



AGENDA REPORT


TO: Jestin D. Johnson
City Administrator

FROM: Jan Mazyck
Interim Director of Finance

SUBJECT: Oracle Business Intelligence and
Analytics Consulting Services

DATE: September 24, 2025

City Administrator Approval


Jestin Johnson (Sep 25, 2025 19:56:24 PDT)

Date: 09/25/2025

RECOMMENDATION

Staff Recommends That The City Council Adopt A Resolution:

(1) Authorizing The City Administrator To Execute A Two-Year Agreement With Fusion BI, Inc. To Provide Oracle Business Intelligence And Analytics Consulting Services In An Amount Not To Exceed Two Hundred And Ten Thousand Dollars (\$210,000) With The Option To Extend For Two Years In An Amount Not To Exceed One Hundred And Five Thousand Dollars (\$105,000) Per Year; And

(2) Waiving The Competitive Multi-Step Solicitation Process And The City's Local/Small Local Business Enterprise Program

EXECUTIVE SUMMARY

Staff recommends that the City Council adopt a resolution authorizing the City Administrator to execute a two year agreement with Fusion BI, Inc. in an amount not to exceed two hundred ten thousand dollars (\$210,000.00) to provide Oracle Business Intelligence and Analytics consulting services. The proposed resolution authorizes the City Administrator to extend the agreement up to two years in an amount not to exceed one hundred and five thousand dollars (\$105,000.00) per year, subject to funding availability and necessity of services. The Information Technology Department (ITD) and Finance Department have jointly determined that these consulting services are needed to support mission-critical City business operations related to the Oracle Enterprise Resource Planning (ERP) system and that Fusion BI, Inc. is the best service provider to meet these needs.

BACKGROUND / LEGISLATIVE HISTORY

Since 2002, the City has used products and services from Oracle America Inc. to perform critical business operations, including procurement, account receivable/payable, budgeting, personnel management and payroll. The City maintains an annual subscription for priority support from Oracle for these products and services, which includes emergency support and regular software updates. These services are critical to maintaining the City's business operations. The recent Legislative History relevant to this project, includes:

Finance and Management Committee
September 30, 2025

- On March 7, 2023, the City Council adopted [Resolution No. 89611 C.M.S.](#) that authorized the City Administrator to negotiate and execute an agreement with Fusion BI, Inc. for one hundred five thousand dollars (\$105,000) for Oracle Business Intelligence and Analytics consulting services for a one (1) year term with the option to extend for an additional one (1) year for a total amount not to exceed two hundred ten thousand dollars (\$210,000).
- On June 10, 2019, the City Council adopted [Resolution No. 87732 C.M.S.](#) that waived the competitive solicitation process for the purchase of professional services for the ongoing support for budget implementation and budget system operations and maintenance for the Oracle Planning and Budgeting Cloud Service ("PBCS") and authorizing the City Administrator to extend the contract for professional services with InnoFin Solutions LLC to provide ongoing support for budget implementation, and budget system operations and maintenance for the Oracle Planning and Budgeting Cloud Service ("PBCS") for two years, from July 1, 2019, to June 30, 2021, in the amount of one hundred fifty thousand dollars (\$150,000) per year, with a total contract amount of three hundred thousand dollars (\$300,000).
- On October 3, 2017, the City Council adopted [Resolution No. 86922 C.M.S.](#) authorizing the City Administrator or designee to appropriate \$2.2 Million from the City's Development Services Fund (2415) Balance to fund the Oracle R12 Reimplementation Project.
- On October 6, 2015, the City Council adopted [Resolution No. 85825 C.M.S.](#) that authorized the City Administrator or designee to execute master lease agreement(s) with IBM Credit LLC for financing not to exceed an amount of \$17,000,000, a term of 7 years and an interest rate of 3.5% tax-exempt and/or 5.5% taxable; and waived competitive selection requirements for the financing agreement(s). Resolution No. 85825 also stipulated that the proceeds of the financing were to fund: (A) current information technology systems operations and maintenance; (B) a project to upgrade/implement the Oracle Systems, including hardware, software, professional services, support and maintenance; (C) a project to implement a new municipal budgeting system including hardware, software, professional services, support and maintenance; and (C) a project to replace and improve 9-1-1 public safety systems including hardware, software, professional services, support and maintenance. In addition, the resolution approved the recommendations of the City Administrator for the award of contracts to provide professional services to upgrade/implement the Oracle Systems and to implement a new municipal budgeting system based on the results of the competitive selection process; and authorized the City Administrator or designee to negotiate and enter into professional services contracts with the approved firms.

ANALYSIS AND POLICY ALTERNATIVES

The City has used products and services from Oracle America, Inc. since 2002 to support, maintain, and enhance its most critical business operations including procurement, accounts receivable / payable, budgeting, personnel and payroll.

