

Oakland County Department of Information Technology Project Scope and Approach

Project Name: Public Communications CRM Implementation

Project ID: DE2120CD

Leadership Group: Finance/Admin					
Department: Department of Public Communications			Division: County Executive Administration		
Project Sponsor: Ashley McBride-Braswell		Date Requested: 3/3/2022		PM Customer No. 120	
Request Type: <i>New Development</i>					
IT Team Name: eGovernment			IT Team No: E		
Project Manager/Leader: Stacy Metcalf					
Account Number:	95654	Account Description:	County Exec-Development	Customer Name:	County Executive Administration
Grant Funded?		Yes <u>No</u>	Mandate?		Yes <u>No</u>
			Mandate Source:		

Project Goal

To source and implement a customer relationship management database so that the Department of Public Communications can optimize their community engagement and gain efficiencies in casework management.

Business Objective

A major objective of this project is to source and implement an enterprise software solution to enable the County to organize its contacts and constituents. This solution would provide the County with improved analytics for community engagement and constituent outreach, allowing for improved messaging strategies and greater collaboration with the public. This product would also include casework management functionality, allowing for sharing among departments and/or County employees in a secure environment.

Major Deliverables

- Create and execute an RFP
- Detailed Project Plan
- Application and/or System Requirements
- Technical Architecture Diagram
- User Acceptance Test Plan
- Implementation Plan
- Training/User Manual(s)
- Disaster Recovery Toolkit
- Service Center Knowledge Documents

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Approach

- Write the RFP
- Review RFP responses
- Request and attend demonstrations
- Select a vendor/implementor
- Perform contract negotiations
- Develop Detailed Project Plan
- Review current business process and conduct needs assessment with customer
- Document system requirements
- Determine and document system architecture and diagram
- Conduct Tech Review
- Develop Implementation Plan
- Configure new system
- Develop User Acceptance Test Plan
- Test new system
- Acquire User Acceptance Sign off
- Conduct Change Control
- Develop User Documentation, Disaster Recovery Toolkit, Service Center Knowledge Documents
- Train users on new system
- Release new system into production
- Decommission legacy tool

Research & Analysis

Gartner Research Recommendation

Benefits

See Return on Investment (ROI) Analysis Document

Impact

Number of Users 25

Divisions County Executive Administration

Leadership Groups Finance/Admin

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Risk

Business Environment

Medium - Project will require some changes to existing business processes.

Technical Environment

Medium – Previously implemented technologies with new aspects and/or new requirements.

Assumptions

Staffing IT Staffing: resources will be available for the hours indicated per the attached project plan.

Other Staffing: additional staffing will be available as follows:

<u>Role:</u>	<u>Name</u>	<u>Hours per Day</u>
Project Sponsor:	Ashley McBride-Braswell	As Needed
Stakeholders:	Pam Tremble	As Needed
	Kaitlin Keeler	As Needed
	Carolynn Krause	As Needed

Facilities

-

Technical

-

Funding

-

Other

-

Priority

-

Constraints

- Data will be separate from current EDCA database

Exclusions

-

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PROJECT PHASE AUTHORIZATION

Phase(s):	
Total Estimated Application Services	Hours: 647
Total Estimated Technical Systems	Hours: 15
Total Estimated CLEMIS	Hours:
Total Estimated Internal Services	Hours:
IT Application Services Division Manager Approval:	Date:
IT Technical Systems Division Manager Approval:	Date:
IT CLEMIS Division Manager Approval:	Date:
IT Internal Services Division Manager Approval:	Date:
IT Management Approval:	
Approved: Yes No	Date:
Reason:	
Project Sponsor Approval:	
Title:	Date:

PROJECT SUMMARY

Authorized Development (see above)	Hours:
Previously Authorized Development	Hours:
Preliminary Estimated Development for Future Phases	Hours:
Grand Total Estimated Development	Hours: 662 Cost: \$109,230

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PROJECT COMPLETION AUTHORIZATION

Customer Acceptance of Product:	
Title:	Date:
Project Office Review:	Date:

Public Communications CRM Implementation - Size Estimate (+/- 10% to 50%)

	Type	ID	Task Name	Estimated Hours	Estimate Notes
3		000000	PROJECT MANAGEMENT	209	
4	Phase	100000	DEVELOP RFP & SELECT VENDOR	134	
5	Phase	200000	DEFINE BUSINESS REQUIREMENTS	32	
6	Phase	300000	DESIGN SYSTEM ARCHITECTURE	54	
7	Phase	500000	DEVELOP APPLICATION	139	
8	Phase	600000	IMPLEMENTATION PHASE	61	
9	Phase	800000	POST IMPLEMENTATION SUPPORT	33	
10				662	

