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1106-2025

Report

Accept recommendation of Chief Procurement Officer to award contract for new Customer Engagement Portal as part of the Advanced Meter Infrastructure project

Accepted

TO THE COUNCIL:

Portland Water Bureau (Water Bureau) and the Bureau of Environmental Services (BES) collectively “the Bureaus” seek to launch a new web and mobile Customer Engagement Portal (CEP) for City wastewater/stormwater/water customers. The City Utility Bureaus are undertaking this project to enhance digital customer service and improve customer satisfaction, while streamlining internal processes and giving employees new tools to do their work. Customers will use the new CEP to view and pay bills, see past consumption trends, enroll in programs, communicate with City Utility Bureau staff, and manage their accounts and communication preferences. The City Utility Bureaus will use the new CEP to communicate with customers for both routine and emergency communications, track and analyze customer activities, and provide targeted suggestions for water conservation.

After Initial Deployment, the selected proposer listed below will support the City Utility Bureaus to Run and Maintain the new System and support the City’s planned transition from manual meter reading to automated collection of consumption data using Advanced Metering Infrastructure (AMI).

On November 8, 2023, Council approved Ordinance Number 191517 authorizing a competitive solicitation for goods and services required to implement AMI and a new customer engagement portal for an estimated amount of \$76 million in accordance with PCC 5.33. This Chief Procurement Officer’s report is for the solicitation for the customer engagement portal. The other competitive solicitations to implement the advanced metering infrastructure are currently ongoing.

On January 2, 2024, the Chief Procurement Officer advertised [RFP No. 00002202](#) and twelve (12) proposals were received and opened on February 14, 2024. Of the twelve (12) proposals received, ten (10) were deemed responsive to the requirements of the solicitation. After three (3) phases of proposal evaluation, including a Best and Final Offer process, the City issued a Notice of Intent to Negotiate and Award a contract to the VertexOne, on June 28, 2024.

Introduced by

[Mayor Ted Wheeler](#)

City department

[Procurement and Business Opportunities](#)

Contact

Sylvester Donelson, Jr.
Chief Procurement Officer

✉ Sylvester.donelson@portlandoregon.gov

☎ [971-469-1584](tel:971-469-1584)

Requested Agenda Type

Consent

Date and Time Information

Requested Council Date
December 18, 2024

Prior to contract signature, VertexOne shall have a current business tax registration and be in compliance with all of the City's contracting requirements. The Bureau's level of confidence in the cost estimate for this agreement is "High" as detailed specifications have been developed and there is good historical information regarding purchases made for these services.

It is requested that City Council authorize the Chief Procurement Officer, to execute, amend, and extend, a contract VertexOne, for an initial term of five (5) years and a not to-exceed amount of \$1,700,000, contingent upon the City Attorney's Office approval.

Recommended by:

Sylvester Donelson, Jr.

Chief Procurement Officer

SD: jcm

Impact Statement

Purpose of Proposed Legislation and Background Information

The Water Bureau provides customer service to the City's nearly 200,000 water, wastewater, and stormwater utility customers. Customers can perform some account activities – viewing and paying bills, enrolling in autopay and paperless billing – through online customer self-service. The company that provides the software the Water Bureau uses to offer customer self-service is no longer investing in the product, so the Water Bureau needs to transition to a new platform.

On November 8, 2023, City Council adopted ordinance 191517 authorizing the Water Bureau to procure software for a new customer engagement portal. The Water Bureau has concluded that procurement and selected a software that will:

- Consolidate existing customer self-service offerings into a single platform.
- Add new self-service functions such as chat with a live agent or chatbot, online program enrollment, and access to customized water conservation tips.
- Provide a seamless experience in five languages most commonly spoken in Portland and on mobile devices such as smart phones and tablets.

The selected software complies with Web Content Accessibility Guidelines version 2.1, Level AA, the new requirement for local government customer-facing technology Title II of the Americans with Disabilities Act.

Financial and Budgetary Impacts

Under Ordinance 191517, City Council authorized procurement of a new customer engagement portal with an estimated cost of \$500,000 and a new annual licensing and support fee estimated to be \$200,000 to \$400,000 per year.

The contract price for both the portal implementation and annual licensing is within the authorized contract amounts: CEP implementation is \$170,000 and the annual licensing fee is \$260,000 for year one, to increase by 3% per year over the five (5)year contract term.

Funding for CEP implementation is included in the Water Bureau and Bureau of Environmental Services capital improvement programs; the annual licensing fee is budgeted for in the Water Bureau Customer Service operating budget.

Economic and Real Estate Development Impacts

Not applicable.

Community Impacts and Community Involvement

The new customer engagement portal has the potential to affect all of the City's nearly 200,000 utility customers. The new customer engagement portal will:

- Centralize existing customer self-service functions like stopping and starting service or viewing and paying bills into a single, user-friendly platform.
- Allow customers to see their usage and bill payment history, and receive water conservation suggestions to help them better manage their utility costs.
- Open up new communication channels with customers including live agent chat during office hours and with a virtual agent (chatbot) 24/7, and text message reminders and notifications.
- Offer online self-service in the five languages most commonly spoken in Portland, and through a platform that meets ADA requirements and accessibility best practices.

100% Renewable Goal

Not applicable.

Financial and Budget Analysis

No fiscal impact to accept the CPO's recommendation.

Document History

Agenda	Council action
December 18, 2024 Consent Agenda 	Accepted Aye (5): Mingus Mapps, Carmen Rubio, Dan Ryan, Rene Gonzalez, Ted Wheeler