

**REPORT/RECOMMENDATION TO THE BOARD OF SUPERVISORS  
OF SAN BERNARDINO COUNTY  
AND RECORD OF ACTION**

October 5, 2021

**FROM**

**LEONARD X. HERNANDEZ, Chief Executive Officer, County Administrative Office**

**SUBJECT**

License Renewal for Customer Relationship Management Software

**RECOMMENDATION(S)**

1. Approve **(County Contract No. 21-751)** Quote No. 31215377 and Salesforce.com Terms of Use with Carahsoft Technology Corp. for cloud services for data storage for use in conjunction with the Customer Relationship Management system, for a total amount not to exceed \$248,730.46, for the period October 6, 2021 through October 5, 2022 for Line Nos. 8-15, and for the period October 8, 2021 through October 7, 2022 for Line Nos. 1-7 under Quote No. 31215377.
  2. Authorize the Chief Executive Officer or County Chief Operating Officer, to electronically accept the Salesforce.com, Inc. License Agreements and Terms, related to Recommendation Nos. 1 and 3, necessary for the implementation of the Customer Relationship Management system, subject to review by County Counsel, provided that such License Agreements and Terms do not result in additional costs to be incurred by the County, and do not extend the duration of the contract.
  3. Approve **(County Contract No. 21-752)** Quote No. 31215377 with Carahsoft Technology Corp. for the "S-Docs" add-on, for use in conjunction with the Customer Relationship Management system, for a total amount not to exceed \$4,779.58, for the period December 31, 2021 through December 30, 2022 for Line No. 16 under Quote 31215377.
  4. Designate the Chief Executive Officer or County Chief Operating Officer to approve and sign financial change orders up to \$25,000 for Contract No. 20-916 with Incapsulate, LLC, as they pertain to changes to or confirmation of the scope of work of the Customer Relationship Management system, subject to review by County Counsel.
  5. Designate the Chief Executive Officer or County Chief Operating Officer to approve and sign non-financial change orders for Contract No. 20-916 with Incapsulate, LLC, as they pertain to changes to or confirmation of the scope of work of the Customer Relationship Management system, subject to review by County Counsel, provided that any such change orders do not result in additional costs to be incurred by the County, and do not extend the duration of the contract.
  6. Direct the Chief Executive Officer or County Chief Operating Officer to transmit copies of all change orders to the Clerk of the Board of Supervisors within 30 days of execution.
- (Presenter: Leonard X. Hernandez, Chief Executive Officer, 387-5417)

**COUNTY AND CHIEF EXECUTIVE OFFICER GOALS & OBJECTIVES**

**Improve County Government Operations.**

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**FINANCIAL IMPACT**

Approval of this item will not require the use of additional Discretionary General Funding (Net County Cost). Sufficient appropriation of \$253,510.04 is included in the 2021-22 County Administrative Office budget to fund the license renewal cost not-to-exceed \$248,730.46 for the one-year term from October 6, 2021 to October 5, 2022, and the S-Docs renewal cost of \$4,779.58 for the one-year term from December 31, 2021 through December 30, 2022.

**BACKGROUND INFORMATION**

On September 29, 2020 (Item No. 4), the Board of Supervisors (Board) approved Contract No. 20-916 with Incapsulate, LLC (Incapsulate) for implementation of the Customer Relationship Management (CRM) system for the period September 29, 2020 through September 28, 2023, with two one-year options to extend the contract, for an amount not to exceed \$253,693.38. This included one-time costs for implementation of \$147,100, ongoing costs for licenses, and maintenance and support with Incapsulate of \$35,000 for the first year of the contract, \$35,525 for the second year of the contract, and \$36,068.38 for third year of the contract. On September 29, 2020 (Item No. 4), the Board also approved a contract for \$118,549.54 with Carahsoft, for licenses, and maintenance and support related to Salesforce cloud services, which is used in conjunction with the CRM system developed by Incapsulate. Incapsulate developed and implemented the CRM system, including implementation of the Salesforce cloud service. The Salesforce cloud service is integral to the operation of the CRM system. Carahsoft is the provider of the Salesforce cloud service product.

On December 15, 2020 (Item No. 7), the Board approved Amendment No. 1 to the Incapsulate Contract No. 20-916 for additional work to create three additional intake forms for \$9,264, and also approved a quote with Carahsoft for \$117,263.43 for five additional business units, 40 additional Service Cloud licenses, the S-Doc add-on, and \$9,588 for the Zapier add-on. The five additional business units would allow each District to manage and customize their individual CRM system based on their needs and processes, with no overlap with the other Districts; the "S-Doc" add-on would allow the printing of certificates from the CRM system to mimic current District processes; and the Zapier add-on for integration with the CRM related to scheduling outreach events. Should additional work from Incapsulate be necessary, under Recommendation No. 4, the Chief Executive Officer or County Chief Operating Officer would be authorized to approve any financial change orders up to \$25,000 with Incapsulate.

Per County Policy 11-05, contracts containing non-standard terms must be approved by the Board. The Carahsoft Quote incorporates the Salesforce.com (SFDC) Terms of Use specific to Salesforce purchases through Carahsoft and is the SFDC standard commercial contract, which includes terms that differ from the standard County contract and omits certain County standard contract terms. County Counsel has reviewed the current SFDC Terms of Use and determined that there have been no substantive changes to the terms approved by the Board on September 29, 2020 (Item No. 4).

Under Recommendation No. 3, S-Docs allows printing of certificates from the CRM system. The S-Docs Master Subscription Agreement is its standard commercial contract, which includes terms that differ from the standard County contract and omits certain County standard contract terms. The Board approved the non-standard terms for S-Docs on December 15, 2020 (Item No. 7). County Counsel has reviewed the current S-Docs Master Subscription Agreement and determined that there have been no substantive changes to the terms approved by the Board.

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**PROCUREMENT**

The original contract with Carahsoft for Salesforce licenses is a result of a competitive procurement. On October 18, 2019, Request for Proposal No. CAO120-CAO04-3558 (RFP) was released via the County's electronic procurement network (ePro) for a customer relationship management software solution including implementation and configuration to meet the County's requirements. Incapsulate was selected from six proposals and scored the highest on qualifications, experience, cost, financial review, technical review, references, and interview/presentation/demonstration. The recommended actions will renew the licenses needed for the CRM system to perform.

**REVIEW BY OTHERS**

This item has been reviewed by County Counsel (Bonnie Uphold, Deputy County Counsel, 387-5455) on September 21, 2021; Information Services Department (Jake Cordova, Assistant Chief Information Officer, 388-0503) on September 23, 2021; Finance (Stephenie Shea, Administrative Analyst, 387-4919) on September 17, 2021; and County Finance and Administration (Matthew Erickson, County Chief Financial Officer, 387-5423) on September 20, 2021.

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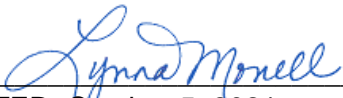
Record of Action of the Board of Supervisors  
San Bernardino County

**APPROVED (CONSENT CALENDAR)**

Moved: Joe Baca, Jr. Seconded: Col. Paul Cook (Ret.)

Ayes: Col. Paul Cook (Ret.), Janice Rutherford, Dawn Rowe, Curt Hagman, Joe Baca, Jr.

Lynna Monell, CLERK OF THE BOARD

BY   
DATED: October 5, 2021



cc: CAO- Shea w/agree  
Contractor- C/O CAO w/agree  
File- w/agree  
LA 10/12/2021