

**COUNTY OF MILWAUKEE  
INTEROFFICE COMMUNICATION**

**DATE:** October 12, 2016

**TO:** Chairman Theodore Lipscomb, Sr., Milwaukee County Board of Supervisors

**FROM:** Greg High, Director, AE&ES Section, DAS-FM Division

**SUBJECT:** **Professional Services Agreement Exceeding \$100,000 for Capital Project WO240 – Project Management Software  
Passive Review**

**POLICY**

Implementation of 2013 Wisconsin Act 14 with regard to purchase of professional service agreements (under the Milwaukee General Ordinance Chapter 56) for Capital projects requires County Board passive review to award the initial agreement, or fee extension(s) to the original agreement, when the total contractual fee exceeds \$100,000 and the contract is related to Milwaukee County land zoned as a Park. The Director of the DAS is requesting passive review of a professional service agreement with Gaea Global Technologies to provide professional software deployment services for the adopted 2014 Capital Project WO240 – Project Management Software.

**BACKGROUND**

The 2014 Adopted Budget required that funding be provided to the Milwaukee County Innovation Fund (Innovation Fund) to provide resources for one-time projects that "...will enhance operational efficiencies, reduce ongoing operating or debt service costs, and improve service delivery and the County's long-term fiscal sustainability". A workgroup was created, made up of representatives of the County Board of Supervisors, the Office of the Comptroller, and the Department of Administrative Services, to solicit and evaluate projects to be financed from the Innovation Fund. The workgroup met in January of 2014 to develop evaluation criteria, solicited project ideas from departments in February, and completed its analysis and review of requested projects.

In April of 2014, the Director of the Office of Performance, Strategy and Budget, Department of Administrative Services, on behalf of the Innovation Fund Workgroup, submitted a resolution to the County Board that recommended allocation of funding for Innovation Fund projects, authorized the creation of new capital projects, and authorized necessary fund transfers. The County Board approved this resolution (File No. 14-290).

The AE&ES Section of DAS-Facilities Management Division received a Tier One project titled Project Management Software with a funding allocation of \$200,000. In May of 2014 AE&ES received authority to pursue upgrade or replacement of the project management (PM) software currently used to manage the AE&ES capital budget projects. This software provides project lifecycle management for capital

planning, project delivery, cost control, and facilities and real estate management and governance across all project phases, from planning and building to operations and maintenance, integrating critical business processes, data, and documents across the organization.

In July of 2014 AE&ES retained a consultant to assist AE&ES Section in conducting a needs analysis and development of an RFP in order to solicit proposals to provide replacement or upgrade of the current project management software (Primavera Contract Manager, ver. 12.0, 2008). An informational status report to the County Board was submitted in October of 2014. Progress on the preparation and issuance of an RFP was delayed in 2015 as the County considered the impact of enterprise resource planning on purchase and deployment of this software. Ultimately it was determined that this stand-alone project management software was required.

In early 2016, a formal RFP process was administered by DAS Procurement Division for procurement of the software. The RFP was developed with input from DAS-FM, Procurement and IMSD staff using the standard Procurement Division RFP format and process. 7 proposals were received. Initial scoring by a panel of 5 County staff (4 from AE&ES, 1 from IMSD) indicated a short list of 4 proposers should be considered and possibly brought in for a demonstration and in-person interview. Upon further review, one of the proposers made the short list mostly due to pricing rather than technical merit.

Interview/demonstrations were conducted for 3 proposers. Subsequently, the evaluation panel decided to reduce the scope of work and solicit a Best and Final Offer (BAFO) from the 3 remaining proposers. Based on the evaluation of the BAFO, the evaluation panel selected Oracle Unifier software. The Oracle Unifier software proposal included a third party software deployment consultant certified as an Oracle Platinum Partner. Expenditures to date from this account include \$20,000 for a needs analysis conducted in 2014 and \$66,000 for the actual software expense. Currently there is approximately \$114,000 remaining in the capital project account. The consultant contract cost to deploy the software is \$235,020.

The adopted 2014 capital budget included funds for purchase and deployment software for the project Capital Project WO240 – Project Management Software. A fund transfer is concurrently being requested for County Board approval to allocate sufficient additional funds in the current WO240 capital budget to award the requested contract to Gaea Global Technologies.

DBE participation goal for this contract is 17%. Gaea Global Technologies submitted a “Good Faith Effort” with their proposal. CBDP office did not accept the GFE but worked with GAEA to reach an agreed upon DBE participation of 6.1%.

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**RECOMMENDATION**

The Director of the DAS respectfully requests passive review of this professional service agreement with Gaea Global Technologies with a contract in the amount of \$235,020.

Prepared by: Greg High, Project Manager, AE&ES, DAS-FM



Gregory G. High, P.E., Director  
AE&ES Section, DAS-FM Division  
Department of Administrative Services

**Attachment:**

1. Administrative Award of the Professional Services Agreement
2. Executed Professional Services Agreement

**Cc:** Chris Abele, County Executive  
Raisa Koltun, Chief of Staff, County Executive's Office  
Kelly Bablitch, Chief of Staff, County Board  
Teig Whaley-Smith, Director, Department of Administrative Services  
Steve Kreklow Fiscal & Budget Director, DAS  
Vince Masterson, Fiscal & Strategic Asset Coordinator, DAS  
Pamela Bryant, Capital Finance Manager, Comptroller's Office  
Justin Rodriguez, Capital Finance Analyst, Comptroller's Office