

PDC

PORTLAND DEVELOPMENT COMMISSION

DATE: April 23, 2008

TO: Board of Commissioners

FROM: Bruce A. Warner, Executive Director

SUBJECT: Report Number 08-51
Purchase of Enterprise Content Management (ECM) Software from Tower Software

EXECUTIVE SUMMARY

BOARD ACTION REQUESTED

Adopt Resolution No. 6574

ACTION SUMMARY

This action will authorize the Executive Director to enter into contracts with Tower Software Corporation for the purchase of Enterprise Content Management Software, including licensing, installation and maintenance, for an amount not to exceed \$720,000.

The selection of Tower Software Corporation is the result of a competitive public solicitation, Request for Proposal #07-19, that received eleven proposals.

PUBLIC BENEFIT

This project helps PDC meet its responsibilities for the retention and destruction of records and for providing the public with timely and reliable access to information and records.

This action will support the following PDC goals:

- Develop healthy neighborhoods
- Provide access to quality housing
- Help businesses to create and sustain quality jobs
- Support a vibrant Central City (urban core)
- Contribute to a strong regional economy

PUBLIC PARTICIPATION AND FEEDBACK

Not Applicable

COMPLIANCE WITH ADOPTED PLANS AND POLICIES

This project supports the following Key Action in the ***PDC Strategic Plan***:

Develop PDC's system infrastructure to allow staff to timely and accurately deliver on business plans, projects and strategies.

FINANCIAL IMPACT

This is a multi-year project that begins with the selection, purchase and installation of Enterprise Content Management Software. The budget for 2007-2008 is \$664,000, which includes a consultant feasibility assessment, hardware purchases, and the purchase, installation, implementation, and maintenance of PDC's preferred Enterprise Content Management software. We anticipate spending \$346,000 of the total budgeted amount this fiscal year, of which \$251,000 would be with Tower Software Corporation. The proposed budget for 2008-2009 includes \$686,000 for the project, including staff implementation, training, and one contract staff for Project Management support. Of this amount, we anticipate \$396,000 to be part of the contracts with Tower Software Corporation. Finally, we are including two additional years of software maintenance in establishing contracts with Tower Software Corporation, contingent upon approved budgetary allocation.

RISK ASSESSMENT

The installation of new software on PDC's system presents a risk with regard to compatibility with existing hardware and software. Information Technology staff have been intimately involved in the selection and evaluation of this software and believe it will present few if any problems being added to the existing PDC infrastructure. This particular software is widely used by other government agencies, including the City of Portland and Metro, who report it is an excellent product that is very stable and should present few problems in PDC's environment. Without this software PDC is at risk of non-compliance with Legal requirements for the retention of records.

WORK LOAD IMPACT

In order to achieve a successful installation and implementation of the software, PDC will utilize the services of a contracted project management specialist to supervise the contract and services of Tower. The entire project will be supervised and managed by the Project Management Office in the Central Services Department.

ALTERNATIVE ACTIONS

If PDC were to not install and begin using this software, PDC records management activities would continue to be limited to the archiving, storage, retention, and disposition of paper records, with limited ability to manage the growing number of electronic records and email messages.

CONCURRENCE

This project was identified by the PDC Leadership as a priority project in 2006 during the Budget Development. PDC's internal Project Management Office Steering Committee continued this as a priority project for this, and successive, fiscal years,

BACKGROUND

The Portland Development Commission's ("PDC") Request for Proposals #07-19 for "Enterprise Content Management Software" ("RFP") was issued by PDC Purchasing & Contract Services on January 9, 2008. A voluntary pre-Proposal conference was held at PDC on January 22, 2008. In response to this solicitation, PDC received eleven responsive Proposals by the RFP deadline.

Responsive Proposals Received:

1. CareerCurrency LLC (CareerCurrency)
2. EMC Corporation (EMC) #1 / WAVE Technology Solutions Group
3. EMC Corporation (EMC) #2 / EMC Microsoft Practice
4. Frontline Logic, Inc. (FrontLine Logic)
5. Genesis Imaging LLC (Genesis Imaging)
6. Pacific Office Automation (Pacific Office)
7. Tower Software Corporation (Tower Software)
8. ImageSoft, Inc. (ImageSoft)
9. ImageSource, Inc. (ImageSource)
10. Perceptive Software, Inc. / ImageNow (Perceptive)
11. CAS Severn (CAS Severn)

The first phase of evaluation of Proposals received in response to the RFP was to determine a short-list of finalist Proposers. Over a period of three weeks, all responsive Proposals were evaluated by an internal four-person Evaluation Committee in accordance with evaluation criteria set forth in the RFP.

Based upon the evaluation of all eleven Proposals submitted in response to the RFP, the Committee identified the following list of finalist proposers:

- **EMC / Wave**
- **Frontline Logic**
- **Tower Software**
- **CAS Severn**

The four finalists were invited to make a live presentation and demonstration to the Evaluation Committee and a larger group of end-users and Information Technology staff.

Based upon a thorough review of all proposals, demonstrations and interviews with the four finalist proposers, and an investigation of Tower Software's references, it was the consensus of opinion among all PDC staff who participated in the RFP and evaluation that Tower Software Corporation offers PDC the best overall value, benefit, convenience and service with regards to its needs for an electronic content management system.

CC: Julie Cody, Chief Financial Officer
David Elliott, Acting General Counsel