



RESOLUTION NO. U-11324

1 A RESOLUTION related to the purchase of materials, supplies, equipment and
2 the furnishing of services; authorizing the City officials to enter into
3 contracts and, where specified, waive competitive bidding requirements,
4 authorize sale of surplus property, or increase or extend existing
5 agreements.

6 WHEREAS the City of Tacoma, Department of Public Utilities, requested
7 bids or proposals for the purchase of certain materials, supplies, equipment or
8 the furnishing of certain services, or proposes to purchase off an agreement
9 previously competitively bid and entered into by another governmental entity or
10 a purchasing cooperative, or for the sales of surplus, or desires to increase or
11 extend an existing agreement, all as explained by the attached Exhibit "A,"
12 which by this reference is incorporated herein, and

13 WHEREAS in response thereto, bids or proposals (or prices from
14 another governmental or cooperative agreement) were received, all as
15 evidenced by Exhibit "A," and

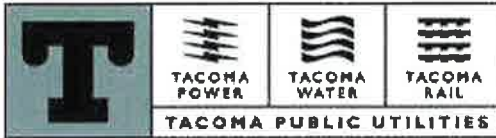
16 WHEREAS the Board of Contracts and Awards or the requesting division
17 have heretofore made their recommendations, which may include waiver of the
18 formal competitive bid process because it was not practicable to follow said
19 process, or because the purchase is from a single source, or there is an
20 emergency that requires such waiver, or because a directly negotiated contract
21 was determined to be in the best interest of the City, or waiver of minor
22 deviations, and in the case of sale of surplus, a declaration of surplus has been
23 made certifying that said items are no longer essential for continued effective
24 utility service, as explained in Exhibit "A," Now, therefore,
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1 BE IT RESOLVED BY THE PUBLIC UTILITY BOARD OF THE CITY OF TACOMA:

2 That the Public Utility Board of the City of Tacoma hereby concurs and
3 approves the recommendations of the Board of Contracts and Awards or
4 the requesting division, and approves, as appropriate: (1) the purchase or
5 furnishing of those materials, supplies, equipment or services recommended for
6 acceptance; (2) the sale of surplus materials, supplies or equipment
7 recommended for acceptance; (3) the purchase from a cooperative or another
8 governmental entity contract; and (4) the increase or extension of an existing
9 agreement, and said matters may include waiver of the formal competitive bid
10 process or waiver of minor deviations, all as set forth on Exhibit "A," and
11 authorizes the execution, delivery and implementation of appropriate notices,
12 contracts and documents by the proper officers of the City for said transactions.
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15 Approved as to form: _____
16 _____ Chair
17 /s/ _____
18 Chief Deputy City Attorney Secretary
19 _____ Adopted _____
20 Clerk
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RESOLUTION NO.: U-11324
ITEM NO.: 1
MEETING DATE: JUNE 8, 2022

TO: Board of Contracts and Awards
FROM: Tenzin Gyaltzen, Power Section Manager, Power Utility Technology Services
Dan Drennan, Market Development Manager, Public Affairs-Market Development
Curtis Sneddon, Utility Technology Project Manager Sr., Power Utility
Technology Services
COPY: Public Utility Board, Director of Utilities, Board Clerk, EIC Coordinator, LEAP
Coordinator, and Tad Carlson, Finance/Purchasing
SUBJECT: Customer Engagement Portal (CEP) Project Phase III
Request for Proposal Specification No. PI20-0019F, Contract No. CW2249484 –
June 8, 2022
DATE: May 31, 2022

RECOMMENDATION SUMMARY:

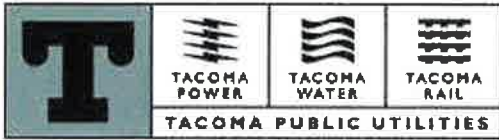
Tacoma Power, Utility Technology Services recommends a contract be awarded to i3-Milestone, LLC of Nashville, TN, assignee of the contracts of Milestone Utility Services, Inc. of Plantation, FL, in the amount of \$1,256,705, plus applicable taxes, budgeted from the 4700 Power and 4600 Water funds, for an initial contract term of two years with the option to renew for one additional year with total contract value remaining \$1,256,705, plus applicable taxes, for Phase III CEP implementation under an Agile implementation framework plus new features and integrations.

