

# Greater Cleveland Regional Transit Authority

## Summary of Proposed Award Enterprise Content Management Consultant

Presented to: Finance Committee  
March 7, 2017



# Project Overview

## ECM Consultant

- Enterprise Content Management (ECM) is the strategies, methods and tools used to capture, manage, store, preserve, and deliver content and documents.

# Project Overview

## ECM Consultant

### Benefits of ECM

- Easy to access, search, use, deliver, and archive RTA records
- Reduce time and effort to fill requests
- Assist with management of continuously growing amount of content/documents
- Reduce costs

# Project Overview

## ECM Consultant

### Examples of GCRTA Structured Content

#### Enterprise Systems

- CITME/Ultramain
- Hastus
- Kronos
- Risk Master
- Trapeze
- Oracle
- Transit Master

# Project Overview

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### Examples of GCRTA Unstructured Content

- Emails
- Letters/Memos
- Invoices
- Reports
- Presentations
- Forms

# Project Overview

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### Examples of Other GCRTA Content

- Cameras
- Cellphones
- Cloud Storage
- Local “C” Drive
- Jump-drives
- Laptops
- iPads
- External Hard Drives

# Project Overview

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### Scale of Enterprise Content at GCRTA

- Over 13,000 boxes in storage
- Structured Data
  - Enterprise Databases – 8TB est.
- Unstructured Data
  - Dept. and Personal Drives – 6TB, 4.72M files
  - Misc. and Offline Storage – 5-10TB est.

# Project Overview

## ECM Consultant

### RTA Records Management Program

- Records Manager
- Record Coordinators
- Records Management Committee
- Executive Records Management Committee



