



"The Best Waterfront City in Which to Live, Work And Play."

CITY OF RIVIERA BEACH

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FROM: ALTHEA PEMSEL, PROCUREMENT DIRECTOR, MS, CPSM
THRU: ELIZABETH MCBRIDE, DEPUTY CITY MANAGER, ESQ
SUBJECT: PRE-DISPARITY STUDY PROJECT UPDATE

DATE: MAY 5, 2021

CC: GENERAL PUBLIC

Background:

To facilitate the data collection, review, and subsequent defense of a disparity study several of the leading firms and individuals in the industry, associated with data gathering, conducting reviews, and the overall implementation of facilitating a study have been engaged on behalf of the City.

The City engaged two consultants and a software firm to assist with data enrichment, migration, centralization, and review. Our process collaborators B2GNow, MGT Consulting Group, Inc., and Tydings and Rosenberg, LLC, has assisted Procurement with refining and developing data points that are standards for future data collection.

Updates:

We have now engaged a Developer/Implementer from the Tyler team to revise our current Tyler software modules to utilize as many data points in our current system as possible.

The transition into the next phase for each of our process partners 1. Mr. Franklin Lee 2. Tyler System 3. B2GNOW, below are the following actions and statuses.

Tydings and Rosenberg, LLC (Mr. Franklin Lee)

1. Reviewed task list to ascertain and begin Phase II tasks
2. Reviewed Mr. Lee's tasks with City Attorney
3. Meet with, reviewed, and discussed agreed upon tasks to include in new contract with Legal
4. The main task for Mr. Lee will be to draft a race-gender neutral ordinance

5. Mr. Lee will work primarily with Legal to draft the ordinance
6. Legal will be presenting a contract for Mr. Lee's services

Tyler Systems –Developer-Implementer

Procurement held several meetings with Tyler's developer/implementer team with a list of objectives for us to achieve with the goal of maximizing our current software to use in gathering high quality data for a future disparity study.

1. Vendor Self-Service (VSS) – Procurement reviews and approves Vendor entries
2. VSS input from Vendors Portal to add required fields that state the firm's status M/W/SBE and ethnicity
3. Testing the ability to obtain reports on using specific MBE /SBE/WBE Data fields in Tyler,
4. Contract Entry (This links prime and their sub-contractors together on the same contract PO File)
5. How can Tyler utilize vendor files to track payments to sub-contractors and their status?
6. Contract Types (How to use with retainage track payments)
7. Changes orders to contracts from requisitions
8. Processing change orders against capital accounts
9. Convert some POs into Contract file format to match B2GNOW data fields.

B2GNOW

1. Data scrub file reviewed by MGT. Dr. Seamon, comments received
2. Data scrub review completed to we determined with MGT which fields work best
3. Adjusted data field to include commodity code per MGT
4. MGT team input and discussion between B2GNOW and City
5. Contract compliance familiarization and discovery
6. Conducted contract compliance survey
7. Reviewed mapping documents to determine fields for contract compliance software
8. Received and reviewed system template letters to use with vendors
9. A link to the portal for the vendors to test/input payment info for file integration
10. Software changes and workflow links and permissions must be changed and the Tyler contract module modified to support the integration with B2GNOW (working through data and set up problems directly with Tyler)

Procurement is reviewing all of our vendor processes to allow the suppliers to sign up with us directly without the use of forms and emails. Speeding up their ability to interact with us and provide complete and consistent disparity study information. Expand the vendor self-service portal to have required fields in order to capture every firm's status that results in accurate payment data, and entry on the Procurement's website.

Additionally, our goal is for the supplier to add their own demographic, payment, and update details in their profile. We have reviewed expanded the contract entry functionality already in Tyler and are able to add the sub-contractors under the Prime Contractor and the amounts they have been awarded. The current problems to be resolved are the gap that lies between obtaining the release of liens and payment confirmation. The ability to make the fields required for vendors on critical data points. Creating a workflow and process for departments to enter contract directly to track as many suppliers as possible.

