Statement of Work

1. Goals

The goal of the project is to acquire and implement a Tourism Customer Relationship Management (CRM) Solution that will improve Tourism's client information management, productivity, analytical and reporting capabilities to drive tourism to the City.

Implementation activities shall include installing, configuring and testing the solution to meet the needs of the City, training business users and IT staff who will be using the solution, and providing support and maintenance for the term of the agreement.

The key project goals are to:

- Efficiently capture, track and follow up using client information
- Provide staff with ability to access and update client information in real-time from any location
- Enhance measurement and reporting of key performance indicators
- Enhance and expand in-house marketing capabilities
- Integration with CVENT event management software
- Maintain security

2. Functional Requirements

The City's requirements for the Tourism CRM solution include all licensing, configuration, training, documentation, testing and installation of all related software, hardware, and equipment. Requirements include professional and technical services, applicable content migration, applicable hosting, maintenance and support.

The system should support the following high-level functional requirements:

a. Sales Management
b. Client Management
c. Managing leads and opportunities
d. Managing contacts, accounts, and business information
e. Comprehensive Marketing features
f. Managing Campaigns
g. Comprehensive Reporting Module

3. Technical Requirements

The City's SaaS Assessment Questionnaire, addresses the Technical Requirements for the solution.

Additionally the following are preferable:

a. The system should have all the features necessary to be compliant with CASL (Canadian Anti-Spam Legislation)
b. The system should use role-based permission including a role for a system administrator
c. The system should be able to integrate with Microsoft Outlook
d. The system should be able to integrate with CVENT
e. A high level system architecture diagram should be available

4. **Project Scope**

    a. Implement a fully functional integrated CRM for use by Tourism Mississauga staff to provide greater access, visibility and a holistic view of Tourism's clients and their multiple touch points within the departments
    b. Configure the system according to the City's business processes and desired preferences where the solution allows
    c. To deliver comprehensive training to City staff
    d. Documentation – supply and maintain documentation for all system components and provide system architecture documentation
    e. System/Data Integration – provide instructions, guidance, and troubleshooting for integrating the solution with City systems and software
    f. Provide support to the City during the stabilization period following go-live

5. **Project Management**

    a. City Responsibilities – The City's Project Manager (PM) will be the main point of contact for the vendor's Project Manager. The City's PM is responsible for implementation, giving direction, communicating City information, approving goods delivered and services performed, and payments.
    b. Vendor Responsibilities – configuration, integration, successful testing and implementation. A dedicated vendor Project Manager is required.
        a. Identify a project manager from the vendor's team to lead the project
        b. Develop a project plan with a schedule and milestones
    c. Testing and Quality Assurance – the vendor will be responsible for facilitating User Acceptance Testing (UAT), System Integration Testing (SIT), and Penetration & Vulnerability testing if required.

6. **Maintenance and Support**

    The vendor should be willing and capable of providing support and maintenance for the duration of the contract term.

    The inclusion of a Service Level Agreement (SLA) with the following is desired:

    -   Service Availability (Uptime Commitment)
    -   Remedies for service Availability Failure (service below the Uptime Commitment)
    -   Business Continuity and Disaster Recovery Plan (including Recovery Time Objective and Recover Point Objective)
    -   Service monitoring, management, and maintenance
    -   Support requests: service levels/tiers for response and resolution of issues
    -   Preventative and scheduled maintenance, upgrades, system maintenance plan.

7. Other

If available, the vendor should provide any standard audits and/or tests that would provide the City with assurance that City data is secure and handled according to best practices periodically throughout the contract term.

   a. For example, if available, the vendor will provide:
      i. SOC 1 Audit for data centre
      ii. SOC 1 and SOC 2 Audit for proposed solution
      iii. Penetration/Vulnerability Assessment from a third party
      iv. Any other documents that can be provided.

The vendor will be required to complete a privacy assessment to assist the City in implementing.

8. Projected Cost

OPERATING BUDGET FORECAST FOR 2021-2030							
Description	Contract Term	2021	2022	2023	2024	2025	Total Years 1-5
License Subscriptions Fees	5 years to 2021-2025	$ 17,100.00	$ 17,955.00	$ 18,853.00	$ 19,795.00	$ 20,785.00	$ 94,488.00
Professional Services	5 years to 2021-2025	$ 3,000.00	$ -	$ -	$ -	$ -	$ 3,000.00
Contingency for Growth, Customization, New Modules	5 years to 2021-2025	$ -	$ 6,284.00	$ 6,598.00	$ 6,928.00	$ 7,275.00	$ 27,085.00
Subtotal		$ 20,100.00	$ 24,239.00	$ 25,451.00	$ 26,723.00	$ 28,060.00	$ 124,573.00

		2026	2027	2028	2029	2030	Total Years 6-10
License Subscriptions Fees	5 years to 2026-2030	$ 21,824.00	$ 22,916.00	$ 24,061.00	$ 25,264.00	$ 26,528.00	$ 120,593.00
Professional Services	5 years to 2026-2030	$ -	$ -	$ -	$ -	$ -	$ -
Contingency for Growth, Customization, New Modules	5 years to 2026-2030	$ 7,639.00	$ 8,020.00	$ 8,421.00	$ 8,843.00	$ 9,285.00	$ 42,208.00
Subtotal		$ 29,463.00	$ 30,936.00	$ 32,482.00	$ 34,107.00	$ 35,813.00	$ 162,801.00
						TOTAL YEARS 1 - 10	$ 287,374.00

	TOTAL Years 1 - 5	TOTAL Years 6 - 10	TOTAL
License Subscriptions Fees	$ 94,488.00	$ 120,593.00	$ 215,081.00
Professional Services	$ 3,000.00	$ -	$ 3,000.00
Contingency for Growth, Customization, New Modules	$ 27,085.00	$ 42,208.00	$ 69,293.00
	$ 124,573.00	$ 162,801.00	$ 287,374.00