

AN ORDINANCE 2009 - 12 - 03 - 0985

**AUTHORIZING AN AMENDMENT IN AN INCREASED AMOUNT OF \$83,950.00 TO AN EXISTING PROFESSIONAL SERVICES CONTRACT WITH GARTNER INC. TO PROVIDE THE INFORMATION TECHNOLOGY SERVICES DEPARTMENT (ITSD) WITH ONGOING PROJECT MANAGEMENT SUPPORT WITHIN THE ENTERPRISE CUSTOMER RELATIONSHIP MANAGEMENT (CRM) PROJECT, FUNDED BY TAX NOTES INCLUDED IN THE FY 2010 - 2015 CAPITAL IMPROVEMENT BUDGET.**

\* \* \* \* \*

**WHEREAS**, the City currently contracts with Gartner Inc., through the Texas Department of Information Resources contract DIR-SDD-204, for project management support for the Enterprise Customer Relationship Management (CRM) project; and

**WHEREAS**, the City's Information Technology Services Division (ITSD) requires additional consulting expertise from Gartner Inc. in project management for the CRM project to conduct additional due diligence in validating requirements, to assist the City with appropriate due diligence in the evaluation of the responses received, to facilitate clarification discussions with the finalists, and to facilitate the Best and Final Offer (BAFO) process and transition to subsequent procurement activities; **NOW THEREFORE**,

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

**SECTION 1.** The Enterprise Customer Relationship Management Initiative Scope Change Request of Gartner, Inc., in the amount of \$83,950.00, is hereby approved. The City Manager or her designee is authorized to approve the agreement. A copy of the document is attached hereto and incorporated herein as **Attachment 1**.

**SECTION 2.** The amount of \$83,950.00 in SAP Fund 43099000, Certificates of Obligation Capital Projects, SAP Project Definition 09-00103, IRSS Replacement aka Enterprise CRM, is authorized to be encumbered and made payable to Gartner, Inc. for project management services.

**SECTION 3.** The financial allocations in this Ordinance are subject to approval by the Director of Finance, City of San Antonio. The Director of Finance may, subject to concurrence by the City Manager, or the City Manager's designee, correct allocation to specific SAP Fund Numbers, SAP Project Definitions, SAP WBS Elements, SAP Internal Orders, SAP Fund Centers, SAP Cost Centers, SAP Functional Areas, SAP Funds Reservation Document Numbers, and SAP GL Accounts as necessary to carry out the purpose of this Ordinance.

**SECTION 4.** This ordinance shall be effective immediately upon passage by eight or more affirmative votes; otherwise, it shall be effective on the tenth day after passage.

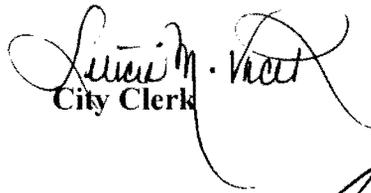
**PASSED AND APPROVED** this 3rd day of December, 2009.



M A Y O R

for **JULIÁN CASTRO**

**ATTEST:**



City Clerk

**APPROVED AS TO FORM:**



City Attorney

<b>Agenda Item:</b>	37 ( in consent vote: 7, 8A, 8B, 10, 11, 13, 15, 16, 17, 18, 21A, 21B, 22, 23, 24, 25A, 25B, 25C, 25D, 25E, 25F, 25G, 25H, 25I, 25J, 25K, 25L, 25M, 25N, 25O, 25P, 25Q, 25R, 25S, 25T, 29, 30, 31, 32, 34, 35, 36, 37, 38, 39 )						
<b>Date:</b>	12/03/2009						
<b>Time:</b>	11:43:19 AM						
<b>Vote Type:</b>	Motion to Approve						
<b>Description:</b>	An Ordinance authorizing an amendment in an increased amount of \$83,950.00 to an existing professional services contract with Gartner Inc. to provide the Information Technology Services Department (ITSD) with ongoing project management support within the Enterprise Customer Relationship Management (CRM) project, funded by Tax Notes included in the FY 2010 - 2015 Capital Improvement Budget. [Richard Varn, Chief Information Officer; Hugh Miller, Director, Information Technology Services Department]						
<b>Result:</b>	Passed						
<b>Voter</b>	<b>Group</b>	<b>Not Present</b>	<b>Yea</b>	<b>Nay</b>	<b>Abstain</b>	<b>Motion</b>	<b>Second</b>
Julián Castro	Mayor	x					
Mary Alice P. Cisneros	District 1		x			x	
Ivy R. Taylor	District 2		x				
Jennifer V. Ramos	District 3		x				x
Philip A. Cortez	District 4		x				
David Medina Jr.	District 5		x				
Ray Lopez	District 6	x					
Justin Rodriguez	District 7		x				
W. Reed Williams	District 8		x				
Elisa Chan	District 9		x				
John G. Clamp	District 10		x				

