

CITY OF OAKLAND
AGENDA REPORT

FILED
OFFICE OF THE CITY CLERK
OAKLAND
2007 AUG. 30 PM 8: 01

TO: Office of the City Administrator
ATTN: Deborah Edgerly
FROM: Public Works Agency and Finance and Management Agency
DATE: September 11, 2007

RE: Resolution Waiving Oakland's Competitive Bid Process And Authorizing An Competitive Request For Proposal Process, For The Purchase Of A Computerized System Involving Products And Services, And Authorizing The City Administrator, Or Her Designee, To Negotiate And Award An Agreement To Vestra Resources, Inc., For A Work Management System For The Public Works Agency, Including Hardware, Software And Configuration, Installation, Testing, Training, And Support Services In An Amount Not To Exceed One Million Two Hundred Thousand Dollars (\$1,200,000.00), Including A Ten Percent Contingency

SUMMARY

A resolution has been prepared authorizing the City Administrator, or her designee, to enter into an agreement for implementation of a work management system with VESTRA Resources, Inc. (VESTRA), along with its subcontractors Azteca Systems and Oakland Computer Company, for an amount not to exceed \$1,200,000.

The work management system will add significant value to the day-to-day operations of maintaining the City's infrastructure. Specifically, it is needed to provide better information to field crews for performing their jobs, allow supervisors to better plan work loads based on available resources, provide management with better and faster tools to calculate performance measures, enhance customer service through improved web-based tools and better tracking of service requests, and increase transparency by having up-to-date information and maps available to show the cost and work associated with maintaining assets throughout the City.

The new Department of Information Technology (DIT) will manage the contract, in close cooperation with the Public Works Agency (PWA) and the Community and Economic Development Agency (CEDA). Specifically, the Information Systems Administrator (formerly located in PWA) will serve as the project manager. Other project team members will include representatives from various PWA and CEDA divisions including Keep Oakland Clean and Beautiful, Infrastructure Maintenance (Streets and Sidewalks, Sewers, Drainage and Tree Services), Traffic Maintenance, Electrical Services, Customer Call Center, Administrative Services Department of the Public Works Agency and the Engineering Design and Right of Way Management (Street and Sidewalk construction and Construction Inspection) of CEDA.

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The proposed resolution also waives the City's competitive bid requirements and authorizes a competitive request for proposal process to select the most suitable vendor solution offered. Staff proceeded with a competitive request for proposal process in order to base selection, not solely on price, but on other factors as well such as product track record, vendor track record, functionality and capability of the proposed combination of products and services, and usability of the system.

FISCAL IMPACT

The cost of the work management system can be broken down into two parts: start-up costs and on-going operating costs. Approval of the resolution will authorize an agreement for the start-up costs not to exceed \$1,200,000 to implement the work management system. This one-time cost includes hardware, mobile devices, automatic vehicle locators, and services needed for implementation. The not-to-exceed amount also includes a 10% contingency. Payment will be based on negotiated milestones and/or deliverables.

Funding is available in the following identified sources:

<u>Source</u>	<u>Amount</u>
Fund 1010 – General Purpose Fund. Funds approved in prior years and earmarked for a system to improve accountability (e.g., time clocks). (Project P247210) The work management system would also serve as an accountability tool.	\$300,000
Fund 2211 – Measure B approved as part of the FY 2007-09 Capital Improvement Program budget.	\$600,000
Fund 7760 – PWA Overhead. FY 2007-09 PWA Operating budget funds derived from all PWA funding sources to cover agency-wide and administrative needs. (Project A167710)	<u>\$300,000</u>
Total	\$1,200,000

In addition, annual operating costs for the system will include data coverage or services (i.e., accessing data while out in the field), software maintenance and hardware replacement. The data services cost will depend on the number of crews who use mobile devices. For example, if 100 crews have mobile devices, and are updating data in the field and accessing real-time data in the field, the annual cost at \$50/month/crew through a mobile carrier (e.g., AT&T/Cingular or Sprint/Nextel), would be \$60,000. The annual estimated cost for support and maintenance of the

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system is \$135,000. These on-going operating costs will come from the Operations and Maintenance budgets from the various divisions using the system.

BACKGROUND

Beginning in December 2004, PWA has tracked all requests for service received by the PWA Customer Call Center, using Magic Service Desk from BMC Software. The PWA Call Center receives over 20,000¹ calls each year. Although PWA is able to track calls received and whether they are completed or not, the information passed along to the staff who actually perform the work is basic. It merely includes a location and a brief description of the request or problem. It does not provide the equally necessary information needed for staff to effectively address the request such as when the last time the work was completed, the age or condition of the asset, and other historical or pertinent data. For more information, see the "Key Issues and Impacts" section below.

In summer 2006, a team formed, consisting of staff responsible for maintaining the City's trees, traffic striping, traffic signals, traffic circles, streets, street recycling containers, street litter containers, street lights, storm drains, speed bumps, signs, sidewalks, sewers, paths, guard rails, etc., and consisting of staff responsible for removing graffiti and illegal dumping. The team identified many issues with the current system (see "Key Issues and Impacts"). PWA held meetings with every crew to validate these issues and determine additional needs.

In October 2006, PWA issued a Request for Proposals (RFP) for a work management system to meet the identified needs. Six firms responded to the RFP as primary proposers, representing a total of 18 firms (primes plus subcontractors). Three proposals met or exceeded the City's Local/Small Local Business Enterprise (L/SLBE) program requirements (including VESTRA), and three proposals were compliant with the City's Equal Benefits Ordinance (including VESTRA). See Attachment A for Compliance Analysis.

A panel comprised of five PWA managers, three PWA supervisors, one PWA Geographic Information Systems (GIS) expert, and one DIT GIS expert reviewed the proposals. The evaluation criteria included the company's demonstrated success in a similar environment, demonstrated support capabilities, demonstrated financial stability, and proposed methodology, project schedule, and deliverables; the product's demonstrated success in a similar environment, ease of use and functional comprehensiveness (minimal screens / applications to do daily work), ease of reporting / data analysis (using maps, reports, charts, and dashboards), completeness and responsiveness to the RFP, and mobile solution; and the fees and associated costs.

