

AN ORDINANCE 2009-03-19-0220

**AUTHORIZING A CONTRACT WITH THE STATE OF TEXAS DEPARTMENT OF INFORMATION RESOURCES (DIR) FOR SERVICES FROM GARTNER, TO PROVIDE THE CITY OF SAN ANTONIO WITH CRM PLANNING AND PROCUREMENT ASSISTANCE FOR THE INFORMATION TECHNOLOGY SERVICES DEPARTMENT, FOR A TOTAL COST OF \$312,240.00.**

\* \* \* \* \*

**WHEREAS**, the City seeks to procure a software solution to replace the current 311 mainframe application and to create an enterprise Customer Relationship Management (CRM) solution for all city departments; and

**WHEREAS**, Gartner has developed subject matter experts, procurement and repeatable processes that can be leveraged and will streamline the time and effort required for this project; and

**WHEREAS**, the Information Technology Services Department (ITSD) seeks assistance from Gartner to help with the procurement using the Texas Department of Information Resources contract DIR-SDD-204; **NOW THEREFORE**,

**BE IT ORDAINED BY THE CITY COUNCIL OF THE CITY OF SAN ANTONIO:**

**SECTION 1.** The offer of Gartner, under the State of Texas Department of Information Resources contract DIR-SDD-204, in the amount of \$312,240.00, to provide the City of San Antonio with consulting services, is hereby approved. A copy of the Proposal is attached hereto and incorporated herein as Attachment 1. The Director of the Information Technology Services Department or his designee may execute this document and any necessary additional documents to carry out the purpose of this ordinance.

**SECTION 2.** The total cost associated with this ordinance is \$312,240.00, available from the FY09 IRSS Capital Project budget.

**SECTION 3.** The financial allocations in this Ordinance are subject to approval by the Director of Finance, City of San Antonio. The Director may, subject to concurrence by the City Manager or the City Manager's designee, correct allocations to specific Cost Centers, WBS Elements, Internal Orders, General Ledger Accounts, and Fund Numbers as necessary to carry out the purpose of this Ordinance.

Elements, Internal Orders, General Ledger Accounts, and Fund Numbers as necessary to carry out the purpose of this Ordinance.

**SECTION 4.** This Ordinance shall be effective on the tenth day after passage.

**PASSED AND APPROVED** this 19th day of March, 2009.



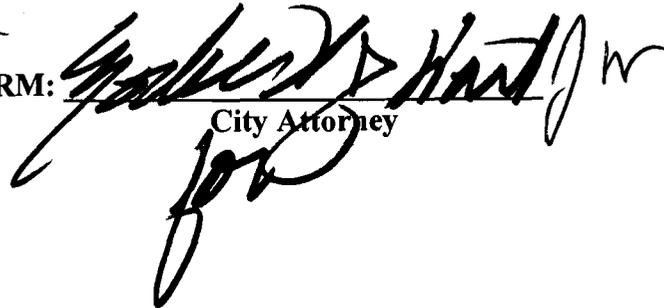
M A Y O R

**PHIL HARDBERGER**

**ATTEST:**

  
City Clerk

**APPROVED AS TO FORM:**

  
City Attorney

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7676 Hazard Drive, Suite 810  
San Diego, CA 92108

# Gartner®

12 February 2008

Mr. Hugh Miller  
Chief Technology Officer  
Information Technology Department  
City of San Antonio  
515 S. Frio Street  
San Antonio, Texas 78207

E-mail: [hugh.miller@sanantonio.gov](mailto:hugh.miller@sanantonio.gov)

Engagement: 222643110

Re: CRM Planning and Procurement Assistance

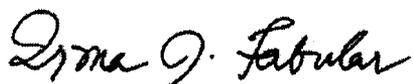
Dear Hugh:

Gartner is pleased to submit our proposal to the City of San Antonio (City, CoSA) for continued consulting assistance on the City's Customer Relationship Management (CRM) initiative. This proposal is based on the results of the first phase of our assistance, recent discussions with you, and our deep expertise in CRM.

Gartner is the world's leading IT research and advisory firm, and has been serving the needs of public sector organizations for nearly 30 years. We can leverage that knowledge and the experience of our consultants to provide you with the best possible advice and support as you work to deliver this critical project for the City. In addition, our current experience working with the City makes Gartner exceptionally well-positioned to continue assisting CoSA with this important initiative.

