

EWEB Board Consent Calendar Request

For Contract Awards, Renewals, and Increases

The Board is being asked to authorize the General Manager to approve a contract with **Milestone Utility Services (Milestone) for a Customer Self Service Portal with Managed Services** after completion of contract negotiations.

Board Meeting Date: 8/6/2019

Project Name/Contract #: Customer Experience Improvement Project/ RFP #005-2019

Primary Contact: Matt Barton at Ext. 7109 and Sue Fahey at Ext. 7688

Contract Amount:

Contract Estimate: On premise/Hosted Solution: \$25,000 annual fees; \$997,000 over 7 years plus implementation travel costs

Contract Estimate: Hosted Solution + Managed Services: \$115,000 annual fees; \$1.78 million over 7 years plus implementation travel costs

Contracting Method:

Method of Solicitation: Formal Request for Proposal

If applicable, basis for exemption: N/A

Term of Agreement: **7 years**

Option to Renew? For annual maintenance

Approval for purchases "as needed" for the life of the Contract Yes No

Proposals Received (Range): 7 responses (\$4,000-\$27,000 annual fees; \$570,000-\$1,498,000 over 7 years)

Selection Basis: **Highest Score after finalist demonstrations**

Operational Requirement and Alignment with Strategic Plan

See backgrounder

Contracted Goods or Service

EWEB issued an intent to award a contract to Milestone to integrate and implement a Customer Self-Service Portal (CSS). If approved, Milestone will be contracted to deploy a technology solution that improves the customer engagement experience, allowing for online self-service customer registration and account management, service notifications and alerts, and personalized data and insights. The solution will integrate with EWEB's systems and provide a single sign-on experience on mobile and web platforms. EWEB currently does not have a CSS system.

As part of the 'best and final offer', Milestone offered a managed services option. Managed services include application management, monitoring and patching, 24/7 production support, environment management, and KPI reporting, among others. While EWEB information services staff does provide 24/7 system support, current staffing levels and skill sets do not align with managing a hosted system that is utilized by a high volume of customers outside of standard business hours. Management believes that it's in the best interest of EWEB and our customer-owners to contract with Milestone to provide managed services for an additional \$90,000/year.

Prior Contract Activities

EWEB has not contracted with Milestone previously.

Purchasing Process

The backgrounder includes information on the purchasing process. Seven firms submitted CSS proposals. After evaluating the proposals based on the criteria noted in the backgrounder, the two highest ranked proposers - Milestone and Smart Energy Water (SEW) - were selected to demonstrate their solution. Milestone scored high in the firm background, implementation approach and technical requirements categories and SEW in the implementation approach, functional requirements and technical requirements categories. Finalist annual fees ranged from \$15,000-\$25,000. Milestone was the highest ranked proposer after demonstrations and received top scores in all categories except one which was highly ranked.

Proposer Information

Accelerated Innovations

Avertra

Kubra

Level One

Milestone Utility Services

Smart Energy Water

Vertex One

Proposer Location

St. Paul, MN

Herndon, VA

Piscataway, NJ

Malvern, PA

Plantation, FL

Irvine, CA

Bend, OR

ACTION REQUESTED:

Management requests the Board authorize the General Manager to approve a contract with Milestone Utility Services for a Customer Self Service Portal with managed services after completion of contract negotiations.