BACKGROUND:

The Tacoma Public Utilities (TPU) Customer Engagement Portal (CEP) will provide a transformative change in the way that TPU will engage with its customers and is a key component of the benefits realized from the deployment of advanced meters (AM). The CEP workstream will move TPU from the existing MyAccount portal to a mainstream, hosted, managed services platform from i3-Milestone, LLC and includes the configuration, integration and testing to meet TPU business requirements and achieve key benefits as part of the overall program.

The initial implementation contract was awarded and executed with Milestone Utility Services, Inc. on November 20, 2020. The contract was approved under resolution U-11217 on November 18, 2020 and subsequently assigned to i3-Milestone, LLC on May 1, 2021. Due to the escalating costs from schedule delays and the need to deliver incremental customer benefits, the project was halted under the Implementation contract and re-written under an agile framework for phase III and beyond to mitigate schedule challenges and costs associated with those delays. The delays occurred due to resource constraints attributed to the pandemic.

ISSUE: Phase I and II of the CEP implementation was completed by utilizing a traditional "waterfall" project management methodology in which work is performed in sequential phases, where each phase depends on the deliverables of the previous one. To better control costs and closely manage the project phases and new feature implementation, the project is being moved to an Agile contract framework.



ALTERNATIVES: TPU could continue under the existing waterfall contract structure, but the costs were showing challenging to control and did not allow for flexible scope and schedule changes without incurring additional unproductive costs.

COMPETITIVE SOLICITATION:

Request for Proposals Specification No. PI20-0019F was opened April 7, 2020. Fourteen (14) companies were invited to bid in addition to normal advertising of the project. Six (6) responsive submittals were received. Out of the six (6) initial submittals, four (4) were selected for shortlist evaluation.

Milestone Utility Services, Inc. submitted a bid that resulted in the lowest evaluated submittal. The table below reflects the amount of the base award.

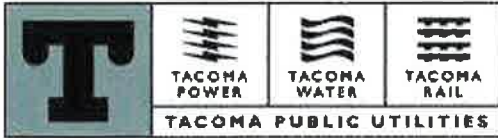
<u>Respondent</u>	<u>Location</u> <i>(city and state)</i>	<u>Score</u>
Milestone Utility Services, Inc	Plantation, FL	82.41
HCL Ameica, Inc.	Sunnyvale, CA	73.27
Smart Energy Water	Irvine, CA	70.13
VertexOne	Richardson, TX	56.24

Pre-bid Estimate: \$5,270,000 (5-year term)
 The recommended award is six percent below the pre-bid estimate.

CONTRACT HISTORY: New Contract

SUSTAINABILITY: Not Applicable

EIC/LEAP COMPLIANCE: Five percent of the scoring criteria was reserved for Equity in Contracting considerations.



FISCAL IMPACT:

EXPENDITURES:

FUND NUMBER & FUND NAME *	COST OBJECT (CC/WBS/ORDER)	COST ELEMENT	TOTAL AMOUNT
4700 – Power Fund	PWR-01038	Various	\$917,394.65
4600 – Water Fund	WTR-00631-01	Various	\$339,310.35
TOTAL			Up to \$1,256,705

REVENUES:

FUNDING SOURCE	COST OBJECT (CC/WBS/ORDER)	COST ELEMENT	TOTAL AMOUNT
TOTAL			Up to \$0

FISCAL IMPACT TO CURRENT BIENNIAL BUDGET: \$ 524,677

ARE THE EXPENDITURES AND REVENUES PLANNED AND BUDGETED? Yes

IF EXPENSE IS NOT BUDGETED, PLEASE EXPLAIN HOW THEY ARE TO BE COVERED. N/A.