

Question Responses for:

RFP for Service Request Management (SRM)/Work Order/Customer Relationship Management (CRM) Software

January 27, 2020

1. Can you disclose your budget for this initiative?  
This RFP shall inform the budget process and funding would be allocated for this project.
2. Is there any significance to the timing of this RFP? Why now instead of, say Q4 2019 or Q2 2020?  
The City is committed to improving service delivery to the community
3. Please list the types of service requests.  
The primary types of service requests are for the City maintenance and utilities functions.
4. Do these service requests have any service level agreements attached to them?  
In most cases no. However, the proposed solution should include the capabilities to track SLA's and measure performance
5. How many internal users of the system? Are there "power users"? If so, how many? What groups do you anticipate using the system?  
Initial estimates are 60-70 internal users, but growth in use would be anticipated, there will likely be 10-15 power users. Users will primarily be in the Utilities Division and Maintenance Division for the City.
6. Can you break down the types of internal users, by required functionality (what should they have access to)?  
The City will work with the selected vendor to map user functions to roles based on the proposed system capabilities. These roles will determine the access level commonly found in roles-based access controls methodologies.
7. How many service requests were made in the last three years? Can you provide a breakdown?  
Please note many areas of service requests are not included in any systems currently, so we believe the new system will handle more requests. Our current system count work orders for which approximately 4,200 per year.
8. How are service requests currently being reported?  
Service requests may be generated internally by City staff or externally by customers reporting requests via phone, email, in person, or online forms on the City website.
9. Do you see a need for reengineering of business processes associated with service requests?  
The City will evaluate the extent of any business process reengineering based on the capabilities of the proposed solution

10. What are the pain points associated with your legacy environment - specifically Civic Plus?  
Please refer to answer #7
11. Are you willing to have a solution that eliminates the Attachment 2 systems?  
It is not likely that the City will be able to move forward with a system that eliminates all these systems immediately, but is open long term opportunities to replace many of the systems listed in Attachment 2.
12. Do you have a required go-live date?  
This will be negotiated with selected vendor upon award
13. Do you have a particular product/software in mind?  
The City is open to all solutions that meet its requirements.
14. Have you seen any demos of products from vendors? If so, please list them.  
No demos have been received in relation to this RFP. The City has had demonstrations of additional functionality of many of the existing software systems it is currently utilizing (Attachment 2).
15. Do you have onsite requirements?  
The City is open to on-premise or cloud hosted solutions
16. Do you reimburse for travel expenses?  
All expenses for implementation can and should be included in the cost proposal, which will be a component of Phase 3.
17. Is a custom mobile application a requirement? Or, does a mobile-friendly, responsive solution suffice?  
A mobile friendly solution will be considered as an alternative to a specific mobile app.
18. Please describe and or provide the reports that are generated.  
The City utilizes a wide variety for reports that are too numerous to describe. It is the expectation of the City that reporting tools that support the all aspects of the software selected will be available. The City will evaluate the reporting capabilities of the proposed solutions for flexibility in ad-hoc reporting, ability to easily access the underlying data and the "canned" or pre-existing reports that come with the system.
19. What specific types of reports or statistical information do you want to present to the resident/constituent via a "web" interface?  
The City would like to be able at minimum to report on the status of constituent requests.
20. Do you currently have knowledge articles, FAQ's and information pieces you intend to present to residents created, and in electronic form? (Where are these managed and updated)  
No.

21. Please describe your training expectations.

The City is open to training methodologies that support the product selected and have not predetermined the best training methodology for this RFP.

22. Do you require existing data to be migrated to the new system? If so, how many records do you wish to be migrated (how large is this data file)?

This has not yet been determined and can be explored through Phase 1 and 2 of the RFP.

23. How do you currently manage assets and fleet?

Assets for the Utilities Division are managed through the Sedaru software other assets and fleet are managed manually through excel spreadsheets.

24. Can you list the 3<sup>rd</sup> party systems that would be required to integrate into the new system? Are you requiring one or 2-way integrations across these systems and our proposed system?

The City uses common municipal solutions such as Office 365 and ESRI for GIS. The intent is to consolidate/leverage mapping functionality, authentication, etc. to these enterprise systems to the greatest degree possible.

25. Can you detail the functionality you utilize Tyler Incode and Sedaru Omni for currently?

a. What is the intended integration to the proposed new system meant to accomplish?

Tyler Incode is used for utility billing and service requests related to utility connections. Sedaru Omni is used for utility system asset management and ongoing maintenance. Potential integration of these functions to work order generation and tracking or other management functions is envisioned.