At Risk	Task ID Number	Responsible Party	Task/Milestone	Project Status	Health Status	Baseline Start Date	Baseline Completion Date	Revised Start Date	Revised Completion Date	Actual Start Date	Actual Completion Date	Duration	% Complete	Notes	Predecessors	Column19
			New Organization	In Progress	🟢	12/15/20	02/28/21			12/15/20	01/19/21	14d	29%			
		All	Official Kick-Off Meeting	Complete	🟢	01/13/21	01/13/21			01/13/21	01/13/21	1d	100%			
		B2G-PM	Notify AP to Bill Initial Amounts	Complete	🟢	12/15/20	12/15/20			12/15/20	12/15/20	1d	100%			
	1.0		Baseline and Portal	Complete	🟢	12/15/20	01/28/21			12/15/20	01/19/21	30d	100%			
			Data Scub	Complete	🟢	01/13/21	02/05/21			01/13/21	02/05/21	18d	100%			
		B2G-PM	Review file requirements	Complete	🟢	01/13/21	01/13/21			01/13/21	01/13/21	1d	100%			
		Customer	Customer to send data export file for B2G review	Complete	🟢	01/14/21	01/14/21			01/14/21	01/14/21	1d	100%			
		B2Gnow-Dev	B2G to review export file and provide feedback if applicable	Complete	🟢	01/18/21	01/20/21			01/20/21	01/21/21	3d	100%			
		B2Gnow-Dev	Build report	Complete	🟢	01/25/21	01/29/21			01/22/21	02/01/21	5d	100%			
		All	Report Review Meeting # 2	Complete	🟢	02/01/21	02/05/21			02/05/21	02/05/21	5d	100%			
	3.0		Contract Compliance	In Progress	🟢	01/28/21	06/11/21			02/05/21		100d	12%			
		B2G-PM	Contract Compliance Survey Provided to Customer	Complete	🟢	01/25/21	01/26/21			02/05/21	02/05/21	2d	100%			
		Customer	Contract Compliance Survey Completed by Customer	Complete	🟢	02/01/21	02/05/21			02/15/21	03/03/21	5d	100%			
		All	Contract Compliance Familiarization and Discovery Meeting	Complete	🟢	02/05/21	02/11/21			02/05/21	02/12/21	5d	100%	watching videos online		
		B2G-ICS	Compliance Configuration with Survey and Standard Configuration Checklist	Complete	🟢	03/05/21	03/18/21			03/04/21	03/05/21	10d				
		B2G-ICS	Initial Configuration Setup	In Progress	🟢	03/05/21	03/11/21			03/04/21		5d				
		B2G-PM	Integrate customer feedback	In Progress	🟢	03/12/21	03/18/21			03/12/21		5d				
		All	Finalize last configuration request (if applicable)	Not Started	🟢	03/19/21	03/23/21					3d		extra time built in for config decisions per customer request		
		B2G-ICS	Finalize any updates	Not Started	🟢	03/19/21	03/23/21					3d				
		All	Discuss and Configure User Roles	Not Started	🟢	03/24/21	03/30/21					5d				
		B2G-ICS	Configure User Roles	Not Started	🟢	03/24/21	03/30/21					5d				
			Compliance Letter Templates	Not Started	🟢	04/02/21	05/20/21					35d				
		All	Contract Compliance Letter Template Familiarization	Not Started	🟢	04/02/21	04/08/21					5d				
		B2G-PM	Provide letter template guide to Customer for their edits	Not Started	🟢	04/02/21	04/05/21					2d		extra time for edits		
		Customer	Provide finalized letter content for configuration	Not Started	🟢	04/15/21	04/22/21					5d				
		B2G-ICS	Configure Contract Compliance Templates	Not Started	🟢	04/23/21	05/06/21					10d				
		Customer	Customer sign off on letter templates	Not Started	🟢	05/06/21	05/12/21					5d				
		All	Letter Template Training	Not Started	🟢	05/14/21	05/20/21					5d				
		Customer	Customer Sign off on Configuration	Not Started	🟢	05/21/21	05/25/21					3d				
		All	Final Roll-out Plan Discussion	Not Started	🟢	05/21/21	05/27/21					5d				
		All	Staff Training - Compliance I	Not Started	🟢	05/24/21	05/28/21					5d				
		Customer	Customer adds 5-10 pilot contracts for staff go live	Not Started	🟢	05/24/21	05/28/21					5d				
		Customer	Staff Go Live	Not Started	🟢	06/01/21	06/01/21					1d				
		Customer	Customer sends vendor outreach notification	Not Started	🟢	05/10/21	05/14/21					5d				
		All	Staff Training Advanced - Compliance II	Not Started	🟢	06/01/21	06/11/21					9d				
		Customer	Attend Customer Support Training (if applicable)	Not Started	🟢	05/10/21	05/10/21					1d				
		B2G-PM	Submit/Update Customer Profile and Provide to Support	Not Started	🟢	05/10/21	05/10/21					1d				
		Customer	Vendor Training	Not Started	🟢	05/31/21	06/04/21					5d				
		Customer	Vendor Go Live	Not Started	🟢	06/07/21	06/07/21					1d				
	4.0		Contract Compliance Data Import	Not Started	🟢	04/01/21	06/30/21					65d				
		All	Data Discussion for Contract Header and Payments Imports of both of Open and Active Contracts	Not Started	🟢	04/01/21	06/30/21					65d				
			Contract Header	Not Started	🟢	04/01/21	06/25/21					62d				
		Customer	Customer to provide sample file, data interface file with field order for mapping and data analysis for All Imports	Not Started	🟢	04/01/21	04/14/21					10d				
		B2G-PM	Conduct analysis of all available data imports and provide feedback to Customer for data gap	Not Started	🟢	04/16/21	05/05/21					14d				
		All	If there is a data gap from the provided information, another data meeting will be held to determine next steps and solutions	Not Started	🟢	05/05/21	05/18/21					10d				
		B2G-PM	Submit finalized/approved sample file and mapping to development for processing/import	Not Started	🟢	05/19/21	05/20/21					2d				
		B2Gnow-Dev	Development Complete Mapping	Not Started	🟢	05/14/21	06/25/21					10d				
		Customer	Customer Validates Interfaces	Not Started	🟢	05/14/21	06/18/21					5d				
			Contract Payment	Not Started	🟢	04/16/21	06/29/21					53d				