

APPROVED
BOARD OF SUPERVISORS
by Reso. No. 2019-0015
JAN 15 2019
BY Florence Evans
Clerk of the Board

COUNTY OF SACRAMENTO
CALIFORNIA

15

For the Agenda of:
January 15, 2019

To: Board of Supervisors

Through: Navdeep S. Gill, County Executive

From: Rami Zakaria, Chief Information Officer, Department of Technology

Subject: Approval To Delegate Authority To The County Purchasing Agent To Approve And Execute An Agreement With Communications Products Inc. For Reconfiguration Of The Countywide Customer Relationship Management System And Integration Of The County Customer Relationship Management With Twelve Line Of Business Systems

District(s): All

RECOMMENDED ACTION

1. Approve the award for the County Purchasing Agent, or designee, to enter into a contract with Communications Products Inc. (CPI) for a one-year term with an option for additional post implementation support offered in six month increments after the first year of support covered under the contract; and
2. Adopt the attached Resolution authorizing the Purchasing Agent, or designee, to negotiate and execute the contract, to amend the contract for non-monetary changes, monetary decreases, to terminate or to assign the contract, and to monetarily increase the total contract amount by no more than 10 percent of the total value of the contract or \$25,000 per fiscal year, whichever is less, and to execute and amend any ancillary documents, and other actions as necessary to uphold the contracts and any subsequent amendments.

BACKGROUND

In 2017, Sacramento County went live with the initial instance of its Oracle Service Cloud (OSC) Customer Relationship Management (CRM) solution. The goal for the initial instance of OSC CRM was to move the county away from the legacy Lagan customer relationship management system and fully on to OSC platform. The successful migration from Lagan to OSC was completed and went live in September of 2017. Full integration and efficient reporting were not achieved with the first instance of OSC.

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The County is now seeking to utilize best practices and reduce customized fields, streamline reporting and manual efforts, reduce work-a-rounds and fully integrate the OCS CRM with departmental line of business systems.

Procurement Process

On September 19, 2018 the County issued Request for Proposals 8597 for OSC Reconfiguration of the 311 CRM. The County posted the solicitation on the Public Purchase website and notified 598 vendors. Of the firms solicited, 53 are State of California micro businesses, and 49 are local. As part of the RFP process vendors were given the opportunity to submit written questions and attend a pre-bidders conference. An Addendum was released with answers to 51 questions. By the RFP closing date of November 8, 2018, seven responses were received, two were from local businesses. A 5% local business preference was applied to the two local vendors that responded, but it did not make any difference in the recommended awardee.

The evaluation team was comprised of staff from three different departments (Technology, General Services, and Office of the County Executive). All evaluation team members and the person signing the contracts have read, understand and documented that they will comply with the County procurement code of ethics and all required forms are in the RFP/contract file (ATT-1).

The evaluation process consisted of two phases. Phase one included evaluation of the written proposals, including a review of minimum qualifications (such as the number of years in business and having experience with OSC in public sector environments), how the vendors proposed to meet the County's requirements, experience and project management capabilities. After the initial evaluation was complete, five (5) vendors were invited to provide demonstrations of their configuration and system integration experience as part of phase two. These demonstrations assisted the staff in fully understanding the operation of the proposed solution. Phase two also included reviewing support and maintenance, product testing, pricing and reference checks.

After conducting a comprehensive evaluation based on criteria listed in the RFP, the evaluation team concluded that it is in the County's best interest to award the contract to CPI. Based on best value and experience, CPI was selected as the vendor to enter into contract negotiations. CPI is not a local or small business.

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FINANCIAL ANALYSIS

The estimated contract from February 1, 2019 through January 31, 2020 is \$177,535, with the option for additional post implementation support at a cost of \$1,900 – \$2,800 per month after the first year of support covered under the contract. Funding for this work is budgeted within Department of Technology, which is subject to annual Board review and approval.

Attachments:

Resolution

ATT 1 – RFP Final Score

ATT 2 – RFP Intent to Award

RESOLUTION NO. 2019-0015

RESOLUTION TO DELEGATE AUTHORITY TO THE COUNTY PURCHASING AGENT OR DESIGNEE TO APPROVE AND EXECUTE AN AGREEMENT WITH COMMUNICATIONS PRODUCTS INC. FOR RECONFIGURATION OF THE COUNTYWIDE CUSTOMER RELATIONSHIP MANAGEMENT SYSTEM AND INTEGRATION OF THE COUNTY CRM WITH TWELVE LINE OF BUSINESS SYSTEMS

WHEREAS, the Sacramento County 311 Communications Center is requesting the Board delegate authority to the County Purchasing Agent, or Designee, to approve and execute an agreement with Communications Products Inc. (CPI) in the amount of \$177,535 plus an additional amount not to exceed \$50,000 for possible post implementation support; and

WHEREAS, on September 19, 2018, Request For Proposals (RFP) 8597 to Reconfigure Oracle Service Cloud (OSC) Countywide Customer Relationship Management (CRM) system and fully integrate the newly configured CRM with twelve of Sacramento County Departmental line of business systems was posted on the Public Purchase website; and

