



CITY OF OAKLAND

AGENDA REPORT

TO: Elizabeth Lake
Acting City Administrator

FROM: Bradley Johnson
Finance Director

SUBJECT: InnoFin Solutions LLC Professional
Services Contract

DATE: June 2, 2026

City Administrator Approval


Betsy Lake (Jun 9, 2026 11:36:06 PDT)

Date: Jun 9, 2026

RECOMMENDATION

Staff Recommends That The City Council Adopt A Resolution Waiving The Competitive Multiple-Step Solicitation Process Required For The Purchase Of Professional Services And Waiving The Local And Small Local Business Enterprise Program Requirements To Award A Contract To InnoFin Solutions Llc 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) For Five Years, From July 1, 2026 To June 30, 2031, In The Amount Of Forty Thousand Dollars (\$40,000) Per Year, With A Total Contract Amount Of Two Hundred Thousand Dollars (\$200,000)

EXECUTIVE SUMMARY

Staff recommends that the City Council adopt a resolution authorizing the City Administrator to enter into a contract with InnoFin Solutions LLC for continued support and ongoing maintenance of the Oracle Planning & Budgeting Cloud Service (PBCS) for the next 5 years from July 1, 2026 through June 30, 2031, in the amount of forty thousand dollars (\$40,000) per year, for an amount not to exceed two hundred thousand dollars (\$200,000).

In May 2016, the City contracted with InnoFin Solutions LLC to design, configure, develop and implement various the City's PBCS modules that support biennial and midcycle budget development. They also provided managed services support, incident support, and problem management, and enhancements for the City's budget process starting with FY 2017-19 Biennial Budget through FY 2026-27 Midcycle Budget.

InnoFin Solutions LLC's continued ongoing support and maintenance of PBCS will add value to the development and management of the City's budget process and reports.

BACKGROUND / LEGISLATIVE HISTORY

The Oracle the Oracle E-Business Suite (EBS) System re-implementation project was started in 2016, including the implementation of a new municipal budgeting system, PBCS, because the then-current public sector budgeting system (PSB) was no longer supported by Oracle and would not be compatible with the Oracle upgrade. The City awarded the PBCS implementation to InnoFin Solutions LLC, an Oracle Gold Partner, proved to be the most qualified, with the deepest experience in implementing the required Hyperion solution via cloud for municipal governments. Aside from developing and configuring PBCS, InnoFin has provided ongoing support from FY2017-19 Biennial budget to FY2026-27 Midcycle Budget. Since the implementation of PBCS, the City has entered into numerous professional agreements with InnoFin Solutions for ongoing professional services support for both Biennial and Midcycle budgets.

The recent Legislative History relevant to this project includes:

- As part of the Oracle EBS re-implementation in FY 2016, City Council passed Resolution No. [86021 C.M.S.](#) on March 1, 2016, authorizing the (1) purchase of Hyperion Hardware and/or Software, Licensing and Maintenance Services for the New City Budgeting System, and (2) enter into a contract with InnoFin Solutions LLC to implement PBCS to replace the obsoleted Oracle PSB budgeting module, and waive the Advertising, Bidding and Request for Proposal/Qualifications ("RFP/Q") Competitive Selection Requirements for the above contracts.
- On March 2016, The City entered into a professional agreement with InnoFin Solutions LLC, an Oracle Gold Partner, whose core focus is providing Enterprise Performance Management and Business Intelligence solutions. InnoFin designed, configured and developed and implemented various PBCS modules that support biennial and midcycle budget development, 5-year forecast, tax revenue anticipation analysis, and projections. Staff recommended that it was in the City's best interests to waive competitive bidding, advertising, and the RFP/Q process requirements for the purchase of Hyperion as well as the related system implementation given the tight timeframe, the very limited number of contractors that are able to provide the software and system implementation services, as well as the mission critical nature of the project. PBCS went live for the FY2017-19 Biennial Budget and InnoFin Solutions LLC provided post-production support up to December 2016.
- On March 2017, the City entered into a professional agreement with InnoFin Solutions LLC through May 2018, for ongoing professional services support for the FY2017-19 Biennial Budget, and completion of the remaining PBCS modules such as the midcycle budget development, 5-year forecast, tax revenue anticipation analysis, and projections.
- On September 2018, the City entered an agreement with InnoFin Solutions LLC ("Original Contract") for ongoing support & maintenance agreement using the Competitive Process Waiver for One Time Purchase (Ordinance No. [13380 C.M.S.](#)) not to exceed \$50,000 for ongoing support & maintenance for June 1, 2018 to July 31, 2019

- On May 2019, City Council passed Resolution No. [87732 C.M.S.](#) authorizing the City Administrator to amend the Original Contract to: (1) extend the contract for professional services with InnoFin Solutions LLC to provide ongoing support for 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), and (2) waive the Advertising, Bidding and Request for Proposal/Qualifications ("RFP/Q") Competitive Selection Requirements for the above contracts
- On September 2019, the City and InnoFin Solutions LLC mutually agreed to amend the initial term of the Original Contract for ongoing support & maintenance agreement for PBCS to begin on June 1, 2018 to June 30, 2025
- On September 2025, the City entered an agreement with InnoFin Solutions LLC for ongoing support & maintenance agreement for PBCS through the informal solicitation process for the contract price of \$49,999 for June 1, 2025 to June 30, 2026.

