Agreement shall lie in the Superior Court of Washington for Snohomish County, Washington.

V.10 **COUNTERPARTS.** This Agreement may be executed in one or more counterparts, each of which shall be deemed an original, but all of which shall constitute one and the same Agreement.

V.11 **AUTHORITY TO BIND PARTIES AND ENTER INTO AGREEMENT.** The undersigned represent that they have full authority to enter into this Agreement and to bind the parties for and on behalf of the legal entities set forth below.

DATED this _____ day of _____, 2014.

CITY OF MARYSVILLE

K2 DATA SYSTEMS

By _____
Jon Nehring
Mayor

By _____
Colin Loader
Regional Manager

Approved as to form:

Marysville, City Attorney

Exhibit A Scope of Services

DESCRIPTION OF PROJECT

The City wants to combine both of their existing Water and Wastewater InTouch applications into one application. This will enable the City to have greater application and data redundancy, and allow for enhanced remote access for offsite monitoring and control purposes. The Consultant, which is a Regional Certified Partner, certified by Wonderware to have previously completed similar projects and maintains personnel with required, on-going training, will provide Professional Engineering Services for the upgrade of the City's SCADA System, which will include (but not be limited to):

1. Combination of the City's current two Wonderware InTouch stand-alone NAD (Networked Application Development) applications, into a single System Platform, Application Server Galaxy that can be deployed to the existing four SCADA PC's.
 - a. Merge existing tagname dictionary.
 - b. Import Water system screens into Sewer app.
 - c. Edits to navigation and security.
 - d. Import Water system scripts into Sewer app.
 - e. Convert Water system window links
 - f. Convert Water system script links
 - g. Convert Sewer system window links
 - h. Convert Sewer system script links
2. Modify the existing Data Access Services (DAS) to accommodate the new Galaxy deployment, maintaining or enhancing the existing data collection redundancy.
3. Maintain and enhance the system wide alarm acknowledgement features.
4. Ensure any data collected via the existing Historian Server is integrated into the new data collected.
5. Current Win-911 Alarm Annunciation must continue to function after the upgrade.
6. Assist the City as needed to import the Galaxy onto the City's supplied Galaxy Server
7. Assist the City as needed to deploy application objects on the existing SCADA PC's.
8. Assist the City with testing and troubleshooting to ensure a fully functional system, equal to or superior to the City's existing system.
9. The City will supply all needed licenses and hardware for this project.

Exhibit B
Consultant's Proposal



November 4, 2014

City of Marysville
Attn. Roy A. Alderman
1049 State Avenue
Marysville, WA 98270

Subject: City of Marysville, SCADA & Telemetry System Upgrade

Mr. Alderman:

K2 Data Systems, Inc. (K2) is pleased to provide this proposal in response to the City of Marysville's (City) Request for Proposals – Upgrade and Consolidation of SCADA Applications, dated October 2014.

All development work will be billed on a firm-fixed basis per the defined scope. Startup costs are estimates only and will be billed on a time and materials (T&M) basis at \$145 per hour. Startup expenses will be billed consistent with K2's current Rate Sheet (Appendix A). K2 will not exceed the contracted amount without prior authorization from the City. Requested changes will be documented and presented to the City along with a cost. Upon the City's acceptance and issuance of a modified Purchase Order, these changes will be completed.

A Purchase Order will be required prior to starting work on this project. Invoices will be sent monthly and payment to K2 Data Systems, Inc. is due 30 days from invoice. This proposal is valid for 60 days from the submittal date. Please feel free to call or email me if you have any questions.

We are looking forward to completing this task for the City of Marysville. Please feel free to call or email me if you have any questions.

Sincerely,

A handwritten signature in black ink, appearing to read "Brian Kier", written over a horizontal line.

Brian Kier
Project Manager
K2 Data Systems, Inc.
541-223-2905



B. NARRATIVE

1. Key Personnel

K2's engineers have been designing, developing, installing, and maintaining HMI systems for over 20 years. We specialize in systems which integrate all aspects of an operation – from the physical IO to reports displayed in the front office. We are fully certified with Wonderware products, including System Platform. Qualifications of key personnel are described below.

