



METROPOLITAN
TRANSPORTATION
COMMISSION

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TO: Administration Committee

DATE: November 6, 2013

FR: Executive Director

W.I.: 1161

RE: Contract – SharePoint Enterprise Content Management System Development: ShareSquared, Inc.
(\$225,000)

Staff seeks the Committee’s approval to enter into a contract in the amount of \$225,000 with ShareSquared, Inc. (ShareSquared) to develop the foundation for an enterprise content management system based on Microsoft’s SharePoint platform. ShareSquared has its headquarters in Montrose, California, with local consultants in San Jose and San Francisco.

Background

Over the past twelve months, MTC’s Technology Services group has undertaken an aggressive program to upgrade the agency’s information technology platforms, including expanding wireless access, implementing a flexible mobile device strategy, and installing an all-digital phone system, among others. Those projects are part of an overall technology strategy that also includes:

- reducing our paper-intensive processes,
- automating workflows,
- improving staff ability to share, collaborate on, and access electronic documents from anywhere, and
- enhancing document and records management to increase efficiency and reduce risks.

Enterprise content management (ECM) systems help to accomplish these strategic goals.

Since MTC already has a long-standing Microsoft Enterprise Volume License Agreement, we determined that Microsoft’s SharePoint platform would be the most cost-effective means to build out an ECM capability. While SharePoint is a powerful and flexible platform on which to build these capabilities, we do not have the in-house expertise to accomplish this. We therefore sought recognized SharePoint experts to help us plan and implement a staged deployment.

Procurement Process

Our procurement policy (EDMM No. 352) allows intergovernmental procurements under paragraph G, which states that MTC’s procurement requirements may be met by:

“...following a documented public procurement process conducted by another government agency where the governing board approves the recommended contractor or the recommended contractor has been placed on a valid eligibility list.”

Staff learned that the City of Richland, Washington, had issued an RFP for a very similar SharePoint ECM scope of work in August of this year. In October, Richland awarded the contract to ShareSquared. We had already placed ShareSquared on a list of firms from which to solicit proposals had we developed our own RFP. ShareSquared is a well-known Microsoft Gold Partner, with several Microsoft-certified SharePoint experts on staff. We contacted Richland and determined that their RFP included a clause for intergovernmental procurements. We have now executed their “Interlocal Cooperative Purchasing Agreement,” enabling us to “piggyback” on Richland’s ShareSquared procurement process.

The initial term of the agreement with ShareSquared is anticipated to be through the end of FY 2013-14, with an option to extend the contract for up to two additional fiscal years (FY 2014-15 and FY 2015-16), pending satisfactory completion of the initial deployment and further development of the various features and capabilities of SharePoint through multiple phases.

Recommendation

Staff recommends that this Committee authorize the Executive Director or his designated representative to negotiate and enter into a contract with ShareSquared to develop an ECM system based on SharePoint subject to future budget approval actions, in an amount not to exceed \$225,000 for FY 2013-14, with an option to extend the contract for two additional fiscal years.



Steve Heminger

SH: NR

REQUEST FOR COMMITTEE APPROVAL

Summary of Proposed Consultant Contract

Work Item No.: 1161

Consultant: ShareSquared, Inc.
Montrose, CA

Work Project Title: SharePoint Enterprise Content Management (ECM) System Development.

Purpose of Project: Improve staff collaboration tools, reduce manual processes, and enhance document and records management.

Brief Scope of Work: Design and implement a SharePoint-based ECM that delivers initial capabilities for staff to (1) collaborate on shared project web sites, (2) use electronic forms and workflows, (3) use document management features (e.g., version control), (4) migrate away from storing documents on unmanaged shared file servers, and (5) begin to develop automated records management processes. This phase will conclude with a staged plan for future enhancements and support.

Project Cost Not to Exceed: \$225,000

Funding Source: General fund

Fiscal Impact: Funds are included in the FY 2013-14 agency budget

Motion by Committee: That the Executive Director or his designee is authorized to negotiate and enter into a contract with ShareSquared, Inc. to develop an enterprise content management system based on Microsoft's SharePoint platform, as described above and in the Executive Director's November 6, 2013 memorandum for a term extending through June 30, 2014 with an option to extend for two additional fiscal years, subject to further fiscal years' budget approval processes, and the Chief Financial Officer is directed to set aside funds up to \$225,000 for such contract.

Administration Committee:

Adrienne J. Tissier, Chair

Approved: Date: November 13, 2013