



Fairfield-Suisun Sewer District

ADDENDUM NO. 1

TO THE REQUEST FOR PROPOSALS FOR THE ENTERPRISE INFORMATION MANAGEMENT AND IMPLEMENTATION ROADMAP

October 8, 2026

Lindsay Sagastume

ENTERPRISE INFORMATION MANAGEMENT AND IMPLEMENTATION ROADMAP
ADDENDUM NO. 1

This Addendum No. 1 shall become part of the RFP Documents and all provisions of the contract shall apply thereto.

QUESTIONS

#	Question	Answer
1	Can we modify "Appendix A: Schedule of Professional Services" to reflect staff titles connecting to our proposed team?	Yes.
2	Page limits: I didn't see any page limits noted – do you have any requirements or guidance on this?	The District has not established a specific page limit for proposals. Proposals should be organized in accordance with Section VI.A.3 and provide sufficient detail to address all required elements. Consistent with the RFP, proposals should be concise, focused, and limited to information relevant to the Scope of Work and evaluation criteria.
3	Use of 11x17 pages: a. Considering this is an electronic submittal (per VI.A.2) – would 11x17 pages count as 1 page? b. Do you have any requirements or guidance on the maximum number of 11x17 pages in the submission?	Please see answer to #2.
4	Cost Proposal: a. Should the cost proposal be provided as a separate PDF file or as a section in the Technical Proposal?	The Cost Proposal and the Technical Proposal shall be submitted as one PDF file.

#	Question	Answer
5	Electrical Proposal File Size(s): a. Is there a maximum file size for the one (or two) files – the Technical and Cost Proposals (depending on response to #3 above) for the District email filter? If files are larger than the limit—if there is one—what is the preferred method of submission?	The Technical Proposal and Cost Proposal shall be submitted as one PDF file and should be limited to 20 MB or less to ensure successful delivery through the District's email system. If the file exceeds this limit, the Consultant should contact Lindsay Sagastume at lsagastume@fairfieldsuisunsewer.ca.gov for instructions regarding an alternative electronic submission method. Proposers are responsible for ensuring the District has received their submission by the deadline.
6	Background Information: a. Can the District provide the outputs of departmental interviews, assessments, inventories, or information management reviews completed to date?	The District has provided the background information and identified enterprise information management challenges included in this RFP. The District has additional existing documentation and information that may be made available to the selected Consultant during project initiation and discovery, as appropriate. The Consultant should not assume that the District's existing information represents a complete or current assessment of the District's enterprise information management environment. The Consultant is expected to conduct the stakeholder engagement, assessment, and discovery activities necessary to validate existing information and develop the Enterprise Information Management Strategy and Implementation Roadmap.
7	Should the roadmap address AI-readiness/data validation as a distinct workstream, or only as a forward-looking "future goal" in the strategy?	The roadmap should address AI-readiness and data validation as considerations within the overall Enterprise Information Management Strategy and Implementation Roadmap, rather than as a separate, standalone workstream. The Consultant should identify the data governance, data quality, metadata, information accessibility, interoperability, and other foundational capabilities necessary to support potential future AI and advanced analytics initiatives. Recommendations should be practical and aligned with the District's current needs and priorities. The scope does not include implementation of AI solutions.

#	Question	Answer
8	Can you clarify what “organizational and staffing considerations” means?	The Consultant should identify organizational roles, responsibilities, resource requirements, and staffing considerations necessary to support implementation and long-term sustainability of the Enterprise Information Management Strategy. This may include recommendations regarding data ownership and stewardship, governance responsibilities, organizational structure, required skills and capabilities, anticipated staff capacity, training and change management needs, and potential resource gaps. The District is not seeking a detailed organizational restructuring or human resources study. Recommendations should be planning-level and focused on the organizational and staffing implications of implementing and sustaining the recommended strategy and roadmap.
9	Does the District expect the Consultant to inventory/document every data source listed, or focus primarily on the highest-risk areas?	The Consultant is expected to assess the data sources identified in the RFP at an enterprise level sufficient to understand the District’s overall information management environment, key relationships, and major data flows. The Consultant is not expected to conduct an exhaustive technical inventory or detailed documentation of every data source. The Consultant should use a risk- and business-impact-based approach to identify and prioritize areas requiring more detailed assessment, with particular attention to the business challenges identified in Section II A, including authoritative data sources, data quality and consistency, asset identification, document management, regulatory and operational reporting, interoperability, and information lifecycle management. The level of assessment should be sufficient to support the recommendations, priorities, and implementation roadmap included in the required deliverables.

