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CITY OF SPOKANE -
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Spokane, Washington 99201-3316
(509) 625-6400
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REQUEST FOR PROPOSALS

City of Spokane, Washington

RFP NUMBER: **#4481-18**

DESCRIPTION: **CUSTOMER RELATIONSHIP MANAGEMENT SYSTEM**

DUE DATE: **MONDAY, OCTOBER 15, 2018**
No later than 1:00 p.m.

City of Spokane - Purchasing
4TH Floor, City Hall
808 W. Spokane Falls Blvd.
Spokane WA 99201-3316

Connie Wahl

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

Contents

1. INTRODUCTION

1.1 BACKGROUND AND PURPOSE

The City of Spokane (hereinafter "City"), through its Neighborhood Services Department is initiating this Request for Proposal (RFP) to solicit proposals from firms interested in participating in a project to implement a new Customer Relationship Management (CRM) services platform to serve residents and customers. The City's goal with this initiative is to refresh the City's customer management technologies, increase the City's response timelines for requested services, to provide more alternatives for customers to access City services, and to provide customers the ability to track their concerns through processes to resolution. As part of this project, the City's goal is to further develop a customer web portal, real-time integration with mobility applications, and to present an intuitive, easy to navigate user interface. The overarching goal is to increase customer satisfaction with the City's service offerings through innovative technology.

The City presently uses an on premises system consisting of Microsoft's Dynamics CRM 2013 SP1 as the foundation software system with a My Spokane 311 overlay to provide customer facing services. The system tracks customer engagement through multiple City entities, including My Spokane 311 and the Mayor's Office. It is also used as a work-flow tool and is integrated with the City's website for customers to self-serve on such items as changing garbage service to reporting potholes to registering a bicycle. It also has the potential to be used for economic development as there is a leads/marketing component that is currently not being utilized. Currently, however, CRM is used by My Spokane 311 to track reason for customer contact as well to create work-flows for Utility Billing, Solid Waste Collection, Streets, Parking Meter Maintenance, Homeless Encampments, and Parks Maintenance requests. One point of contact for the customer creates a case incident that generates follow-up by these departments.

The City's 311 program has a staff of 14 primary CRM users – 8 call takers, 3 public counter staff, 2 supervisors, and 1 manager. Other departments use CRM for data entry and primary use with an estimated 10 staff creating and editing cases within CRM. The remaining 50 users primarily use CRM as a read-only function: they pull data submitted online or from My Spokane 311 staff to complete service requests in other systems. Approximately 200,000 calls are received by 311 staff annually in addition to another 25,000 walk-in customers and 10,000 online submittals. Other departments contribute approximately another 50,000 cases. The City's current capacity is 300,000 annual cases, though 311 is currently averaging about an 8% growth each year.

1.2 MINIMUM QUALIFICATIONS

The Firm must be licensed to do business in the State of Washington. The Firm must have ten (10) more years of experience in developing and maintaining Customer Relationship Management systems.

1.3 FUNDING

The City anticipates funds to obtain this project in 2019. Any contract awarded as a result of this procurement is contingent upon the availability of funding.

1.4 PERIOD OF PERFORMANCE

The period of performance of any contract resulting from this RFP is two (2) to five (5) years.

Contract renewals or extensions may be initiated at the discretion of the City and subject to mutual agreement. The contract may be extended for additional contract periods with the total contract period not to exceed five (5) years.

1.5 CONTRACT PRICING

Pricing will be firm for a period of one (1) year. Pricing adjustment requests will be considered on an annual basis thereafter subject to mutual agreement. Firm must request pricing adjustment in writing with a minimum notice of thirty (30) days.

1.6 DEFINITIONS

Definitions for the purposes of this RFP include:

City – The City of Spokane, a Washington State municipal corporation, the agency issuing this RFP.

Firm or Consultant – Individual or company whose Proposal has been accepted by the City and is awarded a fully executed, written contract.

Proposal – A formal offer submitted in response to this solicitation**.**

Proposer - Individual or Firm submitting a Proposal in order to attain a contract with the City.

SaaS – Software as a Service.

On-Premises – Application runs on a City server in City's data Center.

Hosted - software that is installed, hosted and accessed entirely from a remote server or location

Request for Proposals (RFP) – Formal procurement document in which a service or need is identified but no specific method to achieve it has been chosen. The purpose of an RFP is to permit the consultant community to suggest various approaches to meet the City's needs at a given price.

CRM – Customer Relationship Management

1.7 ADDENDA

It is the responsibility of Proposers to check the Purchasing Webpage https://my.spokanecity.org/administrative/purchasing/current-projects/ for Addenda or other additional information that may be posted regarding this Request for Proposals.

1.8 CONTRACTING WITH CURRENT OR FORMER CITY EMPLOYEES

Specific restrictions apply to contracting with current or former City officers and employees pursuant to the Code of Ethics in chapter 1.04A of the Spokane Municipal Code. Proposers should familiarize themselves with the requirements prior to submitting a Proposal that includes current or former City officers or employees.

2. SCOPE OF SERVICES

The City anticipates the new CRM technology will substantially improve the City staff's ability to monitor and improve the delivery of services to its customers. The desired solution will provide the necessary data and tools to capture the information necessary to improve services, and to provide more granular performance information by department. Other key goals the City is seeking for the CRM solution are:

- Cross entity search (public records request fulfillment)
- Survey integration (ability to link responses to customers)
- Reporting (dashboards as well as ad hoc)
- Notifications (allow customers to opt-in for proactive notifications such as holiday garbage pick-up, delayed garbage service due to mechanical issues, upcoming street construction projects)
- Integration with other systems (chat, Accela, future Utility Information System)
- Improved knowledge base (improved search functionality and ability to maintain/update)
- Caller ID integration. The current "screen-pop" solution has required significant upgrades to properly function. The goal would be to minimize the needed upgrades.
- ArcGIS/ESRI/ Integration (current limitations for online reporting of issues such as potholes)
- Mobile Device Interface (currently not feasible to use in the field)
- Email Integration (emailing from system is incredibly difficult and not user friendly, requiring manual capture of email response from Outlook to be pasted into notes to allow for tracking of conversation)
- Consistent access to City services through multiple communication channels
- Personalized interaction when communicating with the City
- Web portal designed around a customer's needs and perspective
- Transform the way residents experience government services
- Increase visibility for service fulfillment/enhance transparency into City operations
- Provide resident access to real-time data
- Foster collaboration between City departments and customers
- Facilitate data-driven decision making both by the City and its communities
- Identify opportunities for improving City services
- Providing a comprehensive, centralized, user-friendly knowledge base
- Increasing customers' use of self-service options
- Improving intake scripting to provide consistent messages
- Providing a consistent approach to address residents' service requests
- Improving querying and reporting capabilities
- Improving call-related measurement tools and tracking of end-to-end call flows

See Appendix for more detail.

3. GENERAL INFORMATION

3.1 RFP COORDINATOR

The RFP Coordinator is the sole point of contact in the City for this procurement. All communication between the Proposer and the City upon receipt of this RFP shall be with the RFP Coordinator, as follows:

Name	Peggy Lund
Address	808 W. Spokane Falls Blvd
City, State, Zip Code	Spokane, Washington 99201
Phone Number	(509) 625-6954
E-Mail Address	klund@spokanecity.org

Any other communication will be considered unofficial and non-binding on the City. Firms are to rely on written statements issued by Addendum. Communication directed to parties other than the RFP Coordinator may result in disqualification of the Firm.

