



**City of Racine, Wisconsin**  
**AGENDA BRIEFING MEMORADUM**

<b>AGENDA DATE:</b>	November 27, 2023 – Finance and Personnel Committee December 5, 2023 – Common Council
<b>SUBJECT:</b>	Communication sponsored by Mayor Mason, on behalf of the City Clerk, requesting to enter into a three year interstate agreement with Carahsoft for the purchase of Polimorphic Customer Relationship Management (CRM) Software.
<b>PREPARED BY:</b>	Tara McMenamin, City Clerk/ Treasury Manager
<b>SUMMARY:</b>	The City Clerk is requesting to enter into an interstate agreement for the purchase of CRM software provided by Polimorphic. The cost of the program will not exceed \$250,000 a year for three years.
<b>BACKGROUND:</b>	<p>Approval of the 2024 budget included funds to purchase a CRM software system. A team of employees from City Hall including the City Clerk, Deputy Clerk, Communication Director, Mayor, MIS Director, MIS Project Manager, and MIS City Works Specialist attended four virtual demos and three in person demos of different software systems used through out the country.</p> <p>Demos and inquires Included the following software systems:</p> <ul style="list-style-type: none"><li>• ZenDesk</li><li>• Sales Force</li><li>• Polimorphic</li><li>• Indigov</li></ul> <p>After the conclusion of demos and inquiries all members believed the polimorphic systems would best fit the city’s CRM needs. Polimorphic is on a cooperative agreement for purchasing requirements.</p> <p>Polimorphic was the only company which makes CRM software specifically for government. Clients include West Bend, WI and their largest customer is Gaston County, NC whose population is 227,000 residents.</p> <p>Polimorphics main functions include managing customer interactions, process tools (such as workflows), data &amp; case management, payment solutions, performance indicators, asset tracker, constituent facing case status tracking, AI assisted communications, community notification, and many integrations into different programs such as phone, emails, and city works.</p> <p>There will be other savings in cost from software that will be implemented into the CRM system. Those systems include Business Licenses (currently an add on to Munis), Rock Solid, Open Records Software (currently budgeted and not implemented), the possibility of incorporating our current MIS helpdesk software, and the possibility of code red alert system.</p> <p>If approved, the CRM system will be implemented city wide throughout 2024. Starting with the Department of Customer Service in Q1 of 2024.</p> <p>The program costs will not exceed \$250,000 a year for a three-year agreement.</p>

**RECOMMENDATION:** That the Mayor and City Clerk be authorized to enter into a three-year agreement for the purchase of Polimorphic CRM software.

**FISCAL NOTE:** \$250,000 of initial funding is available in the 2024 capital budget. Year 2 and Year 3 will be budgeted in subsequent years operational budgets.