CUSTOMER INFORMATION SYSTEM (CIS) Project Update - August 21st, 2017

TODAY’S UPDATE
Informational Only
Customer Information System Progress
2016-Present
Next Steps
CIS Integrates PUD Back Office

Firm & optional areas

- Kiosk Processing Capabilities
- Mobile App
- MDMS
- Batch Scheduler
- Customer Information System
- Customer Self Service
- Mobile Work Management
- Web Chat Capabilities
Path Forward to Selecting a Customer Information System (CIS)

2016 2nd Quarter
- Contracted with a CIS request for proposal (RFP) consultant
- Created core team
- Complete the project charter
- Developed first schedule

2016 3rd Quarter
- Issued RFP 16-42
- Hosted RFP proposer Q&A session
- Clarified proposal conditions

2016 4th Quarter
- Received 11 proposals
- Core team evaluated 9 proposals
Path Forward to Selecting a Customer Information System (CIS)

2017 1st Quarter
- Selected 4 CIS and 4 Meter Data Management proposers for interviews
- Conducted interviews
- Held 2nd interviews with top proposers

2017 2nd Quarter
- Deliberately paused on further proposer evaluations under RFP 16-42
- Took advantage of the pause to evaluate other CIS solutions and implementation strategies

2017 3rd Quarter
Why Did the District Pause?

• We have a unique combination of a relatively small customer base and a large generation business unit
• The vendor community tends to differentiate based on the size of the utility being served
• Simply on customer numbers alone we could use a smaller, more standardized and less costly solution, but…
  • We have developed sophisticated financial and internal control systems benefitting a large utility
  • We rely upon and do not want to give up the benefits of the sophisticated systems

After considerable evaluation we have concluded that if we want to be among the best in all our functions we need to maintain our financial/internal control systems while upgrading our CIS
Looking Forward

• Conduct final interviews
• Review system agreement terms and conditions
  • Define the scope, schedule and roles and responsibilities
• Outside CIS implementation Quality Assurance/Quality Control
  • Rose Minton from Heights Consulting
• Establish District Project Management roles
  • Mark O'Bryan will be taking over for Sam Dilly as he moves onto facilities planning
• Finalize contract terms
• Board resolution Q4
• Implement Q1 2018