3.2 ESTIMATED SCHEDULE OF PROCUREMENT ACTIVITIES

Issue Request for Proposals	September 6, 2018
Question and answer period	September 7 – September 28, 2018
Proposals due	October 15, 2018
Evaluate Proposals	October 16 – November 2, 2018
Firm Demonstrations	November, 2018
Negotiate contract	December, 2018
City Council approval of contract	January, 2019
Begin contract work	Q1, 2019

The City reserves the right to revise the above schedule.

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 15, 2018 – 1:00 P.M."
YOUR COMPANY NAME

B. SUBMISSION OF PROPOSALS

Submit one (1) paper original, one (1) paper copy and one (1) reproducible electronic copy (thumb drive or CD) of the Proposal to:

DELIVERY BY MAIL:

City of Spokane – Purchasing
4th Floor – City Hall
808 West Spokane Falls Boulevard
Spokane, WA 99201-3316

HAND DELIVERY:

City of Spokane – "My Spokane" Service Desk
1st Floor – City Hall
808 West Spokane Falls Boulevard
Spokane, WA 99201-3316

Do not split up electronic copy of Proposal into more than 4 electronic documents. Uploading multiple electronic documents can be labor intensive and viewing Proposal copy as a whole during evaluation may be more difficult.

NOTE: Proposals will not be accepted by fax or email.

C. DUE DATE

It is the responsibility of the Proposer to be sure its Proposal is sent sufficiently ahead of time to be received no later than 1:00 PM local time on the due date.

Proposers mailing Proposals should allow normal mail delivery time to ensure timely receipt of their Proposals. The City reserves the right to not consider Proposals received late. City Hall is now a secured building. If the Proposer is hand delivering a Proposal, Proposals will be received at the "My Spokane" service desk on the 1st floor of City Hall up until 12:30 p.m. on the due date. Between 12:30 p.m. and 1:00 p.m. Proposals will be accepted at the 1st Floor security desk of City Hall.

Sealed Proposals will be publicly acknowledged at 1:15 p.m., on the due date in the City of Spokane City Hall Council Chambers, 808 West Spokane Falls Boulevard, Spokane, Washington 99201.

3.4 PROPRIETARY INFORMATION / PUBLIC DISCLOSURE

Materials submitted in response to this competitive procurement shall become the property of the City.

All received Proposals shall remain confidential until the award of contract recommendation has been filed with the applicable Council Committee or the City Clerk for City Council action. Thereafter, the Proposals shall be deemed public records as defined in RCW 42.56, "Public Records."

Any information in the Proposal that the Proposer desires to claim as proprietary and thus exempt from disclosure under the provisions of existing state law, shall be clearly designated. Each page claimed to be exempt from disclosure must be clearly identified by the word "Confidential" printed on it. Marking the entire Proposal exempt from disclosure will not be honored.

The City will consider a Proposer's request for exemption from disclosure; however, the City will make a decision whether to exempt a record predicated upon state law and regulations, regardless of any claim of confidentiality by Proposer. If any information is marked as "Confidential" in the Proposal, it will not be made available until the affected Proposer has been given an opportunity to seek a court injunction against the requested disclosure.

All requests for information must be directed to the RFP Coordinator.

3.5 REVISIONS TO THE RFP

In the event it becomes necessary to revise any part of this RFP or provide any other pertinent information, it shall be posted as an addendum to the RFP on the City of Spokane Purchasing Webpage https://my.spokanecity.org/administrative/purchasing/current-projects/.

The City also reserves the right to cancel or reissue the RFP in whole or in part, prior to final award of a contract.

3.6 MINORITY & WOMEN-OWNED BUSINESS PARTICIPATION

The City encourages participation in all of its contracts by Firms certified by the Washington State Office of Minority and Women's Business Enterprises (OMWBE). Proposers may contact OMWBE at (360)753-9693 to obtain information on certified Firms.

3.7 ACCEPTANCE PERIOD

Proposals shall remain in effect for one hundred twenty (120) days for acceptance by the City from the due date for receipt of Proposals.

3.8 RESPONSIVENESS

The Proposer is specifically notified that failure to comply with any part of the RFP may result in rejection of its Proposal as non-responsive.

The City also reserves the right, however, at its sole discretion to waive minor administrative irregularities.

3.9 MOST FAVORABLE TERMS

The City reserves the right to make an award without further discussion of the Proposal submitted. Therefore, the Proposal should be submitted initially with the most favorable terms that can be proposed. There will be no best and final offer procedure. The City reserves the right to contact a Proposer for clarification of its Proposal.

The Proposer should be prepared to accept this RFP for incorporation into a contract resulting from this RFP. Contract negotiations may incorporate some or all of the Proposal.

3.10 COSTS TO PROPOSE

The City will not be liable for any costs incurred by the Proposer in preparation of a Proposal submitted in response to this RFP, in conduct of a presentation, or any other activities related to responding to this RFP.

3.11 NO OBLIGATION TO CONTRACT

This RFP does not obligate the City to contract for services specified herein.

3.12 REJECTION OF PROPOSALS

The City reserves the right at its sole discretion to reject any and all Proposals received without penalty and to not issue a contract as a result of this RFP.

3.13 INTERLOCAL PURCHASE AGREEMENTS

The City of Spokane has entered into Interlocal Purchase Agreements with other public agencies pursuant to RCW chapter 39.34. In submitting a response, the Proposer agrees to provide its services to other public agencies at the same contracted price, terms and conditions it is providing to the City of Spokane, contingent upon the Firm's review and approval at the time of a requested contract. The Firm's right to refuse to enter into a contract with another public agency at the time of request shall be absolute.

4. PROPOSAL CONTENTS

4.1 PREPARATION OF PROPOSAL

Proposals shall be submitted on eight and one-half by eleven inch (8 ½" x 11") paper with tabs separating the major sections of the Proposal. Use recycled paper and both sides of paper sheets whenever practicable. The major sections of the Proposal are to be submitted in the order noted below:

A. Letter of Submittal.
B. Technical Proposal.
C. Management Proposal.
D. Cost Proposal.

Proposals shall provide information in the same order as presented in this document with the same headings. This will not only be helpful to the evaluators of the Proposal, but should assist the Proposer in preparing a thorough response.

4.2 LETTER OF SUBMITTAL

The Letter of Submittal shall be signed and dated by a person authorized to legally bind the Firm to a contractual relationship, e.g., the president or executive director if a corporation, the managing partner if a partnership, or the proprietor if a sole proprietorship. Along with introductory remarks, the Letter of Submittal is to include the following information about the Firm and any proposed professional services, subcontractors, and/or implementation partners:

A. Name, address, principal place of business, telephone number, and fax number/e-mail address of legal entity or individual with whom contract would be written;

B. Legal status of the Firm (sole proprietorship, partnership, corporation, etc.);

C. Location of the facility from which the Firm would operate;

D. Identify any current or former City employees employed by or on the Firm's governing board as of the date of the Proposal or during the previous twelve (12) months; and

E. Acknowledgement that the Firm will comply with all terms and conditions set forth in the Request for Proposals, unless otherwise agreed by the City.

4.3 TECHNICAL PROPOSAL

The Technical Proposal shall contain a comprehensive description of services with specific attention to Section 2 "SCOPE OF SERVICES" and including the following elements:

A. PROJECT APPROACH / METHODOLOGY – Include a complete description of the Firm's proposed approach and methodology for the project. This section should convey Firm's understanding of the proposed project.

