CITY OF SANTA BARBARA

COUNCIL AGENDA REPORT

AGENDA DATE: March 22, 2016

TO: Mayor and Councilmembers

FROM: Information Systems Division of Administrative Services Department; Community Development Department; and Public Works Department

SUBJECT: Purchase Of A New Council Document And Agenda Management System

RECOMMENDATION: That Council:

A.   Approve a professional services agreement with Konica Minolta Business Solutions U.S.A., Inc., for the acquisition and implementation of the Hyland OnBase Document and Agenda Management System, in an amount not to exceed $228,948, and approve an additional $22,895 for contingency costs that may be necessary during the implementation;

B.   Appropriate $53,588 from the Capital Reserve Account for Technology Upgrades to the Community Development Department's Building and Safety Division's Fiscal Year 2016 budget to cover a portion of this agreement; and

C.   Appropriate $55,340 from Information Systems Capital Reserves to the Fiscal Year 2016 Information Systems budget to cover a portion of this agreement.

EXECUTIVE SUMMARY:

The City's existing Questys Council Document and Agenda Management System plays a significant role in administrative and official document storage functions Citywide. The current system was implemented more than 14 years ago and has provided the City an electronic council agenda process and document management system for many years. However, this system uses old technology, is difficult to use, has few features compared to modern systems, and is increasingly experiencing operational and functional problems and issues.

In Fiscal Year 2015 a project to replace Questys was given a high priority and a multi-departmental effort was undertaken to conduct a comprehensive Request for Proposals (RFP) process to replace this outdated legacy system. The project team consisted of members from the City Clerk's Office, Community Development, Public Works, and Information Systems. The team unanimously chose Hyland OnBase to replace Questys

and Konica Minolta Business Solutions to provide the professional implementation services.

OnBase not only addresses the limitations of the current document and agenda management system, but it provides many new features that will enable the City to better conduct its business.

The price of the new software acquisition and professional services for implementation, including a contingency allowance of $22,895, is $251,843. The first year's technical support and maintenance fee is $20,748 and is included in the total purchase cost. Also, during contract negotiations, Hyland agreed to lock in the annual maintenance fee for the first five years at the discounted rate of 19%, rather than their standard 20% with a typical 2-5% annual increase in maintenance costs.

DISCUSSION:

Background

In 2002, the City of Santa Barbara implemented Questys Solutions' Questys software application to manage its Council agenda process and to provide an electronic document repository. For more than 14 years, Questys provided workflow approval for the City's Council Agenda Reports and creation of Council Meeting Agendas. Questys also provides for the storage of and ability to retrieve electronic copies of City documents including:

- <u>City Clerk Documents</u> (approximately 90,000 documents) – meeting minutes, agenda packets, ordinances, resolutions, contracts, and grant files.

- <u>Public Works Documents</u> (approximately 310,000 documents) – large format color building plans, large format zoning maps, engineering documents, and public utility plans.

- <u>Community Development Documents</u> (approximately 425,000 documents) - building and permitting applications, permit plans, architectural plans, inspections, design guidelines, building codes, and land use maps.

Questys is also integrated with Granicus, the City's online video streaming system for Council meetings. Granicus is used by City staff and the Public to watch a meeting's video while viewing the meeting's agenda. After the meeting, people can view the meeting video with agenda and its associated minutes and attachments.

A few years ago, it was realized that Questys was not adequately meeting the City's needs. While it is functional, the version of Questys used by the City has a number of issues: (1) it has reach the vendor's "end of life" for the product and is no longer being updated; (2) it has incompatibility issues with the City's Windows 7 computer operating

system software, Microsoft Office, and Internet web browsers that make it difficult to use and to solve the technical problems and issues that arise; (3) it provides only basic agenda process and document management business functionality and; (4) it has an awkward and hard-to-use interface. Due to these deficiencies, the City decided to replace Questys.

Selection of Document and Agenda Management System

Last year, General Fund funding was approved and the project to replace Questys was prioritized to begin. The first step was to form the project team. It consists of representatives from the City Clerk's Office, Community Development, Public Works, and Information Systems.