26. Can we obtain the questions our references will be asked?

Not at this time. Reference questions have not yet been developed.

27. What type of integration with O365 Mail Server is expected? Are you trying to send/ingest emails or are you looking to build add-ons/additional functionality into O365 Mail Server? (Req 1.1.65).

Office 365 will be used to support emailing to and from the City. Additionally, the City would like to review proposers integrated single-sign on / authentication for user accounts.

28. Are you expecting to migrate components or data within current system, or are you looking to replace the current system entirely?

We are looking to replace the Work Order Management system. For other systems this will be determined by the capabilities of the proposed solution.

29. When you state that you want an original and three copies of the solution proposal - does that mean that the original must contain a "wet signature" and the 3 copies can have a scanned image of the "wet signature"? Yes.

30. Do responses to the questions have to be in the excel document? Or can we respond via a word document? **You can respond in a word document as long as all responses are included.**
31. What is driving this initiative?  
**See RFP Section 2.2.**
32. Who are the key stakeholders and how do you see this initiative impacting them?  
**Key stakeholders include City Staff in the Utilities Division, Maintenance Division, Utility Billing Division, City Manager's Office, other staff throughout the City and constituents.**
33. Describe your current process. Who are the players, what are the touchpoints?  
**The City has various processes that are not completely documented that are hoped to be aligned as part of the software implementation process. The various processes have multiple varying touchpoints and the City is unable to completely define.**
34. How are the systems described in the RFP currently used today and tied together?  
**In almost all cases the systems outlined in Attachment 2 are utilized independently or tied together via manual input by City staff.**
35. What channels do you anticipate using in the system? Phone, Email, Web, Digital Assistant (Chatbot), others?  
**Please Refer the technical requirements of the RFP.**
36. Who will be working SRs vs Work Orders?  
**The City will evaluate the appropriate staffing based on the opportunities to streamline/automate manual processes once system capabilities are fully understood**
37. What is your Citizen Data master? Is that changing with this initiative?  
**The City does not have one master system for citizen data.**
38. Do you have paper-based forms you'd like to 'digitize' as part of this initiative?  
**Potentially.**
39. Please provide samples of your key performance & operational reports.  
**The City utilizes a wide variety for reports that are too numerous to describe. It is the expectation of the City that reporting tools that support the all aspects of the software selected will be available.**
40. Please provide any architectural diagrams.  
**No diagrams are available for the purpose of this RFP.**
41. What are the critical success factors for moving to a new application?  
**Refer to the RFP in its entirety.**

42. Do you have a preferred project methodology? Agile, Waterfall or a hybrid of the two?  
The City is open to the Agile or hybrid methodology.
43. Are you open to implementing the functionality in phases? If so, what are the must-have pieces of functionality for a phase I go-live?  
Yes, the City is open to phasing. Initial must have features would be determined through rfp process.
44. What is the desired start and end dates for the implementation? Is there reason/driving factors behind that date?  
This will be evaluated once the City understands the proposer's expectations for City staff.
45. Will there be business process re-engineering with the project? Describe the areas where you feel you need to change. Will you need assistance with it?  
This is unknown until proposals are received and reviewed.
46. Are your To-Be business processes/use cases documented?  
No.
47. What documentation is required during the implementation?  
The City will engage in a dialog throughout the RFP process and issue addendums if necessary to address this issue. At minimum, however, proposers should expect to document processes / workflows configured in the system and provide and system documentation / configurations that are specific to the City
48. Onsite vs remote project work expectations?  
This is to be evaluated through the RFP process.
49. What languages do you anticipate needing?  
English required, Spanish translation desired.
50. Is there a formal Change Management team that will participate in the project?  
There will be a project team of City staff assigned to the project.
51. What types of testing do you require, beyond configuration validation / unit testing?  
This is to be determined through the RFP process but proposers should provide their methodology for configuration, unit and system acceptance testing as project milestones and payments may be mapped to those deliverables.
52. What kind of training approach do you typically do for software implementations? For the implementation partner, should we quote a train the trainer approach or having trainers develop training materials and deliver to the end user population.  
The City is open to multiple training methodologies that have been successful in other implementations. Proposers are free to suggest the methodology they see most successful for

end-user adoption with customers with similar requirements.

53. What kind and amount of post-production support do you need for this project?

The proposed solutions will require technical support and maintenance at a minimum. In addition, the City would like to establish an hourly rate and tier of hours to provide post go-live support, training and project management.

54. What did you learn from previous implementations?

N/A. This is a new initiative for the City.