¹ This annual figure does not currently include traffic maintenance (e.g., signs and striping) service calls. The PWA Call Center is scheduled to assume those calls in the summer of 2007 and anticipates an increase in total number of annual service calls as a result.

VESTRA's proposal had the highest score (83.5, compared to the next-highest score of 66.8), and 7 of 9 reviewers had VESTRA rated as #1 or #2. No one had VESTRA rated as #5 or #6. All of the other proposals had at least one reviewer who ranked them #1 or #2, and had at least one reviewer who ranked them #5 or #6. Because the results were inconclusive, all 6 proposals were invited to interviews / demonstrations.

The demonstrations were reviewed by a panel consisting of four PWA managers, three PWA supervisors, one PWA GIS expert, two PWA crewmembers, and one PWA Customer Call Center associate. Two firms stood out: Accela, Inc. received 50 points (out of 50), and VESTRA received 46. The next-closest firm received 15 points.

Staff conducted reference checks of the two top-ranked proposals, and scheduled a final round of demonstrations for the two firms, VESTRA and Accela, Inc. The references for both proposals were favorable.

For the final demonstrations, a full day was allotted. Each company was asked to demonstrate how their product works under several real-life scenarios. A copy of the demonstration script is enclosed as Attachment B. The review panel consisted of three PWA managers, four PWA supervisors, one PWA GIS expert, one DIT GIS expert, one PWA Customer Call Center associate, five PWA crew members, and one PWA administrative assistant. The results were unanimous: All 16 individuals determined that VESTRA offered the best solution.

The proposed project team consists of VESTRA as the prime, who will provide project management; system installation, configuration, and integration; data migration; custom reports; web site development (for customer service requests); GIS user training; acceptance testing; and roll-out support. Azteca Systems, Inc. is a subcontractor and provider of the software – the Cityworks® work management system. Azteca will also provide system configuration and integration support; user and administration training; acceptance testing; and rollout support. Oakland Computer Company is a subcontractor and will provide hardware; hardware installation and testing; and field-based rollout support. Loki Innovations, Inc. is a subcontractor providing RIVA On-line infrastructure life-cycle planning software; software installation and testing; user training; and rollout support.

VESTRA has numerous local government clients, including Contra Costa County, Napa County, City of Richmond, City of Pleasant Hill, Marin Municipal Water District, San Francisco Public Utilities Commission, Sonoma County Water Agency, and numerous departments in the State of California (e.g., Department of Food and Agriculture, State Water Resource Control Board, Office of Statewide Planning and Development).

Oakland Computer Company has supported many local government clients, including the City of Oakland Police Department, City of Woodland Police Department, and City of San Leandro.

Loki Innovations reference sites include Waterford Township (MI), City of Burnaby (BC), City of North Vancouver (BC), and City of Hamilton (ON).

Over 275 public works agencies and municipal utility districts throughout North America currently use Azteca Systems' Cityworks® software to manage the work on public works assets. Examples in California include the City of Long Beach, City of San Mateo, City of Woodland, Citrus Heights Water District, City of Escondido, Sacramento Suburban Water District, City of Ontario, and City of Encinitas. Elsewhere in the North America, examples include the City of Houston (TX), City of El Paso (TX), City of Newport News (VA), City of Philadelphia (PA), City of Richmond (VA), City of Chicago (IL), New York City Parks, City of Durham (NC), City of Raleigh (NC), Oklahoma City (OK), City of Grand Rapids (MI), City of Ann Arbor (MI), Fort Collins DOT (CO), City of Loveland (CO), City of Miami Beach (FL), City of Kissimmee (FL), Horry County (SC), White House Utility District (TN), and City of Edmond (OK). The City of Durham (NC) is notable because it also uses Cityworks® for their "One call does it all" 311-style call center, as well as within public works.

KEY ISSUES AND IMPACTS

The proposed solution addresses key issues with the current system include the following:

- Difficult to quickly identify multiple calls for a problem, particularly if multiple callers use different descriptions for the location (e.g., 14th and Broadway, in front of 1333 Broadway, in front of the BART entrance on Broadway).
 - Having a map of the incident location, showing other open and closed incidents, would facilitate faster identification that an incident has already been reported.
- No way to assign calls based on district (e.g., calls are assigned to specific crews based on location). This is currently done via printed maps and institutional knowledge.
 - Having GIS integration, where the suggested support staff is automatically identified based on location, for types of incidents that are assigned by location, would facilitate faster assignment of calls.
- No function to provide an expected resolution time, based on the type of call, location of call, and day of the week.
 - For example, an appliance truck picks up illegally dumped appliances in East Oakland on Mondays and Tuesdays, Central Oakland on Wednesdays and Thursdays, and West Oakland on Fridays. Similarly, for some subjects, there are weekend crews, and the supervisor/crew for the work to be assigned varies based on the day of the week.
- No GPS visibility into location of crews.
 - GPS/GIS integration would facilitate more efficient assignment of calls.
- No direct entry of service requests into system via the Internet.

- A self-service, web-based interface would reduce data entry and allow call center staff to focus on the best assignment of calls to personnel. It can “close the loop” by sending automatic emails to the customer when the work is completed.
- Limited reporting.
 - Difficult to generate maps showing, for example, where the City’s assets are, the condition of the assets where customers (the public) have complaints, where PWA has performed work, etc.
 - Tools in the new system for queries, saved reports, charts, maps, and dashboards would increase transparency, accountability, and greatly speed the analytical time for decision-making.
- Difficult to forward an incident to multiple people.
 - In some cases, it is desirable to let people know about an incident, in addition to the person to whom the incident is assigned.
- No established daily system to track the location and cost of work, and making it difficult to establish reimbursable costs during declared emergencies. Also difficult to provide requested data for claims and lawsuits filed against the City. Current staff time to collect data from handwritten logs and index cards is significant and an ineffective use of staff time.
- Limited tracking of quantities (e.g., how many tons of debris were disposed, how many square feet of graffiti were removed), which makes it difficult to “tell the story” of work accomplished and the resources needed to accomplish specific tasks.
- No systematic data, and therefore no reporting, on how much time an individual, crew, or group of individuals/crews devotes to different responsibilities (e.g., gardening vs. graffiti removal vs. litter removal).
- System tracks reactive work only (e.g., work done as a result of a service request). It cannot be used for scheduled work or proactive work (e.g., pre-storming), preventative work (e.g., street sign replacement), or special projects (e.g., pothole blitz).
- No dashboard showing agency metrics compared to key performance indicators (e.g., number of open work orders in a geographic zone, types of calls received in the current month, all open calls flagged as “emergency”, percentage of calls completed within expected resolution time).
- No single source to get data for quarterly performance measures. No easy way to track performance on an ongoing basis.
- No systematic daily activity log to show what was done, where. Staff currently logs work into “red books” but there is no easy way to extract this data and use it for planning or analytic purposes.
- No systematic way of identifying and tracking preventative maintenance to be done at regular time-based intervals (e.g., street signs to replace, trees to prune).
- Crews arrive on-site “blind” – no access to maps, plans, manuals/instructions (safety manuals, Material Safety Data Sheet (MSDS)’s, standard operating procedures), prior

