

Staff Report

Community Services Department

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REPORT TO: Finance and Corporate Services Committee

DATE OF MEETING: June 16, 2025

SUBMITTED BY: Jana Miller, Director, Corporate Customer Service

PREPARED BY: Jana Miller, Director, Corporate Customer Service
Ryan Scott, Chief Procurement Officer

WARD(S) INVOLVED: N/A

DATE OF REPORT: May 1, 2025

REPORT NO.: CSD-2025-254

SUBJECT: Customer Service Software Implementation Vendor

RECOMMENDATION:

That MuniPaaS Corporation, King City, Ontario, be the sole source provider for licensing, implementation and support services for Salesforce Case Management as the City's customer relationship management platform, at their quoted price of \$327,000, plus H.S.T. of \$42,510, for a total of \$369,510, for a three (3) year term plus two (2) optional one (1) year terms, provided a satisfactory contract is executed.

REPORT HIGHLIGHTS:

- This report explains the rationale for Ontario-based MuniPaaS Corporation as the sole implementation vendor for the City's customer relationship management platform.
- The first phase of the project is complete with the City successfully onboarding its 24/7 Corporate Contact Centre through a 2024 pilot of the platform. Plans are to expand its use to other service areas to create more centralized customer interaction management for the organization.
- This phase of the project is fully funded through \$275,000 of operating and capital funding approved in the 2025 budget process and a pre-existing capital balance.
- This report supports core service delivery.

BACKGROUND:

In 2014, the Region of Waterloo negotiated an agreement for a Customer Relationship Management (CRM) platform and the City was able to utilize it with free licensing and maintenance costs. In 2023, the Region negotiated a new contract with the CRM provider and that did not include continued free licensing and maintenance costs for the City.

The Corporate Customer Service Division began exploring more robust cloud-based CRM platforms that could support improved customer service tracking and management for more service teams across the organization, including: the Corporate Contact Centre (CCC),

*** This information is available in accessible formats upon request. ***
Please call 519-741-2345 or TTY 1-866-969-9994 for assistance.

Kitchener Utilities Dispatch, Revenue, Office of the Mayor and Council and Bylaw. After assessing existing city-owned software, it was found that MuniPaaS Corporation had already implemented Salesforce Case Management in another division. Salesforce is a global leader in case management solutions while MuniPaaS, which specializes in implementation and customization of the platform for municipal government usage, came highly recommended internally, and by other cities.

In 2024, MuniPaaS was retained through a non-standard procurement process to pilot the platform in the Corporate Contact Centre, and after a successful rollout in early 2025, the platform now serves as the foundation for the potential expansion of system integrations and corporate-wide connectivity and automation intended to further enhance service delivery to residents.

The work to expand the platform organizationally will create more connected staff teams and processes, enabling better service for residents by centralizing customer inquiries, through a single user interface that allows staff to access previous interactions, and service and information continuity. Further automation and integration will also enhance efficiency, reducing manual tasks and enabling staff to focus on resolving issues. Residents will also experience improved self-service options, quicker resolutions, and a more seamless interaction with municipal services, fostering a more responsive and transparent government.

Onboarding additional service areas – including integrations to other enterprise systems – will occur between 2025-2027. A non-standard procurement process is required because of the recommendation to sole source this work through MuniPaaS, the City’s original Ontario-based implementation vendor.

REPORT:

In accordance with the Procurement By-law 2022-109, Section 15 – Non-Standard Procurement, Council’s approval is required as the total value of the deliverables for this non-standard procurement exceeds the delegated authority.

A non-standard procurement is the acquisition of goods, services or construction through a process or method other than the process and method normally required for the type and value of the required deliverables, as identified below:

Requirement	Procurement Value Excluding Taxes	Procurement Process	Approval Authority
Goods, Services or Construction under the circumstances included in Schedule “C”.	\$40,001 - \$250,000	Non-Competitive or Limited Competition	Chief Procurement Officer
Goods, Services or Construction under the circumstances included in Schedule “C”.	\$250,001 or more	Non-Competitive or Limited Competition	Council

In accordance with the Procurement By-law 2022-109, Schedule "C", "Goods, services and construction may only be acquired through a non-standard procurement process under the following circumstances:

Item 4: The procurement is for additional deliverables by the original supplier of the goods or services that were not included in the initial procurement if a change of supplier for such additional goods or services:

- a) cannot be made for economic or technical reasons such as requirements of interchangeability or interoperability with existing equipment, software, services or installations procured under the initial procurement; and
- b) would cause significant inconvenience or substantial duplication of costs for the City.

Ontario-based MuniPaaS Corporation is the original provider of implementation services for the Salesforce Case Management platform for the City. Specializing in the deployment and customization of the platform for municipal government applications, MuniPaaS first introduced the system to the City's Economic Development Team in 2018.

Leveraging a proven service provider with an established relationship with the City, alongside existing technology already successfully in use, ensures a cost-effective approach by streamlining the number of corporate systems in use, while enhancing, operational efficiency and service delivery.

The documentation was reviewed by J. Miller, Director, Corporate Customer Service, M. May, General Manager, Community Services and Deputy CAO who concur with the above recommendation.

STRATEGIC PLAN ALIGNMENT:

This report supports the delivery of core services.

FINANCIAL IMPLICATIONS:

The anticipated total cost of the expanded implementation of the customer relationship management platform (\$327,000) is fully funded. Capital and operating funding totalling \$275,000 for licensing, implementation and support to expand the use of the Salesforce Case Management platform to Kitchener Utilities, Revenue, Bylaw and the Office of the Mayor and Council was approved through the 2025 budget process. An existing capital balance of just over \$90,000 will be used to fund the remaining balance of the contract as well as any other incidental cost required as part of the implementation. Any surplus funds will be returned to the appropriate reserve at the end of the project implementation.

COMMUNITY ENGAGEMENT:

INFORM – This report has been posted to the City's website with the agenda in advance of the council / committee meeting.

PREVIOUS REPORTS/AUTHORITIES:

There are no previous reports/authorities related to this matter

APPROVED BY: Michael May, General Manager, Community Services and Deputy CAO