

IMPACT STATEMENT

Legislation title: *Amend Contract No. 30003361 with Infor Public Sector, Inc. to increase the not-to-exceed amount by \$604,725 for Information Technology Advancement Project (ITAP) assessment analysis and implementation planning services (Ordinance)

Contact name: **Paul L. Scarlett**, Director, Bureau of Development Services (BDS) and ITAP Co-Sponsor

Contact phone: (503) 823-7308

Contact name: **Jeff Baer**, Chief Technology Officer, Bureau of Technology Services, (BTS) and ITAP Co-Sponsor

Contact phone: (503)-823-5540

Presenter name: **Paul L. Scarlett**, Director, Bureau of Development Services (BDS) and **Jeff Baer**, Chief Technology Officer, Bureau of Technology Services (BTS)

Purpose of proposed legislation and background information:

To authorize the Chief Procurement Officer to execute an amendment to proceed with the project assessment and development of a Master Plan for completion of the ITAP comprehensive permitting, plan review, and inspections management software system and services.

For the past three consecutive years, BDS ITAP team has been building the ITAP system. On June 13, 2016 the master contract with Sierra-Cedar Inc. expired leaving the Project without a primary vendor and systems integrator to complete the implementation. Since that time the Project has engaged Infor Public Sector, the ITAP primary permitting software vendor to initiate an assessment and validation of work completed to date, and assess sufficiency of Project artifacts to support completion work. It is now important to fund the rest of the assessment and validation work to provide the Master Plan for ITAP completion. This work is comprised of a series of 3 sprints varying in duration from 4 to 7 weeks. The completion of all sprints is required to inform and build the Master Plan for ITAP completion as envisioned on June 14, 2013.

Financial and budgetary impacts:

The cost to complete assessment, validation and build the Master Plan is \$1,500,000 and is outlined below. The Project has been advised by Commissioner Saltzman and the City's Technology Oversight Committee to go forward with modular delivery and based on that advice project staff are pursuing smaller sprints of work. This is the first series of sprints to align to that guidance. It is the intent of the Project, BDS, and BTS to propose each future sprint as a separate ordinance and budget request to Council according to the following schedule:

Council Date	To Fund	Budget Request
September 28, 2016	Sprint 1	\$604,725
October 19, 2016	Sprint 2	\$685,781
November 16, 2016	Sprint 3	\$206,053

The funding will be provided by the Bureau of Development Services from existing reserves.

Community impacts and community involvement:

BDS has been proactive in keeping customers and stakeholders informed regarding ITAP. The Project has a Customer Advisory Committee (CAC) that meets on a bi-monthly to quarterly basis. The CAC includes a diverse group of members from the development services customer community. The purpose of this Committee is to inform the Project of customer requirements and also stay informed about the status and progress of the Project.

The City's Information Technology Oversight Committee (TOC) will reviews monthly reports for the IT Advancement Project.

c) How did public involvement shape the outcome of this Council item?

Feedback from the public, employees, the Development Review Advisory Committee (DRAC), industry, and the TOC validated the scope and objectives of the Project:

- ITAP will deliver a customer portal that is a directly aimed at improved delivery of services to our development services customers.
- The Project will provide customers and stakeholders complete online access to the permitting and case management, review, fee payment, research, and inspections services.
- ITAP will deliver web-based submittals and a paperless application process.
- Identified needs for private sector, neighborhood organizations and needs for citizen access to information through a variety of automated electronic messaging systems, plus 24/7 online access.
- Reviewed the project for both business and financial feasibility.
- Responded to proposed project deliverables.

d) Who designed and implemented the public involvement related to this Council item?

The Bureau of Development Services' senior management team.

e) Primary contact for more information on this public involvement process (name, title, phone, email):

Rebecca Sponsel, ITAP Project Manager

(503) 823-7056

Rebecca.Sponsel@portlandoregon.gov

10) Is any future public involvement anticipated or necessary for this Council item? Please describe why or why not.

BDS will continue to provide these organizations with opportunities to provide input and feedback on ITAP's timeline, expenditures, and deliverables:

- Development Review Advisory Committee (DRAC)
- City Information Technology Oversight Committee (TOC)
- ITAP Customer Advisory Committee (CAC)
- BDS Finance Committee
- BDS Budget Advisory Committee
- ITAP customer user groups will be identified to help test the developed system

Budgetary Impact Worksheet

Does this action change appropriations?

- YES: Please complete the information below.
 NO: Skip this section

Fund	Fund Center	Commitment Item	Functional Area	Funded Program	Grant	Sponsored Program	Amount

ORDINANCE No.