B. WORK PLAN – Include all project requirements and the proposed tasks, services, activities, etc. necessary to accomplish the scope of the project defined in this RFP. This section of the technical Proposal shall contain sufficient detail to convey to members of the evaluation team, the Firm's knowledge of the subjects and skills necessary to successfully complete the project. Include any required involvement of City staff. The Firm may also present any creative approaches that may be appropriate and may provide any pertinent supporting documentation.

C. PROJECT SCHEDULE – Include a project schedule indicating when the elements of the work will be completed and when deliverables, if any, will be provided.

D. DELIVERABLES – Fully describe deliverables to be submitted under the proposed project.

E. FUNCTIONALITY – How well does the solution meet the functional requirements?

4.4 MANAGEMENT PROPOSAL

A. PROJECT MANAGEMENT

1. PROJECT TEAM STRUCTURE/INTERNAL CONTROLS - Provide a description of the proposed project team structure and internal controls to be used during the course of the project, including any professional services, subcontractors, and/or implementation partners. Provide an organizational chart of the Firm indicating lines of authority for personnel involved in performance of this potential contract and relationships of this staff to other programs or functions of the Firm. This chart must also show lines of authority to the next senior level of management. Include who within the Firm will have prime responsibility and final authority for the proposed work. The City will also require:

    a. A migration plan to migrate data and services from the existing system, services and other contingencies applicable to the operations to the system proposed by the vendor.

    b. A Detailed implementation and deployment plan for the system, including the lifecycle management and pilot where applicable

2. STAFF QUALIFICATIONS/EXPERIENCE – Identify staff, including professional services, subcontractors, and/or implementation partners who will be assigned to the potential contract, indicating the responsibilities and qualifications of such personnel, and include the amount of time each will be assigned to the project. Provide resumes' (not to exceed two (2) pages per person) for the named staff, which include information on the individual's particular skills related to this project, education, experience, significant accomplishments and any other pertinent information. The Firm shall commit that staff identified in its Proposal will actually perform the assigned work. Any staff substitution must have the prior approval of the City.

B. EXPERIENCE OF THE FIRM

1. Indicate the experience the Firm and any professional services, subcontractors, and/or implementation partners have in the following areas: **CRM Applications development and deployment, and providing customer service solutions for local government entities similar in size to Spokane.**

2. Indicate other relevant experience that indicates the qualifications of the Firm, and any professional services, subcontractors, and/or implementation partners for the performance of the potential contract.

3. Include a list of contracts the Firm has had during the last five (5) years that relate to the Firm's ability to perform the services needed under this RFP. List contract reference numbers, contract period of performance, contact persons, telephone numbers, and fax numbers/e-mail addresses. The Firm grants permission to the City to contact the list provided.

C. REFERENCES

List names, addresses, telephone numbers, and fax numbers/e-mail addresses of three (3) business references for whom work has been accomplished and briefly describe the type of service provided. The Firm grants permission to the City to contact the references provided. Do not include current City staff as references. The City may evaluate references at the City's discretion.

D. RELATED INFORMATION

1. If the Firm has had a contract terminated for default in the last five (5) years, describe the incident. Termination for default is defined as notice to stop performance due to the Firm's non-performance or poor performance and if the issue of performance was either (a) not litigated due to inaction on the part of the Proposer, or (b) litigated and such litigation determined that the Proposer was in default.

2. Submit full details of the terms for default including the other party's name, address, and phone number. Present the Firm's position on the matter. The City will evaluate the facts and may, at its sole discretion, reject the Proposal on the grounds of the past experience. If no such termination for default has been experienced by the Firm in the past five (5) years, so indicate.

E. STRATEGIC PLANNING

The Firm and its professional services, subcontractors, and/or implementation partners will be an integral part of the team to include strategic planning, business analysis, business process redesign, knowledge base design, hosting, configuration, integration, documentation, training, knowledge transfer, project management, and other implementation services necessary to create a modern, world-class service delivery platform to support the Spokane community.

The City is anticipating a Firm and solution that will work with the City to collect and process customer and staff feedback and work collaboratively on solutions to provide improved, streamlined services to the community. The City is further anticipating a solution that, in addition to traditional communications means such as telephone and e-mail, will support a variety of communications platforms such as mobile, text, and/or web self-service to access services, submit suggestions for improvement, to solicit answers to questions, and to submit information through to specialized City services such as “Ask the Mayor.”

F. MAINTENANCE AND SUPPORT

The City will review the Firm’s proposed on premises or SaaS solution. For either proposed solution, the vendor shall identify the types and quantities of technical staff needed to support the proposed platform. Maintenance and support shall be clearly defined in terms of system support and maintenance, periodic hardware or software upgrades, methodology for out-of-cycle priority bug fixes/patches, and other technical support necessary to support the solution, including help desk support on general system use, configuration settings, reporting, etc.

G. TRAINING AND KNOWLEDGE TRANSFER

The firm shall outline the Training Plan to include how it may address the following:

- General User Training: General End-User Training on the general systems functions, building sufficient time for user questions and answer.
- Super User Training: Super User training for those individuals that will be designated escalation points for apparent technical issues with the system.
- System Administrator Training: System Administrator training for those (IT) technical support staff who will support the troubleshooting and maintenance on the system.
- Train-the-Trainer Training: Train-the-Trainer training would be for those individuals who would be responsible for training all new general users, super users, and system administrators after full implementation

4.5 COST PROPOSAL

The evaluation process is designed to award this procurement not necessarily to the Firm that proposes the least cost, but rather to the Firm whose Proposal best meets the requirements of this RFP.

A. IDENTIFICATION OF COSTS

Identify all costs including expenses to be charged for performing the services necessary to accomplish the objectives of the contract. Submit a fully detailed budget including staff costs and any expenses necessary to accomplish the tasks and to produce the deliverables under the contract. Firms are required to collect and pay Washington state sales tax, if applicable. For licensing and pricing purposes, Proposers should provide cost detail for simultaneous concurrent users or named user licenses.

At a minimum include the following:

1. Hardware, software, professional service fees:

a. Software license costs
b. Professional services fees for implementation, training, conversion, project management and related services. Include breakdown for each category.
c. Professional services for integration (specify the integrations required if applicable).
d. Project expenses (travel, per diem, etc.).
e. Total software/hardware implementation costs.
f. SaaS Costs

2. Annual hardware and software maintenance fees.
   a. Annual operations and maintenance/support costs. If this cost differs over years, please report the cost for each year separately. Please include all third party services.
   b. Total on-going maintenance/support cost.

5. EVALUATION

5.1 EVALUATION PROCEDURE

Responsive Proposals will be evaluated in accordance with the requirements stated in this solicitation and any addenda issued. Evaluation of Proposals shall be accomplished by an evaluation team, to be designated by the City, which will determine the ranking of the Proposals.

The City, at its sole discretion, may elect to select the top-scoring Firms as finalists for an oral presentation.

The RFP Coordinator may contact the Firm for clarification of any portion of the Firm's Proposal.

