



# Memorandum

**TO:** HONORABLE MAYOR AND  
CITY COUNCIL

**FROM:** Scott P. Johnson  
William F. Sherry

**SUBJECT:** SEE BELOW

**DATE:** July 29, 2005

Approved

*Kay Wines*

Date

*8/3/05*

**SUBJECT: AMENDMENT TO THE CARTER & BURGESS CONSULTANT AGREEMENT FOR THE NORMAN Y. MINETA SAN JOSE INTERNATIONAL AIRPORT ("AIRPORT")**

## RECOMMENDATION

Adoption of a resolution authorizing the Directors of Finance and Aviation to:

1. Negotiate and execute an Amendment to the existing Agreement with Carter & Burgess, Inc. (Encino, CA) to purchase Bentley Systems Inc. ProjectWise Software and related installation, first year maintenance, and licensing in an amount not to exceed \$133,073.00, for a total maximum compensation not to exceed \$373,073.00, and to;
2. Negotiate and execute change orders in a contingency amount of \$10,000 for unforeseen changes/requirements that may arise in the deployment of the software.

## BACKGROUND

On May 17, 2005, Council Agenda Item 2.4, the City Council approved entering into an agreement with Carter & Burgess Inc. for services to deploy the ProjectWise Software Program and to assist with the integration and management of new and existing facilities at the Airport. ProjectWise is an enterprise level project management software solution that will enable the Airport to increase efficiencies in managing major Capital Improvement Projects ("CIP") and will enhance the implementation, maintenance, and operation of all Airport facilities.

The current agreement with Carter & Burgess includes the following:

1. Business Analysis that defines the Airport's needs, current conditions, and their present/future goals regarding facility management.
2. Create a Requirements document, Implementation Plan, and the Testing & Acceptance Plan for ProjectWise.

August 3, 2005

Subject: Carter & Burgess Consultant Agreement Amendment for Airport

Page 2

3. Provide oversight of the Product Vender, Bentley Systems, during the installation/configuration process of ProjectWise.
4. Perform system testing to ensure installation of ProjectWise was completed correctly.
5. Import current project drawings into ProjectWise.
6. Provide complete documentation including customization, configuration and testing of System ("As-Built"), Operation and Maintenance Manuals, New Business Workflows, and Customized Training.

## ANALYSIS

Staff performed extensive research to find a software solution that incorporates three major Architectural, Engineering, and Construction (AEC) project management components: 1) Computer Aided Design & Drafting (CADD) Management, 2) Design/Construction Project Management, and 3) Project Drawing Distribution. A cross functional panel represented by the Airport's Master Plan Team including the Airport, Public Works, Information Technology, and Parsons Brinckerhoff (Airport Master Plan Consultant), reviewed and analyzed software solutions from several companies. While many of the solutions that were evaluated provide one of the required components, only ProjectWise meets all three major requirements established by the Airport's Master Plan Team.

To identify potential competition for this software solution, a Request for Information (RFI), describing functional specifications, was issued by the Finance Department, Purchasing Division on October 26, 2004 and advertised for three weeks on the City's Bidline and on the DemandStar bid notification system that proactively notifies participating suppliers nationwide. In addition, Staff directly notified seven CADD and AEC software companies. In all, more than 200 companies were notified of the RFI, either through targeted or broadscale notification. Seven companies accessed the RFI document, and no responses were received by the due date of November 12, 2004. Based on the lack of response to these outreach efforts, the Director of Finance approved standardization for ProjectWise for this purchase only (see attached "Brand Name and Proprietary Procurement" form). All future purchases will be subject to re-evaluation.

The Information Technology Planning Board (ITPB) evaluated the ProjectWise software suite on January 20, 2005 and approved deployment at the Airport. The ITPB additionally determined that ProjectWise is expandable and can meet the needs of other CSAs as may be required.

The May 17, 2005 Carter Burgess agreement recommendation to Council indicated staff's intent to procure ProjectWise directly from Bentley Systems. Staff has since determined that by including the software purchase with the Carter & Burgess Consultant Agreement, the City can better ensure accountability and full responsibility for program development, software implementation, and other deliverables. Under the direction of Carter & Burgess, Bentley Systems will install, configure, and test the software implementation.

August 3, 2005

Subject: Carter & Burgess Consultant Agreement Amendment for Airport

Page 3

### **SUMMARY**

Staff recommends approval of amending the Carter & Burgess Agreement for the direct oversight of the entire project with accountability for all deliverables, including the procurement, configuration and installation of the ProjectWise Software solution. Bentley Systems will operate as a subcontractor to Carter & Burgess.

### **OUTCOME**

Improved project management and accountability under a single entity for overall oversight and deployment of the ProjectWise software solution at the Airport.

### **AIRPORT MASTER PLAN CONSISTENCY**

The San José Municipal Code requires that capital projects at the Airport be consistent with the adopted Airport Master Plan. The proposed agreement for software program acquisition and installation will ultimately facilitate management and documentation of Airport facilities and development, and is therefore consistent with the Master Plan pursuant to San José Municipal Code Section 25.04.210(B)(4).

### **PUBLIC OUTREACH**

The RFI was advertised on City's Bidline and posted on the DemandStar bid notification system. Through DemandStar, over 200 companies were automatically notified of the RFI. In addition, seven companies were directly notified.

### **COORDINATION**

This memorandum has been coordinated with the Information Technology Department, Public Works, City Attorney's Office and City Manager's Budget Office.

### **COST IMPLICATIONS**

This council item is consistent with General Principle #2, "We must focus on protecting our vital core city services", and Item #7 "We must continue to Streamline, innovate, and simplify our operations... so that we can deliver services at a higher quality level, with better flexibility, at a lower cost."

HONORABLE MAYOR AND CITY COUNCIL

August 3, 2005

Subject: Carter & Burgess Consultant Agreement Amendment for Airport

Page 4

**BUDGET REFERENCE**

Fund #	Appn #	Appn Name	RC #	Total Appn	Amt for Contract	Proposed Capital Budget 2005-2006 Page	Last Budget Revision
527	4007	Advanced Planning	121273	700,000	\$143,073	V-70	MBA #60 6/21/05*

\* The 2005-2006 Adopted Capital Budget for this project includes a \$200,000 rebudgeted that was approved by City Council on June 21, 2005.

**CEQA**

Resolution Nos. 67380 and 71451, PP 05-081

  
SCOTT P. JOHNSON  
Director, Finance

  
WILLIAM F. SHERRY, A.A.E.  
Director, Airport