*Amend contract with Infor Public Sector, Inc. to increase the not-to-exceed amount by \$604,725 for the Information Technology Advancement Project assessment analysis and implementation planning services (Ordinance; amend contract No. 30003361)

The City of Portland ordains:

Section 1. The Council finds:

1. The Bureau of Development Services (BDS) serves both industry and the general public through its development review programs. This includes permitting and inspections, as well as building plan and land use reviews. To improve the delivery of these services, BDS is undertaking a modernization of its technology systems, known as the ITAP project.
2. In June 2013, as part of the ITAP project, the City executed a contract with Sierra-Cedar, Inc. (Sierra) to implement software developed and licensed by Infor Public Sector, Inc. (Infor).
3. In June 2016 the City allowed the contract with Sierra-Cedar to expire, and engaged Infor to perform an assessment of the implementation work performed to date.
4. BDS would like to further engage Infor to perform an in-depth validation of the work performed to date, and develop a detailed roadmap and Master Plan for the complete implementation of the ITAP system.
5. This assessment and validation work is estimated to be completed by January 2017, and the total cost is estimated to be \$1,496,559. BDS has broken this work into three sprints, and will be seeking separate Council approval for the funding of each sprint.
6. BDS seeks Council's authorization for \$604,725 for the completion of Sprint 1. Sprint 1 is scheduled for completion within 6 weeks of executing the proposed amendment.
7. The Bureau's confidence level in the estimated cost is medium.

NOW, THEREFORE, the Council directs:

- a. The Chief Procurement Officer is hereby authorized to execute a contract amendment to increase the not-to-exceed value of Contract 30003361 with Infor Public Sector, Inc. by \$604,725, provided it is approved as to form by the City Attorney.

Section 2. The Council declares that an emergency exists because a delay in proceeding with the solicitation prevents the City from gaining full knowledge as to the breadth and severity of implementation issues; without this knowledge and technical expertise the City will be prevented from building the Master Plan with timeline, resource needs and impacts, and build the budget required for completion of the ITAP; therefore, this Ordinance shall be in full force and effect from and after its passage by Council.

Passed by the Council:

Commissioner Dan Saltzman
Prepared by: Rebecca Sponsel/lr, BDS
Date Prepared: September 28, 2016

Mary Hull Caballero
Auditor of the City of Portland
By

Deputy

1080 1200

Agenda No.
ORDINANCE NO.

Title

*Amend Contract No. ~~30003361~~ with Infor Public Sector, Inc. to increase the not-to-exceed amount by \$604,725 for the Information Technology Advancement Project assessment analysis and implementation planning services (Ordinance); amend Contract No. 30003361

<p>INTRODUCED BY Commissioner/Auditor: Commissioner Dan Saltzman</p> <p>COMMISSIONER APPROVAL</p> <p>Mayor—Finance and Administration - Hales</p> <p>Position 1/Utilities - Fritz</p> <p>Position 2/Works - Fish</p> <p>Position 3/Affairs - Saltzman <i>[Signature]</i></p> <p>Position 4/Safety - Novick</p> <p>BUREAU APPROVAL</p> <p>Bureaus: Bureaus of Development Services and Technology Services Bureau Head: Paul L. Scarlett <i>[Signature]</i></p> <p>Bureau Head: Jeff Baer <i>[Signature]</i></p> <p>Prepared by: Leanne Torgerson Date Prepared: 9/19/16</p> <p>Financial Impact & Public Involvement Statement Completed <input checked="" type="checkbox"/> Amends Budget <input type="checkbox"/></p> <p>Portland Policy Document If "Yes" requires City Policy paragraph stated in document. Yes <input type="checkbox"/> No <input checked="" type="checkbox"/></p> <p>City Auditor Office Approval: required for Code Ordinances</p> <p>City Attorney Approval: required for contract, code, easement, franchise, comp plan, charter <i>[Signature]</i></p> <p>Council Meeting Date 9/28/16</p>	<p>CLERK USE: DATE FILED <u>SEP 20 2016</u></p> <p>Mary Hull Caballero Auditor of the City of Portland</p> <p>By: <i>[Signature]</i> Deputy</p> <p>ACTION TAKEN:</p> <p>SEP 28 2016 REFERRED TO COMMISSIONER OF PUBLIC AFFAIRS</p> <p>OCT 26 2016 REFERRED TO COMMISSIONER OF PUBLIC AFFAIRS</p>
---	---

AGENDA
<p>TIME CERTAIN <input type="checkbox"/></p> <p>Start time: _____</p> <p>Total amount of time needed: 2 hours (for presentation, testimony and discussion)</p>
<p>CONSENT <input type="checkbox"/></p>
<p>REGULAR <input checked="" type="checkbox"/></p> <p>Total amount of time needed: 10 minutes (for presentation, testimony and discussion)</p>

FOUR-FIFTHS AGENDA	COMMISSIONERS VOTED AS FOLLOWS:	
	YEAS	NAYS
1. Fritz	1. Fritz	
2. Fish	2. Fish	
3. Saltzman	3. Saltzman	
4. Novick	4. Novick	
Hales	Hales	