

EWEB Board Consent Calendar Request

For Contract Increases

The Board is being asked to approve additional funds for **As-Needed Project Management and Business Analyst Services with Sure Power Consulting, LLC, Make It Happen, LLC, and Milestone Utility Services.**

Board Meeting Date: May 3, 2022
Project Name/Contract #: As-Needed PM and BA Services / 20-154-PSC
Primary Contact: Rod Price Ext. 7122

Contract Amount:

Original Contract Amount: \$1,000,000
Term of Agreement: 5 years
Additional \$ Previously Approved: NA
Invoices over last approval: NA
Percentage over last approval: 350%
Amount this Request: \$3,500,000
Resulting Cumulative Total: **\$4,500,000 (between three contracts over 5 years)**

Contracting Method:

Method of Solicitation: Formal RFP
If applicable, basis for exemption: NA
Option to Renew? Option to renew annually for up to 5 years
Approval for purchases "as needed" for the life of the Contract Yes No
Proposals/Bids Received (Range): 23 proposals (\$99,350 - \$468,750)
Selection Basis: Highest ranked proposers (top three)

Narrative:

Operational Requirement and Alignment with Strategic Plan

These as-needed project management and business analyst services serve to supplement internal resources as needed to support EWEB's projects for the purpose of maintaining project schedules and workflow. The services may also be used to mitigate staff vacancies as well as mitigating effect on project schedules when emergent work and peaks are experienced.

Additional Work Needed

The purpose of the increase is to support the services needed for:

- EWEB Enterprise Solutions (ESS) Program shared with the board in November by Travis Knabe – EWEB CIO (\$2 Million). EES was formerly referred to as an Enterprise Resource Planning (ERP) system.
- Enabling the transition from our legacy metering system to the new AMI systems, including the changes to operations, data and information management and the creation of meter data related products. (\$500,000)

These services include Program Management, Program Governance, Business Readiness, and a formal Incident Management program. In addition, we will leverage these contracts to help backfill resources to maintain day to day operation as EWEB staff resources are used to support project efforts.

Contracted Goods or Services

Contracted services include as-needed Project Management and Business Analyst services.

Example Project Management duties include, but are not limited to:

Facilitate and lead project team meetings as needed for task and deliverable progress; lead development of the work plan and maintain current work plan status; coordinate and track the delivery of the project deliverables; escalate project issues and coordinate decision making.

Example Business Analyst duties include, but are not limited to:

Assist with Business Case and elicit requirements with stakeholders; translate and simplify requirements; documenting sound business solutions; budgeting and forecasting; planning and monitoring; process mapping of existing work flows; and process improvement.

EWEB issues work projects in the form of a Task Order under the awarded contracts. Each Task Order consists of a negotiated Scope of Work, Project Deliverables, Timeframes, and effort/costs related to the work.

Purchasing Process

In September 2020, EWEB issued a formal Request for Proposals for As-Needed Project Management and Business Analyst Services. The solicitation was advertised on the Oregon Procurement Information Network (ORPIN).

Twenty-three proposals were received and evaluated and scored in Phase 1 of the evaluation process, worth 100 points. Phase 1 evaluation criteria included: ability and capability to perform the work (40%); project team experience (30%); and pricing (30%). The top ten highest scoring proposals were then moved to Phase 2 of the evaluation, worth an additional 60 points. Phase 2 included evaluation and scoring of: reference surveys (10 pts); and response to technical questions (50 pts).

Sure Power Consulting, LLC, Make It Happen, LLC, and Milestone Utility Services were selected as the highest ranked, responsive and responsible proposers.

Proposals Received

Vendor Name	City, State	Offered Price	Ranking	
			Phase 1	Phase 2
		Based on RFP Estimate of Hours per role and travel costs annually		
22nd Tech	McLean, VA	\$182,300	12	NA
The Atum Group	Portland, OR	\$263,686	4	4
Bluecrane, Inc.	Rolling Hills Estates, CA	\$345,200	11	NA
Bright Work Consulting	Seattle, WA	\$254,000	21	NA
Compelling Reason Consultants	Portland, OR	\$296,003.5	18	NA
ejAmerica	Irvine, CA	\$99,350	17	NA
Elegant Enterprise-Wide Consultants	Chantilly, VA	\$185,700	8	10
Excergy	Denver, CO	\$431,502	5	6
Galaxux	Salem, OR	\$227,000	9	9
InnoActive Group	San Francisco, CA	\$228,750	13	NA
Kastech	Houston, TX	\$175,000	14	NA
Make It Happen	Eugene, OR	\$355,500	2	2
Milestone Utility Services	Plantation, FL	\$334,000	3	3

Point B	Portland, OR	\$346,100	10	8
Propeller, Inc.	Portland, OR	\$315,295	15	NA
Public Consulting Group	Lacey, WA	\$282,690	19	NA
RefineM	Springfield, MO	\$209,500	23	NA
Resource Data	Portland, OR	\$267,000	7	5
Sure Power Consulting	Alpharetta, GA	\$224,760	1	1
TEKsystems	Portland, OR	\$257,666	22	NA
Treinen	Olympia, WA	\$218,464.50	16	NA
West Monroe	Los Angeles, CA	\$468,750	20	NA
Whitlock	Charleston, SC	\$307,000	6	7

Prior Contract Activities

Make It Happen, LLC					
EWEB Contract	Project Name (Description)	Board Approval Date	Project Duration	Original Contract Amount	Final Contract Amount
2446	IT Project Management Services	4/3/18	9/21/15 – 1/31/19	\$102,500	\$166,000*
19-159-PSC	IS Contract Manager/Business Analyst Services	NA	10/30/19 – 6/30/20	\$107,000	\$105,600
20-079-PSC	AMI Contract Business Analyst Services	NA	3/23/20 – 1/31/21	\$65,340	\$118,480*
20-149-PSC	Energy Insite Replacement Project	NA	7/1/20 – 7/15/21	\$42,900	\$42,570

* Increase reflects EWEB Staff directed additional work

Milestone Utility Services					
EWEB Contract	Project Name (Description)	Board Approval Date	Project Duration	Original Contract Amount	Final Contract Amount
005-2019-A	Customer Self Service Portal Product (includes Integration and Implementation Services)	8/6/19	10/9/19 – 10/8/26	\$1,970,000	N/A

Both Make It Happen, LLC, and Milestone Utility Services, have met EWEB's product quality and service requirements under their current contracts.

For completed contracts, Make It Happen, LLC was responsive to all needs and completed the work under each contract on time and satisfactorily.

ACTION REQUESTED:

Management requests the Board approve an increase to the contracts with Sure Power Consulting, LLC, Make It Happen, LLC, and Milestone Utility Services for as-needed Project Management and Business Analyst Services. Approximately \$1.5 million was planned for these services in the Information Services 2022 O&M budget of \$10.7 million, and approximately \$150,000 was planned for these services across the Electric and Water 2022 O&M budgets of \$256.2 million and \$26.5 million respectively. Variances will be managed within the budget process and Board policy.