

**Item Title:** Two-Year Agreement with Planview for Software Licensing

**Specific Action Requested:**

**That the Board of Commissioners approves a twenty-four- month Agreement with Planview to provide licensing for portfolio management and project management software. The request is to authorize the County Manager to execute a contract on behalf of Wake County for this agreement.**

**Item Summary:**

**Purpose:** The Board of Commissioners must approve all multi-year contracts entered by the County.

**Background:** The County uses Planview software for IT project and enterprise application portfolio management as well as for project management and collaboration. The new multi-year licensing agreement will allow Wake County to maintain current pricing for existing licenses without an annual increase and lock in per license pricing for a twenty-four-month term.

**Board Goal:** This action supports standard County operations and does not relate to a specific Board strategy.

**Fiscal Impact:** This agreement provides the County the most cost-effective plan for the specific set of portfolio and project management tools utilized by Wake County. Funding is included in Information Services operating budget. The total of the twenty-four-month agreement is \$70,560.00.

**Additional Information:**

The Information Services (IS) Department is responsible for ensuring that licenses for all computer system components are properly maintained and upgraded as required by specific vendor agreements.

The County uses Planview portfolio management software to track and maintain IT projects and enterprise applications. County staff also utilize Planview software tools for collaboration and project management. The current licenses are maintained under an annual licensing agreement. The new agreement will allow the County to maintain current license counts and access to the applications at a significant discount from the standard market rate. This agreement will lock in per license pricing for the twenty-four-month period. This is particularly important with the increased cadence of licensing prices in the past several years. The payments fit within the existing IS operating budget for Planview licensing.

The total twenty-four-month cost of \$70,560 is spread across the agreement period of July 29, 2021 through July 28, 2023 as follows:

<b>Payment Due Date</b>	<b>Term</b>	<b>Amount</b>
7/29/2021	12 months	\$35,280.00
7/29/2022	12 months	\$35,280.00

The agreement covers all current Planview licensing. Additional licenses can be procured as needed at the contract rate.

**Attachment:**

1. Planview Order Form