



Legislation Details (With Text)

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**Type:** Action Item      **Status:** Continued  
**File created:** 5/3/2023      **In control:** City Council  
**On agenda:** 5/25/2023      **Final action:**

**Title:** Actions pertaining to the replacement of customer relationship management software (Bid File 12300269) (Citywide):  
 1. Award a contract to Incapsulate, LLC for the Customer Relationship Management Replacement solution and implementation services in the amount of \$395,723.80 for one year with the option of four, five-year extensions.  
 2. Approve the purchase of Salesforce cloud subscription licenses from Carahsoft Technology Corporation, at government approved pricing, in the amount of \$610,343.91.

**Sponsors:** Information Services Department

**Indexes:**

**Code sections:**

**Attachments:** 1. Service Contract, 2. Carahsoft Quote, 3. Cost Proposal, 4. Committee Evaluation Report, 5. 3-A 23-746 Fresno 311 City Council Presentation

Date	Ver.	Action By	Action	Result
5/25/2023	1	City Council	CONTINUED	Pass

**REPORT TO THE CITY COUNCIL**

**FROM:** BRYON HORN, Chief Information Officer  
Information Services Department

**BY:** SARAH BEYE, Division Manager | 311  
Information Services Department

**SUBJECT**

Actions pertaining to the replacement of customer relationship management software (Bid File 12300269) (Citywide):

- Award a contract to Incapsulate, LLC for the Customer Relationship Management Replacement solution and implementation services in the amount of \$395,723.80 for one year with the option of four, five-year extensions.
- Approve the purchase of Salesforce cloud subscription licenses from Carahsoft Technology Corporation, at government approved pricing, in the amount of \$610,343.91.

**RECOMMENDATION**

Staff recommends the City Council award a contract in the amount of \$395,723.80 to Incapsulate, LLC (Incapsulate) for implementation and hosting of customer relationship management software

which will replace the City’s current Accela/PublicStuff software (branded as FresGO); and approve the purchase of Salesforce cloud subscription licensing from Carahsoft Technology Corporation, at government approved pricing, in the amount of \$610,343.91, for a total base year project amount of \$1,006,067.71 per Incapsulate’s proposed solution; and authorize the City Manager or designee to execute the agreement.

**EXECUTIVE SUMMARY**

The City of Fresno (City) is seeking to award a proposal for training, implementation, and replacement of the current Accela/PublicStuff software (branded as FresGO). Staff issued a Request For Proposals (RFP) and received 11 responses (Accela/PublicStuff did not respond to the RFP). After a comprehensive review of the proposals, evaluation by a selection panel and review of the best qualified candidates for this project, staff recommends awarding Incapsulate. Incapsulate was selected due to their credentials, experience with other municipalities and agencies, demonstration of their understanding of our project needs, and the details of their plan to implement the project. The total amount of the implementation for this project is \$1,006,067.71, with the option of four, five-year extensions. Subsequent years will include maintenance and support shown in the table below with a 3.5% annual escalator.

Option Period Pricing (3.5% Escalation per year)					
Item	Description	Unit	Incapsulate	Carahsoft	Total
1	Licensing/Subscriber per year Option 1 - Year 1		\$119,025.00	\$512,680.95	\$631,705.95
2	Licensing/Subscriber per year Option 1 - Year 2		\$123,190.88	\$530,624.78	\$653,815.65
3	Licensing/Subscriber per year Option 1 - Year 3		\$127,502.56	\$549,196.65	\$676,699.20
4	Licensing/Subscriber per year Option 1 - Year 4		\$131,965.15	\$568,418.53	\$700,383.68
5	Licensing/Subscriber per year Option 1 - Year 5		\$136,583.93	\$588,313.18	\$724,897.10

**BACKGROUND**

In 2015, the City launched FresGO, its CRM application that allowed a reporting system for issues within the City arising from potholes, street issues, graffiti, illegal fireworks, and later homeless issues. The program was branded FresGO, however, the software utilized by the program was called PublicStuff.

In 2015, Accela acquired PublicStuff as an expansion to their citizen relationship management software. Over the years, the City’s 311, and departments citywide, relied on PublicStuff to process service requests and handle the backend workflow of those requests to the appropriate departments for resolution. However, after years of promising enhancements, nothing transpired and, in turn, Accela placed PublicStuff in a maintenance mode keeping the application running without further

enhancement. It became increasingly difficult to maintain and program PublicStuff as issues arose with no recourse but to submit a case ticket to their customer support and wait for resolution. ISD felt it was time to explore other options for CRM solutions.

On August 5, 2022, staff issued an RFP to replace the current CRM and bid opening was held on September 20, 2022. The City received 11 responses; Accela did not respond to the RFP. After a comprehensive review of the proposals, the panel chose four proposers for proof of capabilities (POC) demonstrations. Those selected were Incapsulate, Granicus, Rock Solid, and Catalyst. The evaluation committee consisted of members from 9 City departments. The panel reviewed the POC's for the best qualified candidates for this project and recommended awarding Incapsulate. Incapsulate was selected due to their credentials, experience with other municipalities and agencies, demonstration of their understanding of our project needs, and the details of their plan to implement the project. The total amount of base year one for this project is \$1,006,067.71, with the option of four, five-year extensions.

## **ENVIRONMENTAL FINDINGS**

By the definition provided in the California Environmental Quality Act (CEQA) Guidelines Section 15378 this item does not qualify as a "project" for purposes of the CEQA.

## **LOCAL PREFERENCE**

Local preference was not implemented because there were no local bidders.

## **FISCAL IMPACT**

Funds for this project are in the Information Services Department's FY23 budget.

### Attachments:

Service Contract

Carahsoft Quote

Cost Proposal

Committee Evaluation Report