Oakland County -- Public Communications CRM Implementation

Return on Investment Analysis

Project Summary

Description	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Total
Benefits/Savings:							
Tangible Benefits Subtotal:	0	0	0	0	0	0	0
Cost Avoidance Subtotal:	0	0	0	0	0	0	0
Costs:							
Development Services Subtotal:	148,322	11,723	5,100	12,078	5,254	12,443	194,919
Hardware Subtotal:	0	0	0	0	0	0	0
Software Subtotal:	22,297	22,966	23,655	24,364	25,095	25,848	144,226
Infrastructure Subtotal	0	0	0	0	0	0	0
Training Subtotal:	0	0	0	0	0	0	0
Other Subtotal:	0	0	0	0	0	0	0
Annual Statistics:							
Annual Total Savings	0	0	0	0	0	0	0
Annual Total Costs	170,619	34,689	28,754	36,442	30,349	38,291	339,145
Annual Return on Investment	(170,619)	(34,689)	(28,754)	(36,442)	(30,349)	(38,291)	(339,145)
Annual Costs/Savings Ratio	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Project Cumulative Statistics:							
Cumulative Total Savings	0	0	0	0	0	0	0
Cumulative Total Costs	170,619	205,308	234,063	270,505	300,854	339,145	339,145
Cumulative Return on Investment	(170,619)	(205,308)	(234,063)	(270,505)	(300,854)	(339,145)	(339,145)
Cumulative Cost/Savings Ratio	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Year Positive Payback Achieved							NO PAYBACK
State or Federal Mandate?							
Signatures:							
Benefits Reviewed By Project Sponsor	_____			Date:	_____		
Costs (including IT Resources) Reviewed By Information Technology Project Manager	_____			Date:	_____		

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Return on Investment Analysis

Cost Detail

Cost Description	Project Cost Category	Budget Category/Funding Source	Unit Desc	Units	Rate per Unit	Total Cost	Annual Multiplier	Affects Project ROI?							
								Y1	Y2	Y3	Y4	Y5	Y6		
IT Hours - New Development	Development Svcs			662	165	109,230		x							
IT Hours - System Maintenance	Development Svcs			10	165	1,650	1.015		x	x	x	x	x	x	
IT Hours - Customer Support	Development Svcs			20	165	3,300	1.015		x	x	x	x	x	x	
IT Hours - Planned Maintenance	Development Svcs			40	165	6,600	1.015		x		x			x	
User Hours - New Development	Development Svcs					0									
User Hours - PTNE/OT	Development Svcs					0									
Contractor Professional Services	Development Svcs					39,092		x							
PC System - Acquisition	Hardware				639	0									
PC System - Maintenance	Hardware				3,352	0									
Laptop - Acquisition	Hardware				922	0									
Laptop - Maintenance	Hardware				3,352	0									
Tablet Notebook - Acquisition	Hardware				1,069	0									
Tablet Notebook - Maintenance	Hardware				3,352	0									
File Space (100GB)	Hardware		ANN		23	0									
Package Software - Acquisition	Software					0									
Package Software - Maintenance	Software					22,297	1.030	x	x	x	x	x	x	x	
Business Objects Access	Software					0									
Term Emulation SFTW-Acquisition	Software					0									
Term Emulation SFTW-Maintenance	Software					0									
Server - Acquisition/Upgrade	Infrastructure				8,000	0									
Server - Maintenance	Infrastructure				360	0									
Server Sftwre - Acquisition/Upgrade	Infrastructure				335	0									
Server Sftwre - Maintenance	Infrastructure					0									
Server Rack Mount	Infrastructure				400	0									
Oracle Enterprise Software Purchase - Per Processor (4 Cores) - Requires Annual Support Below	Infrastructure				42,280	0									
Oracle Enterprise Software Support - Per Processor (4 Cores)	Infrastructure				9,293	0	1.030								
SQL Server Enterprise Software Purchase - Per Processor (4 cores) - Purchased Sept 2019-Aug 2020 - Includes Support thru Aug 2022	Infrastructure				16,985	0									

