

Attachment 8

BEFORE THE WASHINGTON UTILITIES AND TRANSPORTATION COMMISSION

DOCKET NO. UE-150204

DOCKET NO. UG-150205

EXHIBIT NO. \_\_\_\_\_ (JMK-7)

JAMES M. KENSOK

REPRESENTING AVISTA CORPORATION

## **Avista Corporation**

### **RFP R-37440**

Avista is seeking Proposals for qualified information system solutions consisting of the complete functionality of a Customer Information System (CIS) and an Enterprise Asset Management (“EAM”) (also known as a Work Management System (“WMS”). These functional areas and specific requirements are explained more fully later in this RFP. Avista is seeking a fixed priced Proposal for conversion, testing, training, implementation, post-implementation, software, and hardware (collectively, the “Enterprise Solution”).

Avista has elected to issue this single RFP rather than separate RFPs for each functional system. However, Solution Provider(s) may respond to one, several, or all of the requested functional systems based upon Solution Provider(s) area of expertise and/or desire to form partnerships with other providers. In the final analysis, Avista reserves the right to select proposed solution components that are the best fit for its needs.

The new Enterprise Solution (also referred to as the CIS and EAM Solution) must be professionally installed, must be integrated or highly interfaced and will provide enhanced functionality and the ability to interface with other third party applications.

### **OPTIONS**

This RFP will consider the following solution alternatives:

1. A complete Enterprise Solution consisting of CIS and EAM functionality. These Proposals may be for fully integrated solutions, or they may be for best of breed solutions that are highly interfaced (a “Partnered Solution”).
2. A solution consisting only of CIS. However, the Solution Provider must demonstrate successful integration with EAM solutions at utilities similar to Avista.
3. A solution consisting only of EAM. However, the Solution Provider must demonstrate successful integration with CIS solutions at utilities similar to Avista.

### **SUMMARY OF RFP SCOPE OF WORK**

Several key system and service related components have been identified to achieve Avista’s stated business objectives. The total effort outlined in the RFP calls for a complete Enterprise Solution. The Enterprise Solution consists of the following components:

- **Customer Information System (CIS)**

The new CIS solution will include all software and services required to implement and support the stated interfaces and traditional CIS functions such as customer service, account management, credit and collections, service orders, meter inventory, usage, billing, service address management, portfolio management, rates, and financial based activities. The Enterprise Solution will include utility specific Customer Relationship Management (CRM) functionality.

- **Enterprise Asset Management (EAM)**

The new EAM will include all software and services required to implement and support the stated interfaces and traditional work management and asset management functions such as work initiation, work planning, work approval, work scheduling, work execution, work closing, and work reporting. Avista seeks a system that will accommodate typical utility generation, transmission and distribution operations. Avista is not seeking inventory and

procurement functions, only the integration to those functions in Avista's Oracle eBusiness financial suite. The new EAM will also include asset maintenance and management functionality including analytics and metrics.

- **Mobile Workforce Management (MWM) System**

Avista's current CSS interfaces to ABB-Ventyx Service Suite version 8.1 mobile data system. With the new CIS solution, Avista is considering a new, fully integrated MWM system for all orders generated out of CIS. A later phase may include integration with the new EAM for the long-cycle work that is currently generated out of WMS. As an alternative, if the proposed solution does not include a fully integrated MWM solution, the Solution Provider must factor into the solution the time and expenses to fully interface ABB-Ventyx Service Suite with the proposed CIS solution.

- **Data Access Solution**

Avista is seeking access via a standard set of tools to the CIS and EAM application data for reporting and analysis. The data access solution will include all hardware specifications, software and services required to implement and support application query and reporting within both the CIS and EAM. However, Avista is not seeking an Enterprise Information Management (EIM) or to replace our current Cognos Enterprise Business Intelligence (BI) solution.

- **Full Integration**

The new CIS and EAM will contain full integration between the various modules in each of the solutions. The new systems will also facilitate efficient and effective integration to other Avista systems. There must be a clear approach to master data management supporting both internal integrations as well as external system integrations through industry standard methods.

- **Partnered Solution Approach**

If this is a Partnered Solution, Avista requires that one of the Solution Providers assume responsibility for the complete solution implementation as the Prime Vendor, to include all necessary interfaces and be responsible for the provision of the functionality requested by Avista in this RFP. Avista requires a Prime Vendor approach for these Partnered Solutions to manage, coordinate implementation and be responsible for all subcontractors and third-party software related to their proposed Partnered Solution.

- **Implement Improved Business Processes**

Avista expects the Solution Provider(s) to provide leadership during product configuration to implement common / best practices in order to meet the application's functionality. Avista will rely upon product configuration rather than product modifications and will consider modifying its business processes to fit the technology workflow.

## **MINIMUM REQUIREMENTS**

Avista expects the Proposed Solution(s) meet the following minimum requirements and that each of these requirements be included in and clearly addressed as part of the Proposal. In reviewing these minimum requirements, Solution Provider(s) should consider each item's relevance to the specific solution or service being proposed.

### **Proposed software minimum requirements:**

1. The Proposed Solution is successfully in operation at a minimum of 10 utilities in North America, three of which serve a minimum of 500,000 gas and electric customers.
2. The Proposed Solution is currently in production on a similar platform as that being proposed for Avista.
3. The Proposed Solution has been proven to scale to over one million customer accounts.
4. The Proposed Solution will promote implementation of a functionally rich base product with minimal modifications. Avista will not accept custom development Proposals or those that rely on extensive levels of customization. In addition, Solution Provider must be capable of providing ongoing maintenance support and scheduled product releases as demonstrated through a well-defined, robust product road map.
5. The Proposed Solution must accommodate a multi-company or multi-state environment with varying tariffs, rules and regulations (at least three states and three utility commissions).
6. The Proposed Solution must include licensed packaged products capable of being run either within an in-house data center or in a hosted data center on Avista's behalf. Avista will not consider a Software as a Service (SaaS) solution at this time.

**Solution Integrator minimum requirements:**

7. The SI must be a well-established professional organization that offers the implementation / integration of hardware, software and services for Proposed Solution. The SI must have been in business for a minimum of three years. The SI shall place only experienced professionals on the Proposed Solution. The project manager, technical lead, and functional lead must have a minimum of three referenceable implementations and at least five years experience of the Proposed Solution. Other level professionals must have a minimum of two years of experience with the Proposed Solution.
8. The SI must be a financially healthy institution capable of conducting business during the entire Proposed Solution implementation period and the associated post go-live support period as measured by financial statements, D&B report, etc. SI shall attach three years of audited financial records, D&B reports, etc., and any interim statements.
9. The SI must not be involved in any litigation that may potentially impact the SI's ability to support Proposed Solution and any required support. The SI must disclose any and all existing and pending litigation in the RFP response.

Questions regarding this procurement and RFP are due by end of business Pacific time, Thursday, September 22, 2011.

There will be a pre-proposal phone conference on Tuesday, September 27.

Proposals are due by 3:00 p.m. Pacific time, Friday, October 21 2011.

If you would like to receive this RFP, you will be required to complete, sign and return Avista's Non-Disclosure Agreement and Five Point Partner's Terms of Use Agreement, and register the individuals who will access **STAR**. **STAR** is the acronym for Five Point Partner's "**Selection Tool for Assessment and Requirements**." This online tool replaces functions and features checklists of software product functionality. This tool will be used by the Solution Provider(s) to access Avista's requirements for the new Enterprise Solution. Those documents must be fully executed and sent to Gary Weseloh at [gary.weseloh@fivepoint.net](mailto:gary.weseloh@fivepoint.net) before the RFP documents will be released.