K2 has successfully completed many Wonderware jobs. Recent jobs have included Wonderware development with the City of Albany, including a WIN-911 conversion, InTouch modifications, Historian management, and reporting tasks. In addition, we have been involved with a System Platform conversion for Tillamook County Creamery Association (TCCA). This included the development of their object standards and procedures, creation of object templates, startup support, and Historian upgrades.

K2 strives to create and maintain a partnership relationship with our customers. Nearly all of our work is with repeat customers and we invite inquiries of our listed references. We have offices in the following locations:

Headquarters

222 1st Avenue West, Suite 200
Albany, OR 97321
541-223-2905

Seattle

2442 NW Market Street #216
Seattle, WA 98107
206-316-7165

- a. **Colin Loader** will be the "Principal-in-Charge" for this project and will be the primary development engineer. Mr. Loader will also be in charge of on-site implementation. Mr. Loader has extensive automation and controls experience from working for end users as well as working as a systems integrator in multiple countries. He has been involved in many large projects including several municipalities, a grain elevator, cheese factory, aluminum smelter, and many food processing plants. He has worked on many SCADA systems and has many years' experience with Wonderware products. He is also a seasoned PLC programmer, having worked on many different brands. Mr. Loader is also proficient with Microsoft SQL Server databases, MS Reporting Services, .Net programming techniques, and other Microsoft software offerings.

- Certified with Wonderware InTouch, Historian, and System Platform.
- 2 years as a senior systems engineer with K2 Data Systems.
- 2 Years with a large fortune 500 company as a corporate manager for their controls program.
- 13 years as a senior systems engineer for two systems integration companies using Wonderware and other technologies in a large number of automation projects.



- 3 years working at a large dairy being responsible for all automation related projects.
 - 3 years working as an ex-patriot Instrumentation Engineer for a diamond mine in Africa using Mitsubishi PLC's and VAX computer systems for plant control.
 - 2 years as a Senior Electronics Technician for a Lime Quarry where a lot of experience was gained using and programming Siemens PLC's.
 - 5 years as an Instrument Technician at an Aluminum Smelter while studying Electrical Engineering Instrumentation at College.
- b. **Richard Kessell** has led large projects involving product tracking (MES), front-ends, and reporting in close cooperation with end-users, incorporating both automated and user input. Mr. Kessell will assist with System Platform development and will be on-site during implementation. Mr. Kessell has used HMI products for nearly 20 years, including a large number of Wonderware implementations. He is also an expert with web page development and is certified with Microsoft SQL Server. He has completed many projects involving these technologies. His projects have involved clients from private manufacturing, service companies, and public municipalities
- Certified with Wonderware InTouch and System Platform
 - 9 years as a senior systems engineer with K2 Data Systems.
 - 8 years working for a system integrator focusing on process control, human-machine interfaces, and database storage and reporting systems. Predominantly utilizing Wonderware and SQL Server solutions.
 - 5 years working for a provider of services and equipment for decontaminations and steam generator cleanings of Commercial Nuclear Power Plants. Involved extensive Wonderware and PLC development.
 - 3 years as an electrical engineer developing control systems for a machinery manufacturer focused on roll finishing equipment for paper mills.
- c. **Brian Kier** has extensive database and front-end experience utilizing Wonderware's suite of products and Microsoft SQL Server. Mr. Kier will assist with development tasks and will be on-site during implementation on an as-needed basis. Mr. Kier has successfully implemented many HMI and Historian based installations with emphasis on data storage, recipe development, quality systems, and reporting. He has successfully managed large projects involving multiple engineers and subcontractors. Mr. Kier is certified and proficient in many Wonderware and Microsoft products.
- Certified with Wonderware InTouch, Historian, and System Platform.
 - 9 years as a project manager and senior systems engineer for K2 Data Systems.
 - 8 years working for a large systems integrator implementing Wonderware control systems, developing custom user controls, product tracking systems and project management.
 - 5 years as an engineering consulting company specializing in environmental assessment and remediation.