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Cost Detail

Cost Description	Project Cost Category	Budget Category/Funding Source	Unit Desc	Units	Rate per Unit	Total Cost	Annual Multiplier	Affects Project ROI?							
								Y1	Y2	Y3	Y4	Y5	Y6		
SQL Server Enterprise Software Purchase - Per Processor (4 cores) - Purchased Sept 2020-Aug 2021 - Includes Support thru Aug 2022	Infrastructure				12,724	0									
SQL Server Enterprise Software Purchase - Per Processor (4 cores) - Purchased Sept 2021-Aug 2022 - Includes Support thru Aug 2022	Infrastructure				8,463	0									
SQL Server Enterprise - Support, Per Processor (4 cores) - Sept 2022 and Beyond	Infrastructure				4,261	0									
SQL Server Standard Software Purchase - Per Processor (4 cores) - Purchased Sept 2019-Aug 2020 - Includes Support thru Aug 2022	Infrastructure				4,429	0									
SQL Server Standard Software Purchase - Per Processor (4 cores) - Purchased Sept 2020-Aug 2021 - Includes Support thru Aug 2022	Infrastructure				3,317	0									
SQL Server Standard Software Purchase - Per Processor (4 cores) - Purchased Sept 2021-Aug 2022 - Includes Support thru Aug 2022	Infrastructure				2,205	0									
SQL Server - Standard Support, Per Processor (4 cores) - Sept 2022 and Beyond	Infrastructure				1,112	0									
Websphere Basic Per Processor Single/Dual Core - Includes Year 1 Maintenance	Infrastructure				3,506	0									
Websphere Basic Per Processor Single/Dual Core - Year 2 and Beyond	Infrastructure				701	0									
Websphere ND Per Processor Single/Dual Core - Includes Year 1 Maintenance	Infrastructure				13,180	0									

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Return on Investment Analysis

Cost Detail

Cost Description	Project Cost Category	Budget Category/Funding Source	Unit Desc	Units	Rate per Unit	Total Cost	Annual Multiplier	Affects Project ROI?						
								Y1	Y2	Y3	Y4	Y5	Y6	
Websphere ND Per Processor Single/Dual Core - Year 2 and Beyond	Infrastructure				2,635	0								
SSL Certificate	Infrastructure				845	0								
Internet Access	Infrastructure				180	0								
Imperva Web Application Firewall (External Web Applications Only)	Infrastructure		ANN		500	0								
App Code Directories on Consolidated IIS Server (Virtual)	Infrastructure		ANN		415	0								
Dedicated Virtual Server	Infrastructure		ANN		4,150	0								
Extra Small - 2 Core 8GB RAM, 500GB Drive, 10 GB NIC - Cloud/Virtual = \$601 On Premise Physical Server = \$2,735	Infrastructure		ANN			0								
Small - 4 Core 16GB RAM, 500GB Drive, 10 GB NIC - Cloud/Virtual = \$951 On Premise Physical Server = \$3,057	Infrastructure		ANN			0								
Medium - 8 Core 32GB RAM, 500GB Drive, 10 GB NIC - Cloud/Virtual = \$1,702 On Premise Physical Server = \$8,715	Infrastructure		ANN			0								
Large - 16 Core 64GB RAM, 500GB Drive, 10 GB NIC - Cloud/Virtual = \$3,167 On Premise Physical Server = \$10,758	Infrastructure		ANN			0								
Extra Large - 40 Core 192GB RAM, 500GB Drive, 10 GB NIC - Cloud/Virtual = \$7,564 On Premise Physical Server = \$24,137	Infrastructure		ANN			0								

Oakland County -- Public Communications CRM Implementation
Return on Investment Analysis

Cost Detail

Cost Description	Project Cost Category	Potential Cost Extensions					
		Y1	Y2	Y3	Y4	Y5	Y6
IT Hours - New Development	Development Svcs	109,230.00					
IT Hours - System Maintenance	Development Svcs		1,674.75	1,699.87	1,725.37	1,751.25	1,777.52
IT Hours - Customer Support	Development Svcs		3,349.50	3,399.74	3,450.74	3,502.50	3,555.04
IT Hours - Planned Maintenance	Development Svcs		6,699.00		6,901.48		7,110.07
User Hours - New Development	Development Svcs						
User Hours - PTNE/OT	Development Svcs						
Contractor Professional Services	Development Svcs	39,092.20					
PC System - Acquisition	Hardware						
PC System - Maintenance	Hardware						
Laptop - Acquisition	Hardware						
Laptop - Maintenance	Hardware						
Tablet Notebook - Acquisition	Hardware						
Tablet Notebook - Maintenance	Hardware						
File Space (100GB)	Hardware						
Package Software - Acquisition	Software						
Package Software - Maintenance	Software	22,296.96	22,965.87	23,654.84	24,364.49	25,095.42	25,848.29
Business Objects Access	Software						
Term Emulation SFTW-Acquisition	Software						
Term Emulation SFTW-Maintenance	Software						
Server - Acquisition/Upgrade	Infrastructure						
Server - Maintenance	Infrastructure						
Server Sftwre - Acquisition/Upgrade	Infrastructure						
Server Sftwre - Maintenance	Infrastructure						
Server Rack Mount	Infrastructure						
Oracle Enterprise Software Purchase - Per Processor (4 Cores) - Requires Annual Support Below	Infrastructure						
Oracle Enterprise Software Support - Per Processor (4 Cores)	Infrastructure						
SQL Server Enterprise Software Purchase - Per Processor (4 cores) - Purchased Sept 2019-Aug 2020 - Includes Support thru Aug 2022	Infrastructure						