- work history, or related and unrelated other incidents, unless they brought printed material with them. Crews arrive on-site with only a phone, radio, and printed map.
- Limited communication from standby crew to day shift regarding work completed, work started but not completed, and/or work that was not able to be started. The standby crew and standby supervisor may have regular work assignments (e.g., illegal dumping) that are different from the work required while on standby (e.g., storm drains). Standby supervisor does not have a complete picture of all work that standby crews are doing / have done, because Fire Dispatch may dispatch directly to crews. Information changes as it is passed from person to person, since it is done verbally instead of using data (e.g., from Fire Dispatch to Standby Supervisor to Standby Crew to Daytime functional area Supervisor to Day Crew).
 - Need to do different record keeping during winter storm events (for FEMA and state disaster reimbursement); generally it is not known if an event will be “declared” or not, and staff won’t know the starting point until after it happens.
 - Crews do not have information about the maintenance history for an asset (what was done where). If a storm drain is plugged, it is difficult or impossible to identify who last cleaned it and when – which makes preventative maintenance more difficult to schedule.
 - Inspection results are not tied to asset data or work history. Crews need the ability to attach photos or other materials to a work order and/or asset.
 - Crews do not have a way to show the scope of work accomplishments in a given period.
 - Most PWA vehicles do not have vehicle location devices, which can hinder emergency management. No visibility for Fire/Police computer-aided dispatch (CAD) personnel, Incident Command Post, PWA Department Operating Center (DOC) or City Emergency Operations Center (EOC) into the location of PWA vehicles. No visibility for equipment operators into exclusion zones or other important geographical areas.

The Key Impacts and Issues were also described in the RFP, which can be viewed electronically on the City of Oakland, Public Works Agency website at http://www.oaklandpw.com/Page50.aspx#work_management under “October 26, 2006; Condensed version of the RFP, without the Appendixes, Attachments, and Schedules.”

In addition, the Oakland Municipal Code Section 2.04.050.A requires staff to purchase products such as software and computers by competitive, sealed, fixed bids with award to the lowest, responsive bidder. However, staff believes that the competitive bid requirement of section 2.04.050 does not serve the City’s interests for the purchase of a work management computerized system for a myriad of practicable and sound reasons including the fact that each vendor proposing a work management system offers significantly different products making it impossible to select solely on bid price. Each computerized system differs significantly in

capability, functionality, robustness and quality and these aspects must be used as criteria in the selection process. The successful implementation of a work management system also depends on additional factors such as vendor track record, implementation services and a product that is agreeable and user-friendly to end users. Thus, bid price should not be used as the sole determinate in the selection of computerized systems.

PROJECT DESCRIPTION

Proposers were required to address each key issue and describe how their solution would address the City's need. The recommended solution uses geographically-based data to store, present, and use data. It leverages the City's existing GIS-based data (e.g., streets, sidewalks, trees, litter containers, parks, etc.) and enables the City to build in additional information as it becomes available. The visual result enables stakeholders from multiple disciplines to view and make sense of data that has only previously been viewed from one dimension such as a spreadsheet, single map sheet, or piece of paper. The solution is a commonly used method of managing data – a way that many other jurisdictions have already employed.

The proposed solution addresses the key issues and concerns discussed above. It includes use of Automated Vehicle Locator (AVL) technology to build in the location of vehicles within the GIS context. This feature is particularly useful for emergency preparedness and response.

After a thorough review of the proposals, staff finds that the proposal submitted by VESTRA best addresses the City's needs. The involvement of PWA staff from a spectrum of classifications and the unanimous opinion that VESTRA is a user-friendly product that crews could really use also indicates that, in addition to the need, there is a readiness for such a work management system.

Upon an executed contract, the project implementation, including application setup, data set up, and training, is expected to take 6 – 12 months.

SUSTAINABLE OPPORTUNITIES

Economic: The project will generate business tax, sales tax, and other revenues for the City by those firms who work on the project. Local businesses will be utilized on the projects and will benefit directly; the project meets the City's Local/Small Local Business Enterprise (L/SLBE) program requirements. The project will be subject to the Living Wage Ordinance and Equal Benefits Ordinance.

Additionally, the ultimate implementation of the work management system will enable work efficiencies to develop and support more efficient use of public funds for infrastructure maintenance.

Environmental: By having the system automatically flag duplicate service requests, vehicle trips will be reduced because crews will not be dispatched multiple times to the same location for the same issue. Also, the work management system will enable more efficient use of public funds for infrastructure maintenance, which includes assets such as trees and storm drains that effectively help protect the water environment.

Social Equity: The project will improve tracking of service delivery citywide, which will allow improved analysis of where service is being provided, improved information about the condition of assets citywide, and improved planning for preventative maintenance citywide.

DISABILITY AND SENIOR CITIZEN ACCESS

The system will allow staff to track, plan, and report on maintenance done on assets that improve access for disabled persons and senior citizens, such as curb ramps, blue curb painting, removal of obstructions in the right of way (e.g., illegally dumped materials blocking sidewalks), tree trimming and vegetation management, traffic control devices (e.g., pedestrian countdown signals, medians), traffic striping (e.g., crosswalks), informational signs, street lighting, and paved surfaces (e.g., paths, sidewalks).

