



# Ocala

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## Item Details

**File Number: 2023-0170**

<b>ID #:</b> 2023-0170	<b>Type:</b> Agenda Item	<b>Status:</b> Passed
<b>Version:</b> 1	<b>Placement:</b> 8	<b>In Control:</b> City Council
		<b>File Created:</b> 11/03/2022
<b>Presented By: :</b>		<b>Final Action:</b> 11/15/2022

**Item Title:** Approve additional expenditures for the annual Cogsdale Customer Service Management System maintenance and modifications for an increased estimated total contract expenditure of \$1,065,972

### Internal Notes:

**Target Meeting:** 11/15/2022

**Agenda Number:** 8h.

### Sponsors:

**Enactment Date:**

**Attachments:** FOR COUNCIL -  
Cogsdale\_Maintenance\_FY2023\_Invoice, Renewal  
Council Report, Original Council Report, Fully  
Executed - Original Agreement for Cogsdale CSM

**Enactment Number:**

### Recommendation:

**Hearing Date:**

**Entered by:** eroberts@ocalafl.org

**Effective Date:**

### Approval History

Version	Seq #	Action Date	Approver	Action	Due Date
1	1	11/7/2022	Marie Brooks	Approve	11/7/2022
1	2	11/7/2022	Tammi Haslam	Delegated	
<b>Notes:</b> Delegated: Out Of Office					
1	3	11/7/2022	Cindy Krepps	Approve	11/9/2022
<b>Notes:</b> Approved pending the department's fund transfers and temp budgets.					
1	4	11/8/2022	Daphne Robinson	Approve	11/9/2022
<b>Notes:</b> Added Contract Documents. Updated Council Report.					
1	5	11/9/2022	Jeannine Robbins	Approve	11/11/2022
1	6	11/9/2022	Peter Lee	Approve	11/11/2022

### History of Legislative File

Version:	Acting Body:	Date:	Action:	Sent To:	Due Date:	Return Date:	Result:
1	City Council	11/15/2022	Approved				Pass

**Action Text:**

**Notes:** There being no discussion the motion carried by roll call vote.

Aye: 5 Pro Tem Hilty Sr, Council Member Dreyer, Council Member Mansfield,  
Council Member Musleh, and Council President Bethea Sr

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**Text of Legislative File 2023-0170**

Approve additional expenditures for the annual Cogsdale Customer Service Management System maintenance and modifications for an increased estimated total contract expenditure of \$1,065,972

**BACKGROUND:**

In 2013, the City implemented the Cogsdale Customer Service Management (“CSM”) and Electric Work Order Management Software Maintenance for the application currently used by Customer Service, Utility Billing and Electric. The software maintenance includes the following: CSM, Locations, Smartview, Enhanced Notes, Geolocation Management, Microsoft Dynamics GP Software, Mobile Work, Work Management, and discretionary tax calculations. This software is used daily to manage almost 60,000 active customer accounts.

The annual renewals include software upgrades and support services for all modules to keep software and staff current with the latest technology. Also, additional expenditures are required for the purchase of additional customer locations for new accounts and any software modifications requested by the City.

On December 15, 2015, Council approved the initial Cogsdale maintenance renewal (ELE/12-078) for \$147,471. Since contract inception, annual Cogsdale maintenance expenditures and system modifications have totaled \$801,306.82. The FY 2023 estimated cost is approximately \$264,665.32 including the renewal invoice (attached) of \$214,665.32 and the estimated cost for additional customer locations, maintenance, and modifications of approximately \$50,000.

**FINDINGS AND CONCLUSIONS:**

The City is required to pay yearly software maintenance for the continued use of the software, as well as to receive software upgrades and support services. Additional expenditures will be incurred as necessary for operational requirements.

**FISCAL IMPACT:**

Funds for the yearly operating expenses are budgeted for and charged to accounts 457-032-230-531-53-52010|31010.

**PROCUREMENT REVIEW:**

The Procurement and Contracting Department will review additional purchases to ensure compliance with the City's Procurement Policy.

**LEGAL REVIEW:**

N/A. The City’s standard purchase order terms and conditions will be utilized for the procurement of these software and services.

**ALTERNATIVE:**

- Approve
- Table
- Deny

Presentation By: Emory Roberts