



COUNTY OF SONOMA

575 ADMINISTRATION
DRIVE, ROOM 102A
SANTA ROSA, CA 95403

SUMMARY REPORT

Agenda Date: 7/20/2021

To: Board of Supervisors

Department or Agency Name(s): County Administrator and Information Systems

Staff Name and Phone Number: Christel Querijero and John Hartwig; (707) 565-2431

Vote Requirement: Majority

Supervisorial District(s): Countywide

Title:

Agreement with Rock Solid for a Customer Relationship Management and Civic Engagement Application

Recommended Action:

Authorize the Chair to execute a professional services agreement with Rock Solid to provide Customer Relationship Management and Civic Engagement Applications for a five-year term for \$101,380 annually with annual three percent increases, and a one-time cost of \$101,750 for a total maximum five-year value of \$639,990.

Executive Summary:

The County of Sonoma currently employs various tools to interact with residents, ranging from web forms, email, phone calls and applications like SoCo Report It, a software solution for submitting service requests to select departments. In 2020 the County issued a Request for Proposals for a Customer Relationship Management and Civic Engagement Application that would facilitate improved communications and engagement with residents and replace and augment the existing SoCo Report It software.

The County Administrator's Office and Information Systems Department, in coordination with Transportation and Public Works and Permit Sonoma, recommend that the Board of Supervisors approve a five-year contract with Rock Solid Technologies. The contract includes a customizable and comprehensive Customer Relationship Management platform, which will serve as a single platform for all citizen interactions and allow County users to log and track citizens' inquiries and requests. Additionally, Rock Solid Technologies will partner with PublicInput for use of their Engagement Hub, which facilitates a broad range of engagement tactics including but not limited to: online surveys, project websites, questions embedded in emails, text message surveys, social media comment capturing and live polling at public meetings.

Transportation and Public Works and Permit Sonoma will pilot the Customer Relationship Management platform for 12-18 months while staff assess how the tools may be useful to other departments. If staff determine that additional departments would benefit from using the Customer Relationship Management platform the contract with Rock Solid Technologies includes the ability to scale the software to additional departments.

Discussion:

The County of Sonoma issued a Request for Proposals in 2020 seeking opportunities to enhance the way the County serves and communicates with residents. The County asked proposers to demonstrate how they could

effectively improve civic engagement with residents utilizing technological platforms and provide a Customer Relationship Management (CRM) system.

The County's Request for Proposals highlighted the importance of an automated electronic system to allow the County to improve service engagement with constituents in a way that increases organizational efficiency and accountability, commonly known as CRM. The County Administrator and Board of Supervisors will pilot the CRM with two departments: Transportation and Public Works and Permit Sonoma. The CRM will facilitate code enforcement reporting to Permit Sonoma and public infrastructure reporting including potholes and street light outages to Transportation and Public Works.

Constituent Relationship Management

Rock Solid submitted a proposal that demonstrated a superior CRM platform, which will be customizable to meet the needs of residents and the County. The Rock Solid product suite, OneView Enterprise CRM with Dynamics365, is built on the Microsoft platform, which gives it the ability to integrate into the County's Microsoft systems while serving as a single platform for all citizen interactions. Rock Solid's OneView CRM is a web-based civic relationship management product that will provide the County with a centralized system of record for storing and managing citizen information. It will allow County users to log and track citizens' inquiries and requests. It will also provide functionality to create and send assignments to each County department responsible for providing the service. Field workers and citizens will have online access to their cases and assignment status. Its native integration to Microsoft Office 365 also creates a seamless experience for staff with integrated email communications and reporting. The system is user friendly for residents - citizens may present their requests through a variety of channels, including a County-branded mobile app and a self-service portal.

Rock Solid's OneView CRM offers:

- Intake and resolution of service and information requests from residents and customers with an **omni-channel approach** (e.g., website, mobile app, phone calls and emails), including self-service capabilities.
- A **unified identity** for each new customer and ability to consolidate multiple customer accounts into one unified account for each existing customer via an authentication and/or identity service.
- **English and Spanish capabilities** across interface platforms.
- Rock Solid Integration Engine for out of the box **bi-directional integrations** (GIS, Accela, Central Square EAM/Lucity, MS SharePoint, Outlook and more) provides a future proof approach that compliments existing software used by County departments.
- **Reliable and consistent service delivery** measurements across all functions, and advanced reporting and dash-boarding capabilities.
- A **robust knowledge base** developed in coordination with the County, containing a wealth of information regarding the County and its services, which can be used to research issues, retrieve department and service data, and enable rapid responses to requests for information.
- **Ability for future enhancements like** the ability to integrate with social media comments and messages, text messages, virtual chat and integration with the County's Cisco phone system.

