



**TO:** Board of Contracts and Awards  
**FROM:** Jack Kelanic, Director of Information Technology *JK*  
Michelle Lewis-Hodges, PMO Manager, Information Technology Department  
**COPY:** City Council, City Manager, City Clerk, SBE Coordinator, LEAP Coordinator, and  
Cynthia Lewis, Finance/Purchasing  
**SUBJECT:** Technical Project Management Services for Electronic Records Management Systems  
Project, RFP Specification # PS14-0295F, Requesting City Council Date of September  
12, 2017  
**DATE:** August 28, 2017

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**SUMMARY:**

The Information Technology Department recommends the amendment of contract no. C12 to The Stergion Group, Inc., Rancho Palos Verdes, CA, for an increase of \$299,079.00, plus applicable sales tax, with a term ending December 31, 2018 for continued project management services. The increase will bring the contract to a cumulative total of \$485,655.00, plus applicable sales tax.

**STRATEGIC POLICY PRIORITY:**

- Encourage and promote an efficient and effective government, which is fiscally sustainable and guided by engaged residents.

By managing the City’s electronic records management systems project, this contract supports an efficient and effective government.

**BACKGROUND:**

The Information Technology Department, the City Attorney’s Office and the Tacoma Public Utilities Management Services Office have collaborated the last six months, with the assistance of a senior project manager from The Stergion Group, Inc., to evaluate the City’s electronic records management requirements, potential integrators and software solutions to define the scope and strategy for the City’s electronic records management system project going forward.

The purpose of the project is to establish a modern electronic records management system and e-discovery tools, and to automate management of electronic records in accordance with Federal and State guidelines and other regulatory requirements.

The project scope includes up to two phases. The first phase is a pilot implementation of an electronic records management (RM) system inclusive of an RM-enabled Microsoft SharePoint system hosted in the Microsoft Office 365 Government cloud platform. Phase two would include the migration of data from an antiquated City records system to the new system. Upon completion of the phase one development, City sponsors would consider whether to recommend subsequent phases in 2019-20.

**ISSUE:** For an enterprise-wide project of this complexity, staff recommends the assignment of a contract senior project manager to provide executive level support, facilitate strategic business decisions, manage vendor relationships, and provide leadership to the project team members, and across departmental boundaries.

**ALTERNATIVES:** The alternative is to assign the project management duties to an existing team member. Due to the complexity and risk of this project, this alternative is not recommended.



COMPETITIVE SOLICITATION: A roster of authorized contractors was established in 2014 through RFP Specification No. PS14-0295F IT Project Management Temporary Staffing Services. The Stergion Group, Inc. is one of the authorized contractors selected.

CONTRACT HISTORY: The original contract was approved and executed March 2017, in the amount of \$186,576.00, plus applicable sales tax for an initial eight-month contract term. The increase of \$299,079.00 would bring the cumulative total to \$485,655.00, plus applicable sales tax, with a term ending December 31, 2018.

SUSTAINABILITY: Approximately half of subject services will be provided remotely, thereby reducing the number of carbon-generating trips. Additionally, all contract deliverables will be digital.

DISADVANTAGED BUSINESS ENTERPRISE (DBE): The recommended contractor is a certified Disadvantaged Business Enterprise (DBE). As such, the DBE participation level of the recommended contractor is one hundred percent.

**RECOMMENDATION:**

The Information Technology Department recommends the amendment of contract no. C12 to The Stergion Group, Inc., Rancho Palos Verdes, CA, for an increase of \$299,079.00, plus applicable sales tax, with a term ending December 31, 2018 for continued project management services. The increase will bring the contract to a cumulative total of \$485,655.00, plus applicable sales tax.

**FISCAL IMPACT:**

Funds in the amount of \$485,655.00 are budgeted and available in the 2017/2018 biennium.

**EXPENDITURES:**

FUND NUMBER & FUND NAME *	COST OBJECT (CC/WBS/ORDER)	COST ELEMENT	TOTAL AMOUNT
Information Systems Fund 5800	596000	5310100	\$485,655.00
<b>TOTAL</b>			\$485,655.00

\* General Fund: Include Department

**REVENUES:**

FUNDING SOURCE	COST OBJECT (CC/WBS/ORDER)	COST ELEMENT	TOTAL AMOUNT
Information Systems Fund 5800	596000		\$485,655.00
<b>TOTAL</b>			\$485,655.00

**FISCAL IMPACT TO CURRENT BIENNIAL BUDGET: \$485,655.00**

**ARE THE EXPENDITURES AND REVENUES PLANNED AND BUDGETED? Yes**

**FINANCE PURCHASING  
AUG 30 2017 9:53:13**