RECOMMENDATION(S) AND RATIONALE

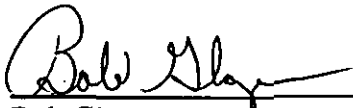
Implementation of the work management system will address the issues identified above under Key Issues and Impacts. Staff recommends VESTRA Resources, Inc. to implement the Cityworks® work management system, based on extensive review of the proposals received, as detailed above under Background.

Staff recommends that Council waive the competitive bid process and authorize the competitive request for proposal process for the purchase of a computerized system involving products and services, and authorizing the City Administrator, or her designee, to enter into an agreement for implementation of a work management system to VESTRA Resources, Inc. (VESTRA), along with its subcontractors Azteca Systems and Oakland Computer Company, for an amount not to exceed \$1,200,000, including a 10% contingency amount.

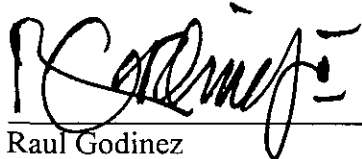
ACTION REQUESTED OF THE CITY COUNCIL

Staff recommends that City Council approve the resolution.

Respectfully submitted,



Bob Glaze
Chief Technology Officer



Raul Godinez
Director, Public Works Agency

Prepared by:
John McCabe, Information Systems Administrator

Reviewed by:
Stephanie Hom, Agency Administrative Manager

APPROVED AND FORWARDED TO THE
FINANCE AND MANAGEMENT COMMITTEE:



Office of the City Administrator

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Memo

Office of the City Administrator
Contract Compliance & Employment Services Division

To: Gwen McCormick
From: Vivian Inman, Contract Compliance Officer, CC&ES Division
Through: Deborah Barnes, CC&ES Manager *Deborah Barnes*
Cc: John McCabe
Date: January 24, 2007
Re: Compliance Analysis: Work Management System

Contract Compliance & Employment Services reviewed six (6) proposals received in response to the above referenced project. Below is the outcome of our compliance evaluation for the twenty percent (20%) minimum participation requirement and a preliminary review for compliance with the Equal Benefits Ordinance.

The L/SLBE findings are as follows:

	Company Name	Bid Amt.	Proposed Participation				Preferences			Banked Credits Eligibility?	EBO Compliant? (Y/N)
			Total L/SLBE	LBE	SLBE	Trucking	Total Credited	Adjusted Bid Amount	Points		
1	Accela, Inc.	NA	20%	0	20%	NA	20%	N/A	2	0	Y
2	Carter & Burgess	NA	10%	0	10%	NA	0%	NA	0	0	Y
3	Corrigo, Inc.	NA	0%	0%	0%	NA	0%	NA	0	0	N
4	EMA, Inc.	NA	0%	0%	0%	NA	0%	NA	0	0	N
5	Hansen Information Technologies	NA	20%	0%	20%	NA	0%	NA	2	0	N
6	VESTRA Resources	NA	21%	0%	21%	NA	21%	NA	2	0	Y

As noted Accela, Inc., VESTRA Technologies and Hansen Information Technologies met or exceeded the 20% L/SLBE requirement. The remaining firms, Carter & Burgess, Corrigo, Inc., and EMA, Inc. did not meet the 20% L/SLBE requirement.

Firms that are not EBO compliant will have to come into compliance.

If you have questions or need additional information, please contact Vivian Inman, Contract Compliance Officer, at 238-6261.

LBE/SLBE Participation Accela, Inc.

Project Name: Work Management System

Project No.: A167710		Engineers Estimate:								
Discipline	Prime & Subs	Location	Cert.	LBE	SLBE	LBE/SLBE	TOTAL	For Tracking Only		
			Status	%	%	%	Percentage	Ethn	MBE	WBE
PRIME Implementation GIS Services Data Conversion Implementation Services	Accela, Inc.	San Ramon	UB				68%	C		
	The Point Solutions	Loomis	UB				5%	NL		
	Farallon Geographic	San Francisco	UB				7.0%	NL		
	Weston Solutions	Oakland	CB		10%	10%	10%	C		
	Policy Innovation Works	Oakland	CB		10%	10%	10%	AA	10%	
Project Totals				0%	20%	20%	100%		10%	0%
Requirements: The 20% requirements is a combination of 10% LBE and 10% SLBE participation. An SLBE firm can be counted 100% towards achieving 20% requirements. LBE firms can only be counted up to 10% of the total contract amount.				LBE 10%	SLBE 10%	TOTAL LBE/SLBE 20%		Ethnicity A = Asian AA = African American AI = Asian Indian AP = Asian Pacific C = Caucasian H = Hispanic NA = Native American O = Other NL = Not Listed		
Legend		LBE = Local Business Enterprise SLBE = Small Local Business Enterprise Total LBE/SLBE = All Certified Local and Small Local Businesses NPLBE = NonProfit Local Business Enterprise NPSLBE = NonProfit Small Local Business Enterprise		UB = Uncertified Business CB = Certified Business MBE = Minority Business Enterprise WBE = Women Business Enterprise						

LBE/SLBE Participation Carter & Burgess, Inc.

Project Name: Work Management System

Project No.: A167710		Engineers Estimate:								
Discipline	Prime & Subs	Location	Cert.	LBE	SLBE	LBE/SLBE	TOTAL	For Tracking Only		
			Status	%	%	%	Percentage	Ethn.	MBE	WBE
PRIME software Implementation Services	Carter & Burgess, Inc.	Oakland	UB				26.00%	C		
	GBA Master Series	Kansas	UB				64.00%	C		
	AEKO Consulting	Oakland	CB		10.00%		10.00%	AA	10%	
Project Totals				0.00%	10.00%	0.00%	100.00%		10%	0%
Requirements: The 20% requirements is a combination of 10% LBE and 10% SLBE participation. An SLBE firm can be counted 100% towards achieving 20% requirements. LBE firms can only be counted up to 10% of the total contract amount.				LBE 10%	SLBE 10%	TOTAL LBE/SLBE 20%		Ethnicity A = Asian AA = African American AI = Asian Indian AP = Asian Pacific C = Caucasian H = Hispanic NA = Native American O = Other NL = Not Listed		
Legend		LBE = Local Business Enterprise SLBE = Small Local Business Enterprise Total LBE/SLBE = All Certified Local and Small Local Businesses NPLBE = NonProfit Local Business Enterprise NPSLBE = NonProfit Small Local Business Enterprise			UB = Uncertified Business CB = Certified Business MBE = Minority Business Enterprise WBE = Women Business Enterprise					

LBE/SLBE Participation Corrigo, Inc.