55. How have you worked with other consulting firms in the past? Are you open to working with a new partner?

The City has worked with consulting firms in a variety of capacities and yes the City is open to working with a new partner.

56. What other CRM applications are you looking at?

The City is using this RFP process to survey the marketplace.

57. What does your approval process look like after selection of an application and vendor?

Selection and recommendation by City staff. Approval will be made by the City Manager or City Council depending upon costs and format of agreement.

58. Are you able to generate new contracts with implementation partners and vendors?

Yes.

59. What kind of engagement are you looking for? A comprehensive implementation, a combined partnership where both parties participate, more of a staff aug approach where the SI provides only functional/technical system expertise?

A comprehensive implementation with a proven track record by both the technology being proposed and the team performing the implementation.

60. Please specify who you anticipate being responsible for the following deliverables/activities. This helps us understand what roles you need the vendor to provide.

- a. - Project Management – Shared vendor and City. The vendor shall lead the project with support from the City
- b. - Planning: Project Charter and Vision - Shared vendor and City.
- c. - Planning: Project Plan - Vendor
- d. - Planning: Project Kick-Off Presentation and Delivery - Vendor
- e. - Planning: Change Management Plan and Execution- Shared vendor and City.
- f. - Planning: Communication Plan and Execution- Shared vendor and City.
- g. - Analysis: Requirements Gathering and Documentation (functional and technical) - Shared vendor and City.
- h. - Analysis: Fit/Gap Analysis and Presentation- Shared vendor and City.
- i. - Analysis: Business Process Flows- Shared vendor and City.
- j. - Design: Functional Design- Vendor

- k. - Design: Detailed Technical Designs- Vendor
  - l. - Build: Configuring the application- Vendor
  - m. - Build: Developing customizations- Vendor
  - n. - Build: Developing custom integrations- Vendor
  - o. - Build: Building Reports / Dashboards- Vendor
  - p. - Data Conversion: Getting the data out of the existing system - Shared vendor and City.
  - q. - Data Conversion: Prepping/cleansing/transforming the data - Vendor
  - r. - Data Conversion: Loading data into each environment - Vendor
  - s. - Testing: Test Planning and Prep - Vendor
  - t. - Testing: Building System Test Scripts - Vendor
  - u. - Testing: Executing System Test Scripts - Vendor
  - v. - Testing: Fixing testing bugs found SIT - Vendor
  - w. - Testing: Building User Acceptance Test Scripts - Vendor
  - x. - Testing: Facilitating UAT- Vendor
  - y. - Testing: Executing UAT scripts- Vendor
  - z. - Testing: Fixing testing bugs found in UAT- Vendor
  - aa. - Training: Developing the Training Plan - Vendor
  - bb. - Training: Coordinating Training Activities- Vendor
  - cc. - Training: Developing Training Materials- Vendor
  - dd. - Training: Delivering the Training- Vendor
  - ee. - Develop a Support Plan- Vendor
  - ff. - Develop a Deployment/Cut-Over Checklist- Vendor
61. much historical data would need to be converted? Please describe anticipated volume by functional area below. Please provide the SOURCE and VOLUME of legacy data for each object listed below (explain non-std object usage):
- It is unknown at this time what type and amount of existing data will be transferred to the new system. This will be determined by how many of the requirements the proposed solution can satisfy.
62. **What integrations and tools are in place today?** Please describe how your current systems are integrated. Please provide a list of integrations that will be in scope.
- a. Integration #1, Civic Plus, City website-based forms for external customer Service Requests
  - b. Integration #2, Hippo, Internal work order system for assigning and processing maintenance SRs.
  - c. Integration #3, Tyler Incode, Utility system for billing, customer services, and field services.
  - d. Integration #4, Sedaru Omni, Preventive/recurring utility equipment asset management
  - e. Integration #5, Standalone utility, Work order system for processing utility SRs on City-owned property
  - f. Integration #6, Arbor Access, Third-party system for tree inventory/work order management
  - g. Integration #7, Tokay, Work orders for backflow management; integrates with Tyler Incode.

- h. Integration #8 Scada Utility system monitoring and management – reporting and controls.
  - i. Integration #9 Sensus Advanced Metering Infrastructure (AMI) for water data and billing
  - j. Integration #10 Esri GIS GIS that we envision being integrated with SRM/CRM
  - k. Integration #11 Track-It Used by the Development Services Department to manage the development permitting process for planning, building, and land development engineering
63. Can you please consider giving us a deadline extension to allow for us to further formulate our response based off of the answers to our questions and other vendor questions?

We will be pushing back the response deadline by one week to February 7, 2020 at 5pm.