




CITY OF HAMILTON
CORPORATE SERVICES DEPARTMENT
Information Technology Division

TO:	Chair and Members Audit, Finance and Administration Committee
COMMITTEE DATE:	June 6, 2024
SUBJECT/REPORT NO:	Constituent Relationship Management Solution (FCS24036) (City Wide) OUTSTANDING BUSINESS LIST
WARD(S) AFFECTED:	City Wide
PREPARED BY:	Michael Nobuto (905) 546-2424 Ext. 6190 Kathy Nuttall (905) 546-2424 Ext. 4571
SUBMITTED BY:	Doug Kay Acting Director, Information Technology, Corporate Services
SIGNATURE:	

RECOMMENDATION(S)

- (a) That, pursuant to Procurement Policy #11 – Non-competitive Procurements, Council approve a single-source procurement for CivicTrack software, a Constituent Relationship Management Solution, as a one-year pilot to support the requirements of Council and their Staff, and that the Director of Information Technology, or designate, be authorized to negotiate and execute an agreement and any ancillary documents required with Momentum BPO Inc., in a form satisfactory to the City Solicitor;
- (b) That the Director of Information Technology, or designate, be authorized to amend any contracts executed and ancillary documents as required if a supplier(s) identified in this report undergoes a name change;
- (c) That staff conduct a review with Council and Council Staff on the effectiveness of the solution before the end of the one-year pilot, and if the solution is deemed to meet the needs of Council and Council staff, that the Director of Information Technology, or designate, be authorized to negotiate a contract extension as identified in Recommendation (a) via Procurement Policy #11;
- (d) That, should the pilot solution prove unsuitable before the end of the one-year pilot, staff bring a follow-up recommendation report to Council;

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OUR Mission: To provide high quality cost conscious public services that contribute to a healthy, safe and prosperous community, in a sustainable manner.

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- (e) That the City of Hamilton, Information Technology Division, be responsible for administering the contract and ensuring the solution meets all Corporate Security and Privacy requirements, and that if Council and Council members opt to use this solution, the pro-rated costs be charged back to the respective Council Office expenses;
- (f) That, as part of an enhanced support model, Council approve a temporary Full-Time Equivalent (FTE) position to be funded from existing IT Operating Budget 350035 to provide enhanced support to the Office of the Mayor, Council, Council Staff, City Manager's Office and City Hall Staff. The support will include facilitating the adoption and initial maintenance of technology tools, including the support of the Customer Relationship Management Solution;
- (g) That, after a nine-month trial period, staff assess the value for money and service experience enhancements, and if appropriate, bring forward a business case for consideration as part of the 2025 Budget, and;
- (h) That the Outstanding Business List item respecting Constituent Management Software, added February 16, 2023, be removed.

EXECUTIVE SUMMARY

Motion 11.1, approved at the February 16, 2023, Audit Finance and Administration Committee, directed Information Technology (IT) staff to explore options to assist the Councillors and staff with constituent case management. Through the collection and review of requirements, it was deemed that a new solution would need to be sourced to meet the requirements. A review of market solutions was conducted via an IT third-party roster vendor and solutions ranked, with CivicTrack software being identified as the recommended solution for the one-year pilot.

As part of enhanced support model, IT will provide a dedicated support role to the Office of the Mayor, Council, Council Ward Offices, City Manager's Office and City Hall, funded from existing IT capital funding. Staff will review the value for money, and if applicable, include any budget impacts as part of 2025 Budget.

Alternatives for Consideration – See Page 4.

FINANCIAL – STAFFING – LEGAL IMPLICATIONS

Financial: Assuming more than 12 total users, the cost (based on the current pricing model) is \$396/user/year plus taxes. The cost per Council Member office would range from approximately \$800/year (assuming two users) to \$2,000/year (assuming five users). An estimated total cost for all of

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Council and their staff (assuming approximately 50 users) would be \$20,000/year. The staffing cost for a temporary nine-month IT support position is approximately \$63,000.

Staffing: To ensure proper support for solution implementation as well as provide an enhanced technology services support model for the Office of the Mayor, Council, and Council Staff, a single person will be identified to manage the vendor relationship, co-ordinate, and provide support. This individual will serve as the point of contact for both users and the vendor. Their responsibilities will include handling vendor relations management, managing or escalating resolutions, effective communication with all parties involved, and general technical support to Council. This support aims to facilitate adoption and provide enhanced technology support to the Office of the Mayor, Council, Council Staff, City Manager's Office, and City Hall Staff. The estimated staffing cost for one FTE is \$80,000/yr.

Legal: Legal staff will be required to assist with contract review and execution.

HISTORICAL BACKGROUND

At the February 16, 2023, Audit Finance and Administration Committee meeting, Motion 11.1 was carried, directing IT staff to explore user-friendly database software options and report back to the Audit, Finance, and Administration Committee with potential solutions and associated costs. Requirements for the software were gathered from Council staff members and used as criteria for evaluating software options. It was concluded that there is currently no standard solution within the City to meet the requirements identified.

POLICY IMPLICATIONS AND LEGISLATED REQUIREMENTS

N/A

RELEVANT CONSULTATION

- Council members and Ward office staff
- Corporate Services Department, Financial Services Taxation and Corporate Controller Division, Procurement Section
- Corporate Services Department, Legal and Risk Management Services Division, Legal Services
- Corporate Services Department, Information Technology Division, Contract Administration Section

ANALYSIS AND RATIONALE FOR RECOMMENDATION

Based on an environmental scan by a third-party City roster vendor, CivicTrack was identified as a leading option, offering features such as tracking constituent interactions, building a contact database, storing relevant documentation, and robust reporting. It follows a Software as a Service (SaaS) model, and the solution would not solely rely on IT technology infrastructure to operate. Seven solutions were reviewed, evaluated, and scored based on features, cost, and support.

In reviewing solution implementation success factors and the broader technology support model, staff identified the need for enhanced support for the Office of the Mayor, Council, Council Ward Offices, City Manager's Office and City Hall to facilitate the adoption and support for technology tools, including the Customer Relationship Management Solution as a primary initial focus of support to ensure a successful go-live (launch) for the solution. A nine-month trial of this enhanced support model is being recommended that will also be evaluated for value for money.

ALTERNATIVES FOR CONSIDERATION

Council could direct staff to develop and issue a Request for Proposal (RFP) for a Constituent Management Solution with input from Council and Council Staff regarding solution requirements. This process would require the involvement of Council members and staff from Information Technology, Procurement and Legal to inform requirements. It is estimated this process would take six to nine months to complete and require approximately 100 staff hours across the various departments.

APPENDICES AND SCHEDULES ATTACHED

N/A