

Portland, Oregon

FINANCIAL IMPACT and PUBLIC INVOLVEMENT STATEMENT For Council Action Items

(Deliver original to City Budget Office. Retain copy.)

1. Name of Initiator Deborah Sievert Morris		2. Telephone No. 823-7338	3. Bureau/Office/Dept. Development Services, 299/5000
4a. To be filed (hearing date): July 30, 2014	4b. Calendar (Check One) <div style="display: flex; justify-content: space-around;"> Regular <input type="checkbox"/> Consent <input checked="" type="checkbox"/> 4/5ths <input type="checkbox"/> </div>		5. Date Submitted to Commissioner's office and CBO Budget Analyst: June 23, 2014
6a. Financial Impact Section: <input checked="" type="checkbox"/> Financial impact section completed		6b. Public Involvement Section: <input checked="" type="checkbox"/> Public involvement section completed	

1) Legislation Title: *Amend contract with CSDC Systems, Inc. to extend the term for three years and provide two additional option years, for a possible five years total of software maintenance and support (Ordinance; amend Contract No. 31000013)

2) Purpose of the Proposed Legislation:

The City seeks to extend this maintenance and support contract for an additional three years, with language for up to two option years, for a potential total of five years. This will ensure continuity of support for the AMANDA software during the period of implementation of and full transition to the new building permit and case management system known as the Information Technology Advancement Project (ITAP).

3) Which area(s) of the city are affected by this Council item? (Check all that apply—areas are based on formal neighborhood coalition boundaries)?

- | | | | |
|--|------------------------------------|------------------------------------|--------------------------------|
| <input checked="" type="checkbox"/> City-wide/Regional | <input type="checkbox"/> Northeast | <input type="checkbox"/> Northwest | <input type="checkbox"/> North |
| <input type="checkbox"/> Central Northeast | <input type="checkbox"/> Southeast | <input type="checkbox"/> Southwest | <input type="checkbox"/> East |
| <input type="checkbox"/> Central City | | | |

FINANCIAL IMPACT

4) Revenue: Will this legislation generate or reduce current or future revenue coming to the City? If so, by how much? If so, please identify the source.

This will not generate or reduce current or future revenues.

5) Expense: What are the costs to the City as a result of this legislation? What is the source of funding for the expense? (Please include costs in the current fiscal year as well as costs in future year, including Operations & Maintenance (O&M) costs, if known, and estimates, if not known. If the action is related to a grant or contract please include the local contribution or match required. If there is a project estimate, please identify the **level of confidence.)**

There are no additional costs to the City.

6) Staffing Requirements:

- **Will any positions be created, eliminated or re-classified in the current year as a result of this legislation?** *(If new positions are created please include whether they will be part-time, full-time, limited term, or permanent positions. If the position is limited term please indicate the end of the term.)*
No
- **Will positions be created or eliminated in future years as a result of this legislation?**
No

(Complete the following section only if an amendment to the budget is proposed.)

7) Change in Appropriations *(If the accompanying ordinance amends the budget please reflect the dollar amount to be appropriated by this legislation. Include the appropriate cost elements that are to be loaded by accounting. Indicate "new" in Fund Center column if new center needs to be created. Use additional space if needed.)*

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

[Proceed to Public Involvement Section — REQUIRED as of July 1, 2011]

PUBLIC INVOLVEMENT

8) Was public involvement included in the development of this Council item (e.g. ordinance, resolution, or report)? Please check the appropriate box below:

☐ **YES:** Please proceed to Question #9.

☒ **NO:** Please, explain why below; and proceed to Question #10.
There is no increase in value for this existing contract.

9) If "YES," please answer the following questions:

a) What impacts are anticipated in the community from this proposed Council item?

b) Which community and business groups, under-represented groups, organizations, external government entities, and other interested parties were involved in this effort, and when and how were they involved?

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

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

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

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

No, the bureau doesn't anticipate making any other changes to the contract.



Paul L. Scarlett, Bureau of Development Services Director

APPROPRIATION UNIT HEAD (Typed name and signature)



City of Portland, Oregon
Bureau of Development Services
Office of the Director

FROM CONCEPT TO CONSTRUCTION

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July 21, 2014

To: Mayor Charlie Hales
 Commissioner Nick Fish
 Commissioner Amanda Fritz
 Commissioner Steve Novick
 Commissioner Dan Saltzman

From: Paul L. Scarlett, Director
 Bureau of Development Services

PLS

Regarding: Bureau of Development Services CSDC Systems, Inc Contract Amendment

The Bureau of Development Services (BDS) has prepared an ordinance proposing to amend the existing contract with CSDC Systems, Inc. (CSDC) extending the term of the contract for three years through August 31, 2016, and including the option of up to two more years. The ordinance is scheduled to be heard by the Council on the consent agenda on Wednesday, July 30, 2014.

Background

Council approved Ordinance 182607 on March 18, 2009 which authorized a five year maintenance and professional services contract (No. 31000013) with CSDC for the Bureau's current permitting system, Tracking Review and Construction System (TRACS), which uses CSDC's AMANDA software. This software is a critical part of Bureau operations tracking building and construction permits and land use cases, collecting customer and permit information, tracking fees, collecting payments, and tracking internal business processes, staff assignments and customer service interactions. The Bureau's ITAP project will be replacing TRACS. However, the Bureau needs to extend its five (5) year contract with CSDC in order to ensure support continuity until full implementation and transition to BDS's new ITAP system occurs.

Proposed Contract Amendment

This contract amendment focuses primarily on extending the timeframe for the contract. The ordinance extends the term to August 31, 2016, with an option to extend for additional periods of time up to 2 years. We are including the additional 2 year language option on the advice of the City Attorney's Office as a "safety net" in order to provide backup and redundancy in the transition to the new ITAP system, which we anticipate having a "go live" date of winter 2015/16.

Ordinance CSDC Contract Amendment

July 30, 2014

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Once the Bureau is fully migrated to ITAP, TRACS will move to an archive (read-only) status and then will be “mothballed” after 12-24 months. No contract with CSDC for maintenance or professional services will be needed after full implementation and transition to BDS’s new system.

The contract amendment specifics include extending the term as well as:

- Maintenance coverage updates to only include software components currently supported by CSDC;
- New annual renewal rates for the next 3 years totaling \$89,000; and
- Restatement of professional services rates for any task order work that may be required during the new term or any extensions of the contract.

There is no increase in the value of the contract being requested. There are over \$645,000 funds remaining of the original contract not-to-exceed amount of \$1,250,000.