



Ocala

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Item Details

File Number: 2023-0089

ID #: 2023-0089

Type: Agenda Item

Status: Passed

Version: 1

Placement: 9

In Control: City Council

File Created: 10/20/2022

Presented By: :

Final Action: 11/01/2022

Item Title: Approve use of two-year Master Subscription and Services Agreement for continued and upgraded cloud-based project management and collaboration software with Wrike, Inc., with an aggregate expenditure not to exceed the amount of \$75,350

Internal Notes:

Target Meeting: 11/01/2022

Sponsors:

Enactment Date:

Attachments: FOR COUNCIL - Master Subscription and Services Agreement - Wrike

Enactment Number:

Recommendation:

Hearing Date:

Entered by: drobinson@ocalafl.org

Effective Date:

History of Legislative File

Version:	Acting Body:	Date:	Action:	Sent To:	Due Date:	Return Date:	Result:
1	City Council	11/01/2022	Approved				Pass
		Aye: 5	Pro Tem Hilty Sr, Pro Tem Dreyer, Council Member Mansfield, Council Member Musleh, and Council President Bethea Sr				

Text of Legislative File 2023-0089

Submitted By: Daphne Robinson

Presentation By: Daphne Robinson

Department: Procurement and Contracting

STAFF RECOMMENDATION (Motion Ready):

Approve use of two-year Master Subscription and Services Agreement for continued and upgraded cloud-based project management and collaboration software with Wrike, Inc., with an aggregate expenditure not to exceed the amount of \$75,350

OCALA'S RELEVANT STRATEGIC GOALS:

Operational Excellence, Fiscally Sustainable

PROOF OF PUBLICATION:

N/A

BACKGROUND:

The City of Ocala uses Wrike's cloud-based project management system to electronically process, manage, and monitor the requests received and records managed by the Procurement and Contracting Department. The City's original contract with Wrike, Inc. was set to renew on October 1, 2022.

Wrike enables Procurement and Contracting Department staff members to upload requests for services and supporting documents online, and provides the departments served the ability to view and track their assignment's status as it moves through the procurement and contracting process. Wrike also provides functionality to enable Procurement and Contracting Department staff members to electronically review, update, and preserve the information required by statute to be maintained in the City's procurement and contracting files.

FINDINGS AND CONCLUSIONS:

Both the Information Technology Department and Procurement and Contracting Department evaluated the City's needs for continued cloud-based project management software and collectively determined that upgrading the City's existing Wrike plan to Wrike-Pinnacle would not only afford the City best value, but lead to greater efficiency in the manner within which the Procurement and Contracting Department electronically manages, tracks, and streamlines its process workflows.

Digitizing these workflows will assist in the City's efforts to work more sustainably and efficiently and to enable the departments serviced by Procurement and Contracting Department to be more informed and productive through the use of online tools and services. The paperless functionality of Wrike-Pinnacle and its workflows are optimal tools for the purposes of electronically coordinating and managing the documents and information handled by Procurement and Contracting Department staff on a day-to-day basis.

Wrike-Pinnacle's enhancements will enable staff to leverage the full benefits of the Wrike system and eliminate the need to maintain paper files or utilize multiple software tools for

procurement and contracting functions.

Staff seeks approval of the contract to renew, upgrade, and redeploy Wrike to Wrike-Pinnacle to expand Wrike's capabilities and enable the Procurement and Contracting Department to comprehensively and efficiently coordinate the various activities associated with the processing and maintaining of procurement and contracting assignments and records.

FISCAL IMPACT:

The annual subscription rate for Wrike-Pinnacle over the course of the two-year agreement will be \$28,800 per year. Upgrading to Wrike-Pinnacle will also require the City to incur a one-time professional services fee in the amount of \$17,750 which will cover the reconfiguration and training sessions required for the redeployment of the Wrike platform.

Both the Information Technology Department (account #001-035-530-516-51-52010) and the Procurement and Contracting Department (account #001-014-014-513-51-31010|52010) have budgeted for these services.

PROCUREMENT REVIEW:

These goods and services were procured in compliance with the City's Procurement Policy.

LEGAL REVIEW:

This Agreement was reviewed and approved for form and legality by former City Attorney, Robert W. Batsel, Jr.

ALTERNATIVE:

- Approve
- Approve with Changes
- Table
- Deny

