City of Coral Gables City Commission Meeting
Agenda Item I-4
March 23, 2021
City Commission Chambers
405 Biltmore Way, Coral Gables, FL

City Commission
Mayor Raul Valdes-Fauli
Vice Mayor Vince Lago
Commissioner Pat Keon
Commissioner Michael Mena
Commissioner Jorge Fors

City Staff
City Manager, Peter Iglesias
Assistant City Manager, Ed Santamaria
City Attorney, Miriam Ramos
City Clerk, Billy Urquia
Information Technology Director, Raimundo Rodulfo
Finance Director, Diana Gomez

Public Speaker(s)

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Agenda Item I-4 [1:49 p.m.]

A Resolution of the City Commission accepting the recommendation of the Information Technology Department and the Executive Steering Team to waive the competitive process of the procurement code and engage Infor Public Sector, Inc. to implement a new ERP System as a special procurement/bid waiver, pursuant to Section 2-691 of the City's Procurement Code.

Mayor Valdes-Fauli: Okay, I-4, please.

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City Attorney Ramos: I-4 is a resolution of the City Commission accepting the recommendation…

Vice Mayor Lago: Good job, Raimundo.

City Attorney Ramos: Of the Information Technology…

Mayor Valdes-Fauli: What?

City Attorney Ramos: Department…

Vice Mayor Lago: He did a great job.

City Attorney Ramos: And the Executive Steering Team to waive the competitive process of the Procurement Code and engage Infor Public Sector, Inc. to implement the new ERP System and the special procurement/bid waiver, pursuant to Section 2-691 of the City's Procurement Code.

Information Technology Director Rodulfo: We also have a PowerPoint for this. I'm going to go through the analysis process for this project. So, as you heard before from the Development Services Department and from the City Manager, we have been doing this digital transformation process over multiple years to go paperless. And we have been working with all City departments implementing multiple enterprise systems for community recreations, for asset management, and now for electronic permitting. At the same time, we have been planning for the final big implementation of enterprise systems for core financial and for HR at the core to finish replacing the legacy system Eden that has been for so long, and at the same time, to bring the enterprise business capabilities of the 21st century, basically bringing big data, analytics, predictive analytics, and a lot of important features. What are some of the features? We want a system that is customer-focused, people-centric. Basically, it's not technology. It's something that is going to improve quality of life, is going to improve processes for the people of the City. So, we want something that excels in user experience, that's very important, the user experience of the customers, of the

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citizens, and that is intuitive, user-friendly, fosters collaboration and efficiencies, and is convenient and accessible, very important, a system that brings accessibility and inclusion at anytime, anywhere. The other big feature that we're looking for is a system that is data driven, so we are living in the time when data is key, so we need data that becomes actionable information at the right time. When a decision maker needs data, needs -- that data has to be available anywhere, in a mobile device, in the cloud, in a website, very accessible and actionable, data that's conducive to action. So, those systems that we are looking at -- that we looked at, they provide a lot of actionable dashboards, they are real-time, they are scalable to the cloud, so they are accessible anywhere, and they are agile, they are responsive, and they horizontally integrate with all systems in the organization because we don't want silos. We want systems that talk to each other and interconnect and share data in real time and provides a lot of analytics and data. So, data is that important element that we want in a system like this. And finally, we want a system that is future-ready in the sense that it's ready to continuously evolve with technology. We want a system that over the next years is going to continue evolving, an evergreen sort of system. So, for that, we need to look at systems that are part of this fourth industrial revolution, that they understand artificial intelligence, data analytics. They understand all the technologies that make possible for systems like this to be agile and to respond to the needs of today's customers and ready for FinTech, Financial Technologies, that's very important, systems that are ready for blockchain, ready for crypto currencies, because all those things are happening and are going to continue happening over the next years. And ready also for immersive technologies, so systems that are going to be able to interact with the users in a modern way. So, during the analysis for this project -- so we followed best practices in systems engineering and industrial engineering. So, we had a multi-phased approach. That is a diagram that shows the approach that we followed. We have five major phases. The first phase was a comprehensive study, a research study, working together with academia, with science, with industry experts and with real-life users, with cities that had successful implementations over the years, so working together as a big team looking outside what is called Delphi technique, so looking for expertise outside to complement our institutional knowledge. And then on the second phase, so we started building the team. We needed an executive team. For best practices, you need to have a committee of experts in the organization and decision makers