5.2 EVALUATION WEIGHTING AND SCORING

The following weighting and points will be assigned to the Proposal for evaluation purposes:

Technical Proposal – 45%		90 points
Project Approach/Methodology	15 Points (Maximum)	
Quality of Work Plan	15 Points (Maximum)	
Project Schedule	10 Points (Maximum)	
Project Deliverables	10 Points (Maximum)	
Functionality	40 Points (Maximum)	
Management Proposal - 25%		50 points
Project Team Structure/Internal Controls	15 Points (Maximum)	
Staff Qualifications/Experience	15 Points (Maximum)	
Experience of the Firm	20 Points (Maximum)	
Cost Proposal – 30%		60 points
Implementation	30 Points (Maximum)	
Licensing	30 Points (Maximum)	
GRAND TOTAL FOR WRITTEN PROPOSAL		**200 POINTS**

5.3 PRESENTATIONS AND/OR DEMONSTRATIONS MAY BE REQUIRED

Written submittals and oral presentations/demonstrations, if considered necessary, will be utilized in selecting the winning Proposal. The City, at its sole discretion, may elect to select the top scoring finalists from the written evaluation for an oral presentation/demonstration and final determination of contract award. Should the City elect to hold oral presentations/demonstrations, it will contact the top-scoring Firm(s) to schedule a date, time and location. Commitments made by the Firm at the oral presentation/demonstration, if any, will be considered binding.

PRESENTATION SCORING:
If there are demonstrations, software will be evaluated on the demonstrated ease of use, look and feel, functionality, etc.

5.4 AWARD OF CONTRACT

This RFP does not obligate the City to award a contract.

The City of Spokane reserves the option of awarding this contract in any manner most advantageous for the City. More than one contract may be awarded.

Award of contract, when and if made, will be to the proposer whose Proposal is the most favorable to the City, taking into consideration the evaluation factors. STATE CONTRACTS WHERE APPLICABLE WILL BE CONSIDERED AS A PROPOSAL. The City Council shall make the award of contract or purchase.

5.5 DEBRIEFING OF UNSUCCESSFUL PROPOSERS

Upon request, a debriefing conference will be scheduled with an unsuccessful Proposer. Discussion will be limited to a critique of the requesting Firm's Proposal. Comparisons between Proposals or evaluations of the other Proposals will not be allowed. Debriefing conferences may be conducted in person or on the telephone.

6. CONTRACT TERMS

6.1 BUSINESS REGISTRATION REQUIREMENT

Section 8.01.070 of the Spokane Municipal Code states that no person may engage in business with the City without first having obtained a valid business registration. The Firm shall be responsible for contacting the State of Washington Business License Services at http://bls.dor.wa.gov or 1-800-451-7985 to obtain a business registration. If the Firm does not believe it is required to obtain a business registration, it may contact the City's Taxes and Licenses Division at (509) 625-6070 to request an exemption status determination.

6.2 ANTI-KICKBACK

No officer or employee of the City of Spokane, having the power or duty to perform an official act or action related to this contract shall have or acquire any interest in the contract, or have solicited, accepted or granted a present or future gift, favor, service or other thing of value from or to any person involved in the contract.

6.3 DISPUTES

This contract shall be performed under the laws of Washington State. Any litigation to enforce this contract or any of its provisions shall be brought in Spokane County, Washington.

6.4 TERMINATION

Either party may terminate this contract by sixty (60) days written notice to the other party.

6.5 NONDISCRIMINATION

No individual shall be excluded from participation in, denied the benefit of, subjected to discrimination under, or denied employment in the administration of or in connection with this Contract because of age, sex, race, color, religion, creed, marital status, familial status, sexual orientation including gender expression or gender identity, national origin, honorably discharged veteran or military status, the presence of any sensory, mental or physical disability, or use of a service animal by a person with disabilities. The Firm agrees to comply with, and to require that all professional services, subcontractors, and/or implementation partners comply with, Section 504 of the Rehabilitation Act of 1973 and the Americans with Disabilities Act, as applicable to the Firm.

6.6 CERTIFICATION REGARDING DEBARMENT, SUSPENSION, INELEGIBILITY AND VOLUNTARY EXCLUSION

A Certification form will accompany the contract to be signed confirming that, to the best of its knowledge and belief, Firm and its principals;

a. Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any federal department or agency;

b. Have not within a three-year period preceding this contract been convicted or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (federal, state, or local) transaction or contract under a public transaction; violation of federal or state antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, tax evasion, receiving stolen property, making false claims, or obstruction of justice;

c. Are not presently indicted or otherwise criminally or civilly charged by a government entity (federal, state, or local) with commission of any of the offenses enumerated in paragraph (1)(b) of this certification; and,

d. Have not within a three-year period preceding this contract had one or more public transactions (federal, state, or local) terminated for cause or default.

6.7 PAYMENT

Payment will be made via direct deposit/ACH unless otherwise provided by state law. A completed ACH application is required before a City Order will be issued. If the City objects to all or any portion of the invoice, it shall notify the Company and reserves the right to only pay that portion of the invoice not in dispute. In that event, the parties shall immediately make every effort to settle the disputed amount.

6.8 LIABILITY

The Firm shall indemnify, defend and hold harmless the City, its officers and employees from all claims, demands, or suits in law or equity arising from the Firm's negligence or breach or its obligations under the contract. The Firm's duty to indemnify shall not apply to liability caused by the sole negligence of the City, its officers and employees. The Firm's duty to indemnify for liability arising from the concurrent negligence of the City, its officers and employees and the Firm, its officers and employees shall apply only to the extent of the negligence of the Firm, its officers and employees. The Firm's duty to indemnify shall survive termination or expiration of the contract. The Firm waives, with respect to the City only, its immunity under RCW Title 51, Industrial Insurance.

6.9 INSURANCE COVERAGE

During the term of the contract, the Firm shall maintain in force at its own expense, each insurance coverage noted below:

A. Worker's Compensation Insurance in compliance with RCW 51.12.020, which requires subject employers to provide workers' compensation coverage for all their subject workers and Employer's Liability Insurance in the amount of $1,000,000; and

B. General Liability Insurance on an occurrence basis, with a combined single limit of not less than $1,000,000 each occurrence for bodily injury and property damage. It shall include contractual liability coverage for the indemnity provided under this contract. It shall provide that the City, its officers and employees are additional insureds, but only with respect to the Firm's services to be provided under this contract; and

C. Automobile Liability Insurance with a combined single limit, or the equivalent of not less than $1,000,000 each accident for bodily injury and property damage, including coverage for owned, hired and non-owned vehicles.

D. Professional Liability Insurance with a combined single limit of not less than $1,000,000 each claim, incident or occurrence. This is to cover damages caused by the error, omission, or negligent acts related to the professional services to be provided under this contract. The coverage must remain in effect for at least three [3] years after the contract is completed.

There shall be no cancellation, material change, reduction of limits or intent not to renew the insurance coverage(s) without forty-five (45) days written notice from the Firm or its insurer(s) to the City.

As evidence of the insurance coverages required by this contract, the Firm shall furnish acceptable insurance certificates to the City at the time it returns the signed contract. The certificate shall specify all of the parties who are additional insured, and include applicable policy endorsements, and the deductible or retention level, as well as policy limits. Insuring companies or entities are subject to City acceptance and must have a rating of A- or higher by Best. Copies of all applicable endorsements shall be provided. The Firm shall be financially responsible for all pertinent deductibles, self-insured retentions, and/or self-insurance.