#	Question	Answer
10	Source data does not include interview documents from the District's previous internal interview process. Will the previous interview materials be made available to be used as a baseline for understanding the organization and its business needs?	The District has conducted internal discussions with staff regarding information management practices, challenges, and business needs; however, these discussions were conducted as part of the District's internal discovery process to help inform development of the RFP. Relevant information from these prior internal discussions may be shared with the selected Consultant during onboarding to provide additional context and as part of the project background. The Consultant should not assume that these prior discussions represent a comprehensive or validated assessment of the District's needs. The Consultant will be expected to conduct its own stakeholder engagement and discovery activities as described in the Scope of Work and validate the information provided.
11	Will the selected Consultant be granted read access to the District's SharePoint, CMMS, WIMS, SCADA, and other listed systems during the engagement, or will data be provided via extracts/exports?	The selected Consultant will not be provided direct read or administrative access. The District will provide the Consultant with relevant information necessary to perform the Scope of Work through available documentation, reports, system demonstrations, data extracts/exports, representative datasets, screenshots, or other appropriate means, as determined by the District and Consultant during project initiation.
12	How is the Gimmel tool currently configured/administered, and is there IT staff support available to assist during the engagement?	Gimmel is currently connected to SharePoint but in its current configuration, is not meeting the District's needs for records management. There is IT staff that will support access during engagement.

#	Question	Answer
13	Are there training programs and/or resources in place to assist District employees with any of the existing data systems?	Training and supporting resources vary by department and system. Existing resources may include standard operating procedures (SOPs), system documentation, informal training, on-the-job knowledge transfer, and other department-specific materials. The District does not have a single standardized enterprise-wide training program covering all information management systems. The Consultant should consider the adequacy, consistency, and sustainability of existing training and knowledge-transfer practices as part of the assessment and identify opportunities for improvement where appropriate.
14	Are there staff members at the District with change management experience who will be engaged with this effort?	District staff representing relevant departments and business functions will participate in the project and provide subject matter expertise, organizational context, and support for stakeholder engagement and implementation planning. The District does not have a dedicated change management team assigned to this effort. Members of the multi-department project team have varying levels of experience with change management processes. The Consultant should identify appropriate change management, communication, training, and adoption considerations as part of the project and implementation roadmap.

#	Question	Answer
15	For “Planning-level cost estimates,” does this include recommendations regarding staff allocation and costs specifically related to data governance, or is this a broader request?	The request for planning-level cost estimates is intended to be broader than data governance staffing alone. The Consultant should provide planning-level estimates for the major initiatives and recommendations included in the Enterprise Information Management Strategy and Implementation Roadmap. As appropriate, this should include anticipated staffing and resource requirements, technology or system enhancements, implementation activities, training and change management, data remediation, integration, and other significant costs necessary to implement and sustain the recommended initiatives. The estimates are intended to be planning-level rather than detailed budget estimates and should be sufficient to support prioritization, sequencing, and District decision-making. The Consultant should identify key assumptions and distinguish between one-time implementation costs and ongoing operational costs, where appropriate.
16	Section VII.B outlines Mandatory Elements, Technical Quality, and Price as evaluation criteria. Can the District provide the relative weighting or scoring methodology (e.g., percentage allocation or point scale) used to evaluate these criteria?	Reviewers will assess proposals on these elements without a pre-defined scoring rubric. Proposers should focus on meeting all mandatory elements and expressing the technical quality of their approach to the proposed scope elements.
17	The RFP identifies challenges related to technical documentation, enterprise asset identification, document management, operational data and reporting, regulatory/environmental information, and information lifecycle management. Are any of these areas considered higher priority than others, or should proposers assume they are of relatively equal priority?	The District considers the identified challenges to be interrelated enterprise information management priorities and does not intend to establish a predetermined ranking among them. Proposers should consider the challenges collectively and recognize that the appropriate level of priority may vary based on business impact, risk, regulatory requirements, operational needs, data quality, and dependencies among the various areas. The Consultant is expected to assess these challenges as part of the project and provide recommendations regarding prioritization, sequencing, and implementation based on its findings and the District’s business needs.