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that will support this effort and also will help us evaluate and make a decision, so we have that Executive Steering Team built during that second phase. And also, the working groups, the groups of subject matter experts from different departments, from Finance, from HR, from IT, and all the departments that are going to work together to implement the system is a major undertaking, multiple years. On the third phase, we started actually evaluating the top technologies that we understood from the industry and from academia that were the best options for our City from the first phase. The fourth phase is the second round of demos and evaluations, after we narrow down an initial big list of potential solutions to a small list of solutions. And the final part is the decision-making part where a steering team makes a decision and a recommendation, and that's where we are at now at this stage. So, if you see this as a convergence of industry expertise from the experts in the industry that we consulted with, also government technology experts nationwide, from the center for digital government, in Silicon Valley. And then we also get expertise from multiple cities that we interviewed, so almost 20 cities that had successful implementations nationwide, so we were looking for best cases. And then we had expertise from Florida International University, FIU, and from the University of Miami, from UM, and from the Institute of Electrical Engineers, from (INAUDIBLE). So, all that expertise together, when you get all that on the first diagram to the left, you see that we had a lot of best practices, vendor agnostic, mostly, what are those best practices recommendations? When you get all the recommendations together in the center, in the sweet spot, you will see a lot of elements that are important, like integration with GIS, data driven, change management is very important. You cannot start a project like this and continuously make changes because then it derails the project, so you need to have a lot of best practices in project management. We want a successful project that takes two years to implement, so we need to follow best practices in the implementation, and that's what we are doing. And all those recommendations are a part of this study, together with all the experts. On the second side, you see how we started getting more -- looking at vendor solutions, so what are the top solutions in the industry, in the market that will fit our needs that we determined during the research study? So, that -- also, you will see that we started narrowing down the list and we got to a sweet spot where all the experts in the industry, academia, and science and used cases from municipalities that we studied, they converged into a reduced list of solutions. In the third part, you see the team that was

confirmed at the Executive Steering Team in Phase 2, so we have the City Manager, the Assistant City Manager, the Finance Director, the HR Director, the City Attorney, the City Clerk, and in my team, myself, and the Applications Manager, so altogether forming that part of the Executive Steering Team. And on the second part, the list of working groups, because we have to start forming the team that is going to work together throughout this process to implement the system, experts in finance, in different divisions, in different areas, procurement, budgeting, et cetera, and also, HR, and also, all the experts in the IT side that are going to work together to make this happen. So, finally, you see on this phase, we went through the demos, so basically, we -- all these solutions are great solutions in the market, in the industry. Basically, at some point, you need to make a decision and narrow down the list. That doesn't mean that some of those applications really are not leaders. They are already leaders in the industry. So, we were narrowing down, narrowing down in those multiple phases, so we ended with two final solutions. And in the last phase, we went through a comprehensive analysis of the results of all those demos, multiple demos, and workshops with all the experts in the City and the Executive Steering Team. So, long story short, we evaluated a lot of dimensions with Finance, HR, IT, and with all the other departments that were involved in this evaluation. And at the end, we had a scoring process where we looked at multiple dimensions, multiple criteria, like the ones that I mentioned in the first slides that I presented, so human-centric criteria, data criteria, functional criteria, so how good this system performs in all the functional areas that we want to implement, finance, HR, accounting, procurement, human resources, payroll, et cetera. In all those criterias, we have those top best performers, and really, they were very close to each other, and at the end, we had one system that performed, we can say good in all this criteria, and one that was excellent but showed really the level of quality and innovation that we were looking for. So, that's where we are at this time. The final part is that throughout this process, we kept reassessing always the innovation and the standing of those technologies, because technology changes very fast, so we started this analysis in 2017 while we were implementing the other enterprise systems. Every year, 2018, 2019, 2020, we reassessed, reassessed, with the same experts, with industry, with academia, and we saw a technology, which is the Infor Cloud Suite, that maintained that roadmap of continuous innovation and implementation of latest technologies in data, analytics, artificial intelligence, and machine

learning that are adding value to this technology. And at the same time, they have a roadmap of FinTech innovation. We know that's a solid provider. We evaluated also business metrics of those providers in the industry, how well they are performing in the market, so all those criteria has been taken into consideration. And at this time, that solution is a software leader in the industry and in the market. So, that pretty much is the conclusion of the presentation, so we are asking for authorization to proceed with the next step, which is the engaging of this technology. And there is an initial cost, the one-time cost of this technology of $2.3 million, broken down in two parts, starting this year with the first payment of $350,000, and next year, with the second payment of $2 million, which is funded out of IT capital that has been already been refreshed every year over the last years to accumulate the capacity to replace Eden because Eden is an old system. And we have been working with Finance over the years to save for this major upgrade, so that is where we are at now at this moment.

Mayor Valdes-Fauli: Thank you very much for a wonderful presentation.

City Manager Iglesias: Mayor…

Commissioner Keon: Thank you, okay.

City Manager Iglesias: Commissioners, as you can see, it's a very intensive process to select an enterprise system, and IT and the whole team has done a tremendous job in selecting a system that will be with us for years to come. And I do think that a lot of these processes -- people don't -- sometimes do not understand how intensive they are and how complicated they are, but how important they are to make sure that we select a system that will be with us for a decade or more to come. So, I thank IT. They've done a fabulous job and the entire team in making a great selection. This is our final enterprise system. This takes care of the entire City, and after this is implemented, then we move away from Eden and into that paperless -- and certainly, one of the top IT cities in the country.