7. REQUIREMENTS

A. General Requirements: The City will require the Firm to meet or exceed the following CRM requirements (See Appendix for a detailed technical and functional requirement form) which include:

1. Knowledgebase / Decision Support
   - Create, review approve, and publish new entries to the knowledgebase
   - Disseminate new or updated entries in the knowledgebase
   - Archive old entries from knowledgebase
   - Customize a view of the knowledgebase
   - Create call scripts
   - Provide the call taker with a script to guide him or her through collecting the information needed for a particular service request
   - Perform natural language searches of the knowledgebase

2. Account Maintenance and Contact History
   - Find information about existing contacts by using various search criteria, including name, address, or phone number
   - Create new contacts and modify existing ones
   - Ability to validate address of the request through interface with City GIS
   - Merge redundant requests into one service request, yet maintain caller history for each request
   - Capture and view contact information and history from all channels
   - Interface with existing databases for "read only" access
   - Capture and display available caller profile and history on the Call taker's workstation
   - Audit records

3. Service Request Management
   - Provide first point of contact response to citizen requests for service
   - Process a citizen's request for information or service
   - Create a 'quick close' for a call to allow rapid opening and closing of short calls without compromising reporting requirements
   - Send service request data to the appropriate department through predefined templates
   - Close a case with systematic validation that closure rules have been met
   - Systematically identify and escalate an open case based on service level agreement rules
   - Receive service requests from City web portal and send e-mail acknowledgements of the request to the requestor
   - Capture call information for a new contact and forward for investigation
   - Track commitments for call-backs
   - Customize information collection for the various types of service requests
   - Provide a unique tracking number for all service requests

- Inquire about service request status by calling the 311 Contact Center or checking the City of Spokane website
- Provide access to electronic forms and software tools to update forms
- Identify duplicate service requests

4. Workflow/Business Rules

- Provide a "super-user" with capabilities to set up and administer business rules, such as workflow and decision trees
- Create application based service level agreement rules
- Change rules and identify the effects of the change and capture change for audit purposes
- Establish a new user or group, deactivate or delete existing users or groups
- Create roles, workflow rules, and decision trees easily
- Create escalation processes within the 311 Contact Center and other City of Spokane departments, external agencies, and/or municipalities
- Create inter-department routing processes

5. Analysis and Reporting

Performance metrics for My Spokane 311 need to be collected from each department and tracked to enable ongoing continuous performance improvement.

Requirements include the ability to:

- Create standard reports on the performance of the Call Center, including but not limited to:
    - ➢ Number of open issues by account type or by department to which the issue was referred
    - ➢ Number/percentage of issues that are past their due dates
    - ➢ Completed cases
    - ➢ Type of cases
- Create standard reports on the City's ability to respond to citizen requests and meet service levels
- Print reports from the call center application
- Manipulate the data (export into Excel, into graphic charts, etc.)
- Create ad-hoc reports (flexible, user-controlled reports on any key data fields)
- Create dynamic, web-based reporting interface
- Report on and manage call back commitments
- Produce real-time reports
- Generate geography-based reports
- Display incident locations

6. Integration

The Integration required is the ability to create a closed-loop processing system with other systems. This requirement will specifically apply to My Spokane 311, as specified below.

These capabilities include the integration of the 311 Contact Center CRM with department legacy systems Integration with the following types of departments is required:

- Departments using the 311 Contact Center CRM application
- Departments using legacy systems with an interface to the 311 Contact Center CRM application (e.g. Accela, GovQA, OnBase, Etc.)
- Departments using a legacy system that is not interfaced to the 311 Contact Center CRM applications.

7. City of Spokane – ArcGIS/ESRI Capability

The use of GIS by the 311 Contact Center will encompass a variety of functions such as providing directions to a City department office, locating services closest to a citizen's home, identifying the proper department servicing the caller's location, and providing data for budget and community service planning. Requirements include the ability to:

- Validate address data components against the GIS
- Integrate Resource Directory applications that map the citizen address against services available in their neighborhood
- Provide analytic reporting based on geographic information

B. Specific Requirements

The Requirements Appendix (A) is categorized by various required and desired features. This table will be used to determine the compatibility of the Firm's software to the requirements of the City of Spokane's CRM Platform. In the 'Firm Response' column, please enter the response to the requirement based upon the possible responses contained in the table below. An omitted response or a deviation from the alpha responses provided below will be construed to be a "NO" – not supported and/or is not provided as part of the Proposal. If you need to add any comments to further clarify your response, please do so in the column specified (if additional space is required, please attach any necessary documentation and index appropriately).

Response	Definition
Yes	This requirement currently exists and can be demonstrated.
Pending	This requirement is scheduled for future release and will be incorporated at no additional cost prior to or post system implementation. Please provide the estimated release date.
Extra	This requirement is not currently available, but can be provided as a modification at an additional cost. Proposer is to provide an explanation in the "comments" column that includes the total cost of the modification.
No	This requirement is not supported and/or is not provided as part of this Proposal

NOTE: It is not expected that the proposed solution will be able to provide all of the functionalities specified in the table. However, during the Proposal's review this will be used to evaluate each Firm's product and will facilitate in the selection of the software that best meets the City of Spokane's needs.

Functional Requirements		
1	Review the Functional Requirements found in Attachment A and respond accordingly	A
General Technical Requirements		
2	Review the General Functional Requirements found in Attachment B and respond accordingly	B
Specific Functional/Technical Requirements		
3	Review the Specific Functional/Technical Requirements found in Attachment C and respond accordingly.	C
Service Requests		
4	Review the Service Request Requirements found in Attachment D and respond accordingly.	D

APPENDIX A

#	Functional Requirements	Firm Response	Comments, Explanation and/or Clarification
1	Ability for entry of all service requests into a centralized database with integrated intake, routing, resolution and reporting modules		
2	Ability to show progress of requests entered by each call center staff member		
3	Ability to allow prioritization of requests		
4	Ability to capture key dates and times during request processing		
5	Ability to handle multi-departmental requests (fields customizable by department)		
6	Ability to check for past due activities and provide automatic notification via system or e-mail to departments		
7	Ability to research a request for information using all appropriate resources		
8	Ability to restrict viewing and input capability via security permissions		
9	Ability to track the following information (but not limited to) about each customer contact for inquiry or service request including a. ID; b. inquiry/service number; c. severity level/priority; d. source of inquiry/request; e. status; f. number of days since creation; g. due date and time; h. date of action; i. time of action; j. action type; k. date creation; l. follow-up activity; m. closure; n. reopening		
10	Ability to allow one or more users to query information and run reports at the same time		
11	Ability to allow one or more users to view the same record at the same time		
12	Ability to apply locks at the record level for update processing to ensure correct updating of the data		
13	Ability to automatically assign a date and time stamp for each request		
14	Ability to automatically assign a unique tracking number for each request		
15	Ability to automatically determine duplicate requests by type, date range, and location. This includes the ability to depict whether the duplicate request is open, closed, in the resolution process, etc.		
16	Ability to automatically record the person who processed the call based on user ID		
17	Ability to provide flexible means to cross reference and search knowledge base information, including key words and phrases		
18	Ability to provide non-proprietary extensibility using standard, commonly available web-based or Microsoft-based tools and languages		
19	Ability to provide wizards and templates for document creation		