#	Question	Answer
18	For the Enterprise Information Standards deliverable, does the District expect the Consultant to develop detailed, implementation-ready standards (e.g., naming conventions, metadata structures, asset identification standards, tag standards, document classification/versioning standards), or primarily establish recommended frameworks and principles for subsequent development?	The District expects the Consultant to develop enterprise-level standards and recommendations that are sufficiently detailed to provide clear direction for implementation, rather than limiting the deliverable to high-level principles or frameworks. The standards should address the areas identified in the RFP, including asset identification and naming conventions, document naming and classification, metadata, operational data and tag naming, document version control and revision management, and information lifecycle management and records retention. The Consultant is not expected to develop detailed, system-specific configuration requirements or implement the standards within individual systems. Where appropriate, the Consultant should identify areas requiring subsequent system-specific development, configuration, or procedural implementation and provide recommendations for how those activities should be addressed through the implementation roadmap.
19	The RFP's list of current data sources includes SharePoint, Maintenance Connection, SCADA, Hach WIMS, ArcGIS and other repositories; however, the business challenge examples also reference eRIS, xLIMS, and Gimmel. Should proposers consider eRIS, xLIMS, Gimmel, and any other systems referenced in the RFP to be within the assessment scope?	Yes, Consultants should consider eRIS, xLIMS, Gimmel, and other systems or repositories referenced in the RFP as part of the assessment scope, as applicable to the identified enterprise information management challenges. The list of current data sources in the Scope of Work is not intended to be an exhaustive inventory of all systems, applications, databases, repositories, or information sources that may be relevant to the assessment. The Consultant is expected to identify and assess additional relevant systems and information sources as necessary to understand the District's enterprise information management environment and develop the required Strategy and Implementation Roadmap. The level of assessment should be proportionate to the system's relevance, business impact, risk, and relationship to the identified challenges and should not be interpreted as requiring an exhaustive technical assessment of every system.

#	Question	Answer
20	Does the District have an anticipated number or range of stakeholder interviews and workshops, or identified departments/roles that should participate in the engagement?	The District has not established a specific number of stakeholder interviews or workshops. We estimate 5–6 interviews based on the 6 areas of focus in the RFP. The Consultant should determine and propose the appropriate level and type of stakeholder engagement necessary to successfully complete the Scope of Work. The Consultant should describe its proposed approach in its Project Plan.
21	Does the District have expectations regarding which project activities should be conducted onsite versus virtually, such as kickoff, stakeholder workshops, facility/process observations, roadmap workshops, and the executive presentation?	The District prefers that the project kickoff be conducted onsite. Following the kickoff, the District is generally comfortable with project activities being conducted virtually. However, the Consultant may recommend additional onsite meetings, stakeholder workshops, facility or process observations, or other onsite activities where they would materially benefit the assessment or development of the Enterprise Information Management Strategy and Implementation Roadmap.
22	Does the District have a desired project start date, overall duration, or required completion date for the Enterprise Information Management Strategy and Implementation Roadmap?	The District has not established a specific project start date, overall duration, or required completion date. The Consultant should propose an appropriate project schedule based on its approach, methodology, and anticipated level of effort.
23	Should the current-state assessment be based primarily on interviews, documentation, and representative workflows/data samples, or does the District anticipate providing consultants direct access to system configurations, metadata, databases, SharePoint environments, or representative datasets for detailed assessment?	Please see answer to Question #11.