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Mayor Valdes-Fauli: Thank you, Peter.

Commissioner Keon: Thank you.

Mayor Valdes-Fauli: Are there comments or…

Commissioner Keon: Move it.

Mayor Valdes-Fauli: You move it?

Commissioner Keon: Move the item.

Vice Mayor Lago: I just want to talk about it for one second. It's a $2.3 million line item, which I think is important.

Mayor Valdes-Fauli: For purpose of discussion, is there a second?

Vice Mayor Lago: I'll second it, for purpose of discussion.

Mayor Valdes-Fauli: Go ahead.

Vice Mayor Lago: I just want to kind of frame it and understand a little bit more about where the monies are coming from. I know you mentioned it coming from IT, and that we've been saving for it -- you know, right now, again, we had about an $8 million shortfall this year and we're forecasting something to the tune around that same amount, a little bit more. I think it'll be better as parking is coming back and hopefully COVID is in our rearview mirror. But I want -- Mr. Manager, I just want to get some reassurances of where we stand financially, because this is a pretty significant number. And again, maybe it's not significant this year, but it's significant -- once you sign that paper, you're committing $2 million next year.

City Manager Iglesias: It is…

Vice Mayor Lago: I want to make sure that you feel comfortable, Finance, and that we're budgeting for this and that everything is…

City Manager Iglesias: We have budgeted for this, Vice Mayor.

Vice Mayor Lago: And by the way…

City Manager Iglesias: And it is very…

Vice Mayor Lago: And I know that you wouldn't bring it before us if you weren't comfortable and if it wasn't budgeted, but I just want to get some -- just some reassurances on this, please.

City Manager Iglesias: Yes. We have looked at this. I think this is the last piece in our technology as far as moving the City forward into -- leaping forward into our final push. This will remove Eden and create our new financial enterprise system. And we have budgeted for this. We realized that this was coming, and I think our Finance Department has done a great job in making sure that that this piece is budgeted. I know we've had difficult times, but we've got to move forward and we're trying to move forward, and Finance has done a fantastic job in moving -- in looking at our finances. We've spent a lot of time in that, but we really -- this is a system that is for the future. It's a system that will rid us of Eden and all the issues. It's a dated system, and it will get us into that electronic plan review, paperless city that we want to be by the end of '22. And so, it's a critical system, and I think that we have the Finance Director here that can answer any of those questions. But we have looked at this, this is budgeted, and this is a big leap forward in our technology. And I believe this program, with this enterprise system, along with all the others that we have -- Intergov and all the others that we have implemented, will allow us to move forward into our GIS platform and into our electronic plan review. And we are moving very quickly on

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that platform, and we've been able to do it through COVID. I'm very proud of this team because we've been able to build, move technology, and get everything done while under COVID. So, we have done a lot of work under the pandemic, and I do think that we are budgeted for that, and we plan on moving forward with it with your approval.

Mayor Valdes-Fauli: Thank you.

Vice Mayor Lago: And like you said, this is…

Mayor Valdes-Fauli: Thank you very much.

Vice Mayor Lago: Critical, this is critical, especially, like you said, for paperless and for the concept of multi-plan reviews, which again, will only serve us well, as we kind of push projects through the system on the residential and commercial side. My only concern -- I know you have everything laid out financially. We have the money in the budget for this year, obviously. We already approved that. For next year, how are we looking financially for that for this pretty significant amount?

Finance Director Gomez: Alright. So, for next year's budget, we will have -- I'm sorry. For next year's budget, it's part of it. We have capital fund dollars that will be allocated to this capital project.

Vice Mayor Lago: Okay.

Finance Director Gomez: So, we do have the funding available for next year's -- in next year's capital fund allocations.

Vice Mayor Lago: Okay, perfect.

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Mayor Valdes-Fauli: Thank you.

Vice Mayor Lago: That's all I needed to hear. Thank you.

Mayor Valdes-Fauli: Will you call…

Vice Mayor Lago: Thank you, Mr. Manager.

Mayor Valdes-Fauli: The roll, please?

Vice Mayor Lago: I appreciate it.

City Manager Iglesias: We have been planning for this and…

Vice Mayor Lago: No, I know we have.

City Manager Iglesias: We've been able to plan through it…

Vice Mayor Lago: Two point three million dollars is a lot of money.

City Manager Iglesias: Even though -- through the pandemic.

Mayor Valdes-Fauli: Will you call the roll, please?

Commissioner Fors: Yes.
Commissioner Keon: Yes.
Vice Mayor Lago: Yes.
Mayor Valdes-Fauli: Yes.
(Vote: 4-0)

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Vice Mayor Lago: By the way…

Mayor Valdes-Fauli: I-7.

Vice Mayor Lago: Great work to everybody on this.

Mayor Valdes-Fauli: Great work.

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