20	Ability to send information to customers immediately via e-mail, text, or automated correspondence and fulfillment		
21	Ability to view history of edits and updates to requests, and provide easily retrievable audit trail information		
22	Can interface with software in use by various City departments (Accela Automation, ArcGIS, Cityworks, etc.)		
23	Complies with all current government standards and web-based transaction encryption standards		
24	Has a consistent look and feel across modules		
25	Has ability to import/export standard desktop application files including, but not limited to Microsoft Office Suite, PDF		
26	Has application modules that are fully integrated with one another to avoid redundant data entry		
27	Includes all support software, tools and utilities needed for configuration, installation, and operation at no additional cost		
28	Is scalable to allow for future growth of internal and external users		
29	Provides ability to maintain and update test environments		
30	Provides ability to perform online archive process		
31	Provides customizable online documentation and training materials, including online tutorial, quick reference guide, and context-specific Help and Search capability		
32	Provides field level edit checks for transactions during data entry		
33	Provides for seamless integration with Microsoft Outlook e-mail		
34	System is user configurable in terms of request scripting, options, workflow setups, and responses		
35	Ability to send surveys to internal/external customers and track responses; send follow-up		
36	Ability to view and track history of sales contact, sales opportunity, and sales customer		
37	Ability to assign and view multiple projects to one sales customer/contact		
38	Ability to allow customers to opt-in to marketing/sales/information/campaign newsletters or updates via email or text		
39	Ability to allow customer to track service request and history via website		
40	Ability to compile and view communication for one customer from multiple sources including email, chat, text, phone call		
41	Ability to recognize customer via phone/ISP and pull up account information directly on screen		
42	Ability to set service level agreement rules that can be measured.		
43	Has integrated chat option within system or ability to integrate with outside vendor (note which)		

APPENDIX B

#	General Technical Requirements	Firm Response	Comments, Explanation and/or Clarification
General Firm Credentials			
1	Firm has significant Public Sector market presence - provide number of customer implementations.		
2	Firm has a service support center (support and implementation personnel only) dedicated to the proposed product?		
Licensing			
1	Describe your licensing (user, application and database) for Hosted, SaaS or On Premises.		
Project Implementation and Training Plan			
1	The Firm shall include a typical timeline with this proposal including major milestones for tasks and subtasks, dates and both Firm and customer resources.		
2	Include a description of your overall approach to each of the following task areas (if applicable):		
	a) System Installation		
	b) System configuration		
	c) Data Conversion		
	d) Training (A sample of training materials & documentation should be included)		
	e) Test planning and execution		
	f) System interface design and support		
	g) System roll-out, procedures, and support		
3	Please describe your current project management methodology.		
Support			
1	The City of Spokane expects that annual support will include all updates, enhancements and training to the proposed solution. Describe how your solution meets this requirement.		
2	Describe your ongoing user support, including whether you provide a service call desk, procedures for handling different types of calls, ability to prioritize critical calls, and ability to respond to calls within a reasonable time period.		

3	Describe your escalation process for issues that are not resolved during initial call.		
4	The City of Spokane prefers a response from the service desk to non-emergency calls within four (4) hours and a response to critical calls (delay in work or loss of data due to system failure) within 1 hour. Provide validation of this capacity.		
5	Describe how problems and/or bugs are reported, fixes developed, and status tracked for the proposed system.		
6	Describe your process for receiving, evaluating, and implementing requests for enhancements to the proposed system post implementation.		
7	Live support is available for any issues Monday – Friday, 8am – 5pm (PST), or other reasonable timeframe during typical business hours. Please provide SLA agreements.		
8	Describe customer communications processes that announce service outages, bug fixes, updates, known issues, EOL dates, etc.		
9	Describe account and support management methodology if provided such as dedicated resources included in cost or available at extra cost, onsite vs. remote meetings, regularly scheduled meetings vs. as needed, etc.		
General System Specifications			
1	City of Spokane staff does not have administrative rights to install or upgrade applications and plug-ins on their computers. Describe any and all components that must be installed locally on a client machine, including Internet Explorer and Office plug-ins. Describe your support for packaging these components, if any, for automated installation.		
2	Internally, the City of Spokane has standardized on a Microsoft desktop platform: Windows operating system, Office suite, and Internet Explorer browser. The selected application Firm is expected to support all features and functionality within this environment. List versions currently supported by your product and describe your policy for adopting new versions of these products.		
3	City of Spokane requires the solution be compatible with multiple modern internet browsers for customer access via various platforms such as smart phones, tablets, desktops, etc. List the browsers and their versions(s) that your system currently supports and describe any functionality restrictions and limitations with your solution.		

4	Any on premise components of the proposed solution must work in the city's current technical environment. If proposal includes an on premise technology component, please describe the components that would be on premise and the environments supported/required. Include networking components and configurations required to support the proposed solution. If applicable, also describe any remote access to the city's network that your staff requires for implementation and/or ongoing support.		
5	Role Based Access Control (RBAC) allows the System Administrator to create user "profiles" that allow and grant user security rights to various functions of the system. Individuals or groups can also be given read/write or read-only access to the function, where applicable. Each user can be attached to a specific profile that gives them all the rights of the particular group. Describe how your system provides RBAC management and the level of granularity.		
Database Management			
1	List any limits to data storage provided as part of your proposed solution.		
2	What database platforms does your product support?		
3	Estimated database size and memory requirements.		
4	Specific database configuration requirements, if any.		
5	Is your environment Single or Multi-Tenant? If multi-tenant, how do you ensure segregation of client data?		
6	Is data available and accessible in native format to City's data management team (data extracts) on a regular basis.		
7	Ability to import information already compiled in other formats into the knowledge base		
8	Ability to index and secure knowledge base information by department		
9	Ability to index and store a series of questions (scripts) for each transaction type to assist operator/citizen communications		
10	Allows for data replication including but not limited to copying an instance of any database to a laptop or separate locations		
11	Includes utilities for database performance monitoring and tuning, including but not limited to tools for table and file maintenance		
12	Provides documented best practices including but not limited to optimum database configuration and client maintenance		

13	Provides unique and non-unique indexing		
Servers and Operating System			
1	Specify if system will be physical, virtual or an appliance.		
2	Supported virtualization platforms		
3	Supported Operating Systems		
4	Number of virtual servers required		
5	Recommended drive space requirements		
6	Recommended RAM (GB)		
7	Recommended # of CPU		
8	Recommended # of NICs		
9	Will any servers need to be public facing or located in the DMZ (demilitarized zone) for any on premises components?		
10	Does your software require any Anti-Virus exclusions? If so, do you have a published document outlining exclusions?		
Network Requirements			
1	Specify maximum allowed latency requirements		
2	Specify the typical amount of network traffic generated by this application in Mbps		
3	Specify the minimum network bandwidth required for each client installation in Mbps		
4	Specify all network ports that will need to be opened for both clients and network firewalls.		
5	Specify all public IP addresses that will need to be accessed by clients or servers.		
6	Specify any special IP address or protocol requirements for server or client PCs		
7	Specify remote access requirements and identify remote access users/equipment		
8	Specify physical switch port count requirements and port speed		
9	Specify any special network design requirements		
10	Specify if there are any QOS requirements		
11	Specify any telephony requirements analog and or IP		
12	Specify any wireless access requirements		

13	Specify fiber or ethernet cabling requirements		
14	Specify power requirements for all new equipment		
15	Identify any certificate requirements		
Third Party Contracting			
1	Identify any/all 3rd party professional services, subcontractors, implementation partners, and/or cloud service providers you contract with for your solution.		
2	If using 3rd party professional services, subcontractors, implementation partners and/or cloud service providers describe the agreements you have with them for system security, business continuance, backup and restoration services, system availability, maintenance windows, hours of support, and penalties for violating prescribed uptime.		
Upgrades			
1	Describe your typical average upgrade schedule (frequency of version releases, patches, length of time to implement, notification process) and documentation provided.		
2	Describe your notification practices for:		
	a) Planned outages		
	b) Changes to the application and/or database		
	c) Unplanned outages		
	d) Product sunset		
3	Describe any test or “sandbox” environments you would provide to the City of Spokane.		
4	Describe typical upgrade effort (downtime, level of difficulty, length of time to upgrade/update)		
Access / Authentication			
1	Application must require users to enter a User ID and a Password to gain access. User IDs and Passwords must be encrypted while in transit and at rest. Passwords must support configurable password complexity, age, and reuse limitations.		
2	Are passwords required to access systems processing, storing, or transmitting City of Spokane data?		
3	Are user access paths set up on a predefined role-based need-to-know basis (e.g., only the operators working on City of Spokane's project have access to City of Spokane's information and systems)?		