Project Name: Work Management System

Project No.: A167710		Engineers Estimate:						For Tracking Only			
Discipline	Prime & Subs	Location	Cert. Status	LBE	SLBE	LBE/SLBE	TOTAL	Ethn.	MBE	WBE	
				%	%	%	Percentage				
PRIME Hardware (Wireless)	Corrigo, Inc.	Oregon	UB				100%	C			
	Walsh Wireless	San Ramon	UB					NL			
Unknown	Digital Design	Oakland	CB	Failed to list percentages				C			
Project Totals				0%	0%	0%	100%		0%	0%	
Requirements: The 20% requirements is a combination of 10% LBE and 10% SLBE participation. An SLBE firm can be counted 100% towards achieving 20% requirements. LBE firms can only be counted up to 10% of the total contract amount.				LBE 10%	SLBE 10%	TOTAL LBE/SLBE 20%		Ethnicity A = Asian AA = African American AI = Asian Indian AP = Asian Pacific C = Caucasian H = Hispanic NA = Native American O = Other NL = Not Listed			
Legend LBE = Local Business Enterprise SLBE = Small Local Business Enterprise Total LBE/SLBE = All Certified Local and Small Local Businesses NPLBE = NonProfit Local Business Enterprise NPSLBE = NonProfit Small Local Business Enterprise				UB = Uncertified Business CB = Certified Business MBE = Minority Business Enterprise WBE = Women Business Enterprise							

LBE/SLBE Participation EMA, Inc.

Project Name: Work Management System

Project No.: A167710		Engineers Estimate:									
Discipline	Prime & Subs	Location	Cert.	LBE	SLBE	LBE/SLBE	TOTAL	For Tracking Only			
			Status	%	%	%	Percentage	Ethn.	MBE	WBE	
PRIME Software Provider	EMA, Inc. Inför Global Solutions	Minnesota Georgla	UB				78%	C			
			UB				22%	C			
Project Totals				0%	0%	0%	100%		0%	0%	
Requirements: The 20% requirements is a combination of 10% LBE and 10% SLBE participation. An SLBE firm can be counted 100% towards achieving 20% requirements. LBE firms can only be counted up to 10% of the total contract amount.				LBE 10%	SLBE 10%	TOTAL LBE/SLBE 20%		Ethnicity A = Asian AA = African American AI = Asian Indian AP = Asian Pacific C = Caucasian H = Hispanic NA = Native American O = Other NL = Not Listed			
Legend		LBE = Local Business Enterprise		UB = Uncertified Business							
		SLBE = Small Local Business Enterprise		CB = Certified Business							
		Total LBE/SLBE = All Certified Local and Small Local Businesses		MBE = Minority Business Enterprise							
		NPLBE = NonProfit Local Business Enterprise		WBE = Women Business Enterprise							
		NPSLBE = NonProfit Small Local Business Enterprise									

LBE/SLBE Participation Hansen Information Technologies

Project Name: Work Management System

Project No.: A167710		Engineers Estimate:									
Discipline	Prime & Subs	Location	Cert.	LBE	SLBE	LBE/SLBE	TOTAL	For Tracking Only			
			Status	%	%	%	Percentage	Ethn.	MBE	WBE	
PRIME Business Process	Hansen Information Technologies Oakland Consulting Group	Rancho Cordova Oakland	UB				80%	C			
			CB		20%		20%	C			
Project Totals				0%	20%	0%	100%		0%	0%	
Requirements: The 20% requirements is a combination of 10% LBE and 10% SLBE participation. An SLBE firm can be counted 100% towards achieving 20% requirements. LBE firms can only be counted up to 10% of the total contract amount.				LBE 10%	SLBE 10%	TOTAL LBE/SLBE 20%		Ethnicity A = Asian AA = African American AI = Asian Indian AP = Asian Pacific C = Caucasian H = Hispanic NA = Native American O = Other NL = Not Listed			
Legend		LBE = Local Business Enterprise SLBE = Small Local Business Enterprise Total LBE/SLBE = All Certified Local and Small Local Businesses NPLBE = NonProfit Local Business Enterprise NPSLBE = NonProfit Small Local Business Enterprise			UB = Uncertified Business CB = Certified Business MBE = Minority Business Enterprise WBE = Women Business Enterprise						

LBE/SLBE Participation VESTRA Resources

Project Name: Work Management System

Project No.: A167710		Engineers Estimate:								
Discipline	Prime & Subs	Location	Cert.	LBE	SLBE	LBE/SLBE	TOTAL	For Tracking Only		
			Status	%	%	%	Percentage	Ethn.	MBE	WBE
PRIME Unknown Unknown	VESTRA Resources Azteca Systems, Inc. Oakland Computer Company	Redding Utah Oakland	UB				67%	C		
			UB				12%	NL		
			CB		21%		21%	AA	21%	
Project Totals				0%	21%	0%	100%		21%	0%
Requirements: The 20% requirements is a combination of 10% LBE and 10% SLBE participation. An SLBE firm can be counted 100% towards achieving 20% requirements. LBE firms can only be counted up to 10% of the total contract amount.				LBE 10%	SLBE 10%	TOTAL LBE/SLBE 20%		Ethnicity A = Asian AA = African American AI = Asian Indian AP = Asian Pacific C = Caucasian H = Hispanic NA = Native American O = Other NL = Not Listed		
Legend LBE = Local Business Enterprise SLBE = Small Local Business Enterprise Total LBE/SLBE = All Certified Local and Small Local Businesses NPLBE = NonProfit Local Business Enterprise NPSLBE = NonProfit Small Local Business Enterprise				UB = Uncertified Business CB = Certified Business MBE = Minority Business Enterprise WBE = Women Business Enterprise						

RFP for Work Management System - Demonstrations

The basics:

- **Dates:** April 16 and April 17.
- **Location:** 150 Frank H. Ogawa Plaza - Second Floor, Oakland, CA.
- **Time:** Starting at 9:00 a.m. All day has been allotted for the interview/demo, with the expectation that Part 1 may take all morning. You can arrive 15 minutes early, for set-up.
- **Projector:** We will provide one as a backup, but it's best if you have your own
- **Laptop:** You provide, we have wired internet connectivity available (via DHCP)
- **Note:** We have provided a DVD with City of Oakland GIS data including with traffic signals, street signs, manholes, sewers, and storm drains; and streets, photos, parcels, and districts. You can use our data or sample data for your demonstration.
- There will be three parts.
 - **Part 1** will cover day-to-day operations.