WHEREAS, 598 vendors were notified and seven vendors submitted complete proposals by the stated deadline and an evaluation team comprised of three county departments evaluated vendors based on the criterion of Organization and Experience, Project Management, Post Implementation Support, Functional Requirements and Narrative Requirements before selecting five vendors to move on to phase two and be evaluated on the additional criterion of Proposer Demonstrations, Customer References and Pricing; and

WHEREAS, the evaluation team selected Communications Products Inc. as the vendor to execute the reconfiguration and integration for OSC CRM; and

WHEREAS, expertise with Oracle Service Cloud and integration of departmental systems are not services currently or ever performed by County employees, and therefore, not subject to the requirements of County Charter Section 71-J.

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NOW, THEREFORE, BE IT RESOLVED by the Board of Supervisors of the County of Sacramento, State of California, that the foregoing recitals are true and correct; and, after consideration of the information presented, the Board hereby approves that the County Purchasing Agent, or designee, is hereby delegated the authority and directed to negotiate, approve and execute an agreement in the amount of \$177,535 plus an additional amount not to exceed \$50,000 for possible post implementation support for a one-year term with CPI, or with the next highest scorer of the RFP if negotiations with CPI are not successful, to execute and amend any ancillary documents, and to perform everything necessary to carry out the purpose of this Resolution.

BE IT FURTHER RESOLVED that the County Purchasing Agent, or designee, is authorized to amend this agreement for non-monetary changes, monetary decreases, to terminate or to assign the agreement, and to monetarily increase the total agreement amount by no more than 10 percent of the total value of the agreement or \$25,000 per fiscal year, whichever is less.

RESOLUTION TO DELEGATE AUTHORITY TO THE COUNTY PURCHASING AGENT OR
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On a motion by Supervisor Peters, seconded by Supervisor Serna, the foregoing Resolution was passed and adopted by the Board of Supervisors of the County of Sacramento this 15th day of January, 2019, by the following vote, to wit:

AYES: Supervisors Frost, Nottoli, Peters, Serna, Kennedy

NOES: None

ABSENT: None

ABSTAIN: None

RECUSAL: None

(PER POLITICAL REFORM ACT (§ 18702.5.))



(SEAL)

ATTEST: *Florence Evans*
Clerk, Board of Supervisors

Pat O'Rourke

Chair of the Board of Supervisors
of Sacramento County, California

In accordance with Section 25103 of the Government Code
of the State of California a copy of the document has been
delivered to the Chair of the Board of Supervisors, County
of Sacramento on 1.15.19

By: *J. O'Rourke*
Deputy Clerk, Board of Supervisors

FILED
BOARD OF SUPERVISORS

JAN 15 2019

Florence Evans
Clerk of the Board

ATTACHMENT 1

RFP 8597 Evaluation Criteria Final Score

RFP 8597 Oracle Service Cloud Reconfiguration		AST		CPI		Cybermoor		Eclat		Graviton		LCS		Nebulogic	
Evaluation Criteria	% Total Points	Max Points	Weighted Score	Weighted Score	Weighted Score	Weighted Score	Weighted Score	Weighted Score	Weighted Score	Weighted Score	Weighted Score	Weighted Score	Weighted Score	Weighted Score	Weighted Score
Pre-Screen	N/A	Pass/Fail	Pass	N/A	Pass	N/A	Pass	N/A	Pass	N/A	Pass	N/A	Pass	N/A	Pass
Phase 1															
Minimum Qualifications (App Z)															
Organization and Experience (App S)	30%	300	2.75	206	2.75	206	0.50	38	1.75	131	1.50	113	2.75	206	3.75
Project Management (App W)	15%	150	2.25	84	3.50	131	1.50	56	2.00	75	2.25	84	2.75	103	3.00
Post Implementation Support (App X)	10%	100	2.75	69	3.50	88	1.50	38	2.00	50	1.50	33	1.75	44	1.75
Functional Requirements (App T)	30%	300	1.75	131	3.50	263	1.75	131	1.75	131	1.75	131	3.00	225	2.50
Narrative Requirements (App U)	15%	150	2.25	84	3.75	141	0.50	19	1.88	70	1.50	56	3.25	122	2.88
Total Phase 1	100%	1000		575.0		828.1		281.3		457.8		421.9		700.0	
Phase 2															
Proposer Demonstrations	50%	500	2.10	262.5	3.88	485		0	3.00	375		0	3.25	406.25	3.00
Customer References (App H)	20%	200	1.50	75	3.75	137.5		0	1.38	69		0	1.50	75	3.13
Pricing (App I)	30%	300		165.17		224.43		66.27		300.00		133.4		56.27	94.77
Total Phase 2	100%	1000		502.7		896.9		66.3		744.0		133.4		537.5	626.3
														Added 5% to Pricing Score Due Local Vendor	

Scale is 0 through 4:	Score:
Exceeds expectations	4
Meets expectation, sometimes exceeds	3
Meets expectations	2
Sometimes meets expectations	1
Does not meet expectations/No Response	0

Instructions:
 1) Team to grade the response on a scale from 0 to 4 and insert their total score for each evaluation criteria in the "score" column above. (column highlighted yellow)
 2) The report card will auto calculate the "weighted score" appropriately.
 3) All weighted scores will be summarized into a team score to rank the bidders responses.