2. Proposer's Plan

K2 proposes the following plan in order to meet the requirements specified by the City's RFP. As part of this plan, K2 will assist the City with testing and troubleshooting to ensure a fully functional system. This work is planned for the period from November 2014 through March 2015. K2 will work with City employees to develop a project schedule.

a. InTouch

The Water and Wastewater InTouch applications will be combined into a single application. The Wastewater application will be used as the starting application. The following components of the combined application will be modified, as necessary.

- Navigation
- Windows
- Graphics
- Scripting
- Memory Tags
- Alarm Groups

b. Data Access Services (DAS)

The DAS will be modified to accommodate the new System Platform Galaxy to support InTouch, Historian, and Win911. It is anticipated the DAS will be installed on a server supplied by the City, in addition to either an additional server or client PC to provide redundancy.

c. System Platform

The following tasks will be completed within the System Platform Galaxy.

- Import InTouch IO tags from both InTouch applications into a new System Platform Galaxy
- Import applicable InTouch Memory tags into the Galaxy to support Alarming
- Create Alarm Groups within the Galaxy
- Convert necessary InTouch scripting to System Platform scripting
- Create necessary security within the Galaxy
- Convert InTouch tag references to Galaxy references

d. Historian

Historian tags will be modified to point to the new Galaxy objects. In order to keep existing data following the tag name changes, existing data files must be modified. This will be done for a maximum of three years of data. Historical data older than this may be converted during startup, under a different project, or archived. During the upgrade process, there may be a brief period of time when no data is collected.



e. WIN-911

The WIN-911 configuration will be modified to communicate with the new System Platform Galaxy. The WIN-911 Alarm Annunciation will function during and after the upgrade, although there may be brief interruptions of these services. K2 will work with City employees to ensure these interruptions are brief and occur at appropriate times.

f. Startup

Startup will be conducted at the City following completion of the development tasks. During startup, K2 will assist the City with importing the Galaxy objects, Historian configuration, and WIN-911 configuration onto City-supplied servers. K2 will also assist the City with deploying necessary objects onto City-supplied SCADA PCs, and then test and troubleshoot the system. During startup, portions of the SCADA system, including process control, alarming, alarm notification, and data collection, may be interrupted for brief periods of time. K2 will work with City employees to manage these interruptions.

g. Pricing

All development work will be billed on a firm-fixed basis per the defined scope. Startup costs are estimates only and will be billed on a time and materials (T&M) basis at \$145 per hour. Startup expenses will be billed consistent with K2's current Rate Sheet (Appendix A). K2 will not exceed the contracted amount without prior authorization from the City.

Development Tasks	Hours	Total
InTouch / System Platform Development	215 Hours	\$31,175
Historian Development / Data Conversion	40 Hours	\$5,800
WIN-911 Development	30 Hours	\$4,350
Subtotal Development	285 Hours	\$41,325

Startup	Hours	Total
Startup	80 Hours	\$11,600
Expenses		\$750
Subtotal Startup	80 Hours	\$12,350

Total Project	365 Hours	\$53,675
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C. REFERENCES

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D. ASSUMPTIONS

K2 assumes the following:

- K2 is not supplying any hardware for this project. All hardware will be provided by the City. Hardware will meet minimum software requirements. Hardware to support the following components is required for this project:
 - System Platform Galaxy Server
 - Historian Server
 - DAS Server
 - SCADA PC's
- K2 is not supplying any software for this project. The City will supply media and licensing for all SCADA software to be used. SCADA software to be utilized includes:
 - Wonderware – System Platform, InTouch, DAS, Historian, Historian Client
 - Any additional IO Servers that may be needed.
 - WIN-911
- The City will provide adequate system downtime for development and startup tasks.
- K2 will assist the City with startup tasks to the extent of approved startup hours. A modified Purchase Order may be required for additional hours requested by the City.
- Modification of reports or other consumers of existing Wonderware data is not included in this proposal.
- This proposal includes a limited amount of Historian data conversion, approximately three years. Additional data can be archived or converted subsequent to this project.



APPENDIX A K2 Data Systems, Inc. Rate Sheet

PLC / HMI Programming	\$145/hr
SPC / MES / Reporting / Visual Studio	\$145/hr
Emergency Support (4 hour minimum)	\$150/hr
Training	Ask for quote
Hardware / Software	Cost + 15%
Travel and Living	Cost
Mileage	\$0.58/mile