



# CITY COUNCIL STAFF REPORT



**August 5, 2025**

## **ITEM TITLE**

Agreement: Approve Agreement with IntelAgree, LLC for a Contract Lifecycle Management Platform and Waive the Competitive Process and Approve an Agreement with Elevate Services, Inc. for Implementation and Integration of the IntelAgree Platform.

**Report Number:** 25-0191

**Location:** No specific geographic location

**Department:** City Manager and Finance

**G.C. § 84308 Regulations Apply:** Yes

**Environmental Notice:** This activity is not a “Project” as defined under Section 15378 of the California Environmental Quality Act (“CEQA”) State Guidelines. Therefore, pursuant to State Guidelines Section 15060(c)(3) no environmental review is required.

## **Recommended Action**

Adopt a resolution 1) Approving an agreement with IntelAgree, LLC, for a Contract Lifecycle Management platform and 2) Waiving the competitive process and approving an agreement with Elevate Services, Inc. for implementation and integration services of the IntelAgree Platform.

## **SUMMARY**

The City of Chula Vista has identified a need for a modern Contract Lifecycle Management platform to streamline the City’s contract management practices. The current manual system is inefficient, inconsistent, and difficult to scale. This solution will establish a secure, standardized platform for initiating, reviewing, executing, and monitoring contracts, while reducing risks, improving compliance, and supporting transparency.

## **ENVIRONMENTAL REVIEW**

The Director of Development Services has reviewed the proposed activity for compliance with CEQA and has determined that the activity is not a “Project” as defined under Section 15378 of the State CEQA Guidelines because it will not result in a physical change in the environment. Therefore, pursuant to Section 15060(c)(3) of the State CEQA Guidelines, the activity is not subject to CEQA. Thus, no environmental review is required

## BOARD/COMMISSION/COMMITTEE RECOMMENDATION

Not applicable

## DISCUSSION

The City processes hundreds of contracts each year across all departments. Currently, contract development, routing, and storage practices are decentralized, varying by department and relying heavily on email-driven processes.

This approach presents several challenges:

- Inconsistent review and approval workflows
- Difficulty retrieving and tracking contract terms and obligations
- Limited visibility into contract lifecycles, renewals, expirations and other critical deadlines
- Delayed execution and missed deadlines
- Increased legal and financial risks exposure

To address these challenges and improve both service delivery and risk management, staff recommends the implementation of a Contract Lifecycle Management (CLM) platform.

In June of 2024, the City posted a request for proposals (“RFP”) RFP P25-2024 to Planet Bids, soliciting competitive proposals from experienced and qualified firms to provide a cloud-based (SaaS) contract lifecycle management solution. The objective of this solicitation was to improve the City’s contract management processes by implementing a system that facilitates standardized contract creation, accelerates approval timelines, and reduces risk.

The minimum features requested in the RFP are as follows:

1. Document authoring, including version control.
2. Automated, rule-based approval workflows.
3. Contract life cycle tracking and notifications (impending contract requirements with fixed or variable timing, contract expiration dates, nearly depleted not-to- exceed contract values, and contract renewals).
4. Strong privacy policy and functionality to comply with relevant data privacy and digital signature regulations.
5. Scalable to accommodate future growth in the number of contracts and users.
6. Employ a user-friendly interface and provide training materials for users.
7. Optimized for quick retrieval of contract-related information.
8. Integration with Microsoft 365, Laserfiche, DocuSign, and Adobe.
9. Contract clause library.
10. Document and clause import and export utilities.
11. Integration with digital signature software.
12. Ability to attach and securely store supporting documents.
13. Legacy document transfer/import.
14. OCR technology to identify and store desired metadata

With highly desirable features:

1. Native digital signature functionality.
2. Contract abstract functionality.
3. Integration with Tyler Munis Purchasing and Accounts Payable modules.
4. Integration with Granicus (CMS).
5. Single sign-on support.
6. Customizable dashboard that provides an area for notices as well as an area showing the status of pending documents including pending action by user.
7. Ability to set up workflows, assign permissions by user, and reassign workflows when person is not available.
8. Ability to link and cross reference documents (Contracts and amendments, Master Agreements with Scopes of Work, Bonds, purchase orders, etc.)
9. Ability to generate solicitation templates, single/sole source justification memos, and other custom forms.

