



**CITY OF PLANO  
COUNCIL AGENDA ITEM**

<b>CITY SECRETARY'S USE ONLY</b>				
<input type="checkbox"/> Consent <input type="checkbox"/> Regular <input type="checkbox"/> Statutory				
Council Meeting Date:		3/6/2012		
Department:		Purchasing		
Department Head		Diane Palmer-Boeck		
Agenda Coordinator (include phone #): <b>Dianna Wike x7549</b>				
<b>CAPTION</b>				
CSP No. 2011-167-C for the purchase of Inventory Tracking Asset Management System from Data Systems International, Inc. in the estimated amount of \$137,310, and authorizing the City Manager to execute all necessary documents.				
<b>FINANCIAL SUMMARY</b>				
<input type="checkbox"/> NOT APPLICABLE <input checked="" type="checkbox"/> OPERATING EXPENSE <input type="checkbox"/> REVENUE <input type="checkbox"/> CIP				
FISCAL YEAR:	<b>2011-12</b>	<b>Prior Year (CIP Only)</b>	<b>Current Year</b>	<b>Future Years</b>
				<b>TOTALS</b>
Budget		0	350,000	0
Encumbered/Expended Amount		0	-25,000	0
This Item		0	-137,310	0
BALANCE		0	187,690	0
<b>FUND(S):    TECHNOLOGY FUND (62.62379)</b>				
<p><b>COMMENTS:</b> Funds are included in the Technology Fund budget for the purchase and implementation of an Inventory Management module which is compatible with the the JD Edwards Enterprise Financial System. The balance of funds will be used for other items related to the inventory management system project.</p> <p><b>STRATEGIC PLAN GOAL:</b> The purchase and implementation of a bar-coding inventory system relates to the City's Goal of Financially Strong City with Service Excellence.</p>				
<b>SUMMARY OF ITEM</b>				
Staff recommends the Competitive Sealed Proposal of Data Systems International, Inc. for Inventory Tracking Asset Management System in the estimated amount of \$137,310, be accepted as the best value proposal, and conditioned upon timely execution of any necessary contract documents for Asset Management System.				
List of Supporting Documents:			Other Departments, Boards, Commissions or Agencies	
Memorandum				
CSP Recap				

# Memorandum

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**To:** Diane Palmer-Boeck, Purchasing Manager  
**CC:** Denise Tacke, Director of Finance  
**From:** Josh Littrell, Financial Systems Manager  
**Date:** 2/24/2012  
**Re:** Recommendation Memo – Award to Data Systems International, Inc.

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After years of manually tracking inventory items, the Fire Department and Plano Centre have decided to implement Inventory Management within the JD Edwards Enterprise Financial system. The implementation of the inventory management module will allow these departments to accurately track where their inventory items are located, stock levels, expiration dates of perishable items as well as lot control in instances of recalled products like controlled medications. This system will streamline the inventory management process through the use of hand held data management devices, utilization of bar code technology and seamless integration of the inventory management data within our current enterprise software.

Inventory management utilizing hand held data management devices will allow these departments to accurately account for what the departments own, purchase, stock and use. This will give management a real-time overview of supply, demand, and shrinkage of departmental assets.

If the hand held device capability is not acquired, these departments will still be relying on an antiquated way of maintaining stock items. This results in more waste as items aren't properly accounted for and expire on the shelf. Controlled medications are not properly tracked through use of lot control and can result in medications being used after being recalled. It is physically impossible without a system like this to track items between the various fire stations and various trucks and ambulances within each fire station.

The search committee assigned for review of proposals submitted for an Inventory Tracking Asset Management System for JD Edwards is recommending the City enter into a contract with Data Systems International, Inc.

The committee reviewed proposals from the two responses we received as well as attended demonstrations from both vendors. Data Systems International, Inc. was selected as our top candidate based on score using a matrix grading system. Taken into consideration were each vendor's project plan, experience, past performance, installation plan, staff training, warranty, maintenance, support, and cost.

The initial Implementation and hardware purchases will occur in year one at a cost of \$137,310. Beginning in year two, annual licensing and maintenance fees will be \$11,660. The maintenance will be a new supplement requested in the 2012-13 budget from the Technology Services Fund. Additional hardware will be purchased as needed for the full deployment in years two through five at pricing per proposal. The initial purchase price and future hardware purchases will be paid from a supplement requested from the Technology Fund.

# CITY OF PLANO

## CSP NO. 2011-167-C FOR INVENTORY TRACKING ASSET MANAGEMENT SYSTEM CSP RECAP

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**Bid opening Date/Time:** June 24, 2011 @ 3:00pm

**Number of Vendors Notified:** 2930

**Vendors Submitting "No Bids":** 0

**Number of Bids Submitted:** 2

Data Systems International, Inc.	\$137,310
WhiteLight Group	\$227,552

**Bids Evaluated Non-Responsive to Specification:** 0

**Recommended Vendor(s):** Data Systems International, Inc. \$137,310

*Dianna Wike*

February 16, 2012

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Dianna Wike, Contract Specialist

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Date