4	Does the vendor support advanced authentication methods such as multifactor authentication, SAML, SSO, Active Directory/LDAP, or other identity management solutions?		
5	Does the system include hidden user access accounts and/or default vendor accounts. What type of access does the vendor and its employees have or expect to have?		
6	Application must allow for the limiting of access to functionality and data through the use of security roles. Security roles should be configurable around processes/functions, data types, or job classifications.		
7	Does application have an auto-logout function and, if so, is that configurable?		
Breaches			
1	Vendor should notify users of any system/data breach within applicable state and federal law.		
Communications and Operations Management			
1	Is there a formal operational change management / change control process?		
2	Are separate environments for development, staging, testing/QA, and production supported and maintained?		
3	Are system resources reviewed to ensure adequate capacity is maintained?		
4	Are suitable tests of systems and applications carried out during development and prior to acceptance?		
5	Is City of Spokane data isolated from other customer systems/data and secured to prevent unauthorized logical or physical access?		
6	Are there documented procedures for securing and hardening IT infrastructure components (e.g. network devices, servers, operating systems, databases, etc.)?		
7	Are audit trails and logs maintained for network/system/application events to support monitoring or incident research and, if so, for what length of time?		
8	Is there a vulnerability management program, which includes security patches or updates being regularly reviewed and applied to IT infrastructure components (e.g. network devices, servers, operating systems, databases, etc.)?		
9	Is traffic to/from the Internet (e.g. e-mail, web browsing) subject to malicious code scanning and data leakage prevention?		

10	Is there a Network Intrusion Detection/Prevention System with 24x7 monitoring, alerting, and handling?		
11	Is all City of Spokane data encrypted while in storage and in transit (over the Internet or unsecure networks)?		
12	Is City of Spokane data ever stored on non-company managed equipment?		
Data Security and Ownership			
1	Is there an information security policy?		
2	Have information security policies been reviewed in the last 12 months?		
3	Is there an individual or group responsible for security within the organization?		
4	What is the geographic location and/or legal jurisdiction of customer data storage? Are commercial and government customer data managed differently?		
5	City of Spokane retains ownership of all city data. Any contractual issues associated with this requirement?		
6	What rights does the vendor gain with respect to use of customer data?		
7	What methods are available to export customer data should the contract terminate?		
8	Is data encrypted at rest? In transit? If so, to what standard?		
9	Is access to City of Spokane data (or the processing facilities hosting such data) provided to external parties?		
10	What does the vendor log and how long are logs retained? What methods exist to extract data for auditing and reporting?		
Disaster Recovery			
1	What is the data retention configuration and data recovery methods for customer data? How often are data/systems replicated between sites?		
2	What is the vendor's service/business continuity plan? Disaster recovery plan? How often are these plans tested?		
3	How far back can a record/application/virtual machine be recovered?		
4	Does the Business Continuity and/or Disaster Recovery plan address notification to City of Spokane when incidents occur?		
5	Are alternate facilities (e.g. data centers, office locations, etc.)		

	used?		
6	Please provide SLAs as it relates to the service offered.		
Physical and Environment Security			
1	Is there a documented physical security policy?		
2	Do systems and applications hosting City of Spokane data reside in a data center?		
3	Is the data center shared with other tenants?		
4	What technology is used to secure and monitor the datacenter (e.g. badge access, video or camera surveillance, etc.)?		
Public Records			
1	What is the procedure to retrieve bulk data in response to a PRR?		
Standards			
1	Does the solution include documentation to support secure configuration, installation and operation (SA-5 NIST 800-53(4))		
2	What security frameworks/standards has the vendor adopted and how is compliance with these frameworks/standards ensured/verified?		
Vendor Risk Assessment			
1	Does vendor require software developers to attend and complete regular security training?		
2	Does vendor use a secure code repository?		
3	Vendor should certify the use of accredited third party entities to conduct a vulnerability test and a penetration test not less than once per year.		
4	Does the application have a documented software development lifecycle that complies with NIST SP 800-64		
5	Does the vendor have a documented security testing plan?		
6	How does the vendor develop and manage custom code for its customers?		
7	How often does the vendor perform periodic vulnerability scans of development environments?		
8	What priority is given to client identified security vulnerabilities?		
9	What is the mean time to patch or remediation of identified security vulnerabilities?		

10	Has the vendor engaged in SSAE 16 efforts?		
11	Has the vendor had any breaches, compliance findings, or other security incidents in the last three years?		
12	Is vendor datacenter/infrastructure located in a natural hazard area (e.g., flood plain, earthquake)?		
13	Has the vendor engaged in SOC 2, Type 2 Report on Controls at a Service Organization Relevant to Security, Availability, Processing, and Integrity, Confidentiality or Privacy efforts? And are these reports available for review?		

APPENDIX C

#	Specific Functional/Technical Requirements	Firm Response	Comments, Explanation and/or Clarification
Application Architecture			
1	Ability to allow for the input of a company or department associated with the requestor		
2	Ability to automatically fill zip code information, based on the address or location entered		
3	Ability to create a centralized internal knowledge base for users (reference text, hints, tips, how to information, telephone directory)		
4	Ability to enter a short description for any entry, if desired. By definition, a short description will be limited in length, but allow at least 50 characters		
5	Ability to enter free-form text descriptions. The entry of text will be unlimited in length. The text description must be scrollable to accommodate viewing lengthy entries		
6	Ability to provide separate fields for storing first name, middle name, last name, and title of the requestor		
7	Ability to record an individual's name that may be assigned to the call within the selected department		
8	Ability to standardize address entry for consistency		
9	Ability to suggest or automatically change address entries that do not conform to standards		
10	Ability to suggest street name spellings, if a possible incorrect spelling is detected		
11	Ability to support real time and batch update processing		
12	Provides ability to attach multiple documents in various formats		
13	Provides customizable user interfaces		
14	Provides data and transaction logic validation through use of centralized or distributed business rules		
15	Provides easy deployment to desktops (either web based or deployment tools to push software to desktop)		
16	Provides support for inter-process communication including, but not limited to a. attachment of standard object types in an object library; and b. cut and paste capability from data fields and screens to other applications		
17	Provides user-defined a. exits; b. tables; c. fields; d. screens; e. reports; f. forms; g. hot keys; h. menus; i. business rules and workflows		
18	Ability to add fields for information to a transaction that the client can define for their own use. (User defined fields)		
System Administration			
1	Ability to allow multiple groups and roles that govern individual access to the system and transactions within the system. Users of the system will be placed in the appropriate group and assigned a role. The assignment of a group/role will determine whether or not the individual may access a transaction, and if the access is update or view only.		

