

EWEB Board Consent Calendar Request

For Contract Awards and Renewals

The Board is being asked to approve additional funds for consulting services provided by Whitlock Consulting Group (WCG) for the Customer Experience Improvement (CEI) project Phase 2 implementation support.

Board Meeting Date: 9/3/2019

Project Name/Contract #: Customer Experience Improvement Project, Consultant Selection RFP 064-2018

Primary Contact: Matt Barton Ext. 7109

Contract Amount:

Original Contract Amount: \$185,000

Additional \$ Previously Approved: \$0

Invoices over last approval: \$0

Percentage over last approval: 0%

Amount this Request: \$204,100, plus travel costs

Resulting Cumulative Total: \$389,100 plus travel costs

Contracting Method:

Method of Solicitation: Formal Request for Proposal

If applicable, basis for exemption: N/A

Term of Agreement: 2 Years

Option to Renew? No

Approval for purchases “as needed” for the life of the Contract Yes ☐ No ☒

Proposals/Bids Received (Range): 4 responses (\$163,800 to \$695,000; Hourly rates ranged from \$130 to \$250)

Selection Basis: **Highest scoring, responsive and responsible proposal**

Narrative:

Operational Requirement and Alignment with Strategic Plan

For several months, Management and staff have been reviewing and implementing ways to improve our customers' experience through Continuous Improvement and in alignment with the Strategic Plan Phase I to Enhance Customer Confidence. Implementing a Customer Self-Service (CSS) solution and updating the bill design and Electronic Bill Presentment and Payment Processing (EBPP) System will allow customers to view and manage their account online and interact with us at a time, and with a method, that is convenient for them. It will also be an important first step to offering new information, as well as new products and services, to customers.

Contracted Goods or Services

In January 2019 as part of the CEI Project, the Board approved a contract with WCG to review existing business processes, recommend areas for improvement, gather system requirements, provide expert advice on marketplace system capabilities, assist in developing RFP specifications, and support contract negotiation strategies. This work was solicited and awarded as RFP 064-2018 Phase 1 services. The RFP process was successful in selecting three quality software providers and with WCG's assistance, staff is finalizing contracts with these providers.

RFP 064-2018 also requested implementation support services information and allowed Management the option to request Board approval of a second phase with the successful proposer. Staff has been pleased with WCG's work and consulting during the CEI project. They have significant knowledge of EWEB's processes and systems, as well as the selected vendors. Staff believe it is in the best interest of EWEB and our customer-owners to retain WCG's expertise for implementation support services and are requesting the Board approve Phase 2 of the contract. Implementation services will include project management support, the documentation of current payment processing practices and identification of areas for improvement, as well as a go-live readiness evaluation.

Prior Contract Activities

WCG has provided support to EWEB on three projects. The first was to provide training, quality assurance, data conversion, and configuration management services related to the Customer Information System (CIS) Replacement project. WCG provided valuable services prior to EWEB terminating the software provider's contract. In August 2018 WCG evaluated the feasibility of upgrading the existing CIS. The \$15,000 contract was completed on time and within budget. EWEB also contracted with WCG in 2018 to evaluate current customer service and billing processes and recommend improvements as well as next steps for implementing a Customer Self Service System, Electronic Bill Presentment and Payment Processing, and Bill Print and Mail. The \$22,700 contract was completed on time and within budget.

Purchasing Process

A formal RFP was issued October 31, 2018 and closed November 29, 2018. The solicitation was posted to the Oregon Procurement Information Network (ORPIN) – four proposals were received. After review, the evaluation committee scored WCG as the highest ranked offeror based on evaluation criteria that included firm experience, key staff experience, methodology, references, and pricing. WCG ranked highest in all five of the selection criteria. During the process WCG demonstrated a strong knowledge of the CSS and EBPP marketplace. Additionally, they have a proven track record developing RFPs that have led to successful selections and implementations. While the contract is based on deliverables, WCG also proposed the lowest hourly rate.

Bidder/Proposer Information

Gartner Consulting
Global Power Consulting
Incho Consulting Group
Whitlock Consulting Group

Bidder/Proposer Location

Seattle, WA
San Ramon, CA
Chicago, IL
Columbia, SC

ACTION REQUESTED:

Management requests the Board approve a contract amendment with Whitlock Consulting Group for the Customer Improvement Experience Project implementation support. The majority of Phase 2 work is capital, and approximately \$1.9 million is included in the capital plan for CEI system implementation with \$400,000 anticipated for Phase 2 implementation consulting.