

CUSTOMER INFORMATION SYSTEM

(CIS) Project Update - August 21st, 2017

TODAY'S UPDATE

Informational Only

Customer Information
System Progress
2016-Present

Next Steps



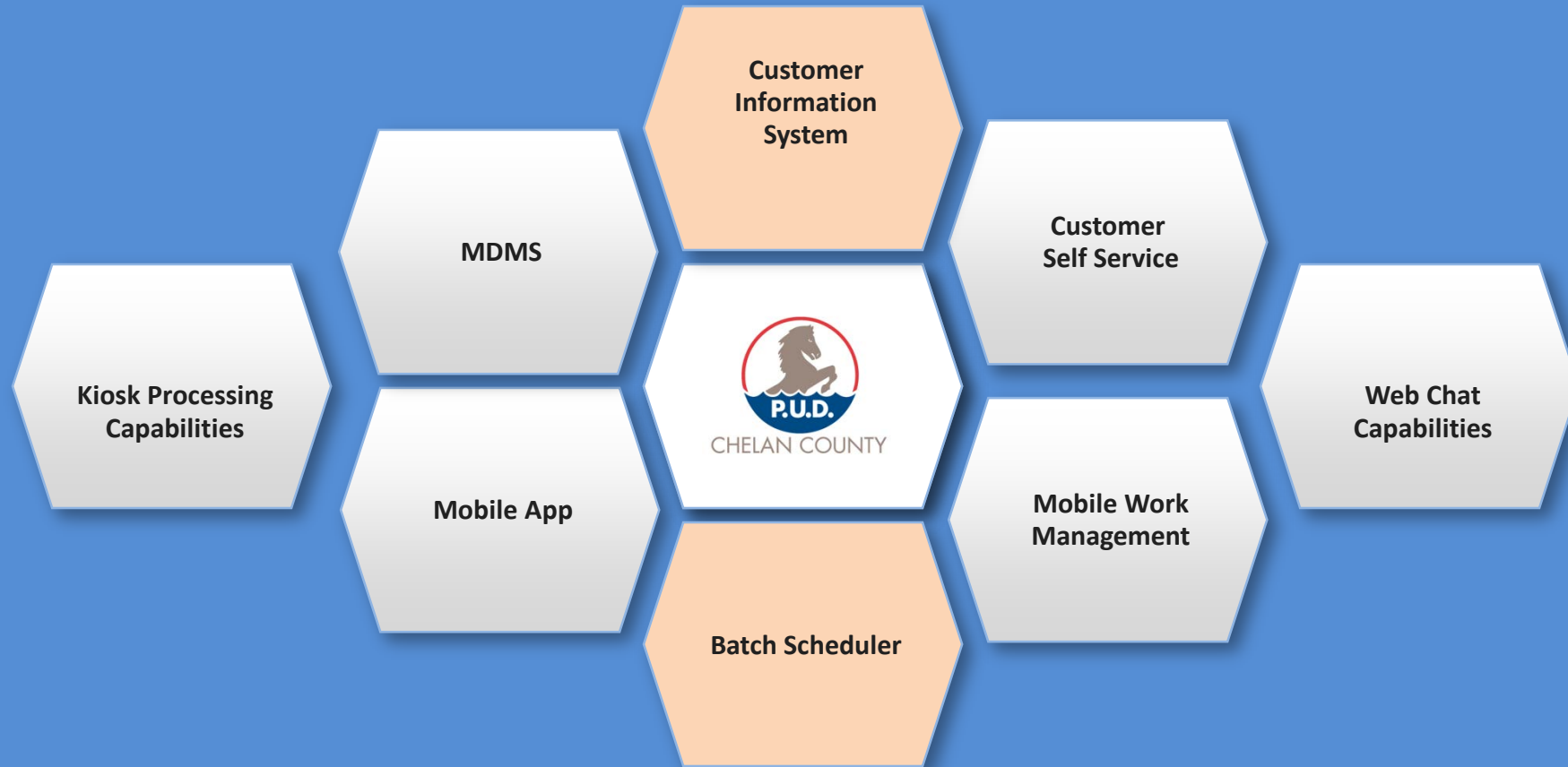
CHELAN COUNTY

The Customer Experience

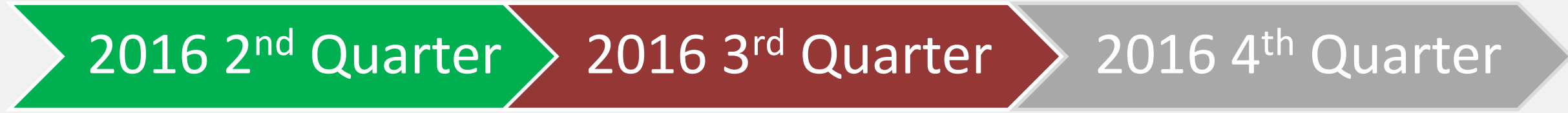


CIS Integrates PUD Back Office

Firm & optional areas



Path Forward to Selecting a Customer Information System (CIS)



Phase I

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

Phase II

- Issued RFP 16-42
- Hosted RFP proposer Q&A session
- Clarified proposal conditions

Phase III

- Received 11 proposals
- Core team evaluated 9 proposals

Path Forward to Selecting a Customer Information System (CIS)

2017 1st Quarter

2017 2nd Quarter

2017 3rd Quarter

Phase IV

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

Phase V

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

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

Questions

