



## **AGENDA MEMORANDUM**

Future Item for the City Council Meeting of September 22, 2015  
Action Item for the City Council Meeting of September 29, 2015

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**DATE:** September 15, 2015

**TO:** Ronald L. Olson, City Manager

**THRU:** Gustavo Gonzalez, P.E., Assistant City Manager, Public Works and Utilities  
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**THRU:** Valerie H. Gray, P.E., Executive Director, Public Works  
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**FROM:** Jeffrey Edmonds, P.E., Director, Capital Programs  
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<p style="text-align: center;"><b><u>Amendment No. 3 to Information Technology Contract</u></b> Project Management Software</p>
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**CAPTION:**

Motion authorizing the City Manager or designee to execute Amendment No. 3 to the Information Technology Contract LMR Consulting aka Upland Software dba EPM Live from Carlsbad, CA in the amount of \$102,274.40, for a re-stated fee of \$227,399.60 for the implementation of Project Management Software.

**PURPOSE:**

The purpose of this Agenda Item is to execute an amendment for Professional Information Technologies Services with LMR Consulting aka Upland Software dba EPM Live for 2015 Full User and Team Member software licenses, support services, creation of automated reporting capabilities, and general upgrades to the current Project Management Software for the Capital Programs (CP) department.

**BACKGROUND AND FINDINGS:**

The EMP Live software is an essential tool for the Project Management by Engineering Services for over 300 projects in planning, design, construction and warranty that have a total value in excess of \$350 Million. This software was initially setup and installed in 2014 with subsequent training, data entry, and analysis. This amendment provides for upgrades to enhance the software management tools by providing additional reports, computer financial interface, document controls and other elements to improve the functionality and accountability for the department. The software will now be inclusive of construction activities such as Daily

Activity Reports and construction contract information. This amendment includes also the software licensing for all Capital Programs Department team members to continue accessing/using the upgrades and site.

This program provides Capital Programs Quality Assurance to gather and report metrics at the program- and project-level for Leadership review (e.g., Issues, Risks, non-performing projects, areas of concern, consultant/contractor performance, etc.).

This amendment also covers an Electronic Document Signing and Tracking capability within the Project Management Site improving the process from hand-carrying to electronic.

**ALTERNATIVES:**

1. Approve the amendment for continued licensing and reporting upgrades to the Information Technologies Services contract with LMR Consulting aka Upland Software dba EPM Live.
2. Do not approve amendment for continued licensing and reporting upgrades to the Information Technologies Services contract with LMR Consulting aka Upland Software dba EPM Live. (Not Recommended)

**OTHER CONSIDERATIONS:**

It is anticipated that the Project Management Site has the capability to generate the Capital Programs Improvement Budget and Planning Guide (CIP Book) annually. There is a planned test scheduled for July of 2016.

This software has the capability to create workflows for electronic document approval and tracking to replace current hard-copy approvals.

**CONFORMITY TO CITY POLICY:**

This purchase conforms to the City's purchasing policies and procedures and Texas State procurement laws.

**EMERGENCY / NON-EMERGENCY:**

Not applicable

**DEPARTMENTAL CLEARANCES:**

MIS Department

**FINANCIAL IMPACT:**

☒ Operating      ☐ Revenue      ☐ Capital      ☐ Not applicable

Fiscal Year 2014-2015	Project to Date Expenditures (CIP only)	Current Year	Future Years	TOTALS
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Capital Programs Operating		\$102,274.40		\$102,274.40
Encumbered/Expended Amount				
This item		\$102,274.40		\$102,274.40
Future Anticipated Expenditures				
BALANCE		\$0.00		\$0.00

Fund(s): Engineering Operating Fund

**RECOMMENDATION:**

City Staff recommends the approval of the amendment with LMR Consulting aka Upland Software dba EPM Live to continue use of the program and enhance the programs' reporting capabilities.

**LIST OF SUPPORTING DOCUMENTS:**

Project Budget  
Presentation  
Amendment No. 3