The audience will primarily be crew leaders and supervisors who manage Public Works operations in the following areas: call center, graffiti abatement, illegal dumping, sewers, signs and traffic striping, storm drains, street lights, streets and sidewalks, traffic signals, trees.

- **Part 2** will cover asset management and planning, including the use of RIVA Online.

We are interested in how RIVA can help us manage our assets and how it integrates with your proposed solution. The primary audience will be Public Works Agency management.

- **Part 3** will cover your proposal, in terms of project planning, training, GIS infrastructure, technology requirements, options, etc.

The audience will primarily be information technology and GIS staff.

Part 1 Outline:

Proposal

1. **Proposal background** – prime and subs

Call Center

2. Demonstrate the **call intake (only)** for each of the following. If the call center can/must use a standard script (series of Q&A to describe the issue), please demonstrate it:
 - a. Call about maintenance needed for a point asset (e.g., manhole) already in our GIS asset inventory.
Example: Overflowing sewer manhole at 1150 65TH ST.
 - b. Call about a point asset (e.g., sign) not already in our GIS asset inventory.
Example: STREETLIGHT POLE'S BULB IS OUT at the corner of Palm Ave. & Bellevue Ave. (near 381 PALM AV).
 - c. Call about maintenance needed on a non-asset (e.g., illegal dumping where a street dead-ends into a railroad track).
Example: ILLEGAL DUMPING REMOVAL of 2 tires on the sidewalk next to a utility box across from 3224 Farnam St.
 - d. 3 calls for the same issue at the same location, but with different location descriptions from the caller:
 - i. In front of X address
Example: 1333 Broadway
 - ii. On the Y block of Z street, near the corner.
Example: 1300 block of Broadway.
 - iii. Near the intersection of A and Z.
Example: near 14th & Broadway.

Resolving Requests for Service

3. Demonstrate the **call intake through completion.**

Describe any notifications to the customer (caller) and the potential for additional notifications to others at different points in the workflow.

Please show each person logging in, seeing the screens that are appropriate for a person in their role (e.g., call intake, supervisor, crew leader).

For the crew leader – the person in the field – the demonstration will be greatly enhanced by showing the work order on a mobile device, and demonstrating the capabilities of the mobile device (e.g., access to maps, plans, manuals/instructions, prior work history, related and unrelated other incidents, and/or use GPS to identify location).

a. **Call #1: Illegal dumping.**

Example: at 89TH AV / G ST.

- i. Citizen who does not live in that neighborhood sees an illegally dumped mattresses, clothes & bags of trash. It is in the public right of way, but not obstructing it. Call Center offers to send an email notification when the work is completed; customer agrees, and provides an email address.
- ii. Call Center forwards service request to supervisor (*Example: Frank Foster*).
- iii. The Supervisor provides crews with work assignments at the beginning of each day. Therefore, the Supervisor (either at the end of the day, or at the beginning of the day), reviews all service requests assigned to him (or to his group, or for the subject Illegal Dumping), and chooses which ones to assign to which crews for which days. In this case, the Supervisor creates a work order for this call, and assigns it to Crew 117.
- iv. Crew 117 goes in the field, collects the materials, records the quantities (1 mattress, 2 bags of clothes, 3 bags of trash), and finishes the work order.
- v. Citizen has not checked her email, and did not write down the service request number. Citizen calls Call Center to ask about the status of the illegally dumped materials. Call Center looks up the status of the service requests and informs the caller that the work was completed at a specific day and time.
- vi. If Crew 117 had taken a photo of the dumped materials, how would she attach the photo to the work order for future reference?
- vii. If the citizen had not provided an email address, but had provided a mailing address, and we wanted to mail a printed letter, how would the work management system facilitate preparing it?
- viii. If Crew 117 had completed 4 work orders before going to the transfer station to dump the materials, how would you recommend tracking the time associated with dumping the materials at the transfer station?

b. **Call #2: Emergency. Sewer main overflow.**

Example: at 2133 EAST 30TH ST.

- i. Call Center receives a call from a City Councilmembers' aide. Standard protocol in such a scenario is that the aide, and the section's Public Works Supervisor II (*Example: Jamie Ramey*), and the original caller (if known) receive email notifications when (1) the call is entered into the work management system; (2) the work is assigned to a crew; and (3) the work is marked as finished.
- ii. Because this is an emergency, the Call Center dispatches the call directly to the crew. Standard protocol is that the crew leader's supervisor (*Example: Charles Bandy*) receives an email notification when the call center directly assigns a work order to a crew, and receives an email notification when the work is completed. Because this is a sewer emergency, City is required to track the time the call was received (initially, which was before the call center received it), the time the work was finished, and the location (latitude/longitude) of the problem.
- iii. Call Center determines that nearest sewer crew is busy on a work order that will take several hours, and instead dispatches to another sewer crew, crew 188. Realistically, they will radio the crew, but please show how the crew receives notification of the work order using a mobile device.
- iv. Crew 188 uses a power rodder to clear the pipe. Issue is resolved.
- v. Crew 188 is very supportive of Public Works Agency director's "all eyes on the City" objective. Crew 188 also wants to try out the new technology, and uses the work management system to note that there is a nearby storm drain inlet that needs cleaning. How does the storm drain inlet observation get turned into a work order, and by whom?
- vi. How does the Supervisor see the activities of the crew for the day?