MEMORANDUM

DATE: December 12th, 2018
TO: Jesse Rosario, Senior Contract Services Officer
FROM: Angela Fanning, BA Analyst II
SUBJECT: RFP 8597- ORACLE SERVICE CLOUD RECONFIGURATION

With your assistance and the participation of the Sacramento Department of Technology (DTech), we evaluated proposals from seven proposers that were submitted on the Public Purchase website in response to request for proposal (RFP) #8597 – ORACLE SERVICE CLOUD RECONFIGURATION. The proposers who participated were APPLICATIONS SOFTWARE TECHNOLOGY CORP, COMMUNICATIONS PRODUCTS INC, CYBERNOOR CORP, ECLAT INTEGRATED SOFTWARE SOLUTIONS INC, GRAVITON CONSULTING SERVICES INC, LCS TECHNOLOGIES INC, NEBULOGIC TECHNOLOGIES LLC.

The County acknowledges that all the proposers exhibited expert-level in-depth knowledge of Oracle Service Cloud and its features. The hard work was clearly visible in their demonstrations. It was difficult for the county to select the best one as the evaluation committee agreed that they all were capable of re-implementing Oracle Service Cloud for 311. Since we must award the contract to only one of the proposers, in the end it came down to selecting the one that stood out.

After reviewing the proposals, customer references, reviewing costs, and watching presentations, we recommend awarding the contract to COMMUNICATIONS PRODUCTS INC for their proposed system configuration. The evaluation committee agrees that CPI stood out as the highly seasoned team and well suited proposer for our needs.

The summary of our evaluation is on the next page.

Pre-Screening: (Minimum Requirements)

- Customer References (3)
- In business continuously for at least (5) years

All proposed vendors passed pre-screening.

Phase 1:

- Organization and Experience

We evaluated the vendor's experience based on Oracle Service Cloud implementations in public sector for operations similar to County 311 Call Center in size and complexity.

- Project Management

We evaluated the roles and responsibilities that was proposed as part of the project implementation and methodology along with the milestones and deliverables in alignment with county's need for resources and ease of understanding and review of the deliverables

- Post Implementation Support

Based on the county's post support needs, we evaluated all vendors on proposed warranty periods, post implementation support models, response times, cost, and training programs.

- Functional Requirements

We evaluated the functional requirements responses based on response codes, along with proposed additional costs outside of scope.

- Narrative Requirements

We evaluated the experience-based knowledge of advanced features of Oracle Service Cloud and the expert advice whether to implement certain features to achieve required functionality. The highest scorers also included justification against using certain features for specific use cases with the help of examples.

Phase 1 Final Scores (1000 Maximum Points)						
CPI	Nebulogic	LCS	AST	Eclat	Graviton	Cybernoor
828.1	732.8	700	575	457.8	421.9	281.3

Proposers passing Phase 1, were invited for demonstrations. All proposers, APPLICATIONS SOFTWARE TECHNOLOGY CORP, COMMUNICATIONS PRODUCTS INC, ECLAT INTEGRATED SOFTWARE SOLUTIONS INC, LCS TECHNOLOGIES INC, NEBULOGIC TECHNOLOGIES LLC, gave in-person presentations, based on a provided script, to demonstrate their proposed system configuration. After evaluating all proposers against the previously mentioned criteria, we recommend COMMUNICATIONS PRODUCTS INC for their proposed system configuration, to be awarded this contract.

Phase 2:

- Proposer Demonstrations

We evaluated proposers based on clarity, thoroughness, and suitability of the content presented (demonstration of Oracle Service Cloud features to relate to 311 operations/functions). In addition to, coherence, interaction with the attendees, and ability to demonstrate on the spot examples of best practices and previous successful implementations.

- Customer References

We evaluated the proposers based on the customer reference responses received (*or not received*). The references were requested to provide feedback around results of the project, integration services provided by the proposer, understanding of needs, conflict resolution, time to respond, and meeting/exceeding expectations.

- Pricing

We evaluated the appropriateness of the cost (underestimate/overestimate) based on scope, understanding of requirements, possibility of revisions in estimates (during demonstration discussions).

Phase 2 Final Scores (1000 Maximum Points)				
CPI	Eclat	Nebulogic	LCS	AST
896.9	744	626.3	537.5	502.7

Top two proposed vendor's follow-up conference call:

After completing follow-up conference calls as requested by the County Network Architect and project team with the top two proposed vendors further discussing questions around integration platform and traffic flow, we recommend COMMUNICATIONS PRODUCTS INC for their proposed system configuration, to be awarded this contract.