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# **CITY OF OCALA**

## **CITY COUNCIL REPORT**

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**Council Meeting Date: 07/06/10**

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Subject: RFP 10-002 Customer Services Management System

Submitted By: Larry Novak

Department: Electric Utility

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**STAFF RECOMMENDATION** (Motion Ready): Approve Agenda Item (ID # 1847) Contract RFP 10-002 to Cogsdale Corporation for New Customer Services Management System (CSM)

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### **OCALA'S RELEVANT STRATEGIC GOALS:**

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### **PROOF OF PUBLICATION:**

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#### **BACKGROUND:**

The current Utility Billing system, Peoplesoft CIS, was implemented and operational in 2003. At the time of implementation, the original system was modified to meet many of our current business practices, as a result of the modifications, we were unable to keep up with system upgrades and consequently our Peoplesoft CIS version is no longer supported by Peoplesoft/Oracle. There have been many advances in technology that we would like to be able to use in an effort to better serve the City and our customers.

#### **FINDINGS:**

##### **CSM Selection Process**

On, November 20, 2009 the City of Ocala issued the Request for Proposals (RFP 10-002). A pre-bid conference was held on Dec. 9, 2009 where vendors were allowed to pose questions and obtain any necessary clarification to the RFP and to determine if their product(s) would meet the needs of the City.

On January 12, 2010, the following seven companies submitted proposals: Advanced Utility System, Cobb Energy, Cogsdale Corp, Innoprise Software, Logics LLC, North/Star Utilities Solutions, OpSolve LLC.

The Selection Committee consisting of Annette Perez, Barbara Carnival, Cloretha McReynolds, Jay Maynard (replaced later by Cindy Kelly), Jeannette Benson, Joe Noel, Larry Novak, Stacey Ferrante, Ted Owen, Terry Austin, Vicky Schooley, Will Stanford and Winsome Jacobs evaluated and ranked the companies on January 26, 2010. Cogadale Corp. and NorthStar Utilities Solutions were selected to proceed with Demonstrations.

Demonstrations were held for the Selection Committee on March 5, 2010 by both Cogsdale and NorthStar.

Selection Committee met on March 10, 2010 and determined that site visits would be necessary to make the final selection and selected the Site Visit team. The team included Barbara Carnival, Cloretha McReynolds, Joe Noel, Vicky Schooley, and Winsome Jacobs.

In May 2010, the committee members did the site visit to New Smyrna Beach Utilities (Cogsdale) and Keys Electric (Northstar) viewed the daily operation of the proposed software solutions and also took the opportunity to interview company representatives.

#### **CONCLUSIONS:**

During the demonstrations and subsequent site visits it was determined that both vendors presented viable solutions. However,

after further evaluation and ranking of the responses to the RFP and site visit reports, it was determined that the Cogsdale Corporation Customer Management System best meets the needs of the Ocala Utility Services. Cogsdale is currently implementing the Electric Work Order Management System with integrations to other City systems this gives them the advantage of being familiar with our current systems so they can also meet the needs of the City of Ocala.

**LEGAL REVIEW:** The contract/agreement/ordinance has been reviewed and approved for form and legality by the City Attorney/Assistant City Attorney, Patrick G. Gilligan/W. James Gooding/Eric P. Gifford. **OR** The contract/ordinance is pending review by the City Attorney/Assistant City Attorney, Patrick G. Gilligan/W. James Gooding/Eric P. Gifford.

**RECOMMENDATIONS:**

Award, negotiation, and execution of the resulting contract of RFP 10-002 to Cogsdale Corporation for the acquisition and implementation of a Customer Service Management System contingent upon the successful negotiations in the estimated amount of \$900,000.00.

**POLICY IMPACT:**

This policy will promote Council Goals 2 and 3 - Provide Greater Fiscal Responsibility to Citizens and Maintain Viability of the Electric Utility.

**FISCAL IMPACT:**

Sufficient dollars to support this project have been budgeted.

**COORDINATION WITH OTHER DEPARTMENTS OR AGENCIES:**

Finance & Administrative Services, Information Technologies, Sanitation, Water & Sewer, and Ocala Utility worked together closely throughout the evaluation process.

**IMPLEMENTATION TIMELINE:**

A project timeline will be developed and milestones for this project will be presented to Council as they are met. Periodic reviews of the project will keep Council members informed of the progress of the project. This project is expected to take approximately 12 months from contract signing to completion of implementation. This implementation will run concurrently with the final phases of the Electric Work Order Management System implementation.

**SUPPORT MATERIALS:**