#	Question	Answer
24	For the Information and Systems Integration Strategy, does the District expect conceptual recommendations regarding systems of record and interoperability, or more detailed future-state information flows, integration requirements, and system-to-system interface recommendations?	The District is seeking enterprise-level recommendations appropriate to an Information Management Strategy and Implementation Roadmap. The Consultant should identify systems of record, authoritative data sources, interoperability opportunities, and recommended future-state approaches at a level sufficient to support prioritization and implementation planning. Detailed system-to-system interface design or technical specifications are not required.
25	For the planning-level cost estimates required in the implementation plan, what level of accuracy or detail does the District expect, for example, order-of-magnitude initiative-level estimates, estimated internal and external resource requirements, or more detailed implementation budgets?	The District expects planning-level cost estimates for the major initiatives and recommendations included in the Enterprise Information Management Strategy and Implementation Roadmap. Estimates should be sufficiently detailed to support prioritization, sequencing, funding considerations, and District decision-making, but the District is not seeking detailed, implementation-ready or procurement-level budgets at this stage. As appropriate, the Consultant should identify anticipated one-time and ongoing costs, including external/vendor resources, significant District internal resource requirements, technology or licensing, system configuration or development, data remediation or migration, integration, training and change management, and ongoing support or governance activities. The Consultant should identify key assumptions and cost drivers and may present estimates as ranges where appropriate.

#	Question	Answer
26	Section VI.A.5 requires proposals "in the format attached to the letter transmitting this request for proposal." No transmittal letter or format was included in the RFP package posted September 21, 2026. Please provide the referenced letter/format, or confirm that a single PDF organized per Section VI.A.3 (a–e) satisfies this requirement.	The reference to the "format attached to the letter transmitting this request for proposal" in Section VI.A.5 was included in error. No separate transmittal letter or proposal format is required beyond the requirements stated in the RFP. Proposals shall be organized in accordance with Section VI.A.3, including the required Title Page, Table of Contents, Transmittal Letter, Detailed Proposal, and Cost Proposal. Consistent with the response to Question #4, the Technical Proposal and Cost Proposal shall be submitted as one PDF file. The Transmittal Letter should be included within the Technical Proposal.
27	What is the maximum email attachment size the District can receive? Will the District confirm receipt of each proposal by reply email?	Please see answer to Question #5. Yes, the District will confirm receipt of each proposal by email.
28	The RFP asks for enterprise-wide solutions not limited to specific software platforms, and to identify technology enhancements only where they provide clear benefit. Would the District welcome a recommendation for a new enterprise content management platform (for example, a cloud content platform with built-in retention, metadata and AI capabilities) if supported by an objective options analysis against optimizing the current SharePoint/Gimnal environment?	Yes. The District would consider recommendations for new or replacement technology platforms, including an enterprise content management platform. Any recommendation for a new platform should be based on an objective assessment of the District's current environment and include consideration of the benefits, limitations, costs, risks, implementation requirements, and organizational impacts of available options. The Consultant should consider optimization or improved configuration of existing systems as part of the analysis and compare those options with potential new technology where appropriate. The District is not seeking a technology-selection or procurement process as a standalone deliverable. Technology recommendations should remain aligned with the enterprise-level Strategy and Implementation Roadmap and should identify technology enhancements only where they provide clear operational or organizational benefit.