**City of San Antonio  
Enterprise Customer Relationship Management (CRM) Initiative  
Scope Change Request  
October 30, 2009**

**Background**

Gartner's support of the City's Enterprise CRM Initiative was initially scoped to be a fifteen week engagement. In order to ensure the appropriate solution and vendor are selected, the City has extended the schedule by 30 weeks. This schedule change has allowed the City to:

- Conduct additional due diligence in validating business, technical, implementation and service support requirements
- Ensure Gartner procurement process recommendations approved by the Steering Committee could be incorporated within City and State procurement guidelines
- Provide vendors with an extended timeline for response to the City's RFCSP to ensure the City obtains the most compatible and complete responses to requirements
- Ensure the City conducts the appropriate due diligence with assessment of proposal responses, references and proposed solution demonstrations
- Ensure the City has the appropriate level of technical support for finalist clarification discussions and the Best and Final Offer (BAFO) process
- Ensure the City can quickly and effectively transition from BAFO to additional procurement and/or project implementation activities

**Scope Change Requirements**

In order to accommodate the City's process and scope change requirements, Gartner's project schedule must be expanded from 15 weeks to 45 weeks. The current estimated end date is projected to be January 14, 2010.

The following table summarizes proposed changes to Gartner's existing scope of work. These changes include extension and expansion of Gartner's Ongoing Project Management activities and the addition of four steps to provide:

- Support for the City's due diligence investigations,
- Technical assistance with finalist clarification discussions and the BAFO process,
- Technical assistance related to contract negotiation, and
- Support for project transition activities in anticipation of a vendor's on boarding.

Step	Deliverables	Activities
0. Project Initiation and Ongoing Project Management	Project Schedule and Status Reports	Conduct 22 additional project status meetings and update the project schedule as required to reflect changes as agreed by the City Project Team  Conduct 2 additional Steering Committee meetings  Prepare 2 Steering Committee Status reports

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<b>Step</b>	<b>Deliverables</b>	<b>Activities</b>
6. Assist with Finalist Due Diligence Evaluation	Finalized Reference Check Notes and Summary of Reference Check Findings  Updated Evaluation Scores	Conduct oversight of the City's Reference Check process – validating the information received from conference calls and summary prepared by the City  Facilitate meetings with the Preliminary Evaluation and Evaluation Teams to adjust scores as appropriate
7. Provide Technical Assistance for Finalist Clarification Discussions and the BAFO Process	Finalist Clarification Questions  Vendor Response BAFO Materials  Updated Evaluation Scores	Work with City Procurement Staff, the Preliminary Evaluation and Evaluation Teams to:  Prepare Finalist Clarification Questions  Prepare Vendor BAFO Response Materials Assess BAFO Response Materials and provide technical assistance to Evaluation Team during BAFO evaluation  Conduct meetings with Preliminary Evaluation and Evaluation Teams to adjust scores as appropriate
8. Provide Technical Assistance for Contract Negotiation	Technical advice during contract negotiations	Should the City select a vendor, Gartner will provide 10 hours of technical assistance during contract negotiations
9. Provide Transition Planning Support	Procurement documentation  Updated project management plan  Updated project schedule  City Project Team and SME staffing plan and readiness assessment	Should the City determine not to select a vendor at this time, Gartner will provide 80 hours of support for alternative procurement options. Activities could include:  Planning for alternative procurement approach  Development of alternative procurement documentation Should the City select a vendor, Gartner will provide 80 hours of transition planning support to ensure the City is prepared for vendor on boarding. Activities could include:  Conduct project planning and readiness activities to ensure City staff members are ready for project implementation activities Support Project initiation activities and on boarding of vendor staff

