



City of San Antonio

Agenda Memorandum

File Number:

Agenda Item Number: 5

Agenda Date: September 1, 2022

In Control: City Council A Session

DEPARTMENT: Finance Department

DEPARTMENT HEAD: Troy Elliott

COUNCIL DISTRICTS IMPACTED: Citywide

SUBJECT:

Salesforce Enhancements

SUMMARY:

This ordinance will authorize the City to utilize the State of Texas Department of Information Resources (DIR) contract DIR-TSO-4288 with Carahsoft Technology Corporation (Carahsoft) to provide the City of San Antonio with additional licensing, development, and implementation services for the Economic Development Department's (EDD) Salesforce Content Management platform. The estimated total contract value is \$200,642.00. Funding in the amount of \$140,000 for the implementation and development of the Salesforce platform is included in the FY 2022 - FY 2027 Capital Improvement Program. Funding in the amount of \$42,000.00 is available from the Economic Development's FY 2022 Adopted General Fund budget. Funding in the amount of \$18,642, for additional licensing, is contingent upon City Council approval of the annual budget.

BACKGROUND INFORMATION:

In 2015, the Economic Development Department (EDD) and the Information Technology Services Department (ITSD) staff began the process of transforming a heavy paper-based SBEDA's goal setting submission process into a completely paperless digital portal that supports all City departments to efficiently navigate the application of SBEDA tools on City solicitations. In

addition to the reduction in paper intensive efforts which address the City's sustainability efforts, SBEDA project tracking, management, and reporting has greatly improved during this time.

EDD intends to expand the utilization of Salesforce to all EDD staff members and divisions. The goals include upgrading and enhancing EDD's management of business incentive agreements, as well as adding data validation and security protocols for business incentive compliance monitoring on existing agreements. Further, the global engagement and small business outreach teams will integrate with Microsoft 365 and replace manually entered data spreadsheets to prove better outreach and engagement with customers and collaborate cross-functionally with the community and business partners. The contract with Carahsoft creates a path for a Salesforce integrator to allow for expanded functionality to track company information, projects, campaigns, and provide increased accessibility through Microsoft Outlook. Additionally, this system's use will be expanded across EDD to all divisions also including the Casa San Antonio (Mexico) office as a common Customer Relationship Management tool.

The work detailed in the Statement of Work (SOW) is planned to start immediately upon contract approval. The phased approach will include requirements/design, configuration/building and configuration, version migration, project management, data migration, testing, deployment, and additional training for a total of about 840 hours. Delivery services include a review of current configurations and customizations, future state diagramming, creation of custom reports, dashboards and forms, general project management and training for administrative and general users.

In July 2022, the City requested a quote and SOW from Carahsoft against the State of Texas Department of Information Resources (DIR) contract, DIR-TSO-4288. The initial term of the contract will begin upon the effective date of the ordinance and expire upon completion and acceptance of the project and the delivery of additional licenses. The SOW is broken out into mutually agreed upon hourly rates that present a total proposed contract value. Implementation is proposed to begin early in September 2022 with an expected completion in Spring 2023.

Continued use of the Salesforce license is to be authorized under a separate annually recurring ordinance for the Texas Department of Information Resources.

ISSUE:

Approval of this item will provide the City of San Antonio with a contract to deliver on the strategic vision of Economic Development Department to provide a comprehensive system that connects all divisions to collaborate, enhance the customer experience and the management of issues, programs, and objectives.

The Small Business Economic Development Advocacy (SBEDA) Ordinance requirements were waived due to the lack of small, minority, and/or women businesses available to provide these goods and services.

The recommended award is an exception to the Local Preference Program.

The Veteran-Owned Small Business Preference Program does not apply to non-professional services, so no preference was applied to this contract.

ALTERNATIVES:

Should this contract not be approved, the Economic Development Department would not be able to expand the Salesforce Customer Relationship Management (CRM) platform throughout their various divisions. A lack of a uniform CRM platform would make it more difficult to provide staff, the citizens, business community and City leadership with uniform information based on the use of different intake and reporting processes.

FISCAL IMPACT:

This ordinance will authorize the City to utilize the State of Texas Department of Information Resources (DIR) contract DIR-TSO-4288 with Carahsoft Technology Corporation (Carahsoft) to provide the City of San Antonio with additional licensing, development, and implementation services for the Economic Development Department's (EDD) Salesforce Content Management platform. The estimated total contract value is \$200,642.00. Funding in the amount of \$140,000 for the implementation and development of the Salesforce platform is included in the FY 2022 - FY 2027 Capital Improvement Program. Funding in the amount of \$42,000.00 is available from the Economic Development's FY 2022 Adopted General Fund budget. Funding in the amount of \$18,642, for additional licensing, is contingent upon City Council approval of the annual budget.

RECOMMENDATION:

Staff recommends the approval of this contract with Carahsoft Technology Corporation to provide the City with additional licensing, development, and implementation services for the Economic Development Department's Salesforce Content Management platform for an estimated cost of \$200,642.00.

This contract is procured by means of cooperative purchasing and a Contracts Disclosure Form is not required.