# AMENDMENT NO. 3 TO CONTRACT 31841

This amends Contract No. 31841 between the City of Portland, Oregon (City) and EMA Services, Inc., (Contractor).

## RECITALS

1. The City entered into Contract No. 31841 in July 1998 with EMA Services, Inc and had amendment the agreement in January 2001.

2. The City requires additional services from EMA Services, Inc to continue to assistance the Water Bureau toward achieving stabilization of the Open Vision (OV) Customer Information System.

WHEREAS, the parties having agreed to the conditions set forth in the original agreement and amendments now desire to amend as follows:

## MODIFICATIONS TO AGREEMENT

The following changes are made to the Agreement for Services:

1. The Contractor shall provide additional services specifically to the City's Bureau of Water Works as set out in Exhibit A.

2. The City shall pay the Contractor at an hourly rate for time spent on work under this amendment as follows:

   Marcia Isbell   $115
   Steve Conrad   $120

   These rates will be effective on the date at which every party has signed this amendment.

3. Compensation for such additional services shall not exceed $100,000.

All other terms of Contract No. 31841 shall remain the same.

**CONTRACTOR:**

By: _Lawrence A. Jentge_
EMA Services, Inc
Business License NO: 37757812
Tax ID No. 41-122-12448597

175 566

**Approved As To Form:**

                                            **CITY OF PORTLAND**

_____

City Attorney

By: _____

Name:   Mike Rosenberger

Title:    Administrator

           Bureau of Water Works

APPROVED AS TO FORM

*Jeffrey L. Rogers*

CITY ATTORNEY

Date: _____5-3-01_____

_____

Erik Sten, Commissioner

Date: _____

_____

Gary Blackmer, City Auditor

Date: _____

# EXHIBIT A

### Statement of Work

EMA, Inc has worked with the Water Bureau on the Customer Information System (CIS) project for all 5 years of its tenure. EMA, Inc has provided support to the Bureau's project manager and served as co-project manager throughout the entire CIS Project. EMA, Inc. to provide continued assistance toward achieving stabilization of the Open Vision (OV) Customer Information System.

Contractor's Personnel and Statement of Work

Services are to be provided from Contractor-EMA, Inc by City-approved Subcontractor Marcia Isbell unless otherwise agreed to by the Portland Water Bureau and EMA, Inc. This scope of services requires Marcia Isbell's on-site presence for the months of April and May, 2001. Julie Shervey, the CIS Project Manager, will determine on-site requirements for the months of June, July, and August, 2001. Services to be provided include:

1. Working with Julie Shervey regarding CIS Project Management issues.

2. Complete work on specific tasks assignments such as defining and verifying the Bill Audit Process, and implementing the plan for resolution of Sewer only Do Not Read (SODNR) account billing and Water District contract issues.

3. Working with the OV Technical Support Team on the following tasks:

    ➢ Creating short and long term system maintenance plans.

    ➢ Creating the sequence for upgrades to Oracle 8/8i, OV release 4, and Unix 4.0.F.

    ➢ Resolving licensing and support issues for all CIS associated software products.

    ➢ Resolving security issues for the OV database.

    ➢ Monitoring performance of the contracted DBA firm (TUSC).

    ➢ Assisting with recruitment of technical staff and identify existing or create a technical position description for the Unix System Administrator.

    ➢ Facilitating decision-making on the desired approach for querying/reporting on the OV system.

    ➢ Facilitating the decisions regarding off-site OV backup storage.

    ➢ Developing the annual training program for the OV Technical Support Team.

4. Facilitate a one-day review and planning session of CIS Project Team members. This

is to be held in July. The focus of the session is to identify the project workplan for the next fiscal year. Document the identified workplan.

5. Provide PWB/STS contract history information when requested.

6. Work with CIS Project and Customer Service staff to create the plan for moving from manual to automated Debt Recovery.

7. Working with project staff to resolve billing issues such as suspended accounts, processing Activity Queues, testing, and accounts that have never billed.

