



## REPORT

**DATE ISSUED:** September 1, 2016

**REPORT NO:** HCR16-072

**ATTENTION:** Chair and Members of the San Diego Housing Commission  
For the Agenda of September 9, 2016

**SUBJECT:** Award of Phone System and Call Center Replacement Contract

**COUNCIL DISTRICT:** Citywide

### **REQUESTED ACTION**

Award a contract for the purchase and implementation of a new phone system and call center for the San Diego Housing Commission and its remote sites.

### **STAFF RECOMMENDATIONS**

That the San Diego Housing Commission (Housing Commission) take the following actions:

- 1) Approve the award of a contract to Packet Fusion in the amount of \$237,332.91 for the purchase and implementation of a new ShoreTel phone system and call center for the Housing Commission and its remote sites;
- 2) Authorize the President & Chief Executive Officer (President & CEO), or designee, to substitute the funding sources with other available funding sources, so long as the total program/project budget amount after substitution does not exceed the approved total budget, should the operational need arise, or should such actions be to the benefit of the Housing Commission and its mission. Funding substitutions will be memorialized in an Information Report at the next scheduled Housing Commission Board meeting; and
- 3) Authorize the President & CEO, or designee, to execute all documents and instruments necessary and/or appropriate to implement these approvals, in a form approved by General Counsel, and take such actions as are necessary and/or appropriate to implement these approvals.

### **SUMMARY**

In February 2016, a project was initiated to define requirements for a new phone system and call center for the Housing Commission. The requirements included the provision of:

- Business units with full call center capabilities integrating Customer Relationship Management (CRM) and Business (BI) solutions;
- Seamless connection of the remote locations;
- Capability for future technical growth;
- Greater business efficiency; and
- Technical architecture and hardware that fit within the Technology Roadmap

The new solution will leverage current technical advancements in telephone hardware, software, call center and reporting capabilities. New capabilities in the call center also include advanced call routing, scheduled callbacks, target announcements and outbound dialing. The new telephone system solution also includes desktop interfaces for agents and supervisors, call recording, analysis features, and reporting capabilities. The system also creates administrative efficiencies from an Information Technology (IT) management perspective. These new capabilities will provide the organization with opportunities for streamlined workflows, simplified and efficient interaction with the public, and more effective business unit activity. This initiative ties directly into the organization's strategic objective of enhancing customer service and increasing operational efficiencies by expanding the use of technology.

IT market research matched three of the top phone system manufacturers, Cisco, ShoreTel, and Avaya, to organizations of similar size to the Housing Commission. These manufacturers all have partnerships with authorized resellers. A cross-departmental selection panel that included representatives from Real Estate Division, Rental Assistance Division and IT Department reviewed and scored demonstrations from these three phone system and call center manufacturers. The selected system based on the highest ranking is ShoreTel, for which Packet Fusion is the authorized reseller.

System	Ranking
ShoreTel	1
Cisco	2
Avaya	3

The contract is being awarded under a Western States Contracting Alliance (WSCA-NASPO) cooperative agreement and in accordance with the Housing Commission's Statement of Procurement Policy.

SDHC's current phone system, Cisco, was awarded and implemented in 2009. As of the date of this report, the system is no longer supported by the manufacturer, is at the end of its shelf life, and has reached its maximum growth scalability.

### **FISCAL CONSIDERATIONS**

Approving this action will not change the FY2017 proposed total budget.

### **EQUAL OPPORTUNITY/CONTRACTING**

Packet Fusion is a national corporation with a branch office in Carlsbad, California. The required EOC forms and Workforce Report will be obtained from Packet Fusion at the time of contract execution.

### **KEY STAKEHOLDERS and PROJECTED IMPACTS**

Key stakeholders include Housing Commission staff and their internal and external customers.

### **ENVIRONMENTAL REVIEW**

This activity is not a project as defined by the California Environmental Quality Act (CEQA) Section 21065 and State CEQA Guidelines Section 15378(b)(5), as it is an administrative activity of government that will not result in direct or indirect physical changes in the environment. The determination that this activity is not subject to CEQA, pursuant to Section 15060(c)(3), is not appealable and a Notice of Right to appeal the Environmental Determination (NORA) is not required. This activity is categorically excluded from the National Environmental Policy Act pursuant to Part 58.35(b)(3) of Title 24 of the Code of Federal Regulations as operating or maintenance related.

September 1, 2016

Award of Phone System and Call Center Replacement Contract Page 3

Respectfully submitted,



Suket Dayal  
Senior Vice President of Business Administration  
Board and Executive Functions

Approved by,



Jeff Davis  
Executive Vice President & Chief of Staff  
San Diego Housing Commission

Hard copies are available for review during business hours at the security information desk in the main lobby and at the fifth floor reception desk of the San Diego Housing Commission offices at 1122 Broadway, San Diego, CA 92101 and at the Office of the San Diego City Clerk, 202 C Street, San Diego, CA 92101. You may also review complete docket materials in the “Public Meetings” section of the San Diego Housing Commission website at [www.sdhc.org](http://www.sdhc.org).