

Council Technology Application Committee Meeting

Wednesday, September 19, 2007

5:00 P.M. to 6:30 P.M.

Hayward City Hall

777 B St. Hayward

Conference Room 4A

Hayward, CA 94541

AGENDA

Public Comments: (Note: For matters not otherwise listed on the agenda. The Committee welcomes your comments under this section but is prohibited by State Law from discussing items not listed on the agenda. Your item will be taken under consideration and referred to staff.)

1. Minutes of July 18, 2007
2. Constituent Relations Management (CRM) briefing
3. Document Imaging System Upgrade status
4. VoIP Implementation Status (verbal report)
5. Discussion concerning future meeting schedule
6. Member Comments

Distribution:

Mayor and City Council

City Manager

Assistant City Manager

Assistant to the City Manager

Community & Economic Development Director

City Attorney

City Clerk

Finance Director

Fire Chief

Human Resources Director

Library Director

Police Chief

Public Works Director

Technology Services Manager

Daily Review

Post

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**City of Hayward
Council Technology Application Committee (CTAC)
Meeting Minutes of July 18, 2007**

Council Members Present: Olden Henson, and Bill Quirk.

Staff Present: Fran David, Debra Auker, Mark Guenther, Clancy Priest, and Millie Saad.

The meeting was called to order at 5PM.

I. Public Comment: None.

II. Approval of Minutes

The Committee accepted the minutes of June 20, 2007

III. Voice over Internet Protocol (VoIP)

Technology Services Director Clancy Priest presented the recommendation for Committee endorsement for the City to replace landline or "plain old telephone service" (POTS) with Voice over Internet Protocol (VoIP).

The current POTS system, Centrex, has limited features, high costs, and relies on AT&T to make additions and changes. The advantages to change to VoIP include:

- Cost savings: Centrex costs \$485K per year; VoIP will cost \$95K per year;
- Allows user access to voice, data and images, including GIS imagery;
- Users able to change (add and delete) features (AT&T now changes \$125 per change);
- Allows use of cell phone as primary phone;
- Built-in teleconferencing capability;
- Accessible from all current computer jacks.

Staff issued a Request for Proposal and invited 25 vendors to present proposals. Proposals were received from six vendors. The proposals were evaluated and three vendors (AMSNet, ExtraTeam, and NexusIS) were invited to the next evaluation phase. Tech Services staff and department representatives interviewed three of the vendors, watched their system demonstrations, tried out their equipment, assessed their experience working with local government, and their training package.

The vendor that came out with the highest marks in all categories, including price, is ExtraTeam and staff's recommendation to implement the VoIP system.

Related to the implementation of the VoIP system is completion of the network infrastructure upgrade to strengthen the City's network capabilities and equipment. The upgraded network will be able to handle voice, video and data requirements over a converged network known as Next Generation Networks (NGN).

In June, Technology Services issued a bid for the network upgrade. Five vendors responded. ExtraTeam was the low bidder and was selected for this component as well.

The overall costs for the network infrastructure upgrade and the VoIP will be between \$800,000 and \$1 Million. However, cost savings from replacing the Centrex system and implementing VoIP will be 80% of the \$485,000 currently spent. To finance the implementation, staff recommends a 3 – 5 year lease/purchase agreement through Cisco Corporation. Savings from the transition to VoIP will be used to make the payments and service the debt which is expected to end in 2011.

Council Members Henson and Quirk approved that staff place the implementation of the VoIP infrastructure and network upgrade with ExtraTeam and the lease/purchase agreement through Cisco Financing Systems on the City Council agenda for approval.

IV. Member Comments

CC Member Henson asked about the status of the emergency alert system. Staff will bring place this item on an upcoming CTAC agenda.

CC Member Quirk asked if Street View (GIS) is available from home. Currently only Public Safety has access.

The meeting adjourned at 6:30PM.

V. Next Meeting

Wednesday, September 19, 2007 at 5:30PM

Agenda Topic: To be determined.