We look forward to assisting you in the subsequent planning and procurement phases of the CRM initiative.

Sincerely,



Irma Fabular

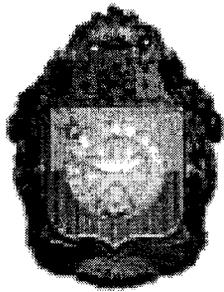
cc: Jan Harris, Gartner

Attachment

**ATTACHMENT 1**

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■ ■ ■ A Proposal for  
**City of San Antonio**



**CRM Planning and Procurement Assistance**

12 February 2008  
Engagement: 222643110

**Gartner.**

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■ ■ ■ **Proposal**

**Gartner.**

## 1.0 Executive Summary

### 1.1 Overview and Understanding

The City of San Antonio (City) is a large municipal organization with about 12,000 full time employees and 2,000 part time employees in 38 different departments.

The Information Technology Services Department (ITSD) supports the City's 311 Services through a centralized call center and a mainframe application that supports delivery of 311 services. The City intends to replace this application with a commercial-off-the-shelf (COTS) customer relationship management (CRM) solution.

Given the opportunity to replace this system and evaluate associated customer service business processes, the City has embarked on establishing an enterprise-wide vision for delivering customer services and for acquiring the necessary technology solutions to support this vision. Efforts are underway to confirm a broader and citywide vision for enhancing citizen-centric services through use of a standard CRM system in 311, Council Offices, and Departments. In support of these efforts, the City needs to address the following areas:

- Conduct additional project planning, including:
  - a) solidifying the business and technical scope of a CRM solution;
  - b) estimating one-time and ongoing costs;
  - c) determining phased deployment strategies;
  - d) identifying Council and Department project participants and roles and responsibilities;
  - e) establishing an implementation project plan;
  - f) identifying risks and developing a mitigation plan, and
  - g) developing organization change and communication management plans
- Initiate knowledge base information gathering for top priority informational requests
- Conduct discussions with a broader set of City stakeholders to solicit input on functional and technical requirements
- Develop implementation, performance and support requirements
- Update the Request for Competitive Sealed Proposals (RFCSP) document that reflects the City's enterprise scope and phasing strategies
- Support the competitive procurement process including evaluating vendor product and services proposals from an "apples-to-apples" perspective
- Successfully managing the implementation project, including organization change management needs.

### 1.2 Objectives

The City envisions that Gartner assistance will be targeted towards providing project management and industry subject matter expertise in all areas of project planning, procurement, and implementation oversight.

Specifically, this assistance will address:

- Validation of the City's overall vision and development of a phased approach
- Project planning and management
  - Develop project implementation plan draft
  - Develop project and risk management plans
  - Develop organizational change management and communication plans
  - Establish project steering committee meeting schedules and approach
  - Re-prioritize project team activities and efforts
- Procurement Support
  - RFCSP Section Development
    - Background
    - Pricing Schedule
    - Project Scope
    - Requirements (functional, technical, implementation, performance and support)
  - Evaluation Process Support
    - Prepare evaluation committee for activities
    - Act as technical advisor for evaluation committee
    - Validate pricing for procurement office
  - Contract Negotiation Support

### 1.3 Key Benefits of Gartner Approach

The Gartner team includes individuals with significant experience in planning, evaluating and implementing customer relationship management/work order management (CRM/WOM) systems in local governments. They are thus equipped to ensure that problems are avoided. The team has the breadth and depth to position the right expert for the relevant issues pertaining to the City's CRM initiative.

We have assisted other organizations on similar large initiatives. Table 1 illustrates some of our recent engagements and team members who were involved:

**Table 1. Sample Customer Relationship Management/Work Order Management (CRM/WOM) Client List and Team Members**

Client	Project	Team Members
City of San Francisco, California	311/CRM Strategy and CRM/WOM Requirements Development	Phoebe Cameron Alistair McKinnon Rich Flowerree John Kost Esteban Kolsky
City of Sacramento, California	311/CRM Strategy, CRM/WOM Procurement Assistance, Project Management	Phoebe Cameron Rich Flowerree
City of Denver, Colorado	CRM/WOM Requirements Validation	Phoebe Cameron Rich Flowerree John Kost Esteban Kolsky
City of Toronto, Canada	CRM/WOM RFP Review	Alistair McKinnon
Nashville, Tennessee	311/CRM/WOM Strategy	Alistair McKinnon John Kost
New York City, New York	CRM/WOM Procurement Assistance CRM Functionality Expansion Planning	Alistair McKinnon Esteban Kolsky Phoebe Cameron
Birmingham City Council, England	311/CRM/WOM Strategy	Alistair McKinnon John Kost

In addition to our extensive experience working with local government CRM efforts, Gartner will also provide the following value to the City’s initiative.