Getting Information from the Data

4. Show the maintenance history for an asset – e.g., a storm drain that is currently plugged – what were previous actions were taken on it, and who can see this information (e.g., call center, supervisor, crew leader)
5. Demonstrate how to answer the following questions:
 - a. Show me all the traffic signals on a map
 - b. Show me all the open work orders “near” (e.g., within 2 blocks of) X location
 - c. Show me all the incidents where we have cleaned up illegal dumping within X distance of Y intersection.
 - d. Show the average cost to fill a pothole.
6. Show a high-level dashboard for the director, which could include:
 - a. Number of open work orders in each council district;
 - b. Pie chart showing types of calls received in the current month;
 - c. All open calls flagged as “emergency” (e.g., traffic signal broken, sewage backup, debris blocking right of way)
7. Demonstrate how the system can be used to facilitate reporting of our Performance Measures. Some examples include:
 - a. Time – based on working days:
 - i. Street Lighting - Percentage of repair calls responded to and repaired within a working day
 - ii. Sidewalks - Average number of working days to inspect sidewalk complaints received
 - iii. Average number of working days between legal claim received related to sidewalks and completion of preliminary repair.
 - iv. Percentage of damaged traffic signs replaced within two business days
 - b. Time – based on calendar days / 24-hour clock:
 - i. Streets - Average number of calendar days between pothole repair requests and potholes filled by staff
 - ii. Traffic Signals - Average number of hours to repair traffic signals
 - iii. Respond to and resolve all reports of sewer backups within 2.5 hours
 - iv. Respond to and resolve all reports of flooding within 1.5 hours
 - v. Percent of illegal dumping incidents responded to and resolved within 72 hours.
 - vi. Percent of reported graffiti removed within 48 hours.
 - c. Quantities:
 - i. Percent reduction in illegal dumping tonnage
 - ii. Percent of 10,000 storm water inlets cleaned and inspected annually
 - iii. Percent of 300 miles of sanitary sewer pipe cleaned and inspected annually (of 1,000 miles) – note: currently, crews record the following in feet: feet of pipe

that the TV crews video inspect; feet of pipe that the are rodded with the power rodder; feet of pipe that the hydroflusher flushes; these are added together and converted to miles to come up with the figure for miles cleaned and inspected

- iv. Streets - Percent of lane miles resurfaced by contract of total lane miles
- v. Number of sidewalk street trees planted
- vi. Number of sidewalk street trees pruned (of approximately 45,000 sidewalk street trees)
- vii. Number of park trees pruned annually
- viii. Number of right-of-way trees pruned annually
- ix. Number of hazardous right-of-way trees removed

Customer Service

- 8. Demonstrate a live example of a citizen request via the internet, using a current customer's website

Emergency Response and Reimbursement

- 9. Describe how your system will help during emergency, where public works is a first responder (alongside Fire and Police) and Fire declares exclusion zone.
- 10. Describe how after the fact, the system helps gather data for FEMA reimbursement in a declared disaster.

References

- 11. Provide a list of public works agencies currently using the software for
 - a. Call center
 - b. Graffiti abatement
 - c. Illegal dumping
 - d. Sewers
 - e. Signs and traffic striping
 - f. Storm drains
 - g. Street lights
 - h. Streets and sidewalks
 - i. Traffic signals
 - j. Trees

ROI

- 12. Please provide specific examples of customers who have demonstrated a measurable (and/or anecdotal) return on investment.

Q&A

Part 2. Planning and Asset Management

Preventative Maintenance

1. Demonstrate how work can be planned and assigned for preventative maintenance (based on time and/or condition) (e.g., street lights bulbs to replace, trees to prune, signs to replace), including projected costs.
 - a. Demonstrate how individual assets and/or asset classes are identified as having a maintenance cycle.
 - b. Demonstrate how to see all scheduled preventative maintenance that is supposed to be done in the next X months
 - c. Demonstrate how scheduled preventative maintenance is turned into work orders.
 - d. Demonstrate how preventative maintenance work orders can be scheduled based on available time, equipment, materials, and (in the case of contracted work) dollars.
 - e. Demonstrate how we can identify any gap between the resources (number of staff) needed to do all required PM's, versus the actual labor availability to perform them.
 - f. Demonstrate how preventative maintenance can be deferred, and what the implications of deferred PM's are from the system's perspective (do they go away, do they get pushed further out, etc.).

Proactive Work

2. Demonstrate how proactive work can be planned and assigned (e.g., pre-storm preparation, pot hole blitz)

Asset Management

3. Demonstrate how a new asset is added, including acquisition and salvage costs, PM intervals, expected lifespan, and expected replacement cost
4. Demonstrate how RIVA Online interacts with your system, and what the benefits are. Who is using RIVA Online, and for what kind of assets?

Q&A

Part 3. Proposal.

Part 3 will cover your proposal, in terms of project planning, training, GIS infrastructure, technology requirements, options, etc. The audience will primarily be information technology and GIS staff.

1. Please describe the timeframe and assumptions in your proposal, from contract award to Go Live.
2. Please describe the training approach in your proposal.
3. Please describe the technology requirements and topology that you propose.
4. Please describe the maintenance and support, and its cost.
5. Please describe the impact of upgrading on configured screens, workflows, etc.

Additional Potential Uses for the Work Management System

6. Gardeners may do several types of work in a given day, without a work order being previously assigned to them (either reactively or as preventative maintenance). For example, at a given park, they might do weeding, pruning, and litter pickup. If we wanted to use the system to track such work, how would it be done?
7. The Recycling Hotline assigns work orders to outside contractors who complete the work (e.g., resolve a missed garbage collection, drop off a new recycling cart) with an expected resolution time (e.g., end of the next day, 5 business days later). Currently, the outside contractors VPN into our system, and have limited access – basically to describe a work order resolution and to close a work order. If we wanted to use the system to track such work, how would it be done?

Q&A

OAKLAND CITY COUNCILFILED
OFFICE OF THE CITY CLERK
OAKLAND

RESOLUTION No. _____ C.M.S.