The Finance Department and ITD jointly determined that consulting services are needed to support the following ongoing functions in the Oracle system:

- 1. Migration, Upgrade and Support of Oracle Business Intelligence and Analytics (OBIEE/OBIA)**
 - a. Construct and implement migration & upgrade plans for the City's OBIEE/OBIA systems and products;
 - b. Restore and validate the OBIEE, OBIA, and Oracle Data Integrator in non- production and production environments;
 - c. Reinstate the integration between OBIEE/OBIA and Oracle EBS in the non- production and production environments;
 - d. Verify access, security, and availability of OBIEE/OBIA;
 - e. Recommend and implement improvements to OBIEE, OBIA, and Oracle Data Integrator systems and applications;
 - f. Restore and validate all OBIEE/OBIA reports;
 - g. Retrofit impacted OBIEE/OBIA report;
- 2. Support and Maintenance of City's Business Intelligence and Analytic systems and Products**
- 3. All Reporting systems support and development**
 - a. Sync up security/access in all BI instances, Production, Test and Dev;
 - b. May develop/support Single sign-on access to the reporting platform;
 - c. Expand data source support beyond Oracle EBS such as Microsoft SQL;
 - d. Resolve any issues related to the City's OBIEE/OBIA;
 - e. Deploy maintenance, security, update, and product specific patches for the City's OBIEE/OBIA systems and products;
 - f. Administer the City's OBIEE/OBIA instances;
 - g. Maintain Oracle Data integrator and ETLs
- 4. Development**
 - a. Enhance existing reports by doing necessary modifications as requested by departments;
 - b. Create new reports as requested by departments

The consultant will provide the services outlined above remotely. There will not be any travel or out-of-pocket cost reimbursed to the consultant. The consultant will provide a weekly status report to the City following weeks in which development/support hours are incurred, to mutually track the balance of remaining hours.

The Finance Department previously conducted a Request for Proposals (RFP) to solicit bids from qualified consultants for this work on November 25, 2022 and only one proposal was received from Fusion BI Inc. Upon reviewing the proposal, the Finance Department and ITD both determined the consultant was sufficient to meet the needs of the City, based on their work history, experience with Oracle, and previous quality of work with the City. The City subsequently entered

into a two-year agreement with Fusion BI, Inc. for the services, pursuant to Resolution No. 89611 C.M.S. At this time, Finance and ITD need the work to continue and jointly recommend awarding a continuing contract to Fusion BI, Inc. If this work is not carried through, it could have damaging impacts on the City's ability to maintain its Oracle operations and reporting capabilities in the Oracle ERP. The consultant will assist with the City's reporting upgrade to a more secure and responsive financial system, which will enhance the integrity of the City's financial information and enable City staff to perform analyses of such data with greater efficiency.

Funding allocated for this contract is expected to support the Citywide priority of responsive, trustworthy government.

Waiver of Multi-Step Solicitation Process and of the Local /Small Local Business Enterprise Program Requirements

Oakland Municipal Code ("OMC") section 2.04.042 B requires a multi-step competitive solicitation process for the procurement of computerized/information technology systems (combined purchase of products and IT professional services). Under OMC section 2.04.042 D, the Council may waive this solicitation process if it finds and determines that it is in the best interests of the City to do so.

Additionally, Ordinance No. 13825 C.M.S. requires a minimum 50-percent (50%) Local /Small Local Business Enterprise ("L/SLBE") participation for all professional service agreements and purchases of commodities, goods and associated services for contracts valued at or over fifty thousand dollars (\$50,000). The City Council may waive the City's L/SLBE requirements pursuant to Part I of the Program.

Staff has not been able to identify any certified L/SLBEs that can provide the professional services that are required under this contract, however there was not an availability analysis requested or completed for this agreement and no continuing competitive solicitation process. Thus, staff requests that the City Council waive the L/SLBE requirements for this proposed contract award to continue the work with Fusion and because it is in the best interests of the City as discussed in this report.

ITD Staff recommends, pursuant to OMC Section 2.04.042.D, that the City Council finds that it is in the best interests of the City to waive the multi-step competitive solicitation process requirements; and the L/SLBE requirements for the above purchase expenditures due to the time-sensitive nature of the project. There is currently no one in the City with the knowledge that is required for this work. Additionally, Oracle Cloud migration project has started and a consultant that has a knowledge of our Business Intelligence infrastructure is required.

FISCAL IMPACT

Adoption of the proposed resolution will authorize the City Administrator, or designee, to negotiate and execute an agreement with Fusion BI Inc. to provide Oracle Business Intelligence and Analytics consulting services in an amount not to exceed two hundred and ten thousand dollars

(\$210,000) for a term of two years, with the option to extend by two years, subject to funding availability and the need for the services to continue.

Funding for the proposed contract is available is available in the Fiscal Year (FY) 2025-2027 Biennial Adopted budget in the following funding source:

Table 1: Funding Sources

Fund	Org	Project	Account	Program	FY 2025-2026	FY 2026-2027	Total
4600 – Information Technology	08211 – Accounting: Admin.	1004391- Finance Ops Sys.	54930 – Services: Professional	IP59 – Financial Mgmt.	\$105,000	\$105,000	\$210,000

Funding for FY 2027-29 will be requested during the biennial budget process. ITD and the Finance Department recommend approving the ability to extend the agreement for an additional two years for the same amount of \$105,000.00 per year. Funding for the extension has not been approved and will be requested during the FY 2027-29 Biennial budget process.

COORDINATION

This report and legislation have been reviewed by the Information Technology Department, Finance Department, Office of the City Attorney, and City Administrator's Office.

SUSTAINABLE OPPORTUNITIES

Economic: There are no economic opportunities associated with this report.

Environmental: There are no environmental opportunities associated with this report.

Race & Equity: There are no racial equity opportunities associated with this report.

ACTION REQUESTED OF THE CITY COUNCIL

Staff Recommends That The City Council Adopt A Resolution:

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(2) Waiving The Competitive Multi-Step Solicitation Process And The City's Local/Small Local Business Enterprise Program

For questions regarding this report, please contact Brittany Hines, Assistant to the Director, at bhines@oaklandca.gov.

Respectfully submitted,


Jan Mazyck (Sep 24, 2025 16:24:12 PDT)

JAN MAZYCK
Interim Director of Finance, Finance

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