

Committee of the Whole (2) Report

DATE: Tuesday, September 20, 2022

WARD(S): ALL

TITLE: **ADVANCING CITIZEN RELATIONSHIP MANAGEMENT WITH ACQUISITION OF VELOCITY 365 ACCELERATOR SOFTWARE LICENCE**

FROM:

Nick Spensieri, City Manager

ACTION: DECISION

Purpose

To allocate existing Council-approved funding from the Citizen Relationship Management (CRM) program capital budget to obtain a one-time license to the Velocity 365 Accelerator Software through a Single Source contract. Corporate Procurement Policy states that awarding a Single Source contract for a value exceeding \$100,000 requires Council approval.

Report Highlights

- The April 2017 Service Vaughan Strategy and Implementation Plan recommended the implementation of a CRM solution to enhance service delivery and improve citizen interactions with the City.
- Departments across the corporation leverage the CRM, including Public Works, Economic Development and the City's contact centre, Access Vaughan, which will officially join the Service Vaughan family on Wednesday, October 26, changing its name to Service Vaughan. This name change will further the singular goal of delivering an exceptional citizen experience. The CRM will continue expanding as more services are added and other departments adopt its use.
- Velocity 365 Accelerator is a KPMG proprietary solution that is part of the CRM. KPMG is changing the licensing model for Velocity 365 from Software as a Service (SaaS) to an Accelerator License Agreement, providing the City with a one-time licence to the code of the Software.

- Single sourcing the License Agreement between the City and KPMG for Velocity 365 Accelerator will allow the City to advance the CRM project, and not pay future licensing fees to KPMG for the Velocity 365 Accelerator after June 2023.
- In June 2022, the CRM program was transferred to the Office of Communications and Economic Development, thereby providing opportunities to strengthen governance, oversight and utilization of the CRM.

Recommendations

1. That the Single Source for acquiring the Velocity 365 Accelerator solution, valued up to \$221,000, be awarded to KPMG; and
2. That Council authorize the Director of Procurement Services to award and execute the agreements related to the acquisition of the above solution, in a form satisfactory to Legal Services.

Background

The CRM is about improving public services and enhancing citizen interactions with the City:

The Service Vaughan Strategy and Implementation Plan was introduced in April 2017 and recommended implementing of a CRM solution to support citizen service request management, tracking and reporting across the corporation. The CRM's objective is to replace obsolete technology and provide departments with enhanced functionalities, usability, data analytics and reporting capabilities to improve citizen interactions with the City.

In March 2018, the City began the process of acquiring a CRM solution based on the recommendation of the Service Vaughan Strategy and Implementation Plan. Through an RFP process, Adoxio Business Solutions Limited was selected by the City to provide CRM implementation services for the corporation with the Velocity 365 Solution. In April 2018, KPMG acquired Adoxio Business Solutions Limited.

Velocity 365 is part of CRM, developed explicitly for municipal service request management. Phase 1 of the CRM project was implemented in June 2019 as part of a phased rollout and features a citizen self-service online portal of City services to submit and action requests.

Departments across the corporation are leveraging the CRM, including Public Works, Economic Development and Service Vaughan:

This tool is accessible through the City's homepage, at vaughan.ca/ServiceVaughan, and works in tandem with Service Vaughan* and other departments, providing staff in these areas the ability to respond to and address online inquiries.

**In June 2022, Council endorsed the renaming of Access Vaughan into Service Vaughan, to enable the alignment of the department and Service Vaughan strategy, with the ultimate goal of delivering an exceptional citizen service experience. The department name change will be communicated more broadly to internal and external audiences in Q4 2022 through support from Corporate and Strategic Communications (CSC).*

For context, Service Vaughan is a long-standing strategic initiative to implement corporate standards that enhance the citizen experience. The vaughan.ca/ServiceVaughan website is also the City's hub for residents and businesses to complete online services or report an issue with a City service 24 hours a day, seven days a week. In fact, it features over 65 different services that the public can undertake online – from requesting sidewalk repairs and purchasing garbage tags to registering for a recreation program and getting a pet licence. Staff are working to make additional services available online.

Economic Development staff use the CRM to track and report business advisory interactions with critical stakeholders. Subsequent phases of the CRM initiative include the implementation of the Direct to Public Works Communications Tracking tool completed in June 2020 and the implementation of the CRM solution in all business units in Public Works, including Environmental Services, Parks, Forestry and Horticulture Operations and Road Operations and Traffic Services, completed in Q2 of 2022.