The project team performed a needs assessment, drafted an RFP document including functional requirements, identified potential vendors (including Questys Solutions), sent RFPs to nine vendors; and five proposals were received. The project team reviewed the proposals and the top three qualified responders were chosen as semi-finalists: Konica Minolta Business Solutions with Hyland OnBase document and agenda management software, Questys Solutions with ECMx document and LSx agenda management software, and ECS Imaging with LaserFiche document and Novus agenda management software.

The semi-finalists provided presentations and demonstrations of their company's viability and the software's functionality to the project team. Based on this assessment, the project team concluded that Hyland OnBase, provided by implementer Konica Minolta, was the product that best met the City's needs.

In verifying that OnBase is the best product, reference checks were conducted with other municipalities, and multiple software demonstrations and live online document portals were viewed. At the conclusion of this effort, the project team unanimously chose Hyland OnBase as the City's new document and agenda management software application.

Functions and Features of Hyland OnBase

The Hyland OnBase document and agenda management software not only addresses the limitations of the current document and agenda management system, but provides many new features needed by the City to better conduct its business. Some of the more important features of the proposed OnBase version are:

- It is a supported and regularly updated software product
- It has an easy to use modern user interface based on the Microsoft Office interface
- It is compatible with: Windows 7, 8 and 10; Microsoft Office 2013, and Internet Explorer 11 and other current web browsers

- It provides functionality to route Council Agenda Reports via workflow for approval and to create and publish Council Agendas on paper to the web
- It provides an interface with the Granicus video streaming system
- It stores and easily retrieves electronic copies of various paper documents such as: agendas, ordinances, resolutions, contracts, building plans, permit applications, architectural plans, design guidelines, building codes, land use maps, building plans, large format zoning maps, and engineering documents. These documents can be easily found, displayed, printed, and e-mailed
- **New Feature:** It provides a modern public portal with search capability for retrieving and displaying documents via the web
- **New Feature:** It provides agenda review and workflow approval on Apple iOS and Android mobile devices
- **New Feature:** It provides easy-to-use form and workflow creation tools for non-technical staff to create online forms that can be routed for approval and the data entries stored in a standard database that custom reports can access
- **New Feature:** It provides easy-to-use tools to create City policies online and route via workflow to staff for review and acknowledgement
- **New Feature:** It provides integration with Geographic Information Systems (GIS) allowing documents to be associated and retrieved via an address or map location
- **New Feature:** It provides integration with other software applications allowing documents to be associated and retrieved via keywords in data fields

Project Implementation Timeline

The project is planned to begin in April 2016 and with an approximate 5 month implementation timeframe, go-live by October 2016. The first phase will bring the Agenda Management system online citywide followed by the Document Management system for the Public Works and Community Development Departments.

BUDGET/FINANCIAL INFORMATION:

The total contract amount for the Hyland OnBase Document and Council Agenda Management system is $251,843, including a 10% contingency.

In Fiscal Year 2016, $100,000 was appropriated for the General Fund portion in connection with the adoption of the Fiscal Year 2016 budget. The remaining $151,843 amount required will be funded as follows:

1. Public Works Department ($42,915) – these funds are already appropriated in a number of funds.
2. Community Development Department ($53,588) – These funds will be appropriated from a Capital Reserve Account for Technology Upgrades.

3.   Administrative Services Department ($55,340) - Reserves from the Information Systems Fund be appropriated to cover the balance of funds needed, which will be repaid by charging back the departments that use the Agenda Management system through allocated costs in Fiscal Year 2017.

Community Development's $53,588 contribution pays for their portion of the OnBase Document Management software licenses, professional services to implement, and document migration from the Questys system.

Public Works' $42,915 contribution pays for their portion of the OnBase Document Management software licenses, professional services to implement, and document migration from the Questys system.

The remaining amount of $155,341 purchases the OnBase Council Agenda Management software licenses, professional services to implement, and document migration from the Questys system.

In addition, the City will be required to pay an annual maintenance and support fee. This fee is fixed at $20,748 for five years and the first year's fee is included in the contract amount.

SUSTAINABILITY IMPACT:

The Hyland OnBase Document and Agenda Management System will store electronic copies of the documents the City generates and receives, such as agendas, building plans, official City documents, and forms; thereby reducing the need to print them on paper, distribute multiple copies, or store them in file cabinets.

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APPROVED BY: City Administrator's Office