

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: 5/5/2020

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

Primary Contact: Travis Knabe Ext. 7770

Contract Amount:

Original Contract Amount: \$185,000

Additional \$ Previously Approved: \$204,100, plus travel expense

Invoices over last approval: \$69,000, includes travel expense (Amendment 2)

Percentage over last approval: 17.7%

Amount this Request: \$69,000 (Amendment 2) + \$233,000, plus travel expense (Amendment 3)

Resulting Cumulative Total: \$691,100, 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 ☒

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

Narrative:

Operational Requirement and Alignment with Strategic Plan

As part of the Strategic Plan Phase I to Enhance Customer Confidence, EWEB is implementing a customer self-service solution (CSS), as well as updating the Electronic Bill Payment and Presentment System (EBPP) and bill print and mail services (BPM). The Customer Experience Project goal is to improve and simplify how we serve our customer owners by:

1. Delivering services in a manner that meets customers' expectations, and
2. Making it easier for our customers to transact business with EWEB.

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. 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. In September 2019, the Board approved a contract amendment with Whitlock Consulting Group for the Customer Improvement Experience Project implementation support. Implementation services included project management support, the documentation of current payment processing practices and identification of areas for improvement, testing coordination, as well as a go-live readiness evaluation.

The CEI Project officially kicked off on November 4, 2019. Configuration and Business Process workshops were held during December and January, which paved the way for the development and integration work to be completed by the three CEI project vendors during February. WCG led the effort to plan for the 8-week long User Acceptance Testing sessions that launched mid-March.

The amendment approved last September allowed for work through April 2020. Due to COVID-19 response, there

have been downstream effects to the testing resources and schedules, training schedules, and communications plan. To account for this slippage, the project schedule now has a Soft-Go-Live date of July 22, 2020 and a Post-Go-Live Support period through September 30, 2020. This amendment seeks to extend the work period through September 2020, and includes the following extension/increase of original proposed services:

- Project Management Extension & Effort: \$137,000 - Given the multiple vendors involved with this project, this amendment will increase the Project Management effort from 0.5 to 1.0 FTE for March 2020 and through the end of September 2020.
- Testing Extension & Effort: \$24,000 - EWEB has had to reduce the number of full-time testers and account for less efficient testing from remote environments due to COVID-19. To ensure that exhaustive testing is still completed, four (4) additional weeks have been added to the UAT Testing Schedule. This amendment combines System Testing and UAT and accounts for the increase of testing coordination efforts for the aforementioned 4-week period.
- Business Process Extension: \$72,000 - This amendment extends the fixed-price monthly Configuration/Business Process services through the end of September 2020. EWEB's processes under review include: start, stop, and transfer service automation, collection processes, deposits automation, payment arrangements automation, and cancel/rebill services.

Prior Contract Activities

EWEB 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. 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 to continue to support the project implementation services.

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 the implementation work is capital, and approximately \$1.9 million is included in the capital plan for CEI system implementation with \$400,000 anticipated for consulting services. Variances will be managed within capital project planning, budget process, and Board policy.