**Table 2. Gartner Value Proposition**

<b>Objectivity and Independence</b>	All consulting firms claim to be objective—Gartner is the one firm whose objectivity and independence are tested and proven in the marketplace every day.
<b>Deep Government Expertise</b>	Gartner understands the unique business challenges and idiosyncrasies in the government environment. This enables us to: <ul style="list-style-type: none"> <li>■ Identify potential issues faster, and ensure that they are addressed in project plans and designs</li> <li>■ Provide key information on the vendor marketplace as it relates to CRM and government trends, products and services</li> <li>■ Communicate with multiple levels and groups of decision makers</li> </ul>
<b>Credibility</b>	In order to achieve success on multiyear projects, organizations need to build and maintain confidence with many key decision makers. Gartner has a track record of providing credible advice to C-level executives, financial markets, government and business/program management across the globe. In fact, many of our competitors rely on Gartner to corroborate and validate their own approaches and recommendations.
<b>Value Added Breadth and Depth of Resources</b>	Gartner has extensive intellectual capital and industry research that will be leveraged for the City’s initiative. No other firm can offer the unique combination and strength of Gartner’s global resources and “bench strength.” This will help ensure that the City’s planning, procurement, and implementation process is backed by industry best practices and the best “mind share” in the information technology market.

<b>Seasoned Project Team</b>	Gartner's veteran team of consultants and research analysts will provide: <ul style="list-style-type: none"> <li>■ Confidence that recommendations are borne of real-life experience</li> <li>■ Proactive solutions because we are able to anticipate potential problems</li> <li>■ Efficiencies and minimal overhead since our associates have worked together in the past</li> </ul>
<b>Tailored, Scalable Approach</b>	Gartner has extensive intellectual capital pertinent to products and services. These can be customized and adjusted to suit the needs of different projects. Gartner brings experience, best practices and structure—not a dogmatic, inflexible methodology.

## 2.0 Proposed Project Team and Organization

As appropriate, Gartner consultants who have previously worked with the City will be engaged on planning and procurement phases of the City's CRM initiative. This will ensure that knowledge gained from our previous engagement is leveraged.

We propose that Ms. Phoebe Cameron lead this engagement with the City. Ms. Cameron has worked with a number of public sector organizations in selecting and implementing a variety of CRM/WOM solutions.

Ms. Irma Fabular will continue to have executive responsibility for quality assurance for this engagement. She will be responsible for assuring the quality of both the overall process and key deliverables for this project. Ms. Fabular has more than 20 years of experience in the IT industry and in procuring and implementing large, complex enterprise solutions in the public sector. Ms. Fabular also has overall responsibility for all Gartner consulting engagements with the City.

Mr. Alistair McKinnon will assist on the project as a subject matter expert (SME). Mr. McKinnon is one of Gartner's leaders in the CRM arena. He has assisted state and local government organizations in the procurement of CRM products and services.

The assigned project team will be supported by Gartner research analysts on an as-needed basis.

Our proposed project team structure and roles and responsibilities are described below.

- **Engagement Manager/Project Executive.** Provides executive leadership and direction to the project team, including the framework for project approach and deliverables. Has responsibility for success of the Gartner engagement, including review of deliverables. Coordinates with the client's project executive sponsor(s).
- **Quality Reviewer.** Ensures overall quality of deliverables and client satisfaction. Conducts internal review of key client deliverables with Gartner project team prior to delivery to client.
- **Project Consultant.** Works closely with client to complete specified work plan tasks and high-quality deliverables. Conducts data collection and analysis, and assists in development of deliverables.
- **Subject Matter Expert.** Provides depth and breadth of expertise in specific areas to support the development of client deliverables. As appropriate, assists in facilitating client workshops to build consensus around specific strategy areas.

