

## **EWEB Board Consent Calendar Request**

*For Contract Awards and Renewals*

The Board is being asked to approve a new contract with Whitlock Consulting Group (WCG) for the Customer Experience Improvement project consulting and RFP development.

Board Meeting Date: 1/8/2019

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: \$185,000

**Resulting Cumulative Total:** \$185,000

### **Contracting Method:**

Method of Solicitation: Formal Request for Proposal

If applicable, basis for exemption: N/A

Term of Agreement: **1 Year**

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)

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 as part of the Strategic Plan Phase I to Enhance Customer Confidence. Implementing a customer self-service solution (CSS) and updating the Electronic Bill Payment and Presentment System (EBPP) 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. An experienced consultant will provide knowledge of the current marketplace, system offerings, and best business practices making the selection process more efficient and effective. In October 2018, staff requested proposals from consultants interested in providing support for the selection of a CSS and EBPP. Four proposals were received, and Whitlock Consulting Group (WCG) was the highest-ranked proposer.

#### Contracted Goods or Services

EWEB issued an intent to award a contract to WCG to provide EWEB expert advice in the development of CSS and EBPP RFP specifications that solicit responses from several high quality software providers. If approved, WCG will be contracted to review existing business processes, recommend areas for improvement, gather requirements, provide expert advice on marketplace system capabilities, assist in developing specifications, and support contractual negotiation strategies.

#### Prior Contract Activities

WCG has provided support to EWEB on three projects. The first was awarded to WCG in late 2017 via Formal RFP to support the Customer Information System (CIS) Replacement project. WCG's role in this project was to provide training, quality assurance, data conversion, and configuration management services. The contract was awarded for approximately \$1.5 million and \$400,000 was spent before the CIS project was cancelled. Much of the work performed is transferrable to any future CIS system implementation.

WCG was contracted in August 2018 to help EWEB Information Services evaluate the feasibility of upgrading the existing Customer Information System (CIS). The \$15,000 contract was completed on time and within budget.

EWEB also contracted with the WCG in Q3 and Q4 of 2018 to evaluate current customer service and billing processes and provide options and next steps for implementing EWEB's technology roadmap. 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, 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.

Bidder/Proposer Information

Gartner Consulting  
Global Power Consulting  
Incoho Consulting Group  
Whitlock Consulting Group

Bidder/Proposer Location

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

The RFP also requested information on Phase II system implementation support services. EWEB will determine the scope of work associated with Phase II depending on EWEB project team availability and expertise, implementation approach by the selected software vendors, consultant experience, and the ability to agree on terms and scope of work. If Management believes it would be in EWEB's best interest to retain WCG for these services, a contract would be brought to the Board for approval at that time.

**ACTION REQUESTED:**

Management requests the Board approve a new contract with Whitlock Consulting Group for the Customer Experience Improvement project consulting and RFP development. Funds for this work were budgeted for 2019. Total IS Division O&M budget for 2019 is \$11 Million.