The mandate of the CRM will continue expanding as more services are added to this tool and other departments adopt its use.

Strengthening governance, oversight and utilization of the CRM through the Office of Communications and Economic Development:

In June 2022, the CRM program was transferred from the Community Services Portfolio to the Office of Communications and Economic Development (OCED). This transfer is consistent with the December 2021 Council-approved reorganization that established OCED and moved the Service Vaughan department to this new office, based in the City Manager's Portfolio.

The alignment of the OCED with the CRM presents opportunities to strengthen governance, oversight and utilization of the CRM with internal and external audiences – namely staff and the public – to work toward the singular goal of delivering an exceptional citizen experience.

A new position for a Program Manager, Service Vaughan, has been created to support the advancement of the CRM project in the OCED. This role continues to implement the initiatives outlined in the June 2022, Committee of the Whole (2) *Access Vaughan Strategic Review and Next Steps* staff report and the four components of the Service Vaughan Strategy.

As a recap, the Council-approved Service Vaughan Strategy includes four components:

1. Integrated service

- Identifying and implementing in-person service integrations with all departments to ensure first-point resolution, where possible.
- Executing telephony enhancements to prioritize call reasons (e.g. municipal emergencies), better triaging incoming calls, reducing wait times and increasing first-point resolution for telephone-based service (please note that telephony enhancements were launched in May 2022).

2. Digital transformation

- Identifying opportunities for innovation and process improvement.
- Leveraging tools and technology (e.g., CRM) to further automate service delivery.

3. Service standards and performance measurement

- Develop service standards for all types of service delivery (in-person, on-call, email, social media) to ensure accountability.
- Track and monitor performance metrics to identify strengths and opportunities for improvement.

4. In-person citizen experience

- Improving the in-person citizen experience at City Hall by implementing all components of the new design for service delivery, including a new main service counter, private and semi-private meeting rooms and a digital service area.

To ensure governance and oversight with the execution of the Service Vaughan strategy as outlined above, an internal Service Vaughan working group has been established. This working group has representation from critical internal stakeholders, including CSC, and meets weekly to review progress and address issues and opportunities, bridging the flow of information between Service Vaughan and CSC to elevate the level and quality of timely information to the public. In addition to executing the Service Vaughan strategy, the Program Manager will further support the implementation of the findings from the Service Vaughan Audit. The audit has identified

opportunities for Service Vaughan to develop effective operational and staffing strategies and optimal performance measures, use technology to enhance information retrieval and manage service delivery outcomes, develop standard operating procedures and improve the CSR training program, and implement corporate-approved guidelines and policies to enhance relationship management with service partners.

Previous Reports/Authority

June 21, 2022, Committee of the Whole (2) *Access Vaughan Strategic Review and Next Steps* [staff report](#).

Analysis and Options

Velocity 365 is part of the CRM system to support citizen service request management, tracking and reporting; it is leveraged by approximately 175 internal users and is accessible to residents through the City's website.

KPMG is changing the licensing model for the Velocity 365 solution from Software as a Service (SaaS) to an Accelerator License Agreement, providing a one-time licence to the code of the Software to the City.

Single sourcing the License Agreement with KPMG for the Velocity 365 Accelerator solution will allow the City to have continuity of services with the CRM solution. In addition, the City will not pay additional licensing fees after June 2023.

Financial Impact

The Service Vaughan Program is currently being funded from the Service Vaughan capital project SE-0088-16. There is funding budgeted in the capital project for maintenance and support fees for the CRM solution, including the Velocity 365 product. This funding can be re-directed to procure the single source Licensing Agreement with KPMG.

Section 3, item 3.6c of the Corporate Procurement Policy states that the award of a Single Source contract for a value exceeding \$100,000 requires Council approval.

Funding for this request will come from the latest Council-approved 2022 CRM Capital Budget. There will be two installments of \$98,000 each made by June 2023, for a one-time total cost of \$196,000. In addition, contingency support fees of \$25,000 have been allocated.

By buying a license to the Velocity 365 Accelerator Software code from KPMG, the City will not have to pay future licensing fees after June 2023.

Broader Regional Impacts/Considerations

Not Applicable

Conclusion

It is recommended that the Single Source Agreement for the Acquisition and Licensing Agreement of the Solution Velocity 365 Accelerator be awarded to KPMG.

For more information, please contact:

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Attachments

N/A

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Approved by

A handwritten signature in black ink, appearing to read 'Nick Spensieri', with a horizontal line extending to the right.

Nick Spensieri, City Manager