We estimate that we will have a core project team of three to four resources who will focus on the successful completion of the project. In addition, we will utilize subject matter experts from both our Research and Consulting organizations that will be targeted at specific areas. Our consultants are senior professionals with extensive background in IT and all aspects of project

management. In addition, they have performed a significant number of projects in the area of vendor evaluation and procurement in the public sector arena .

### 3.0 Statement of Work

The proposed statement of work is based on Gartner experience and intellectual capital in conducting similar engagements. Please note the following as they pertain to our proposed consulting services scope.

- Gartner research and consulting recommendations are produced independently by the Company's analysts and consultants, respectively, without the influence, review or approval of outside investors, shareholders or directors. For further information on the independence and integrity of Gartner research, see "Guiding Principles on Independence and Objectivity" on our Web site, [www.gartner.com](http://www.gartner.com) or contact the Office of the Ombudsman at [ombudsman@gartner.com](mailto:ombudsman@gartner.com) or +1 203 316 3334.
- Any contract negotiations assistance is provided by Gartner as business advice. Gartner assumes that the City has legal counsel that will assist on all contractual terms and conditions pertaining to the CRM initiative.

### 3.1 Project Steps and Deliverables

#### ***Step 0. Project Initiation and Ongoing Project Management***

**Objectives:** Ensure all project team members and CoSA stakeholders have a consistent view of project objectives, activities, schedule, roles and expectations.

**Process:**

- Review and clarify project objectives, scope, and approach
- Review key project timeline dates and resources
- Identify responsibilities of all project team members
- Identify additional CoSA participants required for the engagement and the expected level and timing of their participation
- Develop project schedule
- Conduct weekly project status meeting (30 minutes to one hour) for 15 weeks

**Deliverable:**

- Initial project schedule and weekly project status reports (assumes up to 15 status reports until award of vendor contract)

**Timeline:**

- Week 1 for project kickoff; weekly for ongoing project management

#### ***Step 1. Validate CRM City Vision and Develop Phasing Strategies***

**Objectives:** Ensure executive buy-in on overall vision and phased approach for implementation of an enterprise-wide CRM system

*Process:*

- Complete analysis of business executive input to establish basis for phased approach
- Conduct survey of all City departments to establish a full understanding of customer service environment and potential use of the system (includes existing systems, staffing for customer service support, volume of customer contacts through each channel, understanding of priority information and service requests)
- Present draft vision to City business executives and solicit input on recommended phased approach
- Document final vision and phasing strategies based on executive input
- Facilitate communication of final vision and phased approach

*Deliverables:*

- Survey key findings
- Documented vision and phased approach

*CoSA Participation:*

- Schedule project participants
- Participate in discussions
- Establish communication media (e.g., leverage existing communications channels)

*Timeline:*

- Weeks 1 - 5

**Step 2. Develop Project Management and Risk Management Plans**

**Objectives:** Document project management and risk mitigation plans to ensure common understanding of enterprise CRM project scope, objectives, timelines, estimated costs, risks, resources, and mitigation plan

*Process:*

- Use previous assessment and subsequent interview results to develop project planning and risk mitigation documents
- The project plan will incorporate
  - Project timeframes and phasing
  - Installation schedules/milestones
  - Resource requirements
  - City policy issues
  - Transitional issues (for example, operations, facilities, systems)
  - Interim solutions
- Communicate project and risk mitigation plans

- Update planning documents as appropriate based on additional data from subsequent requirements definition and RFCSP development efforts

*Deliverable:*

- **Draft and Final Draft - Project Management and Risk Mitigation Plans:**

- Project Budget
- Project Plan and Schedule
- Risk Management Plan
- Project Resources

*CoSA Participation:*

- Provide input on technical interfaces, applications initiatives, and interdependencies

*Timeline:*

- Weeks -4 - 6

**Step 3. Develop Organization Change Management and Communication Plans**

**Objectives:** Ensure the City identifies and successfully executes critical organizational change management and communication strategies to facilitate acceptance and use of the new CRM system.