8. Other tasks as assigned by the Project Manager or Bureau Administrator.

Services are to be provided by Steve Conrad unless otherwise agreed to by the Portland Water Bureau and EMA, Inc. This scope of services requires Steve Conrad's on-site presence. Julie Shervey, the CIS Project Manager, will determine on-site requirements. Services to be provided include:

1. Evaluate Crystal Reports 8.5 and Crystal Enterprise as an upgrade to the existing web report server.

2. Troubleshoot and resolve intranet access problems.

3. Complete documentation of the intranet access system.

4. Assist with resolving issues related to report generation from the intranet access system, including parameter and subreport issues, Oracle connection optimization, and others as identified.

# ORDINANCE NO. 175566

* Amend contract with EMA Services, Inc for $100,000 and authorize payment.
  (Ordinance; amend Contract No. 31841)

**The City of Portland ordains:**

Section 1. The Council finds:

1.  The Bureau of Water Works has purchased and installed Open Vision as its new Customer Information System in February 2000.

2.  The City authorized by Ordinance No. 172450 in July 1998 entered into Contract No. 31841 with EMA Services, Inc for $398,000. Ordinance No. 172450 also authorized an increase not to exceed 25%. The City had amended the agreement for the additional $99,500.

3.  The Bureau of Water Works has acquired EMA Services, Inc to provide technical assistance and project management services for implementation of the new Customer Information System.

4.  The Bureau of Water Works is continuing with implementation of Open Vision and has determined that additional service from EMA Services, Inc is necessary to achieve stabilization of the system.

5.  The cost of the additional services is not to exceed $100,000 with the total compensation not to exceed $597,500.

NOW, THEREFORE, The Council directs:

a.  That the Commissioner of Public Works and Auditor are authorized to execute on behalf of the City an amendment to Contract #31841 in the amount of $100,000 with EMA Services, Inc for services as outlined in Exhibit A attached to the original only.

b.  That the Administrator of the Bureau of Water Works shall be authorized to approve additional amendments which in the aggregate do not exceed 25-percent of the additional amount for the services under this amendment, or not-to-exceed $25,000. Any amendment exceeding an additional 25-percent must be approved by ordinance of the City.

b.  The Mayor and the Auditor hereby are authorized to draw and deliver warrants chargeable to the FY 2000-01 budget, Water Fund, Bureau of Water Works, Center Code No. 18089989, Project #3057, Account 521000, when demand is presented and approved by the proper authorities.

Section 2. The Council declares that an emergency exists because it is necessary to authorize this contract so processing of water and sewer bills will not be delayed; therefore, this Ordinance shall be in force and effect from and after its passage by Council.

Passed by the Council, **GARY BLACKMER**

**MAY 0 9 2001**

Auditor of the City of Portland
By _Susan Parsons_
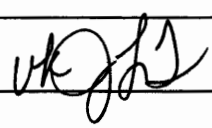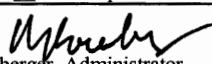Deputy

MFR:ch    ORD:
CENTER : 18089989/3057

Agenda No.

# 551 --

## ORDINANCE NO. 175 5 66

Title

---

\* Amend contract with EMA Services, Inc for $100,000 and authorize payment.
(Ordinance; amend Contract No. 31841)

---

| INTRODUCED BY | DATE FILED: **MAY 0 4 2001** |
|---|---|
| Mayor Vera Katz | Gary Blackmer<br>Auditor of the City of Portland |
| **NOTED BY COMMISSIONER** | |
| Affairs | By: _____ *Deputy* |
| Finance and Administration | |
| Safety | For Meeting of:_____ |
| Utilities | ACTION TAKEN: |
| Works  Commissioner Sten | |
| **BUREAU APPROVAL** | |
| Bureau:  Water Works | |

| Prepared by | Date |
|---|---|
| Julie Shervey | April 9, 2001 |

Budget Impact Review:

_X_ Completed    ___ Not Required

Bureau Head:
Michael F. Rosenberger, Administrator

---

| AGENDA | | FOUR-FIFTHS AGENDA | COMMISSIONERS VOTED AS FOLLOWS: | | |
|---|---|---|---|---|---|
| Consent | Regular X | | | YEAS | NAYS |
| NOTED BY | | Francesconi | Francesconi | ✓ | |
| City Attorney | | Hales | Hales | ✓ | |
| City Auditor | | Saltzman | Saltzman | ✓ | |
| City Engineer | | Sten | Sten | ✓ | |
| | | Katz | Katz | ✓ | |