The City received nine (9) responses to RFP P25-2024. Each proposal was reviewed for qualifications and evaluated by a selection committee, consisting of staff from the City Manager's Office, City Attorney, City Clerk and Purchasing Division. The proposals were ranked, and the top three (3) respondents were invited to provide a presentation and demonstrate their solution to the selection committee. Presentations were made by ECS Imaging, Inc., IronClad, Inc. and IntelAgree, LLC.

The selection committee then evaluated the proposals based on the following criteria:

1. Experience – evaluation of respondent's technical expertise and professional competence in areas directly related to the scope of services.
2. Qualifications – evaluation of respondent's demonstrated qualifications to provide the scope of services.
3. References – evaluation of respondent's demonstrated ability to undertake the scope of work and produce the required outcome in a timely manner.
4. Proposed Cost – evaluation of the fee proposal, including both one-time and ongoing costs.
5. Demonstration – evaluation of the ability of respondent's CLM platform to provide the features set forth in the scope of work.

Based on the evaluation process, staff recommends entering into an agreement with IntelAgree, LLC, (IntelAgree) for an initial three-year term (through June 30, 2028), with two optional, three-year extensions.

IntelAgree's CLM solution provides a comprehensive, cloud-based platform that centralizes and standardizes contract development, review, approval and execution processes. The platform integrates with existing City systems including Laserfiche, the City's document management repository, and Tyler Munis, the City's enterprise resource management system, and others. These integrations enhance workflow efficiency and contract oversight.

Key features of the IntelAgree's CLM solution include:

- Automated alerts for key deliverables, renewal options, expiration dates, and financial thresholds;
- Improved contract tracking and visibility across departments;
- Proactively identifies high-risk clauses and ensures consistency in contract language;
- Standardized templates and approval processes to reduce legal and compliance risks; and

- Integration with City enterprise systems to streamline operations and reporting.

IntelAgree's proposal, presentation and system demonstration demonstrated that their CLM solution will enhance contract oversight; reduce legal, financial and operational risk; ease administrative workload; and align contract management practices across departments. As part of their proposal IntelAgree recommends utilizing Elevate Services, Inc., (Elevate Services) a third-party consulting firm specializing in the implementation and integration of the IntelAgree CLM solution.

IntelAgree recommends utilizing Elevate Services for implementation due to their proven expertise in successfully building the IntelAgree CLM solution and its existing integration with Tyler Munis and Laserfiche. To achieve cost savings and avoid the supervision fee markup associated with this work being included in the IntelAgree agreement, staff recommends entering into a separate agreement between Elevate Services and the City. Staff is requesting to waive the competitive process for the implementation piece of this project in accordance with [CVMC 2.56.110\(H\)\(2\)](#) as impractical as the City's interest are materially better served by applying a different purchasing procedure.

The proposed agreement, inclusive of the terms and conditions, conforms with the City's Privacy Protection and Technology Transparency Policy.

#### **DECISION-MAKER CONFLICT**

Staff has reviewed the decision contemplated by this action and has determined that it is not site-specific and consequently, the real property holdings of the City Council members do not create a disqualifying real property-related financial conflict of interest under the Political Reform Act (Cal. Gov't Code § 87100, et seq.).

Staff is not independently aware, and has not been informed by any City Councilmember, of any other fact that may constitute a basis for a decision-maker conflict of interest in this matter.

#### **CURRENT-YEAR FISCAL IMPACT**

Approval of this resolution will award agreements with IntelAgree for providing a Contract Lifecycle Management platform in the amount of \$150,000 for the first year and Elevate Services for implementation and integration of the platform in the amount of \$95,000 in one-time costs. Sufficient funds were budgeted in the General Fund for fiscal year 2025-26 for this expenditure. There is no additional fiscal impact anticipated as a result of this action.

#### **ONGOING FISCAL IMPACT**

The annual cost during the initial three-year term of the IntelAgree agreement is \$150,000, to be funded by the General Fund. Each optional three-year extension may include an increase of up to 9.3%. This expenditure will be reviewed and considered as part of the annual budget development process in future years.

#### **ATTACHMENTS**

1. IntelAgree Master Services Agreement

*Staff Contact: Victor De La Cruz, Procurement Services Analyst  
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