*Process:*

- Obtain an understanding of existing City organizational change management and communication processes and vehicles
- Use previous assessment and subsequent interview results to develop organizational change management and communication plan documents
- Develop the Change Management Plan that includes:
  - Introduction
  - Change Management Objectives and Strategies
  - Change Management Critical Success Factors
  - Change Management Activities
  - Change Management Roles and Responsibilities
  - Change Management Risk Mitigation
- Develop the Communications Plan that includes:
  - Change Commitment Model
  - Communication Objectives
  - Guiding Principles
  - Communication Process
  - Key Messages
  - Roles and Responsibilities

- Communication Matrix
- Launch Change Management and Communication Plan activities

*Deliverable:*

- ***Draft and Final Draft – Organization Change Management and Communication Plans***

*CoSA Participation:*

- Provide input on organizational change management and communication approaches used in the City currently

*Timeline:*

- Weeks 4 - 6

**Step 4. Complete RFCSP Document and Assist in Procurement Process**

**Objectives:** Refine technical and functional requirements previously completed to ensure that they reflect full scope of enterprise CRM. Update requirements to include implementation services and operational support.

*Process:*

- Collaborate with project team to develop Section I (background) and Section II (scope of services, statement of work, and technical requirements)
- Customize Part C (under attachment B) vendor submittal requirements for experience, history, and past performance
- Develop proposal response and pricing templates
- Use survey instruments and facilitated workshops to collect additional requirements
- Provide input on vendor selection process and evaluation criteria
- Work with core project team and procurement analyst to finalize RFCSP

*Deliverable:*

- ***Draft and Final Draft – RFCSP Section I and II and Submittal Requirements***
  - Project Background and Objectives
  - Scope of Services
  - Functional Requirements
  - Technical Requirements
  - Implementation Requirements
  - Proposal Response and Pricing templates (includes: Vendor History and Performance Response Submittal)
- ***Draft and Final Draft – Q&A Response to Vendor Written Questions***

*CoSA Participation:*

- Schedule project participants
- Participate in discussions
- Assist in data collection process by driving survey process
- Support workshops for refining functional and technical requirements

*Timeline:*

- Weeks 2 – 7 for RFCSP Sections
- Weeks 8 – 11 for Q&A Responses to Vendor Written Questions

**Step 5. Assist in Evaluating Proposals from Vendors**

**Objectives:** Streamline evaluation of vendor proposals through use of structured process and tools. Leverage industry data to obtain best value products and services from the market.

*Process:*

- Meet with CRM evaluation team to discuss structure and process
- Review vendor proposals consistent with evaluation criteria and City procurement guidelines
- Provide CRM market and subject matter expertise
- Provide input on vendor proposed pricing
- Prepare clarification questions for vendors as necessary to ensure the evaluation team has sufficient data to score vendor proposals

*Deliverable:*

- **Proposal Scoring Tool**
- **Proposal Evaluation Report**
- **Finalist Vendor Clarification Questions**

*CoSA Participation:*

- Schedule project participants
- Lead evaluation process

*Timeline:*

- Weeks –12 – 15 (depending on number of proposals, finalists, and time to present final recommendations to City Council, time to complete contract negotiations)

**3.2 Assumptions**

The following assumptions have been made in preparing this SOW:

- The scope of work focuses on current City of San Antonio enterprise CRM initiative.

- The current scope focuses on project planning and procurement assistance. Should additional support be needed for contract negotiation, project oversight and/or quality assurance in the future, additional work requests will be submitted via the change order process.
- Gartner proposed project team assumes that the project will be initiated by March 2009. Changes to the start date may impact proposed project team members.
- Gartner proposed schedule assumes project duration of approximately 15 weeks. Any changes in schedule and work effort may have an impact on project budget.
- Gartner will collaborate extensively with the CoSA team managed by a single point-of-contact Project Manager.
- Gartner will perform detailed review of up to 4 finalist proposals and provide evaluation summary as a technical subject matter expert.
- The CoSA Project Manager will be responsible for on-site logistics, meeting arrangements, conference call arrangements, work product/deliverable distribution and review, and general CoSA communications management.
- Gartner will have timely access to CoSA personnel, including any subject matter experts and key stakeholders.
- CoSA will make available any related documentation that will be necessary for the purpose of this project.
- CoSA will review all deliverables promptly to ensure adherence to the project schedule.
- CoSA will provide necessary on-site facilities for consultant analysis, workshops and meetings. This will include access to copiers, printers and Internet access to the Gartner network.
- On-site work is assumed to be in San Antonio, Texas.
- Gartner will perform some analysis, report development and follow-up work remotely from Gartner office locations.

