



**Date:** June 20, 2016

**To:** Thomas J. Bonfield, City Manager  
**Through:** Wanda S. Page, Deputy City Manager  
**From:** Bertha T. Johnson, Budget and Management Services Director  
Kerry Goode, Director of Technology Solutions  
**Subject:** Upgrade and Maintenance Support for Performance Management System

### **Executive Summary**

Since 2011, the City has had a perpetual software license with ClearPoint Strategy to house and display the City's Strategic Plan to the public. The City is now ready to use ClearPoint not only an outward facing system but also to track and analyze data from internal measures that departments use to make decisions.

### **Recommendation**

The Budget and Management Services Department recommends that the City Council authorize the City Manager to:

1. Enter into a contract with ClearPoint Strategy for maintenance and support for three years, for a total amount not to exceed \$138,962; and,
2. Authorize the City Manager or his designee to negotiate change orders for the contract provided that the cost of all change orders does not exceed \$13,896 and the total contract cost does not exceed \$152,858.

### **Background**

Departments are currently collecting data for the Citywide Strategic Plan, Department Strategic Plan, annual core measures, benchmarking studies and internal measures in various systems and in many cases, performing double entry. Much time and energy goes into the collecting and tracking of data and it is difficult to perform actual analysis that would lead to better decision making. This proposed citywide system would provide a single source to track all measures as well as provide department staff an opportunity to better analyze and make decisions based on data. Database is needed:

- To streamline the process so that staff will enter into a single database and then be able to download the data to use in other systems if need be
- So that core measures can be tracked on a monthly basis year after year to see patterns and trends
- To better track department's process and timeliness
- To have a single location for data to make it easier to pull information from multiple departments

The City purchased user rights of ClearPoint Strategy software in 2011 to house data and display the Strategic Plan online for residents to view. When the City was ready to take performance management to the next level, an RFP was conducted in order to find the best software system for Durham's needs. Four vendors were evaluated by a cross sectional team of employees over a 3 month period. The evaluation process included an in depth

review of the RFP and live demonstrations. ClearPoint Strategy was selected unanimously by the selection team.

**Issues and Analysis**

The City has made a significant investment in performance management. This is the next step in the process to becoming a more data driven organization. This system will improve the timeliness of information used for decision making and make it easier to communicate that performance to elected officials and the residents of Durham.

**Alternatives**

The City can choose not to purchase software maintenance and support services from ClearPoint Strategy. Without this software, the City cannot grow its data driven activity in the future. This alternative is not recommended.

**Financial Impact**

The total cost for the system set up and training will be \$50,049 for the first year. Full implementation of the system is estimated to take a little over a year to complete. The funding required for the annual user support shall be paid from the Budget and Management Services Department with the option of additional users being paid for by departments if they require over the standard amount. The funding required for the software services is included in the FY16 Budget and Management Services' budget.

Year 1 - \$50,049  
Year 2 - \$44,457  
Year 3 - ~~\$44,456~~  
\$138,962

**SDBE Summary**

The Department of Equal Opportunity/Equity Assurance reviewed the bid submitted by ClearPoint Strategy and has determined that they are in compliance with the Ordinance to Promote Equal Opportunities in City Contracting.

**SDBE Requirements**

There were no SDBE firms to provide this service.

The workforce statistics for ClearPoint Strategy are as follows:

Total Workforce	7	100%
Total Females	3	43%
Total Males	4	57%
Black Males	0	0%
White Males	4	57%
Other Males	0	0%
Black Females	0	0%
White Females	3	43%
Other Females	0	0%

**Attachments**

- 1) ClearPoint Strategy Contract
- 2) Exhibit A ClearPoint Contract

### 3) Exhibit B Insurance Requirements