DATE: September 19, 2007
TO: Council Technology Application Committee
FROM: Clancy Priest, Deputy City Manager/Technology Services Director
SUBJECT: Constituent/Customer Relations Management (CRM) System

RECOMMENDATION

That the Committee review and comment on this report.

BACKGROUND

The City currently has a manual system to handle Mayor, Council, and resident requests and/or complaints, even when they enter the system through the Internet. In some Departments a "Call Routing" system enables residents to be routed to the proper person or service they are calling about. In other areas a designated staff member is used to handle requests, and delegates them as required within their respective Department or forwards them on to other Departments if deemed necessary.

The existing way we deal with information does not allow us to easily track and report how well we are handling resident requests and would become more efficient if we implement some form of automated system. As the volume of resident inquiries continues to grow, there is a need to track and manage each inquiry effectively as well as to garner information regarding programmatic or geographical trends.

DISCUSSION

The fundamental concept behind Constituent/Customer Relations Management (CRM) system is the consolidation of information from separate sources within our organization to provide a single, complete picture. This comprehensive view will enable our organization to coordinate activities and enhance service delivery to our residents. An effective CRM system is much more than just a technology; it is an enterprise-wide approach to managing information and relationships. A CRM will deliver comprehensive data about our residents' requests, which can drastically improve the success rate of our service delivery and provide information vital to successful strategic planning.

In order to effectively and efficiently manage our customer relationships, and provide us with important feedback, we are pursuing an automated, web-based, CRM solution from Tele-Works and their certified CRM partner GovOutreach. The City currently has an investment in the Tele-Works

system that controls our web content management and can be expanded into an entry-level CRM system in a cost effective manner. The Tele-Works system will allow us to also implement both web-based and telephony-based routing, tracking, and customer call-back.

The proposed CRM system will improve organizational performance, including measured efficiency and customer satisfaction. City staff will have a tool to log and track resident inquiries allowing the City to document progress and results. City Departments will also receive immediate feedback about their level of service via customer surveys and through generated reports.

This is a hosted, web-based application that will be used by residents and staff to submit requests for a City service. This tool will enable staff to build, manage, and grow relationships with our residents. The end result will be a sustainable level of greater customer service and better resident/government relationships through improved information flow.

Residents can request a service by using the phone, the web, by fax, or in person. Those who contact the agency by phone, fax, or in-person will have their request entered by a staff member and will be offered a choice of if and how they would like to be updated on the status of their request. Those who submit a request are offered a choice of providing their contact information for tracking and follow-up or remaining anonymous. We must also recognize that some citizens or business operators may wish to provide information anonymously, and the system allows them to easily do so. Those who choose to provide their contact information will be offered several communications options for tracking and follow-up.

CRM allows staff to better analyze needs and trends while increasing the amount of work accomplished. The system includes numerous features, including automatic reports delivered to managers describing the status of requests, customer satisfaction surveys and follow-up communications to residents.

The system offers many benefits to those who live, work, or do business within our jurisdiction. The CRM ensures that staff will be able to track a residents request and users of this system can track their own complaints or requests and receive updates. The system can also automatically send updates on issues of interest to individuals and educate users using "Frequently Asked Questions". Requests can be submitted with the actual name and contact information from the requesting party, or they can remain anonymous.

Implementing a CRM system will allow the City to use new technology to operate more efficiently; it is *not* designed to be a "watchdog" tool. The system does, however, provide extensive reports for staff and Council. The information can then be used to ensure that residents and business operators are receiving a high level of customer service.

The system dramatically improves the ability to resolve issues quickly. Since requests are automatically forwarded to the appropriate staff member, contacts can't "fall through the cracks" and become lost. Users can continuously monitor the status of their request, and managers receive a constant flow of information about how well their staffs are providing customer service.