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**Scope Change Impact on Project Budget**

Gartner estimates these activities will require 230 hours of additional work at a cost of \$83,950. We believe these activities will not require changes to the travel budget, so this budget does not need to be adjusted. The following table provides a breakdown of estimated hours across each of the project steps and activities required:

<b>Step / Deliverables</b>	<b>Activities</b>	<b>Estimated Hours</b>	<b>Cost</b>
0. Project Initiation and Ongoing Project Management	Conduct 22 additional project status meetings and update the project schedule as required to reflect changes as agreed by the City Project Team	44	\$16,060
	Project Schedule		
	Project Status Reports	24	\$8,760
	Steering Committee Status Reports	4	\$1,460
6. Assist with Finalist Due Diligence Evaluation	Finalized Reference Check Notes and Summary of Reference Check Findings	4	\$1,460
	Updated Evaluation Scores	8	\$2,920
7. Provide Technical Assistance for Finalist Clarification Discussions and the BAFO Process	Work with City Procurement Staff, the Preliminary Evaluation and Evaluation Teams to:		
	Finalist Clarification Questions	16	\$5,840
	Vendor Response BAFO Materials	16	\$5,840
	Updated Evaluation Scores	16	\$5,840
	Assess BAFO Response Materials and provide technical assistance to Evaluation Team during BAFO evaluation	8	\$2,920
	Conduct meetings with Preliminary Evaluation and Evaluation Teams to adjust scores as appropriate		

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<b>Step / Deliverables</b>	<b>Activities</b>	<b>Estimated Hours</b>	<b>Cost</b>
8. Provide Technical Assistance for Contract Negotiation Technical advice during contract negotiations	Should the City select a vendor, Gartner will provide 10 hours of technical assistance during contract negotiations	10	\$3,650
9. Provide Transition Planning Support Procurement documentation Updated project management plan Updated project schedule City Project Team and SME staffing plan and readiness assessment	Should the City determine not to select a vendor at this time, Gartner will provide 80 hours of support for alternative procurement options. Activities could include:  Planning for alternative procurement approach  Development of alternative procurement documentation  Should the City select a vendor, Gartner will provide 80 hours of transition planning support to ensure the City is prepared for vendor on boarding. Activities could include:  Conduct project planning and readiness activities to ensure City staff members are ready for project implementation activities  Support Project initiation activities and on boarding of vendor staff	80	\$29,200
	<b>Totals</b>	<b>230</b>	<b>\$83,950</b>

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**Next Steps**

City approval of an increase to Gartner's professional fee \$278,000 project budget. The \$83,950 increase results in a new professional fee budget of \$361,950.

Submit signed authorization of this scope change request to Gartner – see next page.

A new PO will be required reflecting a new end date of February 26, 2010 and the following updated costs for Key Milestones as follows:

Project Initiation and Ongoing Project Management (initial 15 weeks)	\$35,000
(New) Ongoing Project Management (additional 22 weeks)	\$26,280
(New) Assist with Finalist Due Diligence Evaluation	\$ 4,380
(New) Provide Technical Assistance for Finalist Clarification Discussions and the BAFO Process	\$20,440
(New) Provide Technical Assistance for Contract Negotiation	\$ 3,650
(New) Provide Transition Planning Support	\$29,200

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**Authorization**

By signing below, the City agrees to the terms of this Scope Change and represents that this Scope Change and Gartner's original SOW, together with the State of Texas DIR-SDD-204 Agreement constitutes the contractual relationship between the parties with respect to this engagement.

SUBMITTED ON BEHALF OF GARTNER, INC.



\_\_\_\_\_  
SIGNATURE

Irma Fabular, Vice President  
\_\_\_\_\_  
PRINT NAME AND TITLE

30 October 2009  
\_\_\_\_\_  
DATE

AGREED ON BEHALF OF CITY OF SAN ANTONIO

\_\_\_\_\_  
SIGNATURE

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

\_\_\_\_\_  
DATE

**Billing Address (please mark corrections)**

City of San Antonio  
Accounts Payable  
515 S. Frio Street  
San Antonio, Texas 78207  
Telephone: +1-CBphone

**Client PO Number**

POnumber