City Attorney

2007 AUG 30 PM 8:02

RESOLUTION WAIVING OAKLAND'S COMPETITIVE BID PROCESS AND AUTHORIZING A COMPETITIVE REQUEST FOR PROPOSAL PROCESS, FOR THE PURCHASE OF A COMPUTERIZED SYSTEM INVOLVING PRODUCTS AND SERVICES, AND AUTHORIZING THE CITY ADMINISTRATOR, OR HER DESIGNEE, TO NEGOTIATE AND AWARD AN AGREEMENT TO VESTRA RESOURCES, INC., FOR A WORK MANAGEMENT SYSTEM FOR THE PUBLIC WORKS AGENCY, INCLUDING HARDWARE, SOFTWARE AND CONFIGURATION, INSTALLATION, TESTING, TRAINING, AND SUPPORT SERVICES IN AN AMOUNT NOT TO EXCEED ONE MILLION TWO HUNDRED THOUSAND DOLLARS (\$1,200,000.00), INCLUDING A TEN PERCENT CONTINGENCY

WHEREAS, the Public Works Agency is the steward of Oakland's infrastructure and provides for the design, construction, management and maintenance of Oakland's physical assets including streets, trees, sidewalks and pathways; parks; creeks; sewers and storm drains; buildings and structures; vehicles and equipment; street lights and traffic signals; and

WHEREAS, the Public Works Agency also manages community volunteer programs for beautification and clean-up projects, residential garbage and recycling, graffiti abatement, illegal dumping removal and facilitate environmental compliance; and

WHEREAS, the daily activities performed by staff are primarily recorded using pen and paper and sometimes transferred to a variety of independent spreadsheets and databases; and

WHEREAS, discussions were held with crews representing a broad spectrum of maintenance fields including tree services, traffic striping, traffic signals, traffic circles, streets, street recycling containers, street litter containers, street lights, storm drains, speed bumps, signs, sidewalks, sewers, paths, guard rails, graffiti and illegal dumping removal; and

WHEREAS, a long list of operational issues and needs were identified and confirmed such as the current inability to track and access relevant data to efficiently complete the work; and

WHEREAS, a work management system provides a tool that would enable staff to gather, access and use better information needed to perform their jobs, allow supervisors to better plan work loads based on available resources, provide management better and faster tools to calculate performance measures, enhance customer service through improved web-based tools and better tracking of service requests, and increase transparency by having up-to-date information and maps available to show the cost and work associated with maintaining assets throughout the City of Oakland; and

WHEREAS, the Oakland Municipal Code Section 2.04.050.A requires staff to purchase products such as software and computers by competitive, sealed, fixed bids with award to the lowest, responsive bidder; and

WHEREAS, the competitive bid requirement of section 2.04.050 does not serve the City's interests for the purchase of computerized systems because bid price can not be used as the sole determinate in the selection of computerized systems for a myriad of practicable and sound reasons including: 1) the fact that vendor computerized systems differ significantly in capability, functionality, robustness and quality making it impossible to solely apply uniform product descriptions in the selection process, and 2) successful implementation and operation of computerized systems depends on additional factors such as a vendor's proven track record, quality and comprehensiveness of implementation and support services, the offer of products that are user-friendly to end users and that have the capability to interface or coordinate with the City's existing equipment and products; and

WHEREAS, staff proceeded with a competitive Request for Proposal and rigorous evaluation process which is now complete and have identified the most suitable system or products for PWA with unanimous opinion of the evaluators that VESTRA Resources, Inc. offered the best solution or system; and

WHEREAS, VESTRA Resources, Inc., along with its subcontractors Azteca Systems and Oakland Computer Company, meets the City of Oakland's Local/Small Local Business Enterprise (L/SLBE) program requirements and Equal Benefits Ordinance; and

WHEREAS, VESTRA Resources, Inc. has a confirmed track record in numerous other local government entities including Contra Costa County, Napa County, City of Richmond, City of Pleasant Hill, Marin Municipal Water District, San Francisco Public Utilities Commission, and Azteca Systems' Cityworks software is used in over 275 public works agencies and municipal utility districts throughout North America including the cities of Long Beach, Houston, El Paso, Philadelphia, Richmond (VA), Chicago, and New York City Parks to name a few; and

WHEREAS, the services to be provided under the contract(s) authorized in this Resolution are of a professional, scientific or technical nature, are temporary in nature and shall not result in the loss of employment or salary by any person having permanent status in the competitive service; now, therefore be it

RESOLVED: That, pursuant to Oakland Municipal Code Section 2.04.050.I.5, and based on the information set forth in the City Administrator's report accompanying this item and presented at the public meeting of the City Council at which this Resolution is discussed or voted upon, the City Council finds and determines that it is in the City's best interests to waive the competitive bidding requirements of Oakland Municipal Code 2.04.050.A for the purchase of hardware, software and other products needed for a Work Management System for the Public Works Agency, so waives, and authorizes the competitive request for proposal process used by staff for this purchase; and be it

FURTHER RESOLVED: That the City Administrator, or her designee, is authorized to negotiate and award an agreement with VESTRA Resources, Inc. for implementation of a work management system including hardware, software and configuration, installation, testing, training and support services in an amount not to exceed one million two hundred thousand dollars (\$1,200,000.00), including a ten percent contingency; and be it

FURTHER RESOLVED: That the funding sources for the project include \$600,000 in Fund 2211 – Measure B, FY 2007-09 Adopted Capital Improvement Program budget; \$300,000 in Fund 1010 – General Purpose Fund, prior year appropriations earmarked for a time clock-based, accountability system (current project number P247210); and \$300,000 in Fund 7760 – PWA Overhead, current project A167710 operating funds used to cover agency-wide and administrative needs; and be it

FURTHER RESOLVED: Future on-going operating costs associated with the completed project such as data services, software maintenance and hardware replacement will come from the Operations and Maintenance budgets from the various PWA divisions using the system; and be it

FURTHER RESOLVED: That all contracts authorized hereunder shall be approved for form and legality by the Office of the City Attorney and placed on file in the Office of the City Clerk.

IN COUNCIL, OAKLAND, CALIFORNIA, _____, 20_____

PASSED BY THE FOLLOWING VOTE:

AYES - BROOKS, BRUNNER, CHANG, KERNIGHAN, NADEL, QUAN, REID, and
PRESIDENT DE LA FUENTE

NOES -

ABSENT -

ABSTENTION -

ATTEST: _____
LaTonda Simmons
City Clerk and Clerk of the Council
of the City of Oakland, California