

Agenda Report Details (With Text)

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Sponsors: Lorenzo Tyner
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Attachments: 1. Agenda Report, 2. Professional Services Agreement

Date	Ver.	Action By	Action	Result
12/15/2021	1	BOARD OF DIRECTORS		

FROM: James D. Herberg, General Manager
Originator: Lorenzo Tyner, Assistant General Manager

SUBJECT:

NINTEX APPLICATION DEVELOPMENT SERVICES

GENERAL MANAGER'S RECOMMENDATION

RECOMMENDATION:

Approve a Professional Services Agreement to AgreeYa Solutions, Inc. to provide Nintex Application Development Services, Specification No. CS-2021-1243BD, for a total amount not to exceed \$300,000.

BACKGROUND

Over the years, a variety of platforms for electronic forms and workflows have been adopted and used at Orange County Sanitation District (OC San), such as InfoPath, Nintex, and K2. More than 80 forms and workflows are in production at OC San today, facilitating a variety of critical business processes, ranging from COVID-19 Screening to Employee Status Changes and Payment Request Vouchers. Some of these forms and workflow platforms will no longer be supported by the vendors in the near future. Further, demand at OC San for moving paper-based processes into digital workflows has increased significantly as a result of COVID-19.

RELEVANT STANDARDS

- Maintain a culture of improving efficiency to reduce the cost to provide the current service level or standard
- Ensure the public's money is wisely spent

PROBLEM

Managing numerous forms and workflow platforms is problematic for OC San. Staff is working inefficiently, updating and maintaining various systems with similar functions. Staff is required to maintain various development skills required to work with multiple platforms. Additionally, several of these platforms will no longer be supported by the vendors in the near future, putting many business processes at risk. Lastly, the demand for new electronic forms and workflows, along with other high priority projects, has prevented staff from making significant progress in migrating existing forms and workflows to a more modern and fully supported system.

PROPOSED SOLUTION

Utilize professional services to consolidate and migrate existing electronic forms and workflows to a single modern workflow platform known as Nintex Workflow Cloud. Staff will oversee Nintex Application Development Services as they work to move existing forms and workflows to the new platform.

TIMING CONCERNS

Several electronic forms and workflow systems in use today will no longer be supported starting in 2023.

RAMIFICATIONS OF NOT TAKING ACTION

Without the use of these professional services, IT staff will be unable to recreate all the existing forms and workflows prior to support expiration. Any system failures that occur without an active support agreement may result in significant business process delays.

PRIOR COMMITTEE/BOARD ACTIONS

N/A

ADDITIONAL INFORMATION

A Request for Proposal was issued on August 3, 2021, via PlanetBids. A non-mandatory pre-proposal meeting was conducted virtually on August 31, 2021. Proposals were due on September 15, 2021. OC San received six responsive proposals valid for 180 calendar days from the proposal opening date.

Prior to receipt of proposals, an evaluation team was formed consisting of OC San staff listed below. The team was chaired by a Purchasing representative as a non-voting member. On September 21, 2021, the evaluation team met to discuss the policies and procedures for the evaluation process.

TITLE
IT Supervisor
Principal IT Analyst
IT Analyst III

IT Analyst II

Individual scoring was the chosen method of evaluation for this procurement. Members of the team performed an independent review of the proposals and later met as a group with the Buyer to discuss their preliminary scores and discuss any questions/concerns they had. Proposals were evaluated based on the following criteria:

CRITERION	WEIGHT
Qualifications & Experience of Firm	30%
Proposed Staffing & Project Organization	30%
Work Plan	10%
Presentation/Interview	10%
Cost	20%

The evaluation team first reviewed and scored the proposals based upon the criteria listed above, other than cost.

Rank	Proposer	Criterion 1 (Max 30%)	Criterion 2 (Max 30%)	Criterion 3 (Max 10%)	Subtotal Score (Max 70%)
1	Konica Minolta	29%	27%	9%	65%
2	AgreeYa Solutions, Inc.	27%	24%	8%	59%
3	Kambrian Corp.	16%	15%	5%	36%
4	ThoughtFocus Inc.	14%	14%	5%	33%
5	Chiron LLC	11%	11%	4%	26%
6	Sonus Software	8%	9%	1%	18%

The two highest ranking firms, AgreeYa and Konica Minolta, were selected for interviews. The interviews were conducted on October 12th and October 14th. Following the interviews, the evaluation team ranked the firms based on both the proposals and interviews using the evaluation criteria and weighting listed above.

Rank	Proposer	Subtotal Score (Max 70%)	Presentation (Max 10%)	Total Score without cost (Max 80%)
1	Konica Minolta	65%	9%	74%
2	AgreeYa Solutions, Inc.	59%	9%	68%

All proposals were accompanied by a sealed cost proposal. Only the cost proposals for the two highest ranked firms were opened and evaluated.

Rank	Proposer	Subtotal Score without cost (Max 80%)	Cost (Max 20%)	Total Weighted Score (Max 100%)
1	AgreeYa Solutions, Inc.	68%	20%	88%
2	Konica Minolta	74%	6%	80%

COST INFORMATION FOR OPENED PROPOSALS

Rank	Proposer	ORIGINAL RATE	BAFO
1	AgreeYa Solutions, Inc.	\$105/HR	\$105/HR
2	Konica Minolta	\$165/HR	\$154/HR

Based on these results, staff recommends approving the Professional Services Agreement to AgreeYa Solutions Inc. The term of this Agreement will begin upon effective date of Notice to Proceed.

CEQA

N/A

FINANCIAL CONSIDERATIONS

This request complies with authority levels of OC San’s Purchasing Ordinance. This item has been budgeted. (FY2020-21 & 2021-22 Budget, Section 8, Page 49, Information Technology Capital Program (M-MC-IT)).

<u>Date of Approval</u>	<u>Contract Amount</u>	<u>Contingency</u>
12/15/2021	\$300,000	N/A

ATTACHMENT

The following attachment(s) may be viewed on-line at the OC San website (www.ocsan.gov) with the complete agenda package:

- Professional Services Agreement