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Cost Detail

Cost Description	Project Cost Category	Potential Cost Extensions					
		Y1	Y2	Y3	Y4	Y5	Y6
SQL Server Enterprise Software Purchase - Per Processor (4 cores) - Purchased Sept 2020-Aug 2021 - Includes Support thru Aug 2022	Infrastructure						
SQL Server Enterprise Software Purchase - Per Processor (4 cores) - Purchased Sept 2021-Aug 2022 - Includes Support thru Aug 2022	Infrastructure						
SQL Server Enterprise - Support, Per Processor (4 cores) - Sept 2022 and Beyond	Infrastructure						
SQL Server Standard Software Purchase - Per Processor (4 cores) - Purchased Sept 2019-Aug 2020 - Includes Support thru Aug 2022	Infrastructure						
SQL Server Standard Software Purchase - Per Processor (4 cores) - Purchased Sept 2020-Aug 2021 - Includes Support thru Aug 2022	Infrastructure						
SQL Server Standard Software Purchase - Per Processor (4 cores) - Purchased Sept 2021-Aug 2022 - Includes Support thru Aug 2022	Infrastructure						
SQL Server - Standard Support, Per Processor (4 cores) - Sept 2022 and Beyond	Infrastructure						
Websphere Basic Per Processor Single/Dual Core - Includes Year 1 Maintenance	Infrastructure						
Websphere Basic Per Processor Single/Dual Core - Year 2 and Beyond	Infrastructure						
Websphere ND Per Processor Single/Dual Core - Includes Year 1 Maintenance	Infrastructure						

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Cost Detail

Cost Description	Project Cost Category	Potential Cost Extensions					
		Y1	Y2	Y3	Y4	Y5	Y6
Websphere ND Per Processor							
Single/Dual Core - Year 2 and Beyond	Infrastructure						
SSL Certificate	Infrastructure						
Internet Access	Infrastructure						
Imperva Web Application Firewall (External Web Applications Only)	Infrastructure						
App Code Directories on Consolidated IIS Server (Virtual)	Infrastructure						
Dedicated Virtual Server	Infrastructure						
Extra Small - 2 Core 8GB RAM, 500GB Drive, 10 GB NIC - Cloud/Virtual = \$601 On Premise Physical Server = \$2,735	Infrastructure						
Small - 4 Core 16GB RAM, 500GB Drive, 10 GB NIC - Cloud/Virtual = \$951 On Premise Physical Server = \$3,057	Infrastructure						
Medium - 8 Core 32GB RAM, 500GB Drive, 10 GB NIC - Cloud/Virtual = \$1,702 On Premise Physical Server = \$8,715	Infrastructure						
Large - 16 Core 64GB RAM, 500GB Drive, 10 GB NIC - Cloud/Virtual = \$3,167 On Premise Physical Server = \$10,758	Infrastructure						
Extra Large - 40 Core 192GB RAM, 500GB Drive, 10 GB NIC - Cloud/Virtual = \$7,564 On Premise Physical Server = \$24,137	Infrastructure						

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Return on Investment Analysis

Cost Summary

Cost Description	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Total
Development Services:							
IT Hours - New Development	109,230						109,230
IT Hours - System Maintenance		1,675	1,700	1,725	1,751	1,778	8,629
IT Hours - Customer Support		3,350	3,400	3,451	3,502	3,555	17,258
IT Hours - Planned Maintenance		6,699		6,901		7,110	20,711
User Hours - New Development							
User Hours - PTNE/OT							
Contractor Professional Services	39,092						39,092
<i>Development Services Subtotal:</i>	148,322	11,723	5,100	12,078	5,254	12,443	194,919
Hardware:							
<i>Hardware Subtotal:</i>							
Software:							
Package Software - Maintenance	22,297	22,966	23,655	24,364	25,095	25,848	144,226
<i>Software Subtotal:</i>	22,297	22,966	23,655	24,364	25,095	25,848	144,226
Infrastructure:							
<i>Infrastructure Subtotal</i>							
Training:							
<i>Training Subtotal:</i>							
Other:							

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Cost Summary

Cost Description	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Total
<i>Other Subtotal:</i>							
Costs Total:	170,619	34,689	28,754	36,442	30,349	38,291	339,145