Civic Engagement

In addition to the CRM features, the County sought a solution for a civic engagement system with an online

discussion forum where ideas, feedback, sentiment surveys, and other types of polling could allow citizens to participate and communicate on relevant topics in a real-time environment. RockSolid will partner with PublicInput Engagement Hub, through which residents can engage in surveys or submit comments via website, text message, email, phone, and live polling during public meetings. The Hub facilitates a broad range of engagement tactics including but not limited to: online surveys, project websites, questions embedded in emails, text message surveys, social media comment capturing, live polling at public meetings. All input collected from these methods - including those manually uploaded from paper surveys or field notes - are stored in the PublicInput.com database and automatically attributed to their respective projects for analysis and reporting.

The PublicInput Engagement Hub is built to reach and engage the greatest number of people possible, with a focus on traditionally underrepresented, low-income, Environmental Justice, and low-English proficiency communities. A specific function of the Engagement Hub that ensures representative feedback is an integrated census demographics reporting tool that affords an understanding of the sample received of each community’s diverse population.

Funding

The chart below illustrates the costs for the first year and the anticipated annual operating costs. The Fiscal Summary section of this Board Item describes the funding source for ongoing costs and one-time costs.

| Services | First Year Cost | Annual Ongoing Costs |
|---|------------------------|--|
| OneView CRM, Service Requests, and Mobile App | \$68,580 | \$70,637 |
| Enterprise User 1-25 (Tier 1) | \$13,200 | \$13,596 |
| PublicInput Engagement Hub | \$19,600 | \$20,188 |
| Software as a Service Cost | \$101,380 | \$104,421 with 3% annual increase |
| Planning and Analysis | \$10,500 | - |
| Requirements Definition (Design) | \$5,500 | - |
| Configuration | \$7,250 | - |
| Other Integrations | \$20,000 | - |
| PublicInput Configuration | \$20,000 | - |
| Data Migration | \$6,000 | - |
| KBA Migration | \$5,000 | - |
| Deployment (Testing, Training, Installing) | \$23,500 | - |
| Operations (Go Live Support) | \$4,000 | - |
| Implementation costs | \$101,750 | \$0 |
| ISD Implementation | \$56,700 | |
| ISD Ongoing Support | \$31,200 | \$31,200 |
| ISD Cost | \$87,900 | \$31,200 |
| Total Services Costs | \$291,030 | \$135,621 |

Prior Board Actions:

None

FISCAL SUMMARY

| Expenditures | FY 21-22 Adopted | FY22-23 Projected | FY 23-24 Projected |
|------------------------------------|-----------------------------|------------------------------|-------------------------------|
| Budgeted Expenses | 291,780 | 135,621 | 138,754 |
| Additional Appropriation Requested | | | |
| Total Expenditures | 291,780 | 135,621 | 138,754 |
| Funding Sources | | | |
| General Fund/WA GF | 243,340 | 135,621 | 138,754 |
| State/Federal | | | |
| Fees/Other | 47,690 | | |
| Use of Fund Balance | | | |
| Contingencies | | | |
| Total Sources | 291,780 | 135,621 | 138,754 |

Narrative Explanation of Fiscal Impacts:

The cost of the Customer Relationship Management and Civic Engagement software for a five-year term is \$101,380 annually, with annual three percent increases. There is an additional one-time cost of \$101,750 for set up. The total maximum five-year value of the contract is \$639,990.

Existing general fund appropriations within the Non-Departmental budget are available for this request for FY 21-22 from the remaining balance of \$800,000 allocated by the Board in the 2019-2020 budget hearings to finance efficiency studies, and subsequent approved use to finance the Clerk of the Board Agenda Coordinator position costs. This source will finance the annual costs of the CRM and Civic Engagement Platform in FY 21-22 (\$101,380 software costs and \$31,200 ISD technical support), and the one-time implementation costs associated with the CRM (\$65,400 configuration and deployment and \$45,360 ISD implementation support) for a total of \$243,340.

Given the Public, Educational, and Governmental (PEG) access nature of the Civic Engagement platform, staff recommends the use of accumulated PEG funds to support the one-time implementation costs of the PublicInput platform \$36,350, and associated one-time ISD technical support costs \$11,340. This totals \$47,690 in FY 21-22.

The County Administrator's Office is piloting the FY 21-22 program with the funding mechanisms described above and will determine department's usage of the CRM and PublicInput software and recommend a financing solution where departments share costs commensurate with their use of the software beginning FY 22-23.

Staffing Impacts:

| Position Title (Payroll Classification) | Monthly Salary Range (A-I Step) | Additions (Number) | Deletions (Number) |
|---|---------------------------------|--------------------|--------------------|
| | | | |
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| | | | |

Narrative Explanation of Staffing Impacts (If Required):

The County will support Rock Solid’s CRM with existing staffing levels. ISD will budget staff time for training and software implementation. Staff in the Board of Supervisors’ Offices, County Administrator’s Office, Permit Sonoma and Public Works will require training on the new CRM and Civic Engagement platforms. Additionally, staff from Public Works and Permit Sonoma will dedicate staff time to working with Rock Solid and PublicInput to implement the new software.

Attachments:

Attachment A: Master Terms and Scope of Work

Related Items “On File” with the Clerk of the Board:

Customer Relationship Management Request for Proposals