The system will allow Department Heads and supervisors to easily identify reoccurring problems and/or issues. City Departments will be accessible for submission of service requests 24/7. Residents will benefit by the ease of submitting an inquiry and will be able to track progress of an inquiry by using a tracking number; residents will receive follow up correspondence letting them know the status of their request. Residents will receive a higher level of customer service not realized before.

This project will impact all Departments, staff and residents. The implementation of this system will affect the way the City processes service requests. The City's business practices, across the entire organization, will change to include the use of the CRM for logging, tracking and resolving issues. Efficiencies will be achieved through streamlined processes resulting from use of the CRM system.

An open and fully developed CRM system can, in the future, be tied to a type of citywide "3-1-1" system to centralize calls coming into the City and to relieve the non-emergency call burden from the Public Safety Communication Center. This requires more capability than we are presently considering in the TeleWorks/GovOutreach system. However, it is believed that this system will either feed into a more robust system at the later date, or, at the very least provide affordable preparation for such a system. Maximizing the functionality of a "3-1-1" approach also requires some organizational changes in the way departments do business.

FISCAL IMPACT

The proposed system is not a full-featured CRM that is offered by such firms as Oracle or IBM. The system has many of the capabilities of the full-featured systems but will require expansion to accomplish full integration with many of our existing systems such as our financial or public safety programs. CRM system prices vary based on the population size that the agency serves. Costs generally fall into two categories – a one-time installation, setup, and training fee and a yearly license fee.

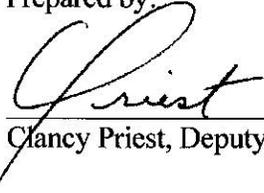
The proposed City of Hayward system expansion can be implemented for approximately \$70,000, which will provide for the system upgrade, implementation, and staff training for the new system.

The heart of the system is hosted by GovOutreach at two separate geographical locations for redundancy and availability purposes. There is a recurring cost of \$15,000 per year for license, maintenance, and hosting fees.

NEXT STEPS

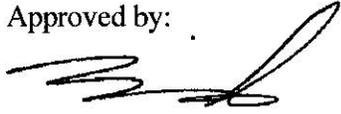
City staff will complete the due diligence process to ensure this particular system is the appropriate one for our organization. Once this process is complete, staff will either recommend implementation or proceed with further research into other possible solutions.

Prepared by:



Clancy Priest, Deputy City Manager/Technology Services Director

Approved by:



Fran David, Acting City Manager



DATE: September 19, 2007
TO: Council Technology Application Committee
FROM: Technology Services Director
SUBJECT: Laserfiche Enterprise Content Management System Upgrade

RECOMMENDATION

That the Committee review and comment on this report.

BACKGROUND

CTAC last reviewed this project with the approval of the Two Year Technology Plan in 2001. One of the last objectives of that existing Technology Plan is the expansion of the City's document imaging system. Since that plan was written, these systems have come to be called Enterprise Content Management Systems (ECM). The system used by the City is Laserfiche.

This existing Laserfiche system is managed by the City Clerk and is primarily used as the City's electronic document storage and retrieval system. The City has been using Laserfiche for about ten years, and was several versions behind in updating.

The City's Laserfiche system was installed in September 1997. Early that year, staff in the City Clerk's office began looking at document imaging systems because they desired the search capability and other staff productivity enhancements such systems provide. At that time, they judged Laserfiche to be the best of the few affordable document imaging systems on the market.

DISCUSSION

ECM is the family of technologies used to capture, manage, store, preserve, and deliver content and documents related to organizational processes. ECM systems can also manage document workflow and approval processes.

Naturally, ECM system security restricts access to content, both during its creation and management as well as when delivered. This is especially critical when dealing with confidential documents, such as personnel files, etc.

Prior to the upgrade described below, we were using version 5.0, which is several versions behind the most current version 7.2. The upgrade from version 5.0 was postponed to allow staff to analyze whether it was most advantageous to upgrade Laserfiche or switch to another ECM system. Staff reviewed other ECM systems on the market, and concluded that upgrading to the current version of Laserfiche was the most cost-effective and productive solution.