#	Question	Answer
29	Consistent with Government Code §1097.6, please confirm that a consultant whose work under this agreement remains limited to conceptual, preliminary, or initial plans is not precluded from proposing on subsequent implementation phases the District may solicit.	The District anticipates that the work under this RFP will focus on development of the Enterprise Information Management Strategy and Implementation Roadmap. Any future implementation services resulting from the Strategy and Roadmap would be subject to a separate procurement process and applicable District procurement requirements, and the Consultant working on this scope would not be precluded from participation in future scopes. Consistent with Government Code §1097.6, the Consultant's duties under this RFP will not include preparing or assisting the District with the preparation of a request for proposals, request for qualifications, or other solicitation for any subsequent or additional implementation services. The District will retain responsibility for all public contracting activities associated with any subsequent phase.
30	The RFP does not state a period of performance. What is the District's target completion date for the Final EIM Strategy and Implementation Roadmap and the Executive Presentation?	Please see answer to Question #22.
31	Please describe the current Gimmel deployment: licensed modules, scope (SharePoint only or other repositories), contract renewal date, and the District's satisfaction with it. Is the District open to alternatives if they reduce cost or effort?	The District currently maintains an annual subscription for Gimmel, which is currently used for SharePoint. The current configuration of Gimmel is not satisfactorily addressing the District's records management needs. The District is open to considering alternatives as part of the Enterprise Information Management Strategy and Implementation Roadmap if the Consultant identifies an option that provides a clear operational or organizational benefit while maintaining the functionality required by the District. The District is not presupposing a replacement of Gimmel or other existing technology and expects any technology recommendations to be based on the Consultant's assessment and findings.

#	Question	Answer
32	To size discovery, can the District share approximate volumes: number of SharePoint sites/libraries, total storage (TB), number of engineering drawings (digital and paper), and linear feet of physical records?	The District has digital records, multiple SharePoint sites/Libraries and numerous physical records in various locations. The District has executed hundreds of projects over 50 years and has project records from each project, including drawings, specifications and other relevant documentation (e.g., equipment operation and maintenance manuals). The District also develops drawing records of field modifications made by District staff. The District also has 3,000 individual assets listed in our Computerized Maintenance Management System (each with an asset history and relevant documents attached); and around 1,500 individual data points being saved into our SCADA historian (each minute).
33	How many stakeholders and departments does the District expect to participate in interviews and workshops, and does the District prefer in-person sessions at 1010 Chadbourne Road or a hybrid/virtual approach?	Please see answer to Question #20 and Question #21.
34	Is the Executive Presentation intended for District leadership only, or also for the Board of Directors? How many presentation sessions are expected?	The District anticipates one management-level presentation. A separate presentation to the Board of Directors is not anticipated as part of the Scope of Work. Any additional presentations, if requested, would be coordinated with the selected Consultant as appropriate.

#	Question	Answer
35	What level of accuracy does the District expect for planning-level cost estimates (e.g., AACE Class 5, –50%/+100%)? Should estimates include software licensing and internal staff costs?	The District does not have a prescribed accuracy range or AACE estimate classification for the planning-level cost estimates. The District's primary expectation is that the estimates be sufficiently reasonable, transparent, and supported by appropriate assumptions to allow the District to make informed decisions regarding prioritization, sequencing, funding, and implementation of the recommended initiatives. Estimates should identify significant cost drivers and, where appropriate, distinguish between one-time implementation costs and ongoing operational costs. The Consultant should include relevant costs necessary to understand the overall implications of the recommended initiatives, which may include software licensing, technology or system enhancements, implementation services, data remediation or migration, integration, training and change management, and anticipated District internal staff resources. The Consultant should identify the methodology, assumptions, and limitations associated with the estimates and may provide reasonable cost ranges rather than point estimates where appropriate. The District is not seeking detailed, implementation-ready or procurement-level cost estimates as part of this RFP.
36	For operational data and tag naming conventions, will the District provide exports of the SCADA tag database, Hach WIMS variable list, and xLIMS/eRIS parameter lists? Is the District's SCADA integrator available to participate in a workshop?	Please see answer to Question #11.

