



## SAN RAFAEL CITY COUNCIL AGENDA REPORT

Department: Digital Service and Open Government

Prepared by: Sean Mooney, Director Digital Service and Open Government

City Manager Approval: 

**TOPIC:** TELEPHONE PROJECT IMPLEMENTATION SERVICES

**SUBJECT:** AUTHORIZE THE CITY MANAGER TO ENTER INTO A FIRST AMENDMENT TO THE PROFESSIONAL SERVICES AGREEMENT WITH XANTRION, INC. FOR TELEPHONE IMPLEMENTATION SERVICES, IN AN AMOUNT OF \$40,000, INCREASING THE TOTAL NOT-TO-EXCEED AMOUNT OF THE AGREEMENT TO \$97,000

### RECOMMENDATION:

Staff recommends that the City Council authorize the City Manager to enter into a first amendment to the professional services agreement with Xantrion, Inc. for telephone implementation services in the amount of \$40,000, increasing the total not-to-exceed amount of the agreement to \$97,000.

### BACKGROUND:

The City's 14-year-old ShoreTel telephone solution has reached end-of-life and is no longer supported by the vendor. The system has technical issues and does not meet the City's growing requirements. In 2022-2023, the Digital Services and Open Government ("Digital") team conducted discovery with departments on telephone needs and, in March 2024, released an RFP for a replacement system that offers integration with Microsoft productivity tools.

The project team selected CallTower as our new call router and PacketFusion, the City's current telephone system support consultant, to assist in integration. Xantrion was also identified to manage the implementation on behalf of the City and support City staff in discovery and auditing due to their role as the City's IT-managed service provider.

### ANALYSIS:

Upon project kick-off, the Xantrion team began coordinating with CallTower and PacketFusion to develop an inventory of the City's current ShoreTel system, including all assigned phone numbers, phone trees, and call queues. PacketFusion supported the project with historical knowledge of existing configurations and was able to export information from our telephone system. However, Xantrion was best equipped to work directly with departments to review the accuracy of existing configurations and to determine what changes might be needed when migrating to the new system. The Xantrion team also reviewed all phone numbers assigned to individual staff or common area telephones to verify they still exist and are properly assigned. They also called and tracked down unknown phone numbers and phone locations. The primary goal of this discovery phase was to ensure that the migration would cause the least disruption to City

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FOR CITY CLERK ONLY

Council Meeting:

Disposition:

operations and that we could identify potential waste in the system's architecture before migration. The time needed to work with departments in this phase exceeded Xantrion's initial estimate of the time needed to complete this work.

Once the staff directory, phone trees, and all queues had been audited and confirmed, the Xantrion team began working with our AT&T account representatives to confirm City ownership of each line and corresponding customer service records (CSR) and billing telephone number. During this process, we discovered that the City has accumulated many phone lines over the past few decades. Over time, these phone lines have spread over multiple accounts instead of a single AT&T account for the City of San Rafael. Confirming these accounts with AT&T requires all phone numbers and their corresponding CSR and billing telephone numbers (BTN) to match AT&T records before porting. The time spent on this process, in addition to discovery, has impacted the total hours initially estimated for the project, and more hours will be needed to complete the project, including network configuration, upgrading the firmware of new handsets, distributing handsets and headsets to users, collecting old ShoreTel handsets, and retiring the existing ShoreTel servers.

**FISCAL IMPACT:**

Funding to support the recommended contract amendment is provided within available appropriations included in the Technology Fund (601) budget for Fiscal Year 2024-25.

**OPTIONS:**

The City Council has the following options to consider on this matter:

1. Authorize the City Manager to enter into a first amendment to the professional services agreement with Xantrion, Inc. for telephone implementation services, in an amount of \$40,000, increasing the total not-to-exceed amount of the agreement to \$97,000.
2. Direct staff to return with more information.

**RECOMMENDED ACTION:**

Staff recommends that the City Council authorize the City Manager to enter into a first amendment to the professional services agreement with Xantrion, Inc. for telephone implementation services in the amount of \$40,000, increasing the total not-to-exceed amount of the agreement to \$97,000.

**ATTACHMENTS:**

1. Draft First Amendment

**FIRST AMENDMENT TO THE AGREEMENT WITH XANTRION INC. FOR TEAMS  
PHONE IMPLEMENTATION SERVICES**

**THIS FIRST AMENDMENT** to the Agreement by and between the **CITY OF SAN RAFAEL** (hereinafter “**CITY**”), and **XANTRION INC.** (hereinafter “**CONSULTANT**”), is made and entered into as of \_\_\_\_\_.

**RECITALS**

**WHEREAS**, the **CITY** and **CONSULTANT** entered into an Agreement dated June 12, 2024 to perform services in connection with the **CITY’S** Teams phone implementation project, for an amount not to exceed \$57,000 (the “Agreement”); and

**WHEREAS**, **CITY** requires additional services from the **CONSULTANT**, and the **CONSULTANT** is willing to provide such services.

**AMENDMENT TO AGREEMENT**

**NOW, THEREFORE**, the parties hereby agree to amend the Agreement as follows:

1. Article 4 of the Agreement, entitled “**TASKS & SCOPE OF WORK**” is hereby amended to include the additional services set forth in **CONSULTANT**’s proposal dated October 29, 2024, attached to this First Amendment as Exhibit A and incorporated herein by reference.
2. Article 7 of the Agreement, entitled “**PROJECT BUDGET**” is hereby amended to include additional compensation payable to **CONSULTANT** for the services described in Exhibit A to this First Amendment, on a time and materials basis in accordance with the Exhibit A, in a not-to-exceed amount of \$40,000 and to change the total not-to-exceed amount under the Agreement to \$97,000.
3. Except as specifically amended herein, all of the other provisions, terms and obligations of the Agreement between the parties shall remain valid and shall be in full force.