2	Ability to allow system administrators or other authorized personnel to update text-based reference, topic, and keyword information displayed on the information reference screen		
3	Ability to configure transactions to fit the needs of the city. Configuration must be parameter-driven.		
4	Ability to define a system administrator, who will have access to all functions in the systems, including system administration and security, as well as all transaction types		
5	Ability to define and maintain business rules for a particular field of information (field edits)		
6	Ability to define and maintain transaction codes and department codes for the city		
7	Ability to define default values for a field. This includes the ability to automatically populate fields based on the value of another field		
8	Ability to define fields of information as mandatory (required), or optional. This ability must be provided for every type of transaction, or sets of transactions, if the transactions are similar		
9	Ability to define the format for assigned tracking numbers or document numbers. This includes the ability to reset tracking and document numbers on a scheduled basis.		
10	Ability to identify ‘customer’ of the system as a citizen, contractor, business owner, elected official, etc.		
11	Ability to provide drop-down lists within a transaction that may be maintained with the values used by the City of Spokane to describe various problems. The lists that display to the operator will vary by transaction type		
12	Administration module is executable from any workstation connected to the network		
13	Includes an administrative function to notify and log any problems		
14	System shall access scripts with branching logic that enable service agents to consider alternative actions		
15	System shall access scripts within a workflow-based, dynamically generated capability designed to guide the service agent through a client interaction		
16	System shall provide scripting functionality that is automatically invoked based on business rules and presented through screen pops		
17	System shall provide the ability to develop and maintain scripts		
Reporting			
1	Ability for raw data to be formatted and exported and allows for HTML, .pdf, .xls, .csv extension, etc.		
2	Ability to add notes electronically to reports		
3	Ability to aggregate data into hourly, daily, monthly and annual statistics		
4	Ability to create report based upon user defined grouping criteria (i.e., geography, chronology, and type of work)		

5	Ability to create status reports based on user defined criteria		
6	Ability to create, modify, save, and distribute ad hoc and standard reports, charts, graphs and information “dashboards”		
7	Ability to easily generate reports via query logic, wizards, and templates		
8	Ability to forward reports, letters or messages via email or link to an individual or group of individuals		
9	Ability to generate charts and graphs based on raw and report data within the system		
10	Ability to generate dashboards with computed fields (i.e. variances, percentage and statistics)		
11	Ability to incorporate maps into reports of analytical data		
12	Ability to provide print preview of all reports prior to printing and print screen functionality		
13	Ability to report analysis of service levels to help pinpoint problem areas based on schedule delays and missed completion dates using dates and status of requests and cases		
14	Ability to report requests by origin/source, such as in person, email, phone, online chat, or web		
15	Ability to report requests by type, status, location, date/time, department, priority, and other user defined fields		
16	Ability to schedule reports to run automatically		
17	Ability to search the database for transactions that include specified keywords or phrases		
Workflow			
1	Ability to create citizen segmentation rules		
2	Ability to route an escalated case to a senior customer service agent		
3	Create intra and inter-department routing processes		
4	Establish new user groups, deactivate or delete existing users or groups		
5	System provides best practice workflow templates		
GIS			
1	Ability to integrate with ArcGIS and ArcGIS Online. Please outline. (ex: map call-up feature)		
2	Ability to display maps online		
3	Ability to identify and query nearby requests on a map which are coded by service request from call center, request for service and/or case views		
4	Ability to geolocate an address		
5	Ability to perform basic map viewing functions including display, query, and analyze dynamic map data in the CRM-CM map display window		
6	Ability to upload and display topographical or aerial maps to help city personnel locate and understand the nature of a request.		
7	Ability to use GIS mapping to assist managers to consolidate service requests and organize work crews		

8	Ability to view open requests via a GIS display for all cases, symbolized by one or more attributes		
9	Utilize the GIS to notify the call taker if a particular service request falls outside of City limits		
Mobile Requirements			
1	Ability to support the use of wireless devices for viewing and updating service requests and case requests		
2	Ability for citizen to perform proximity search for city maintained objects (i.e., parks, schools, polling places, etc.) on the web		
3	Ability for CRM system administrators to create mobile users within the CRM system and these changes are replicated out to mobile users upon their next sync		
4	Ability for mobile messaging functionality to allow users to send/receive text messages to/from any users registered with the CRM system or to any valid email address		
5	Ability to send a cancellation alert to notify workers when activities are re-assigned		
6	Ability to support multiple types of wireless devices: Apple and Android		
7	Ability to synchronize data with the system based on a system defined time value, to ensure that CRM users can access virtual real-time data		
8	Ability to view, edit and add to related service request information such as caller/participant data, questions and answers relating to the task and location information		
9	Ability to upload one or more images at a time to service request		

APPENDIX D

#	Specific Functional/Technical Requirements	Firm Response	Comments, Explanation and/or Clarification
1	Ability to choose the appropriate outcome of activities from a list and update the CRM system on the next synchronization		
2	Ability to create any of the service request types owned by a user's group from the field		
3	Ability to display a confirmation page after submission of service request on the web		
4	Ability to extend entry of service requests to web page for citizen use		
5	Ability to optionally validate service request locations on the web		
6	Ability to perform pre-defined queries from the field against the CRM system database for those needing to view historical service request data based on type, location or participants		
7	Ability to re-assign a work assignment from the field		
8	Case activity statuses will contain, but not be limited to: a. Open; b. In progress; c. On hold; d. Complete; e. Additional		
9	Ability for the public web site to allow the citizen to enter a word or phrase to navigate to the correct link, or view a list of departments		
10	Ability for the public web site to interface to the CRM tool's database and route the transaction to the appropriate department		
11	Ability for the public web site to provide instructions for non-English speaking individuals		
12	Ability for the web site to interface to the CRM tool's database and route the transaction to the appropriate department via the Intranet		
13	Ability for web entry forms for the public to use the same business-defined editing rules as transactions entered by a city operator. (I.e. prompting citizens for questions pertaining to problem type.)		
14	Ability to assign a date/timestamp to scanned document images to record when the image was scanned		
15	Ability to attach electronic documents to a specific transaction		
16	Ability to automatically route the individual service request to the responsible department upon the completion of the information collection process		

17	Ability to change a service request type and re-route or transfer to a different department or individual		
18	Ability to designate or flag requests as new requests		
19	Ability to dynamically refresh the case queue display as new requests are routed and received		
20	Ability to establish “case queues” for each department for routing of requests		
21	Ability to integrate web entry forms with multi-queue workflow		
22	Ability to post web entries as real-time transactions to the CRM database		
23	Ability to provide a history of case activity routing		
24	Ability to provide a public web site with a single entry point that will be accessed from the City of Spokane home page		
25	Ability to provide flexible and on demand sorting of the case activities by fields such as transaction type, date, and priority		
26	Ability to provide web-enabled forms that may be input by the Mayor’s Office, internal City departments and the City Council to request services and report problems via the Intranet		
27	Ability to provide web-enabled forms which citizens may use to request services and report problems		
28	Ability to record the date, time and person who assigned or transferred a request to a department or individual		
29	Ability to record the user ID and name of the person who received and scanned the original documents		
30	Ability to reference and track multiple activities on a case by type, category/classification (trade), or area		
31	Ability to route a request to other department(s) and individuals during the life cycle of the request		
32	Ability to tailor web entry forms for public use to a subset of transactions used by the City of Spokane. The City will determine which transactions are available for public web reporting.		
33	Ability to validate data and automate processes within the web entry forms to assist customer self-services access		
34	Ability to view any portions of a case assigned to any department		