#	Question	Answer
37	May references include (a) projects performed by a proposed subconsultant/teaming partner, and (b) projects performed by proposed key personnel while at a prior firm?	References may include projects completed by the proposing Consultant and/or proposed subconsultants or teaming partners, provided the referenced work is similar in nature and scope to the services requested in this RFP. References for projects performed by proposed key personnel while employed by a prior firm will not be accepted as firm or teaming partner references.
38	Please confirm the relative weighting of the evaluation criteria (Mandatory Elements, Technical Quality sub-factors a–c, and Price).	Please see answer to Question #16.
39	May the Consultant use a vendor-provided sandbox environment with a District-approved sample of non-sensitive documents (e.g., archived as-built drawings) to demonstrate classification and search concepts? Are there District policies on cloud storage location or treatment of SCADA/security-sensitive information?	Please see answer to Question #11.

#	Question	Answer
40	Should travel and out-of-pocket expenses be included within the firm fixed price, or shown as a separate not-to-exceed allowance reimbursed at cost? Will invoices be paid on monthly progress or on deliverable acceptance?	The District intends for services under this RFP to be performed on a time-and-materials basis, with compensation based on the actual hours worked at the hourly rates proposed by the Consultant, subject to the total not-to-exceed amount established in the agreement. Travel and other authorized out-of-pocket expenses should be identified separately from professional services and will be reimbursed in accordance with the District's applicable policies and the terms of the agreement. Consultants should identify any assumptions regarding anticipated travel and expenses in their Cost Proposal. The Consultant will invoice the District periodically for services performed during the billing period, based on actual hours worked by each project team member and the applicable approved hourly rate, along with any authorized reimbursable expenses.
41	Does the District have an existing records retention schedule, IT strategic plan, asset management plan, or prior SharePoint governance documents that will be made available at kickoff? When was the retention schedule last updated?	The District has a records retention schedule that was updated in 2021 and will be made available to the selected Consultant during project initiation. The District doesn't currently have an IT strategic plan, asset management plan or SharePoint governance documents.
42	For Professional Liability, will the District accept a claims-made policy with a five-year extended reporting period in lieu of maintaining the policy for five years after completion? Is Automobile Liability required when the Consultant has no owned vehicles (Code 8 and 9 hired/non-owned only)?	Yes for Professional Liability and a five-year extended reporting period. Per our risk pool, non-owned and hired Auto Liability would be acceptable if the proposer has no owned autos. This can be endorsed to the Consultant's General Liability policy.

#	Question	Answer
43	Has the District engaged consultants in the past three years for related work (SharePoint implementation, CMMS implementation, asset management planning, SCADA master planning)? If so, will those reports be available to proposers?	The District has used a consultant when needed for SharePoint expertise after implementation. The District has not used a consultant for CMMS implementation or Asset management planning in the last three years. We did conduct SCADA master planning, and that information may be made available to the selected Consultant during project initiation and discovery, as appropriate.
44	Regarding the future goal to use AI tools to query validated District data: has the District adopted an AI use policy, and which AI tools (if any) are currently licensed or piloted?	The District does not currently have an adopted enterprise AI use policy. The District is currently working with a small internal group to develop an AI policy and to pilot the use of paid Microsoft CoPilot licenses, and anticipates establishing guidance regarding the appropriate and responsible use of AI tools. The District does not currently have any other enterprise AI tools that are formally licensed or being piloted specifically for the purposes described in the RFP.
45	Should the Asset Identification and Naming Conventions standard address only future assets, or also a strategy to reconcile legacy P&ID (pre-2017) identifiers with the Maintenance Connection CMMS?	The District expects the Asset Identification and Naming Conventions standard to address both existing/legacy assets and future assets. This should include recommendations for reconciling, cross-referencing, or otherwise establishing relationships between legacy identifiers—such as the pre-2017 P&ID identifiers—and current identifiers used in Maintenance Connection CMMS and other relevant District systems. The Consultant should recommend a practical approach for addressing legacy identifiers while establishing consistent enterprise standards for the identification and naming of future assets. The level of effort and sequencing for any legacy data reconciliation or remediation should be addressed through the Implementation Roadmap.