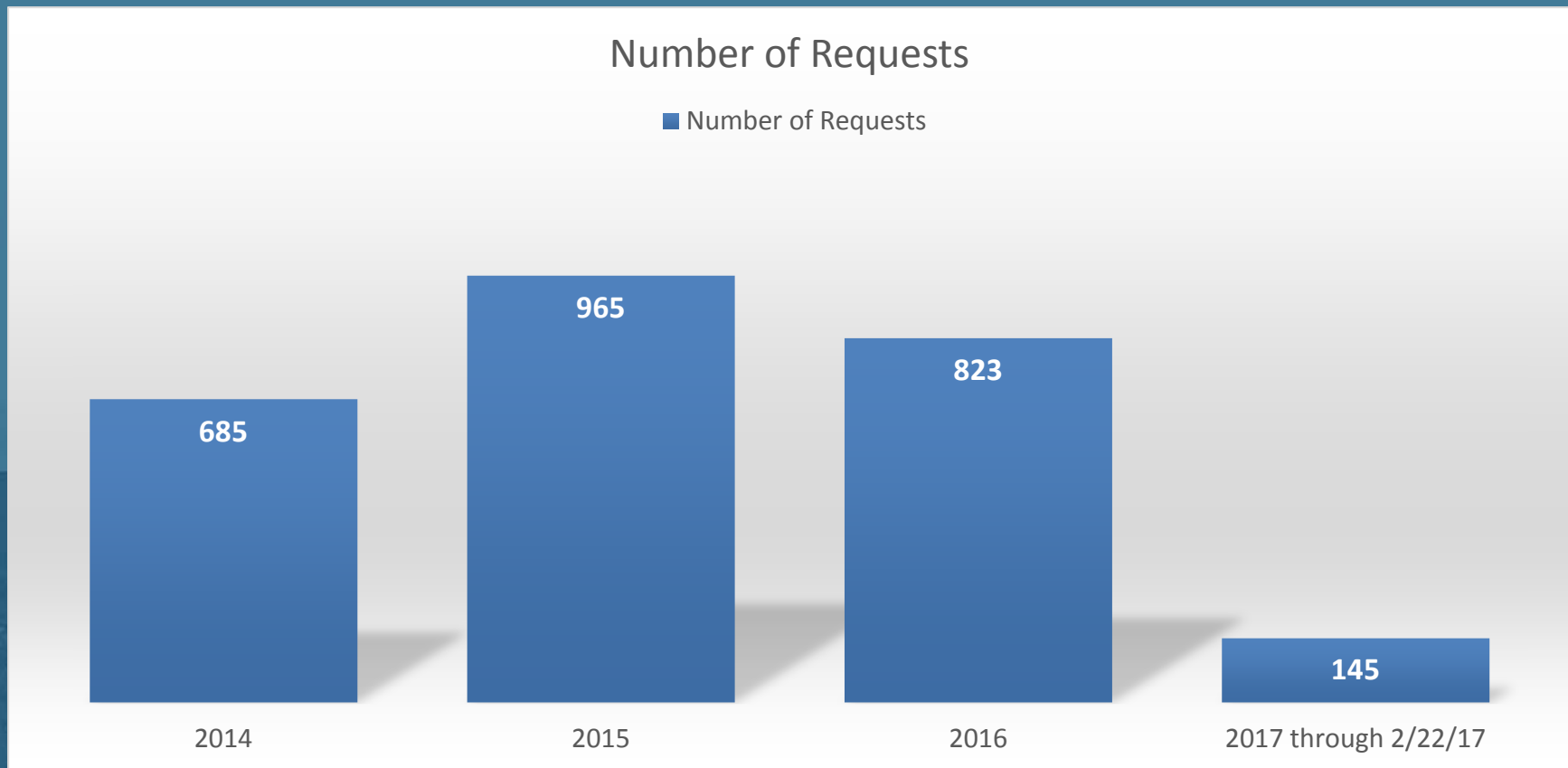
# Project Overview

## ECM Consultant

### Summary of GCRTA Content

- Paper documents
- Electronic documents
- Unstructured and structured electronic data
- Electronic devices

# Rise in Public Records Requests



# Project Overview

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### It is the Law to be Organized

- O.R.C. 149.43(B)(2) requires a public office to organize and maintain public records in a manner that they can be made available for inspection and copying.

# Project Overview

## ECM Consultant

### Phase I – Base Contract

- Assess the current information technology infrastructure and system tools, and unstructured data
- Recommend how to implement ECM within the Authority
- Assist with the development of an RFP, If needed
- Assist with selection of a vendor

# Project Overview

## ECM

### Phase II

- Implementation of the ECM solution for pilot departments

### Phase III

- Full implementation of the ECM solution across the entire organization

# Procurement Overview

## ECM Consultant

- RFP issued October 2016
- Accessed on the GCRTA website by 28 interested parties
- Seven firms proposed
- Four firms interviewed

# Procurement Overview

## ECM Consultant

### Evaluation Panel Members:

- Finance and Administration
- Information Technology
- Legal
- Procurement
- Support Services

# Procurement Overview

## ECM Consultant

### Evaluation Criteria:

- Experience and reputation of firms
- Service offerings
- Qualifications of assigned personnel
- Project plan and delivery
- Cost effectiveness



# Procurement Overview

## ECM Consultant

### Recommended Firm:

- Iknow LLC
  - Princeton N.J.
- DBE Goal: 0%

# Procurement Overview

## ECM Consultant

### Firm Experience:

- One of the leading technology consulting firms in the knowledge management industry.
- Been in business for more than 15 years, with extensive experience in government and transit.
- Vendor-agnostic approach allows recommendations based on the Authority's needs.

# Procurement Overview

## ECM Consultant

### Firm Experience (continued):

- Recent clients include: Capital Metro Transportation Authority, Dallas Rapid Transit Authority, National Institute of Health, Department of Homeland Security, State of Florida, State of Michigan, State of Washington, Nike, Best Buy, Johnson & Johnson, and Booz Allen Hamilton.

# Procurement Overview

## ECM Consultant

### Recommendation:

- Staff requests that the Finance Committee recommend to the Board of Trustees the award to Iknow LLC to provide ECM Consultant services in an amount not to exceed \$185,666.00.