On July 2, 2007, Technology Services staff, along with technicians from Laserfiche, completely upgraded the City's existing Laserfiche document imaging system. This upgrade included installing new server hardware, a new scanner in the City Clerk's office, and the installation and configuration of the latest version of the Laserfiche software on both the new servers and approximately 30 workstations located in various departments throughout City Hall.

Since the upgrade, staff has begun working to expand the system's use. In late 2008, staff plans to perform an update to Laserfiche version 8.0. Once these tasks are completed, this will fulfill the objective of creating an enterprise wide document imaging system.

Current ECM Projects Underway – The Human Resources Department is currently working on a project to test the document workflow and approval functionality of the system. Currently, Payroll/Personnel Action Request (PPAR) forms are routed manually through the department, HR, and City Manager approval process. HR, along with Laserfiche, is working to design a workflow process that will automate this routing and approval process with security auditing and electronic signatures. The routed and approved document would then be stored in the HR document repository upon completion. If this test project proves successful, use of the workflow and approval process could be expanded to automate similar manual routing and approval processes. In addition, they are working on setting up a repository and designing their directory structure in preparation for scanning all personnel records and maintaining them electronically.

The Purchasing Division of the Finance Department is looking at the upgraded system to store and retrieve all of its procurement documentation. This will be an improvement over the current paper file system and will increase productivity and customer service.

The Building Division is working with Laserfiche and Eden Systems technicians to design and configure the permit system integration with Laserfiche. Documents supporting individual building permit plan approvals can be scanned into Laserfiche, and with this integration they can be viewed by users across the organization using either application.

The Hazardous Materials Office of the Fire Department is also currently developing their own repository structure and will soon begin storing documents relating to HazMat permits and cases in the ECM.

Technology Services is beginning work on integrating Laserfiche with our in-house ESRI Geographic Information System. Technology Services staff is also working with the City Clerk and Laserfiche to resolve any privacy issues involved and to explore appropriate uses of the web interface to Laserfiche, which allows secured access to documents using a web browser, either internally via COHNet, or externally via the Internet.

All other city departments will have the opportunity to create their own directory structures and begin electronic document storage in the expanded and updated ECM.

FISCAL IMPACT

It is estimated that the \$100,000 appropriated in the Capital Improvement Program for this project will be sufficient to accomplish this objective.

The original cost of the Laserfiche software was approximately \$14,000. Laserfiche provided full credit for the original cost, as well as an additional credit to provide a no-cost upgrade from version 5.0 to 7.2. The cost to add seat licenses and additional functionality of approximately \$50,000, as well as approximately \$38,000 in hardware costs, were paid from the CIP appropriation. The remaining appropriation will be used for departmental scanners and professional services.

Internal staff involvement to assist the vendor with the upgrade has been 40 work/hours for the Network Technician to implement the new hardware and 40 hours for the Interim IT Manager to project manage the overall installation. Future involvement by internal staff will be necessary to complete the project. The exact amount of time needed remains to be seen as Departmental implementation grows.

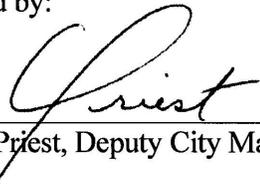
Annual software maintenance and VIP support service costs of approximately \$28,000 are paid out of the operating budget.

While pricing for Laserfiche 8.0 has not been established, Laserfiche will provide a similar trade-in credit towards the purchase of the new version, but there may be a small charge for the upgrade.

SCHEDULE

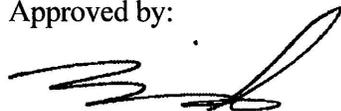
The estimated completion date for the projects outlined above is December 31, 2008.

Prepared by:



Clancy Priest, Deputy City Manager/Technology Services Director

Approved by:



Fran David, Acting City Manager