



September 14, 2018

ADDENDUM NO. 1

REQUEST FOR PROPOSALS #4481-18 – CUSTOMER RELATIONSHIP MANAGEMENT SYSTEM

This Addendum 1 to Request for Proposals #4481-18 for Customer Relationship Management System is being issued to extend the due date and provide answers to questions received.

1. **The due date for submitting Proposals has been extended. The due date is now MONDAY, October 29, 2018 – 1:00 P.M. local time.**
2. **In Part 3 “General Information”, Paragraph 3.2 “Estimated Schedule of Procurement Activities”, replace the entire paragraph including the schedule with the following wording:**

3.2 ESTIMATED SCHEDULE OF PROCUREMENT ACTIVITIES

Issue Request for Proposals	September 6, 2018
Question and answer period	September 7 – October 5, 2018
Proposals due	October 29, 2018
Evaluate Proposals	October 30 – November 21, 2018
Firm Demonstrations	November 2018 - January 2019
Negotiate contract	January, 2019
City Council approval of contract	January/February, 2019
Begin Contract Work	Q1, 2019

The City reserves the right to revise the above schedule.

3. **In Part 3 “General Information”, Paragraph 3.3 “SUBMISSION OF PROPOSALS”, replace Paragraph “A” with the following wording:**

3.3 SUBMISSION OF PROPOSALS

A. PREPARATION OF ENVELOPES

Place each copy of the Proposal in a separate sealed envelope. On the front of each envelope, clearly note if it contains the original or a copy and place the following information:

“SEALED PROPOSAL – IMPORTANT”
“RFP #4481-18 Customer Relationship Management System”
“DUE: MONDAY, OCTOBER 29, 2018 – 1:00 P.M.”
YOUR COMPANY NAME

4. In Addition, this Addendum 1 to Request for Proposals #4481-18 for Customer Relationship Management system is being issued to provide answers to questions received. Questions are identified with “Q”. Answers are identified with “A” in red text.

Q: Whether companies from Outside USA can apply for this? (Like, from India or Canada)

A: Yes

Q: Whether we need to come over there for meetings?

A: No, but Firms selected as viable options will be required to provide an onsite demonstration and have other options available for support / training opportunities.

Q: Can we perform the tasks (related to RFP) outside USA? (Like, from India or Canada)

A: Yes

Q: Can we submit the proposals via email?

A: No. Per the RFP submittal instructions, sealed Proposals are to be submitted as follows: submit one (1) sealed paper original, one (1) paper copy and one (1) reproducible electronic copy (thumb drive or CD) of the Proposal. See RFP document for additional detailed submittal instructions.

Q: Beyond the established question and answer period, is there a scheduled pre-bid for interested vendors?

A: No, the City did not include a separate pre-bid conference meeting.

Q: The Firm must have ten (10) more years of experience in developing and maintaining Customer Relationship Management systems. Is there a specific reason behind the number of years listed here?

A: The City of Spokane likes to work with well-established companies. We are willing to consider exceptions to the 10 year requirement. Please provide more information and number of years of experience in developing and maintaining Customer Relationship Management systems. The City will make final determination regarding granting an exception.

Q: Is there any possibility of an extension on the due date?

A: Yes, the due date will be extended to Monday, October 29, 2018 at 1:00 p.m.

Q: Is the city looking to replace the outdated Dynamics CRM 2013 because the city wants software different from the latest version of Dynamics CRM?

A: The City is exploring all CRM options to see what best meets their needs and addresses current performance issues in Dynamics.

Q: Or, is the city willing to get Dynamics 365 CRM in its latest version, enhanced to meet all the requested requirements?

A: Dynamics-365 will be given the same consideration as other Firms.

Q: Do you prefer a custom-made solution (made from scratch) or an “off-the-shelf” / “out-of-the-box” platform?

A: The City is looking for a solution that has been developed, and can be configured, and is not interested in entering in a custom development project.

Q: Does this solution require/demand the vendor to host it?

A: The City would prefer a solution that is not on-premises, but this will not be a factor for excluding a Firm's Proposal.

Q: Considering Section 1.3 on page 4 (Funding), I assume there is not an approved budget yet for this project?

A: Correct.

Q: If there is an approved budget for this project, what is the [estimated] amount of the approved budget?

A: There is no established budget for this project.

Q: We are a U.S based company with office across the globe. With that said, will you accept offshore development services for this project?

A: Yes.

Q: If you are seeking development, will onsite visits be required during development?

A: No.

Q: Is there an incumbent competing? Is there an internal team currently working on the development, or are you outsourcing current development?

A: No.

Q: When is the anticipated award date?

A: Our goal is first quarter 2019.

Q: When is the expected/needed "go-live" date of the project?

A: We have not defined a "go-live". We would like the Proposer to provide/recommend the project schedule.

Q: Would you need any hardware for this project or just the software?

A: We would like the Proposer to recommend all pricing components required for City which include hardware and software.