ANALYSIS AND POLICY ALTERNATIVES

InnoFin Solutions LLC has successfully deployed PBCS via cloud for the City in 2016 and has provided on-going support since inception up to June 30, 2026. InnoFin provided ongoing professional services for all the budget processes from FY2017-19 Biennial up to the current FY2026-27 Midcycle budget. InnoFin provided skilled Oracle resources to assist the City in supporting the Oracle Planning Budgeting application on an on-going basis & provided technical and functional expertise as requested and ensured timely resolution of issues. They supported areas needing enhancements and streamlined processes based upon feedback from budget system users, including departmental fiscal staff. InnoFin has the requisite skills and knowledge to design and implement solutions to these needs.

InnoFin Solutions LLC will enable the City to introduce areas of improvements to the current version of PBCS, leverage new PBCS features, and replace obsoleted PBCS functionality. PBCS is a cloud-based application where the hardware and software versions are maintained by Oracle which releases new features, enhancements and software corrections. InnoFin can introduce and incorporate technology updates and has successfully implemented multiple technology updates.

Since InnoFin Solutions LLC was the original developer of the City's customized PBCS system, they are familiar with the City's budgetary procedures, processes, timelines, and unique system requirements. They have provided quick fixes of issues during multiple budget processes, including any reporting requirements to support the budget book or any budget analysis with minimal interaction. As such, they are uniquely positioned to support the City's budget system needs. InnoFin Solutions LLC has demonstrated their expertise in solution design, configuration, reports development and product knowledge of PBCS and is immediately available to support budget implementation without delay and minimal administrative guidance.

Ongoing support from InnoFin Solutions LLC will assist in budget implementation ensuring that the adopted budget is efficiently entered into the various Financial and Human Resource modules of the Oracle E-Business Suite (EBS) Financial system.

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

WAIVER RATIONALE

OMC Section 2.04.042.B requires staff to conduct a multi-step proposal competitive solicitation process for the procurement of computerized/information technology systems, and OMC Section 2.04.042.D permits the Council to waive the multi-step proposal solicitation competitive selection requirement upon a finding and determination that it is in the best interests of the City to do so.

Staff recommends that, pursuant to OMC Section 2.04.042 D, the City Council finds and determines that it is in the best interests of the City to waive the multi-step proposal solicitation competitive selection requirement for the above Information Technology purchase and expenditures.

Ordinance number 13640 C.M.S. and 13647 C.M.S. requires a minimum 50-percent (50%) Local Business Enterprise/Small Local Business Enterprise (LBE/SLBE) participation for all purchase of commodities, goods, and associated services for contracts valued at or over fifty thousand dollars (\$50,000) when there are at least three certified business listed in the industry, trade, or profession that constitutes a major category of work. However, the Council may waive the City's LBE/SLBE requirements due to a lack or limited availability of LSBEs or LBEs and because it is in the best interests of the City to do so.

Staff did not perform an availability analysis. The business case for leveraging InnoFin's existing work is very compelling. Transitioning to a new firm at this stage would create significant opportunity costs, including the loss of continuity, institutional knowledge, efficiencies, and cost savings already built into InnoFin's prior work. Thus, staff requests that the Council waive the LBE/SLBE utilization requirements for this proposed contract award on this basis and because it is in the best interests of the City to do so because of the reasons discussed in this report.

RELATED PLANNING EFFORTS

This agenda item is a routine item and does not relate to any Oakland strategic planning efforts.

FISCAL IMPACT

Approval of this proposed resolution will authorize the City Administrator to enter into an agreement with InnoFin Solutions LLC in an amount not to exceed \$200,000 for a term of five (5) years. The proposed annual expense for the project is not expected to exceed \$40,000 per year. Funding for the first year of the contract is included in Fiscal Year FY 2025-27 Biennial adopted budget. Funding availability for FY 2026-27 will be contingent upon Council adoption of the Midcycle Budget. Future years funding will be included in the proposed annual budget and

will also be subject to Council approval of annual appropriations. Costs are one-time and funds span multiple fiscal years.

The project will be funded as follows:

Fund Source	Organization	Account	Project	Program	Amount
1010 - General Purpose Fund	08811 - Budget Unit	54930 - Services: Professional	1004391 - Finance Ops Systems	IP12 - Budget Analysis & Operations	\$ 40,000/year
Total Project:					\$ 200,000

PUBLIC OUTREACH / INTEREST

No outreach was deemed necessary for the proposed policy action beyond the standard City Council agenda noticing procedures because this agenda item is a routine item.

COORDINATION

This report and legislation have been reviewed by the Office of the City Attorney and the Budget Bureau.

RACE AND EQUITY


No race and equity opportunities are identified in this report, nor was a racial equity analysis performed.

ACTION REQUESTED OF THE CITY COUNCIL

Staff Recommends That The City Council Adopt A Resolution Waiving The Competitive Multiple-Step Solicitation Process Required For The Purchase Of Professional Services And Waiving The Local And Small Local Business Enterprise Program Requirements To Award A Contract To InnoFin Solutions Llc 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) For Five Years, From July 1, 2026 To June 30, 2031, In The Amount Of Forty Thousand Dollars (\$40,000) Per Year, With A Total Contract Amount Of Two Hundred Thousand Dollars (\$200,000)

For questions regarding this report, please contact Rina Stabler, Budget Administrator, Interim, at 510-238-4758

Respectfully submitted,


[Bradley Johnson \(Jun 8, 2026 12:51:20 PDT\)](#)

BRADLEY JOHNSON
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