REPORT FROM EVALUATION COMMITTEE
REQUEST FOR PROPOSAL FOR
REQUIREMENTS CONTRACT FOR CRM REPLACEMENT

REQUEST FOR PROPOSAL NO. 12300269

May 10, 2023

COMMITTEE AND PROOF OF CAPABILITIES MEMBERS:

Bryon Horn, Information Services Department (Project lead)
Sarah Beye, Call Center/311 Manager, Information Services Department (Project Lead)
Gina Medina, Call Center/311 Supervisor, Information Services Department
Dennis Jones, Systems and Applications Manager, Information Services Department
Pedro Braz, Senior Programmer Analyst, Information Services Department
Sanjay Patteson, Database Administrator, Information Services
Ed Smith, GIS Manager, Information Services Department
Harjinder Saini, Community Coordinator, Office of the City Manager & Mayor
Brock Buche, Director, Department of Utilities
Scott Mozier, Director, Department of Public Works
Aaron Aguirre, Director, Parcs and Recreation Department
Brian Russell, Assistant Director, Public Works
Melissa Almaguer, Parking Manager, Planning & Development Department
Billy (Joseph) Burgen, Chief of Facilities Maintenance, Transportation Department
Bret Conner, Public Utilities Manager, Public Works
Ray Ramos, Custodial Supervisor, Transportation Department
Cha Thao, Custodial Supervisor, Transportation
Jill Aiello, Project Liaison/Program Administrator, Department of Public Works
TJ Miller, Assistant City Manager, Office of the City Manager & Mayor

FACILITATOR

JONATHAN MEDINA, DBE/Small Business Coordinator, Purchasing, Finance Department

BACKGROUND:

The goal of this Request for Proposal (RFP) was to solicit proposals from qualified vendors to propose a replacement for the City's Customer Relationship Management (CRM) software known as PublicStuff. This software is end of life and end of support and has been serving the public since 2015 branded as "FresGO." The RFP is seeking a full service solution including linking other applications that are being used by the City.

The RFP was posted to Planet Bids site on August 5, 2022, and eleven proposals were downloaded, opened and recorded on September 27, 2022. This proposal would be for a one (1) year contract with the option for four (4) five (5) year extensions at the City's discretion based upon performance and adherence to contract requirements. From the initial list, four proposers were selected for deeper review/proof of concept meetings.

SIGNIFICANT EVENTS

Bid Release – August 5, 2022
Bid Opening – September 27, 2022
Committee Kickoff Meeting – October 31, 2022
Proof of Capabilities Selection Committee Meeting – December 5, 2022

	Day	Time	Vendor
**Vendors Selected for Proof of Capabilities**		
1	Tuesday, Jan 17th	9:00 a.m. – 11:00 a.m.	**Catalyst**
2	Friday, Jan 27th	1:00 p.m. – 3:00 p.m.	**Granicus**
3	Tuesday, Jan 31st	8:00 a.m. – 10:00 a.m.	**Incapsulate**
4	Thursday, Jan 26th	1:00 p.m. – 3:00 p.m.	**Rock Solid**

Award Selection Committee Meeting – February 17, 2023
Committee Meeting Regarding Mass Closing and Geo-mapping – March 2, 2023
Meeting with Incapsulate to Discuss Software Licensing Details and Costs

EVALUATION FOR DETERMINATION OF COMPETITIVE RANGE

1.   Cost – The reasonableness and competitiveness of the total price for services, licensing, and implementation.

2.   Ability to Meet the Stated Requirements – The vendors ability to meet the requirements as described in Scope of Work contained in the RFP on pages 36 to 42.

3.   Conformance to the Terms and Conditions of the RFP – Completeness of the response and required forms in accordance with RFP instructions; exceptions or deviations from the RFP requirements or any other relevant factors.

4.   Future Growth and Expansion of the Proposal – Does the proposal fit the City's needs and can it grow with and expand as the City's needs develop over time.

5.   Documentation of Proposed Project Plan Timeline – Ability to meet and adhere to project timeline to complete the project on time and on budget.

6.   Qualifications, Experience and References – Technical experience in performing the same work with public agencies, strength and stability of the firm, and assessment by references for providing similar project implementations in other public agencies.

COMMITTEE NOTES

Incapsulate – ($712,948.65)
Incapsulate solution is a programmed solution utilizing Salesforce. Salesforce is a data platform that allows a data store, and this data store can be used for many purposes. Once the CRM system is in place, customizations and add-ons can be implemented to perform other functions. As to the solution Incapsulate proposed, it was chosen as one of the proposals in which the team wanted to see demonstrations. It checked all the boxes and met all the criteria as it was a robust solution that had the ability to perform similar functions as the City requires in a pleasing presentation. It contained both web based and mobile functions as well as geofencing – which is necessary for the City. The price tag for this solution is rather high, however, it is because it is running over Salesforce which provides a great deal of flexibility allowing the City to use the data and expand the City's online presence. The Evaluation Team ranked this solution as the best solution for the City's needs.

Rock Solid – Cost Proposal ($139,280)
Rock Solid (now owned by Granicus) is a solution similar to PublicStuff in that it handles requests via web and mobile devices. It also met all the City's needs with the ability to log and track work orders as well as report on City work orders, etc. It is a solution that is cost effective and would meet the City's needs. The solution is not expandable in that it is a programmed application by the vendor and does not run over a flexible platform like Salesforce. The Evaluation Team ranked this solution as the second best solution for the City's needs.

Catalyst – ($704,124.85)
Catalyst is another solution that is programmed on the Salesforce platform. It also could be used on the web or from a mobile application. While it met all the needs of the City, it was not as robust as the other top two solutions. The Evaluation Team ranked this the third best solution for the City.

Granicus – Cost Proposal ($204,100)
The Granicus solution is similar to PublicStuff in that it is a workorder system that has most of the functionality for which the City desires. It is similar to the Rock Solid solution but does not have the same robust features being offered by Rock Solid. It is also not written on a platform which the City can expand upon. The Evaluation Team ranked this solution as the fourth best solution for the City.

RECOMMENDATION

After closely examining the licensing requirements of the City it was determined that the initial proposed licenses would be too low for the City's needs. This would also be true for any Salesforce offerings that the City is considering. After the licensing adjustments, the City determined that the amount needed to make this a success is $1,006,067.71. Even with the licensing adjustments, the Committee unanimously agreed that Incapsulate would be the best fit for the City's needs and recommends that Council approve and award Incapsulate a one (1) year contract with the option of four (4) five (5) year renewals.

As with any other enterprises system, licensing costs may change as a result of hiring new personnel, adding current personnel to different roles and cost escalators (cost of living) increase. This change may result in a decrease or increase in licensing costs depending upon the situation.