Q: If there is a preference for local firms, how many additional evaluation points are they awarded vs U.S based firms outside of Washington?

A: We do not have a preference for local Firms.

Q: I am aware that you may request software demonstrations. Does this mean you would rather have a product already built vs. development since vendors will not be able to provide a demo of the product since it's not yet developed?

A: The City is looking for a solution that has been developed, and can be configured, and is not interested in entering in a custom development project.

Q: I downloaded the 38-paged RFP. Are there any other documents that I need to be aware of for this project?

A: There are no other documents associated to this RFP.

To the best of your knowledge, are there any circumstances that will cause you to:

Q: Cancel the RFP?

A: No, but the City reserves that right.

Q: Not move forward with the winning bidder?

A: No, but the City reserves that right.

Q: Lower the budget for the project?

A: There is no budget associated to this project.

Q: Prolong the evaluation process or reissue the RFP?

A: No, but the City reserves that right.

Q: Who is the incumbent vendor for supporting and maintaining the current CRM system?

A: No – system is maintained with City IT resources.

Q: Has the same vendor implemented the current solution?

A: No.

Q: What are the challenges that the City is facing in supporting, maintaining and enhancing the existing CRM system?

A: Inability to integrate due to upgrade versioning.

Q: Why is the current CRM platform, Microsoft Dynamics 2013 SP1, not upgraded or migrated to later versions (on-premise or hosted)?

A: City IT resources turnover and costs have precluded the City from maintaining an upgrade schedule.

Q: How many City IT staff (full-time and part-time) is assigned for supporting and maintaining the existing solution?

A: Less than one FTE supports CRM.

Q: Which telephony system is currently in place?

A: Cisco Finesse.

Q: Does “screen-pop” solution work?

A: Not well due to browser configuration changes.

Q: Is an integrated chat option available within the current system or the system is integrated with outside vendor for chat functionality?

A: No, but the City would like to have that functionality.

Q: Did the City review and/or see demonstrations from any CRM software vendors with respect to delivering the scope mentioned in this RFP? If so, please provide the list of vendors and technologies reviewed.

A: No.

Q: The new CRM system is required to integrate with various other systems including department legacy systems. Please provide the total number, and type/nature (for example: bi-directional, real-time, batch-mode, etc.) of such integrations that are included in the current scope?

A: Two main integration points are Accela and Utility Billing. The City would like bi-directional. Currently we are only batching.

Q: What is the current and expected number of City staff who would be accessing the mobile device interface/application from the field?

A: The City only has a few now, but would like to extend up to 50.

Q: Does the City anticipate the need to implement an enhanced field services component encompassing functionality such as case/service request creation, assignment, routing, scheduling, and tracking (from the field) as part of the new City 311 CRM solution?

A: Yes.

Q: Where is the data stored? Which database?

A: On-Prem with a SQL database.

Q: For the legacy data import, please provide the total number of records (number of objects/tables, average number of fields per table, total number of records per object, total number of attachments, total data and average size of attachments in MB).

A: The City would like to further discuss with Proposer during demonstrations because we do not want to migrate all data. We are looking for recommendations around conversion.

Q: Would the City provide the cleansed data for the data import or is data cleansing part of the scope of work?

A: City would be required to cleanse.

Q: May we request the City to provide the anticipated project kick-off date in order to develop the initial project plan?

A: The City can only estimate first quarter 2019 due to approval processes for funding.

Q: When does the City expect the new CRM solution to go live?

A: We are seeking recommendations from the Proposers for a project schedule.

Q: Can the vendors submit the "Cost Proposal" in a separate envelope?

A: No.

Would the City accept the confidential and proprietary information such as solution screenshots, sample training documents, and staff resume as a separate attachment?

A: You can have separate attachments but they must be submitted together as a whole package. See Part 3 "General Information", Paragraph 3.4 "Proprietary Information/Public Disclosure" for additional information.

Q: We understand that in order to respond to Section E. FUNCTIONALITY in Technical Proposal, we have to respond to all requirements as listed under Section 7: Requirements (Page 15 of the RFP document) that includes the following categories:

A. General Requirements (Page 15 to Page 17)

B. Specific Requirements (Appendix A, B, C and D – Page 17 to Page 35)

Please confirm our understanding.

A: If I'm understanding your question here, you need to respond to all requirements even if it is "No". Answering "No" to a question does not automatically eliminate a Proposal.

Q: What is the allocated budget (software licenses, implementation, production support and maintenance) for this Project?

A: Unknown.

Connie Wahl

Connie Wahl, C.P.M., CPPB
Purchasing

PLEASE NOTE: A SIGNED COPY OF THIS ADDENDUM MUST BE SUBMITTED WITH YOUR PROPOSAL, OR THE PROPOSAL MAY BE CONSIDERED NON-RESPONSIVE.

The undersigned acknowledges receipt of this Addendum.

Company

Authorized Signature