

**REPORT FROM EVALUATION COMMITTEE
REQUESTING FOR PROPOSAL FOR
PROFESSIONAL CONSULTING SERVICES FOR THE DEPARTMENT OF PUBLIC
UTILITIES, UTILITY BILLING & COLLECTION – RFP NO. 072915**

COMMITTEE MEMBERS:

- Michael Lima, Controller, City of Fresno, Finance Department
- Jerry L. Schuber Sr., Assistant Director, City of Fresno, Public Utilities Department - Solid Waste Management Division
- Brian Reams, Revenue Manager, City of Fresno, Department of Public Utilities - Utility Billing & Collection
- Dee Barnes, President of Fresno City Employee Association
- Cynthia Williams, Business Manager, City of Fresno, Department of Public Utilities - Solid Waste Management Division

BACKGROUND

The goal of the Request for Proposal (RFP) was to solicit proposals to provide professional consulting services to conduct an operational assessment and evaluation of Utility Billing & Collection (UB&C). Expertise from a professional consulting service will provide the Department an assessment of UB&C's organizational structure, practices, operations, processes, systems and tools used by UB&C.

COMMITTEE NOTES

A Notice Inviting Proposals was published on August 3, 2015. The Specifications were distributed to 28 prospective proposers. Four proposals were received and opened on August 25, 2015. The four firms that submitted proposals were:

- Baker Tilly, Chicago, IL
- R3 Consulting Group, Inc., Berkeley, CA
- West Monroe Partners, Los Angeles, CA
- Mindboard, Sterling, VA

The Selection Committee met on October 2, 2015 to review, evaluate, score and rank the submitted proposals. As presented in the RFP, each of the proposals was evaluated based on the following criteria:

- Ability to meet requirements
- Past performance and experience providing service
- Written proposal and presentation
- Qualifications of key personnel

At the conclusion of the Proposal Review Process, the proposals were ranked as follows: West Monroe Partners, R3 Consulting Group, Inc., Mindboard and Baker Tilly. The Selection Committee identified West Monroe Partners as having the highest ranked proposal based on their exceptional presentation, professionalism, knowledge and experience in the utility industry.

Once the Proposal Review Process was complete, the Selection Committee determined that all four firms should be provided the opportunity for an interview. Given that all of the firms were located outside of Fresno County, the Selection Committee agreed to allow firms to conduct their interviews either in person or through an internet-based meeting application. The interview schedule was as follows:

1. Baker Tilly	10/03/15	9:00 a.m.	Web-based
2. R3 Consulting Group, Inc.	10/03/15	10:30 a.m.	In-person
3. West Monroe Partners	10/03/15	1:30 p.m.	In-person
4. Mindboard	10/03/15	3:00 p.m.	In-person and Web-based

Based on the quality of the proposals and interviews, the Selection Committee ranked the firms as follows:

1. West Monroe Partners
2. R3 Consulting Group, Inc.
3. Mindboard
4. Baker Tilly

West Monroe –

- Well developed, comprehensive assessment plan including a robust Blue Ribbon panel component.
- Nationwide firm with a strong level of company resources that would enable them to find answers if the project team didn't have them already.
- Proposed timeline is the most rapid of the four respondents.
- Met all requirements of the RFP.
- Proposal, presentation and interview were professional and their references checked out and found to be satisfactory.

R3 Consulting Group, Inc. –

- Have worked with City of Fresno in the past on Solid Waste project so already familiar with the City.
- Presented a strong, detailed assessment plan.
- Strong familiarity with Solid Waste operating procedures and billing rules.
- Met all requirements of the RFP.
- Proposal, presentation and interview were professional and their references checked out and found to be satisfactory.

Mindboard –

- Strong communication tools for updating stakeholders on project status.
- Would house staff onsite throughout the project, resulting in a quick turnaround time for assessment.
- Strong familiarity with evaluating IT processes.
- Met all requirements of the RFP.
- Proposal, presentation and interview were professional and their references checked out and found to be satisfactory

Baker Tilly –

- Lowest bid of any respondent.
- Has some experience with public utilities assessments.
- Familiar with PeopleSoft and Sungard.
- Met all requirements of the RFP.
- Proposal, presentation and interview were professional and their references checked out and found to be satisfactory.

RECOMMENDATION

The Selection Committee unanimously identified West Monroe Partners as having the highest ranked combination of proposal and interview. Based on this finding, the Selection Committee recommended that the West Monroe Partners be selected for the UB&C Operational Assessment and Evaluation Study based on their exceptional knowledge, presentation, professionalism, experience in the utility industry and ability to connect and understand the Blue Ribbon panel process.

The Committee believes that West Monroe Partners will provide a well-developed, comprehensive assessment plan that will include a robust Blue Ribbon panel process. The proposal was very thorough allowing sufficient attention to each major work task, including stakeholder, and expert engagement process. They have an extensive team of resources that brings a wider diversity of skills and utility experience. Therefore, the Committee recommends West Monroe Partners be awarded the contract.