### 3.2.1 Changes to Scope

All CoSA requests for changes to the SOW must be in writing and must set forth with specificity the requested changes. As soon as practicable, Gartner shall advise CoSA of the cost and schedule implications of the requested changes and any other necessary details to allow both parties to decide whether to proceed with the requested changes. The parties shall agree in writing upon any requested changes prior to Gartner commencing work.

As used herein, "changes" are defined as work activities or work products not originally planned for or specifically defined by this SOW. By way of example and not limitation, changes include the following:

- Any activities not specifically set forth in this SOW.
- Providing or developing any deliverables not specifically set forth in this SOW.
- Any change in the respective responsibilities of Gartner and CoSA set forth in this SOW, including any reallocation or any changes in engagement or project manager staffing.
- Any rework of completed activities or accepted deliverables.

- Any investigative work to determine the cost or other impact of changes requested by CoSA.
- Any additional work caused by a change in the assumptions set forth in this SOW.
- Any delays in deliverable caused by a modification to the acceptance criteria set forth in this SOW.
- Any changes requiring additional research analyst time or changes to research analyst resources.

### 3.3 Schedule

Gartner will use reasonable business efforts to complete the engagement in accordance with the schedule below. The time it takes Gartner and CoSA to execute a legally binding contract, and the cooperation and availability of CoSA personnel, as well as third parties, may impact the schedule.

The estimated engagement schedule based on key milestones is summarized below.

**Table 3. Estimated Engagement Schedule**

Project Steps	Key Deliverables	Target Time Frames
Step 0. Project Initiation and Management	Project schedule and status reports	Week 1 and ongoing
Step 1. CRM Vision Validation & Phasing	Validated Vision and Phasing Approach	Weeks 1 - 5
Step 2. Project Management and Risk Plan	Draft and Final Draft Project Management and Risk Plan	Weeks 4 - 6
Step 3. Organization Change Management and Communication Plans	Draft and Final Organization Change Management and Communication Plans	Weeks 4 - 6
Step 4. RFCSP Sections I and II and Response Submittal	Draft and Final Draft Sections	Weeks 2 - 7
Step 4a. Support Procurement Process	Q&A Response to Vendor Questions	Weeks 8 - 11
Step 5. Assist with Proposal Evaluation	Proposal Scoring Tool Proposal Evaluation Report	Weeks 12 - 15

## 4.0 Fee Estimate

Gartner professional fee to complete the statement of work and deliverables described in the previous sections is \$278,000. In addition, we anticipate expenses, including travel and DIR fees, not-to-exceed \$34,240. The total proposed project budget is \$312,240.

Gartner suggests the following payment milestones:

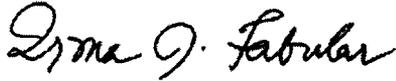
**Table 4. Payment Milestones**

Key Milestones	Fees
Project Initiation and Ongoing Project Management	\$35,000
Validated CRM Vision and Phased Implementation Approach	\$58,000
Project and Risk Management Plans	\$37,000
Organization Change and Communications Plans	\$38,000
Final Functional, Technical, and Implementation Requirements	\$65,000
Evaluation Tool and Summary	\$45,000
Total Professional Fee	\$278,000
Expenses (billed as incurred)	\$34,240
Total Project Budget	\$312,240

## 5.0 Authorization

By signing below, City of San Antonio agrees to the terms of this SOW and represents that this SOW is governed by the terms and conditions of the State of Texas Agreement (DIR-SDD-204).

SUBMITTED ON BEHALF OF GARTNER, INC.



\_\_\_\_\_  
SIGNATURE

Irma J. Fabular, Vice President and Managing Partner

\_\_\_\_\_  
PRINT NAME AND TITLE

12 February 2009

\_\_\_\_\_  
DATE

AGREED ON BEHALF OF CITY OF SAN ANTONIO

\_\_\_\_\_  
SIGNATURE

Hugh Miller

\_\_\_\_\_  
PRINT NAME AND TITLE

\_\_\_\_\_  
DATE

**Billing Address (please mark corrections)      P.O. Number**

City of San Antonio  
Accounts Payable  
Billing address  
Telephone: