TAEO | Tulsa Authority for Economic Opportunity

Request for Proposal 2022-002

Request for Customer Relationship Management (CRM)

THE SERVICES

The Tulsa Authority for Economic Opportunity is seeking proposals for an Analytical and Case Tracking product to serve its economic development, real estate management, customer service, and compliance management activities.

1. Introduction

The Tulsa Authority for Economic Opportunity (TAEO) is issuing this Request for Proposals (RFP) to solicit responses from qualified providers. Respondents will be competing against each other for selection to provide the product or services set forth herein (the "Services"). The submissions of all Respondents shall be compared and evaluated pursuant to the evaluation criteria set forth in this RFP, and a single Respondent may be selected.

TAEO's departments collect and maintain a significant amount of contact information from vendors, contractors, business owners, corporations, government agencies, lessees, and other groups and individuals. Additionally, TAEO documents numerous communications, notes, and activities associated with these contacts. TAEO manages opportunities in many different stages of the sales pipeline, leases, grants, and loans issued by TAEO as well as grants awarded to us. Without a comprehensive, unified, and fully integrated customer relationship management solution (the "Services"), there is no effective way to maintain an accurate, up-to-date database of contacts, activities, opportunities, grants, or comments on these items. Furthermore, information is very dynamic and requires a user-friendly way to collect, update, manage and share all the data among the various personnel.

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2. Company Overview

About TAEO:

TAEO is a Public Trust, established under Oklahoma State Statutes for the benefit of the City of Tulsa, Oklahoma to serve as the lead entity for the City of Tulsa in carrying out its community and economic development priorities, goals, and programs. TAEO was established following a year-long strategic planning process through the effective merger of five (5) separate public entities: the Mayor's Office of Economic Development, Economic Development Commission, Tulsa Development Authority, Tulsa Industrial Authority, and Tulsa Parking Authority. In merging these entities together, the City has established a world-class economic development organization which will leverage the collective assets and resources of the Authority to accelerate economic growth, increase shared prosperity, and promote racial equity. The model has been fashioned based upon the learnings from Dag Detter's research in the Public Wealth of Cities, and is driven by the fundamental belief that public assets and resources – if managed properly – have the ability to drive enhanced economic growth.

Governance:

TAEO is governed by a board of thirteen (13) Trustees, which is comprised of the Mayor, seven (7) Trustees appointed by the Mayor and approved by City Council, and the five (5) Commissioners of the Tulsa Development Authority (TDA), who will continue to function as a legally separate entity governing the assets and resources of TDA.

The continued operation of TDA will allow the City to retain the unique tools granted to Urban Renewal Authorities under Title 11 of Oklahoma State Statutes. TDA will contract with TAEO through an annual Service Agreement to allow the staff of TAEO to provide staff services for its operations.

3. Mission and Vision Statements

Mission:

We are innovators who create and manage public assets and resources to drive economic growth. We invest in Tulsa's economy, businesses, neighborhoods, and people with the goal of leveraging our resources to create economic opportunity and drive equitable outcomes.

Vision:

We envision a future where race, nativity, gender, or zip code do not determine economic opportunity, and all people can maximize their potential to create and share in Tulsa's economic prosperity.

Assets:

In addition to its annual revenues, TAEO manages a substantial asset base that includes: cash reserves of both TAEO and TDA; six (6) structured parking garages in downtown Tulsa (four of which are owned by TAEO and two of which are leased from the City); two surface parking lots; a hangar currently leased to American Airlines; various residential and commercial lots concentrated in the central and northern portions of the City; and other real estate holdings.

4. OBJECTIVES OF THE REQUEST FOR PROPOSAL

TAEO seeks a comprehensive Service to meet its needs of maintaining and expanding its contact and opportunity database within a user-friendly system that will be shared among staff. The Service must be able to provide a uniform system that can be easily accessed, updated, and shared by users across groups in the organization. The Service must also have the ability to import legacy data currently stored in excel spreadsheets, Access databases, ArcGIS, and Outlook into the new, unified structure.

TAEO must have the ability to change vendors without having to re-implement a new solution in the future. This is a protection necessary for the possibility of the vendor going out of business or a breach of contract. The Service must have the ability to accommodate potential future enhancements and integrate with other services as needed. These must be possible without having to re-implement, re-architect the entire solution, modify the base code, or create a legacy system that must be actively maintained. For a full list of potential future enhancements and integrations, refer to Exhibit B.

Responses to this Request for Proposal (RFP) should provide TAEO with the information needed to assess, evaluate, and select Services based upon product capabilities and capacity as well as the product's ease of use and onboarding process, including usage experience of similar organizations or communities. The Request for Proposal will result in a contract with a desired effective date of September 1, 2022.

The objective of this RFP is to provide a **cloud-based CRM system** which will support a team of up to **20 people** performing a range of activities including:

1. Customer Service,
2. Contract Management,
3. Real Estate Management,
4. Economic and Business Development
5. Contract Compliance.

5. Background

CRM is currently accomplished within TAEO through a variety of tools and data types including:

1. Microsoft Office 365 calendars, contacts, and email
2. MS Excel spreadsheets
3. MS Power BI databases
4. ArcGIS geodatabases
5. EnerGov database

Because the base of TAEO's operations is conducted in Microsoft products, the ability to integrate directly with the products above will be critical to selection of the Services. Surveys of staff have indicated that the most important features of a CRM system will include:

1. Data importing
2. Analytics
3. MS Office, Outlook, and data visualization integrations
4. Multi-channel Support
5. SaaS cloud-based access
6. Availability of fully functional desktop and mobile applications

6. SCOPE OF WORK

TAEO seeks to engage a contractor to provide the Service as described in more detail below. TAEO requests proposals which address the Objectives listed above, and specific requirements of the desired Services which may include, but are not limited to, the following:

- A cloud solution to maintain and develop contacts, activities, opportunities, leases, loans, and grants.
- System tools for collaboration, data sharing, and communication among the individual users and departments that integrates with Outlook and MS Office.
- Reporting and analytic capabilities to provide leadership with quantitative data related to internal and external output. The ability to create reports must be available to general users (with some training required) rather than requiring a complex Administrator request process and lead time for custom reports.
- Full access to mobile and cloud-based devices across multiple platforms (e.g., iOS/Android mobile devices and Windows PC).
- Initial training for all users and creation of training materials to be used as reference and for training of new personnel. Training to include overall group, individual administrator, and individual application training for:
    - Customer Service,
    - Contract Management,
    - Real Estate Management,
    - Economic and Business Development, and
    - Contract Compliance.
- Consultation on methods of data cleanup, unification and streamlining, both at the initial implementation and ongoing customer and technical support.
- Provide your service and troubleshooting for technical issues and barriers that prevent effective operation and use.
- Import of existing data found in Excel spreadsheets, Access and visualization databases, ArcGIS, and Outlook.

7. PROPOSAL CONTENTS

- **Cover**
  - A one-page cover should be provided to include the following information:
  - TAEO RFP Title, Number, and Submittal Date
  - Company name
  - Business mailing address and web address
  - Type of company (publicly traded, privately owned, corporation, LLC, etc.)
  - Headquarters location and additional locations (City, State) serving this RFP

- **Approach to Delivery of Services**
  - The Respondent, through its written proposal, must describe its approach to delivering the Services, demonstrating appreciation for the key issues and stakeholders, for achieving the objectives, and for having an appropriate methodology and plan for delivering the Services.
  - The Respondent should indicate in their Approach to Delivery of Services how the Services will be delivered. This section should include a detailed breakdown and description of the specific steps that will be followed to perform the Scope of Work and address the Objective and Background concerns listed above.
    - Schedule for Deployment, including training, that meets the timeframes specified by this RFP. The Schedule should also address long-term items including:
    - Duration of the license agreements,
    - Renewal terms, if applicable, and
    - Whether such licenses would be singular to TAEO or to each individual user.
  - Respondents may elect to include in this section any innovative methods or concepts that might be beneficial to TAEO if the requirements established in this RFP are met.
  - Describe the available cloud solution options and briefly explain advantages of each as pertaining to TAEO's Objectives including scalability of the solution and ability to support a wide range of clients and a description of the cloud-based solution's security and SLAs, including standards for data backup and recovery.
  - Describe availability and ease of implementation for future enhancements and integrations as listed in Exhibit B.
  - Describe Respondent's available Support Services, including installation, initial training for 15 users, ongoing training for system upgrades and new users, maintenance and troubleshooting. What is your training methodology?

- **Project Management**
  - Please provide a project organizational chart plus a one-paragraph summary with photo for each key staff member on your team, including subcontractors as appropriate. Clearly identify the Project Manager for your team and provide Project Manager contact information. For each key staff member indicate their role and responsibilities, compliance certifications (examples: HIPPA, CJIS) in the project along with a summary of relevant past project experience, key skill sets, or other qualifications.

- **Past Experience**
  - The Respondent should provide evidence of ability and experience to undertake the specified objectives/duties in this RFP. Provide a discussion of the firm's overall qualifications and experience in providing similar services. Specifically, experience implementing a CRM for other economic development agencies. The candidate shall demonstrate that it possesses the experience necessary to successfully provide the CRM Solution required by this RFP and the ability to work in a responsive and cooperative manner with TAEO staff. Please include:

- The Respondent should provide three project examples on how they have previously applied the proposed approach or performed similar scopes of work for quasi-governmental or governmental economic development team
- Two references of organizations that have worked with the firm in a professional consulting capacity within the last five years. Each reference must include the organization's name, mailing address, contact name, contact telephone, email information, and the specific service(s) provided by the candidate. Ideal references will be in a similar industry, geography, and have a similar size, specifically Economic Development in the Midwest/Central US with 20-50 end users.

- **Budget**
  - The Respondent is required to deliver a detailed proposal of fees in submitting their proposal. Clearly state all fees and expenses, including any fees or expenses to third-party licensors or contractors, to be charged for available cloud options, design, implementation, staff, and support services as well as what options are included in any fee packages. This should include, at a minimum:
    - A quote with a list of available features that meet the needs of this RFP.
    - Pricing for add-on features.
    - Support Services fees (if applicable).
    - Pricing per user or license.

The proposal should illustrate the Respondents understanding of the level of effort required to serve TAEO's needs, including training and support services, provide timely delivery, and quality products. Any direct charges should be shown as a flat fee with markup not to exceed 10%. <u>No charges for travel to/from Tulsa or associated expenses due to in-person delivery of services shall be billed by the chosen Respondent or paid by TAEO</u>.

- **COST OF SERVICES**
  - The respondent's proposal must contain the fee schedule with an investment for the services listed in this RFP.
    - Describe the costing model structure for your solution. Is your pricing structure transaction based, licensed by the user, or some other format? Please provide an example.
    - Describe the costing model structure(s) for training. Train the trainer vs. Training all users, if applicable.
    - If other departments or areas of the business choose to be implemented in the SaaS solution, what costs are associated with their integration?
    - As volume increases it is expected that the costing model will decrease in price (i.e., by transaction or per seat price). Describe how the proposed costing model accommodates this need.
    - Describe the 'base' system that is included in the costing model as well as pricing for additional functionality that is not included in the 'base' system.
    - Identify how supervisor and manager positions are built into the costing model

- Define additional charges (e.g., travel charges, hourly consulting rates, etc.)
- Define additional charges or cost models associated with integrations

- **Small Business Utilization**
  - This section has been omitted for the purpose of the RFP.

- **References**
  - The Respondent should identify 3 client references (including names and contact information) who can be contacted by the Executive Director of TAEO or her designee and who can speak to the comprehensive nature, value and quality of the services provided both at initial on-boarding and over time.

- **Conflict of Interest**
  - At the time of submitting a proposal, the Respondent agrees there is no conflict of interest (real or perceived) unless specifically and clearly identified in their proposal with a recommended plan to manage the conflict of interest. The Respondent agrees to notify the Executive Director of TAEO immediately if an actual or potential conflict of interest arises at any point during the RFP, contracting or service delivery process.

8. DETAILED FUNCTIONAL REQUIREMENTS

- **Architecture**
- Provide a summary of the proposed solution and describe in detail the Vendor's product offering. Include an overview of the hardware, software, architecture and design, cloud environment, processes, management, implementation, and support of the proposed solution to meet the requirements as described in this RFP.
- Include additional functionality offered by the Vendor that is not a requirement of this RFP.
- What is the system availability rating of your proposed solutions (for example, 99.999% availability)?
- Describe any specific capabilities of your proposed solution to support high levels of reliability and availability
- Describe how system and customer data integrity is maintained in the event of a failure in one of the system's components.
- Is any equipment required at our sites? Provide detail if so.
- Does your solution support multi-tenancy? If yes, how you do provide multi-tenancy?
- How do you provide physical separation for each tenant?

- **Network**
- What connectivity options are available?
- Please describe your technical environment, including operating system(s), database management system(s), and required network protocols
- Does the vendor use redundant IP network solutions at the hosting facility?
- Is your Network Operations Center (NOC) manned 24 hours per day or staffed via page out? Where is your NOC located?
- Scalability and Capacity
- Describe the Vendor's system scalability in detail. Describe the scalability of system in terms of the number of concurrent or named users.

- **Integration**
- Describe support for open APIs for CRM and Other Application Integration.
- We often need to implement new features available on the platform we use that would benefit our business. Having to wait extended periods of time is disruptive to our goal of continuous improvement. How will you solve this? Please explain priorities and escalation procedures.
- Describe integration to customer provided databases to leverage the existing database(s)
- What are the database access methods?
- Can the Vendor provide a database solution in the event there is no database of record?
- Do you use Web Services for integration with third-party applications?
- What standard APIs do you offer for integration?

9. Disaster Recovery, Redundancy, and Security

- Provide detail on your approach to security architecture, including the development and implementation measures that will provide security and protection for the system.
- Application Response Times: Vendor must provide approximated response times that can be expected from the application. Vendor must also provide approximated transaction loads/ numbers of transactions through your service.
- Describe the proposed backup and recovery processing approach, and proposed virus protection strategy.
- Describe vendors general approach to reestablishing operations in the event of a catastrophe, as well as its approach to providing TAEO with a disaster recovery plan.
- Provide specifications on any hardware and software components utilized by the proposed security and disaster recovery solutions.
- Will you allow TAEO to evaluate your disaster recovery/business continuity plan on a yearly basis?
- Can your system provide seamless failover across the Wide Area Network?
- How are your systems structured? Can your systems accommodate management monitoring of the entire process to include all entry and exit points?
- How often are you auditing for compliance? How often is it done internally? How often is it done by an external vendor? Please provide the latest external vendor compliance report to the City of Tulsa Security team.
- Have you preformed an SSAE16/SSAE18/SOC1 audit? Type I or Type II? Can the audit results be provided to the City of Tulsa Security team?
- Do you require third party vendors supply SOC 1 and/or SOC2 reports?
- Describe your solution's backup / fail over process.
- Does your company use redundant IP network sources at the hosting facility? Provide detail if yes.

10. Reporting

- List and describe reporting capabilities for all modules in the Vendor's proposed solution.
- Provide a sample of standard reports (screen shots).
- Describe the system's capability of providing custom reports.
- Can the reports be exported to reporting tools such as Power BI? Please list all of the compatible reporting tools.
- Can data be extracted to use with a web-based reporting system?
- Describe your ability to aggregate data from disparate sources into a single real time dashboard.
- What is your data retention policy?
- Describe the report scheduling capabilities of your system
- Does your solution provide a secure method for directly accessing your data?
- Describe any other reporting capabilities of the Vendor's solutions.
- Is the reporting module customizable so we can set our own service levels?
- Describe the system's local and remote monitoring capabilities. What process can be monitored remotely?

- **Historical Reporting**
  - Does your solution provide the capability to create, maintain, and distribute custom tabular reports using data from the platform? If yes, explain.
  - Describe how reports are scheduled and distributed.
  - Does your solution provide API-based access to historical reporting for creation of custom reports?
  - Does your solution support creation of report templates and if so, explain the process?
  - Tell us about your custom reporting. Can reports be scheduled to run at regular intervals and run "on demand"? How are the reports delivered to the end user?
  - Will we have access to reports that use raw data and display it in canned reports in comma-delimited, tab-delimited, or XML formats? How is that accomplished?

11. Application Development Tools

- Describe any application development tools that the Vendor provides that would customize or enhance the Vendor solutions.
- Describe whether the proposed system supports windows with familiar features such as pull-down menus, toolbars, drag-and-drop, and cut/copy/paste.
- Provide a brief description of how the Vendor's application development tools can help develop and applications quickly, such as offering Rapid Application Development techniques including any component-based approach and pre-built library.
- Describe the Vendor's support for development tool features:
- Does the system allow developers to transfer changes to applications, rather, than move the entire application, from the PC to the production?
- Application tools provided for debugging tools.
- Describe the training that is required to utilize the application development tools.
- Do you provide a set of REST APIs for development?
- Do you have a Developer Community where developers can access complete documentation on your APIs?
- Describe any other application development capabilities of the Vendor's solutions.

12. Implementation, Support, and Training

- **System Implementation**
  - Describe your standard process and timeline for any new product implementation.
  - What project methodology do you use for managing projects and initiatives?
  - Please provide a detailed “roadmap” with the stages of the deployment for the proposed solution. Each stage should describe the sites and the capabilities available at the end of each stage.
  - Please provide detail on your largest implementation as well as your typical implementation.
  - Explain the makeup of Vendors implementation team.
  - When does project acceptance occur? Describe your acceptance criteria.
  - How long is a typical installation from contract signing to first call? Provide a high-level outline.

- **Support**
  - Describe in detail the Vendor’s support processes; include specifically the processes and contact information which users will use when requesting service, reporting a problem, and questioning their bill. Include:
    - Help desk availability and response times
    - How the help desk is reached and what are the hours? Where is it located?
    - Process for handling escalations
    - Availability and requirements for remote support
    - Do you support web tickets?
    - Do you have a knowledge Base that is easily accessible by the customer?
  - Are there a limited number of people who can call support and open a ticket? Are there a limited number of tickets that can be opened per time-period?
  - Describe the level of experience of your company's support personnel.
  - Describe how support will be provided and coordinated for any aspects of your solution that are to be supported by a third party.
  - Describe your company's maintenance offerings. Include:
    - Whether upgrades are included in the maintenance fees
    - How and how often upgrades are conducted?
    - Describe the responsibilities your company takes to implement software patches or updates. Are they tested and certified in your lab?
  - Do you provide 24x7x365 system support?
  - Please describe in detail your standard operational procedures for resolving technical problems.

- **Training**
  - Provide an overview of your training methodology.
  - The solution must provide ease of use. How is that accomplished?
  - Do you provide online training? If so, explain.
  - What continuing education offerings are available after the initial deployment phase? Do you offer monthly/quarterly web sessions?
  - What are your instructor qualifications?
  - What is the average learning curve for learners?
  - What is the learning curve for supervisory personnel?
  - Please provide a summary of online training

13. Maintenance & Upgrades

- Describe your upgrade process. How do you manage updates and maintenance, and the impact these have on your service? Can the system be upgraded without any downtime?
- Please describe your Service Maintenance/Management Process.
- How is maintenance scheduled and coordinated? Describe your process for providing notification of upgrades and patches.
- What provisions do you have to minimize maintenance windows?
- Please detail your Maintenance windows procedure.
- Describe how you handle updates for bug fixes.
- Please describe your SDLC (software development life cycle).
- Are all upgrades performed by the vendor?
- Please explain what procedural controls are in place to ensure that "hot fixes" applied in one release are rolled forwards into the next release.
- How often do you come out with new releases of your software? What is the history of your product releases?
- What is your strategy for incorporating changes to industry standards into your products? How does this strategy affect your product release cycle?

14. Key Information and Deadlines

Topic	Key Information
TAEO Project Manager	Gary Hamer, Sr. Performance Strategy Analyst ghamer@cityoftulsa.org 918-596-7573
RFP Published and Notices Issued	**On or before 5:00 pm CT, May 3, 2022**
Due Date for Brief Email of Intent to Respond with Key Contact Information (Name, Title, Company, Email, Phone)	All Respondents wish to express an interest in responding to the RFP should issue a brief email of intent (no more than 250 words) by **May 13, 2022 by 5:00pm CT** directed to the TAEO Project Manager.
Requests for Information regarding RFP	All Questions or Requests for Information from Respondents must be submitted in writing as indicated **below on or before 5:00 pm CT, May 20, 2022** Questions should be submitted by email to the TAEO Project Manager referencing in the subject line: **TAEO RFP – Request for Information.**
Responses to Questions Emailed to All Respondents	TAEO will send answers to all questions posed by potential respondents **on or before 5:00 pm CT, May 27, 2022.**
Closing Time for Proposal Submittals and Method to Submit Proposal	All Responses to this Request for Proposals must be submitted **on or before 5:00 pm CT, June 3, 2022** by email to the TAEO Project Manager referencing in the subject line: **TAEO Response to RFP – [Your Entity Name].** Proposals submitted other than as detailed in this paragraph or after the deadline shall be deemed to be invalid and may be excluded from consideration.
Review and Recommendation by Committee	**June 2022**
Board Approval of Recommended Respondent	**June 2022**
Contracting	**July – August 2022**
Expected start date of Contract	Anticipated start date for services: on or before **September 1, 2022**
Deployment	**September 2022**
Data Migration	**October 2022**
Integration	**November 2022**
Group and Administrator Training	**December 2022**
Full Implementation	**January 2023**

15. PROPOSAL EVALUATION

TAEO may convene a committee or the Executive Director or their designee may evaluate proposals in accordance with the following rubric. Respondents will be judged on the following evaluation criteria:

Evaluation Criteria	Point Range
Approach to Delivery of Services	0 – 20
Project Management	0 – 15
Past Experience	0 – 30
Budget	0 - 25
References	0 - 10
Total Possible Points	**0-100**

16. CONDITIONS OF REQUEST FOR PROPOSAL

1. The Tulsa Authority for Economic Opportunity (TAEO) is seeking proposals for the provision of the Services described herein.
2. Each Respondent to this RFP is expected to fully inform themselves on all aspects of the work required to be performed and submit its proposal on the template provided herein.
3. Each Respondent, by submitting its proposal, agrees that the proposal is subject to Exhibit A - TAEO Standard Contract Conditions, and agrees to comply with those conditions.
4. TAEO may, at its discretion, vary the Request for Proposals before the Closing Time. Changes to the RFP will be marked clearly and emailed to all interested parties who submitted an email indicating their intent to respond.
5. TAEO may, at its discretion, discontinue the RFP, may decline to accept any proposal, may decline to issue any contract, or may opt to satisfy its requirements separately from the RFP process.
6. Respondent should submit proposals in the format provided in the RFP.
7. Proposals shall be provided in English and with prices quoted in U.S. Dollars.
8. If requested by TAEO, the Respondent must be able to demonstrate its financial stability and its ability to remain viable as a provider of the Services over the term of any agreement.
9. Nothing in this RFP will be construed to create any binding contract (express or implied) between TAEO and any Respondent until a written Contract is entered into by the parties.
10. The Respondent agrees to attach their sample contract for Services which incorporates by reference the proposed TAEO Terms and Conditions of Contract.
11. The Respondent agrees that participation in any stage of the RFP process is at the Respondent's sole risk and cost.
12. Proposals shall be limited to 20 pages in length, including cover and appendices.
13. Evaluation of proposals may result in the selection of a Respondent for Contract or short-listing of multiple Respondents. If a short-list is developed, selected Respondents will be asked to provide a follow-up presentation based upon criteria identified by the Executive Director or their designee.

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Exhibit A

The below list represents future enhancements and integrations that have currently been thought of but are not an exhaustive list. The purpose of providing this list is not to request a guarantee of feasibility for enhancements or integrations, but rather to ensure that the proposed solution can be expanded upon and/or has an existing list of integrations and enhancements readily available

List of potential future enhancements and integrations:

- Integration with DocuSign
- Marketing automation including mail merge, response tracking, and event management
- Automated workflows
- Project Management
- Website integration with regards to event registration

Exhibit B

User Personas

Example Use Cases:

User 1: Laudette – Customer Service Specialist

Laudette would use the CRM to track the type and volume of our interactions with customers over time. For requests that require action, the CRM would track how we fulfill requests or provide support and indicate where we have the greatest requests. In addition, the CRM would track how requests are received, whether through email, online form, phone, etc. A CRM would also aid in keeping track of customer requests as they move through TAEO staff as well as through external City and INCOG departments, integrated with MS Outlook. The CRM would allow Laudette and leadership to see how many requests are open, how many are completed, etc. Ideally, automation in the CRM could also proactively follow-up with former customers with quality surveys and email to see if additional support is needed and visualization to support communication of CRM data.

User 2: Ashton – Business Development Specialist

Ashton would use CRM to track business development data (site requirements, project offerings, project feedback, discussion history, etc.) from lead to location (or closing of project) with the potential to easily share or transfer this project context data with necessary internal staff. The ability of the CRM to integrate with a data visualization platform (currently Power HB) to aggregate key data points over time or to display areas of interest geographically is an essential component of reporting. The CRM should have a simple way to input key points from leads into the system so that Ashton can easily monitor and report out key data points and KPIs. When leads require additional support, the CRM should allow the customer's information to be transferred to Simon for evaluation of incentives, to Larry for later compliance tracking, or to Laudette for permitting support without the need to re-enter data.

User 3: Simon – Program Manager

Simon would use the CRM to automate MS Outlook email outreach to applicants and participants, track responses and requests, and sync responses with his MS Outlook Calendar and Tasks. For applicants, the CRM would:

- Provide a link to the application upon submittal of an online Google Forms interest survey,
- Email all onboarding materials upon application submittal,
- Track completion of required supporting documents,
- Email applicants regarding any missing documents,
- Interface with ArcGIS/Survey123 to track uploading of signed documents, and
- Email status of acceptance upon Program Manager review.

For program participants, automated CRM processes send updates as new features are added, survey participants through an interface with Google Forms or Survey Monkey, notify external partners of new program participants, and track continued compliance as well as complaints & the statuses of those on probation. If a program participant requested help with city services, Simon could use the CRM to refer the customer to Laudette and track the status of their request.

User 4: Larry – Compliance Manager

Larry would use the CRM to track contracts and compliance. This would include an automated system to provide reminders to staff about upcoming performance requirements in various types of contracts. This would support staff in developing stronger compliance and monitoring systems, including:

- Notifying a party of an upcoming requirement to provide proof of financing, design documents, etc. for a development agreement.
- Notifying a party of a quarterly or annual reporting requirement related to jobs created or other items within a development agreement (i.e., for incentive contracts or development loans)
- Notifying a party of an upcoming interest payment on a loan or the full payment of outstanding principal on a loan.

The CRM would provide reports as to the number of development agreements or contracts which comply and those which are out of compliance. The CRM would have a way to input key points about contracts into the system so that Larry can easily monitor and enforce contract terms and ensure they are properly managed.

User 5: Jeane – Operations Manager

Jeane would utilize the CRM to monitor the status of operations, specifically output monitoring. The CRM would create a centralized means for tracking the outputs of our work and programs. For example:

- Capital investment generated by projects supported.
- Amount of incentives offered to projects;
- Housing units created (and affordability of them).
- Jobs created and quality of jobs (wages, benefits, etc.); and
- Overall KPI tracking.

The CRM would also simplify reporting by creating automated reports that allow easy monitoring of current performance and progress.