

**BOARD MEETING DATE:** MARCH 13, 2023

**SUBJECT:** PROCUREMENT APPROVAL REQUEST – SERVICE CENTER CUSTOMER RELATIONSHIP  
MANAGEMENT SYSTEM MIGRATION

**PREPARED BY:** BRIAN BRAUN, CFO, KELLY GUTHNER, CIO

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**Proposed Action:**

Board approval to contract with TTEC through a statement of work for the migration of the current Oracle customer relationship management (CRM) system to Microsoft Dynamics.

**Summary:**

In 2022 TTEC acquired a portion of Faneuil that included our contracted service center operations. The current contracted services are scheduled to sunset February 28, 2023. C4HCO anticipated the end of the contract and has moved to internalize the service center operations including the technology services/CRM system. In the fall of 2022 C4HCO underwent an analysis of CRM platforms and selected Microsoft Dynamics as the best fit for the organization.

C4HCO has been in the process of migrating from the Faneuil Oracle platform over the last 2 months and is needing TTEC's expertise to complete the migration. The combination of TTEC as the current owner/operator of C4HCO's Oracle platform and their expertise in Microsoft Dynamics migrations makes them the preferred choice for this work given the time constraints of completing the migration.

The estimated cost of TTEC's services for this migration is \$415,000. This estimate includes the designing, building, testing, training, deployment and transition of the CRM to C4HCO. In order to meet the timing needs resulting from the end of the Oracle licensing the planning and design work has commenced utilizing TTEC's services.

**Staff Recommendation:**

Staff recommends the approval of this statement of work.

**Procurement Compliance:**

*Procurement Exceeds \$250,000 threshold: Yes*

*Procurement/Business Initiative is necessary or advisable: Yes*

*Type of procurement vehicle: The Statement of Work falls under the Amended Master Service Agreement that was transferred to TTEC from Faneuil.*

*Need for RFP,RFI,RFS or similar: A public procurement process was followed last fall in our selection of Microsoft Dynamics as the preferred platform, the migration services fall under the current scope of the Master Service Agreement with TTEC. **In addition, given the combination of timing constraints (needs to be transitioned by April) and vendors contractual relationship with Oracle, this is deemed a sole source procurement since no other vendor would be able to deliver these services as needed.***

**Funding Source:**

Anticipate the use of general operating funds.