



Office of the City Manager

CONSENT CALENDAR

May 7, 2024

To: Honorable Mayor and Members of the City Council

From: Dee Williams-Ridley, City Manager

Submitted by: Kevin Fong, Director, Information Technology

Subject: Contract: Catalis Public Works and Citizen Engagement, LLC for New Community Relationship Management (CRM) System

RECOMMENDATION

Adopt a Resolution authorizing the City Manager to execute a contract with Catalis Public Works and Citizen Engagement, LLC (Catalis) for software hosting, implementation, maintenance, and related services for a new Community Relationship Management system, for an amount not to exceed \$500,000 for the period commencing on June 1, 2024 through June 30, 2029.

FISCAL IMPACTS OF RECOMMENDATION

Funding for this recommendation in the amount of \$500,000 will be provided by Information Technology's Tech Services – Software Maintenance fund as outlined below. Spending for this contract and related amendments in future fiscal years is subject to Council's approval of the proposed city-wide budget and annual appropriation ordinances.

\$500,000	FY 25 – FY 29: Software Maintenance – Information Technology Fund 680 – Information Technology – Tech Svcs – Software Maintenance
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CURRENT SITUATION AND ITS EFFECTS

The City's current Community Relationship Management (CRM) system, called Lagan is over 16 years old. It was built on an older technology that is no longer being supported. It does not have a customer facing portal, a mobile application, robust reporting engine, GIS capabilities, or automatic workflow – all of which are crucial to the City current business needs. The system is subpar in today's standard.

On September 7, 2023 the City issued Request for Proposals (RFP) # 23-11606-C for an improved Community Relationship Management (CRM) System based upon business analysis completed by the Departments of Information Technology, Public Works, Parks, Recreation and Waterfront, and Finance.

The City received fifteen (15) responses to the Community Relationship Management (CRM) Software and Services RFP by the October 26, 2023 deadline. A committee of 13 staff from the Public Works, Finance, and Information Technology departments conducted a comprehensive evaluation process that included proposal reviews, vendor demonstrations, and reference checks. Staff selected Catalis as presenting the most comprehensive, user-responsive, user-friendly, and effective solution for the City's current and future community relationship management needs.

The New Community Relationship Management (CRM) System is a Strategic Plan Priority Project, advancing our goal to be a customer-focused organization that provides excellent, timely, easily accessible service and information to the community.

BACKGROUND

The City formed the Customer Service Division (AKA 311) on July 1, 2007 with six (6) customer service representatives to take customer service calls for the Finance and Zero Waste divisions, and City Manager's office. Soon thereafter, the City implemented our current Community Relationship Management (CRM) system, called Lagan to provide the newly created 311 / Customer Service division with a tool to capture the interactions the City was having with community members.

Over the years, 311 has taken up more and more responsibilities and become the center for most, if not all, customer service related calls. Today, the 311 unit is comprised of ten (10) members (8 customer service representatives, 1 supervisor and 1 manager) taking calls from nine (9) customer service phone lines. They process upward of 5500 calls a month on average. With the increase in workload and interactions, coupled with the need for an interactive and responsive online service portal, 311 mobile application, as well as text-to-service-request and email-to-service-request capabilities, the current system proves to be inadequate.

ENVIRONMENTAL SUSTAINABILITY AND CLIMATE IMPACTS

An improved system with greater efficiency and accuracy, including advanced duplicate request detection & mitigation and GIS capabilities, will lessen the number of duplicate requests and therefore, reduce the number of trips field employees have to visit a site to address an issue which reduces greenhouse gas emissions associated with travel. This supports the reduction of carbon footprint and the goals of the City's Climate Action Plan. Further, the mobile capability of the new CRM system will eliminate the use of paper currently being used by field staff thus contribute towards the City's goal of achieving zero waste to landfills.

RATIONALE FOR RECOMMENDATION

Staff recommends Catalis as it best fits the requirements of the City scoring highest in the evaluation criteria outlined in the RFP and demonstrations. Catalis' features and functionalities exceed the City's requirements. The software is user-friendly. Furthermore, extensive reference checks reinforced Catalis' ability to deliver a quality CRM solution on time and within budget.

ALTERNATIVE ACTIONS CONSIDERED

Staff considered staying with the existing system. This proposal was rejected due to the inherent technical limitations and inadequacies of the legacy system. Our community members deserve an effective software built on the latest technology, with an online self-service portal, and a 311 mobile application.

CONTACT PERSON

Kevin Fong, Director, Information Technology, 510.981.6541

Attachments:

1: Resolution

RESOLUTION NO. ##,###-N.S.

CONTRACT: CATALIS PUBLIC WORKS AND CITIZEN ENGAGEMENT, LLC (CATALIS) FOR A NEW COMMUNITY RELATIONSHIP MANAGEMENT (CRM) SYSTEM

WHEREAS, the City of Berkeley has identified the need to improve the efficiency of its community request management process, internal workflows and reporting capabilities; and

WHEREAS, the City of Berkeley desires to procure a turnkey, commercial off-the-shelf cloud-based Community Relationship Management (CRM) System that handles service request intake with automatic workflow capabilities and provides a customer facing portal, a mobile application, robust reporting engine, GIS capabilities; and

WHEREAS, on September 7, 2023 the City issued Request for Proposal No.23-11606-C for an improved Community Relationship Management (CRM) System and received fifteen responding bidders; and

WHEREAS, in response to the City's Request for Proposal, vendor Catalis Public Works and Citizen Engagement, LLC (Catalis) responded with a proposal that was rated as the highest response submitted by competing vendors; and

WHEREAS, funding for this recommendation will be provided by the FY 2025 through FY 2029 Information Technology's Tech Services – Software Maintenance fund and spending for this contract and related amendments in future fiscal years is subject to Council's approval of the proposed city-wide budget and annual appropriation ordinances.

NOW THEREFORE, BE IT RESOLVED by the Council of the City of Berkeley that the City Manager is hereby authorized to execute a contract and subsequent amendments with Catalis Public Works and Citizen Engagement, LLC (Catalis) for software hosting, implementation, maintenance and related services for a New Community Relationship Management (CRM) System, for an amount not to exceed \$500,000 for the period commencing on June 1, 2024 through June 30, 2029.