**IN WITNESS WHEREOF**, the parties have executed this First Amendment on the day, month, and year first above written.

**CITY OF SAN RAFAEL**

CRISTINE ALILOVICH, City Manager

ATTEST:

LINDSAY LARA, City Clerk

APPROVED AS TO FORM:

ROBERT F. EPSTEIN, City Attorney

**CONSULTANT**

By: \_\_\_\_\_

Name: \_\_\_\_\_

Title: \_\_\_\_\_

[If Consultant is a corporation, add signature of second corporate officer]

By: \_\_\_\_\_

Name: \_\_\_\_\_

Title: \_\_\_\_\_

## Statement of Work

City of San Rafael  
Teams Phone Implementation – Change Order

Proposal Date: October 29<sup>th</sup>, 2024

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## 1. Summary

### 1.1. Overview

Completing the implementation of the Teams Phone is requiring more resources because:

- The discovery phase with departments was more involved than anticipated
- Untangling AT&T records and updating their databases to accurately perform a number port has been challenging
- Configuring new requirements such as E911, Call Recording, etc. requires additional resources
- Xantrion needed to take ownership of aspects of the project where CallTower and PacketFusion were not going to be successful

This change order reflects the outstanding scope of work remaining to successfully complete the Teams Phone project.

## 2. Remaining Tasks & Scope of Work

The Xantrion project team will perform each of the following tasks:

### 2.1. Xantrion Technical Configuration

#### 2.1.1. Hardware

- 2.1.1.1. Update firmware on 135 physical phones
- 2.1.1.2. Setup test common area phones for Police Records and Terra Linda Community Center
- 2.1.1.3. Stage all common area phones a deploy prior to migration
- 2.1.1.4. Deploy phones assigned to individuals after the migration
- 2.1.1.5. Remove and e-waste roughly 360 legacy phones
- 2.1.1.6. Remove and e-waste 18 ShoreTel switches
- 2.1.1.7. Decommission ShoreTel server

#### 2.1.2. Networking

- 2.1.2.1. Implement LAN/ WAN network configurations recommended by CallTower and PacketFusion
- 2.1.2.2. Decommission legacy phone LAN/ WAN network configurations
- 2.1.3. Setup a temporary virtual clone of the ShoreTel server for PacketFusion
- 2.1.4. Configure dynamic E911 dialing
- 2.1.5. Microsoft Identity and Security
  - 2.1.5.1. Provision common area phone accounts
  - 2.1.5.2. Assign Teams Phone licenses to users and common area phone accounts
  - 2.1.5.3. Configure conditional access policies for phones to securely bypass MFA requirements when located in trusted San Rafael facilities
- 2.1.6. Provide technical resources where gaps arise between CallTower and PacketFusion
- 2.1.7. Address issues that arise after migration with auto attendants, call queues, and common area phones

2.1.8. Configure Atmos Call Recording and setup Single Sign On

## 2.2. Create Documentation for Ongoing Support

- 2.2.1. Document Microsoft Teams Voice and CallTower configuration settings
- 2.2.2. Create documentation for provisioning DIDs, phones, common area phones, auto attendants, call queues, etc.
- 2.2.3. Update Xantrion documentation for user provisioning and terminations for phones

## 2.3. Client Strategy, Project Management, Meetings

- 2.3.1. Complete official migration worksheet for CallTower
- 2.3.2. Complete DID porting LOA documentation to AT&T
- 2.3.3. Reviewing and consolidating AT&T records
- 2.3.4. Troubleshooting address AT&T port rejections
- 2.3.5. Draft remaining communications
- 2.3.6. Attend CallTower training sessions to answer San Rafael specific questions for users
- 2.3.7. Manage CallTower and PacketFusion teams to ensure timeline of implementation plan is being met
- 2.3.8. Review project progress, budget, and time entries
- 2.3.9. Request and follow up on quality assurance
- 2.3.10. Provide project closure

## 3. Assumptions & Notes

- The quote assumes no more than 150 physical phones will be deployed by Xantrion. Webcams and headset deployment are not included in this quote.
- The labor costs associated with this engagement are an estimate. If, during the project, an overage in labor is anticipated, Xantrion will communicate this to the client stakeholder associated with the project, for approval before proceeding.

## 4. Project Schedule

Milestone or Deliverable	Party	Timing
Complete Technical Configuration	Xantrion/CallTower/PacketFusion/Digital	Week 1-2
Supervise Migration and Address Issues	Xantrion/CallTower/PacketFusion	Week 2-3
Create/Update Documentation	Xantrion	Week 2-3
Quality Control Review & Project Closure	Xantrion	Week 3

## 5. Project Budget

Xantrion Labor		
One-Time Costs		Total
Estimated Cost Not to Exceed:		\$40,000
Total One-Time Cost		
		<i>Total</i> \$40,000

## 6. Payment Terms & Timing

The labor costs associated with this engagement will be billed on a “Not to Exceed” basis.

If the scope of the project expands, a change order may be issued.

An invoice will be generated based monthly for work completed.

## 7. Acceptance

The terms and conditions of the General Service Agreement apply in full to the services and products provided under this Statement of Work.

Signed \_\_\_\_\_  
Printed \_\_\_\_\_  
Title \_\_\_\_\_  
Company \_\_\_\_\_  
Date \_\_\_\_\_