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April 1, 2014

### MEMORANDUM

**TO:** Council Members

**FROM:** Charlie Black, Power Planning Division Director

**SUBJECT:** Progress Report on RFP for Regional Portfolio Model

At the Council Meeting on April 8, 2014, I will report on further progress in the process to select a resource planning software vendor to redevelop the Council's regional portfolio model.

As you will recall, three vendors have been short-listed: Ascend Analytics; Energy Exemplar; and Navigant Consulting. Two series of meetings were held with the vendors on March 18-19.

The first series of meetings involved 2½ hour sessions with each vendor and the Council staff evaluation team. During these meetings, the vendors provided responses to written questions Council staff submitted in advance. The meetings also provided an opportunity for additional discussion and clarification of each vendor's proposal.

The second series of meetings involved 1½ hour briefings by each vendor to an ad hoc advisory group. The advisory group is composed of seven individuals who are experienced with resource planning models and who represent a diverse range of stakeholders. Following the meetings, members of the advisory group provided written responses to five questions about their reactions to each vendor's proposal.

Following the meetings, the Council staff team reviewed and discussed the merits of each vendor and its proposal, including their performance during the staff session and the advisory group session. Additional clarification questions were identified and are being prepared for submittal to the vendors.

Meanwhile, each vendor has submitted some pro forma contract language, and Council legal staff has identified an outside attorney to provide specialized legal review and advice.

Remaining steps include checking each vendor's references and following up on remaining clarification questions. Then the Council staff team will individually evaluate each vendor's proposal using the evaluation criteria defined in the RFP and meet as a group to develop a consensus recommendation.

Results of the Council staff team's evaluation and recommendation for selection of a vendor to redevelop the regional portfolio model are anticipated to be ready to be submitted to the Council on or about April 11.