

RFP for Constituent Response Management Software and Implementation Services

Job No. 09-18-CMO

March 09, 2018

Questions and Answers

Following is the questions and provided answers received by the March 2nd deadline for this project:

1. Does the City currently subscribe to or employ a SaaS, cloud or some other enterprise application that it would prefer to leverage to achieve its desired CRM capabilities? If yes, which system and/or application? And, who was the Contractor who completed the initial implementation? *The City does not have a preferred application but would consider leveraging an existing application if it would meet the project requirements.*
2. Is this a new requirement? *Yes, the City currently uses a variety of ad hoc methods to track constituent responses including spreadsheets, Outlook reminders, etc., but has no centralized application.*
3. What does the City anticipate is its proposed initial budget for this effort, inclusive of licenses and implementation? What is the city's anticipated annual budget for licenses following the initial implementation? *The City is seeking a cost-effective solution to meet the project requirements. Funding has been set aside but we are looking for vendors to propose solutions and related costs for our consideration.*
4. Will the City consider a custom solution for this requirement? *The City prefers COTS and SaaS applications*
5. Will the City consider offshore resources for technical development and/or support? – *Yes*
6. In Exhibit A's requirements section regarding ratings, do customizations fall under "minor modifications?" *No. For customizations that are not minor modifications as defined, using rating 0 or 1, as appropriate, and include an explanation of the customization required and an estimate for the cost of the customization.*
7. In Exhibit A's requirements section regarding ratings, where would integrations / interfaces that need to be built fall in the rating categories? *Use the same scale to evaluate your products ability to support each required interface and integration.*
8. How many City Departments participating in this effort? Please include a total number and specify by Department title. *12 Departments*

City Manager's Office, City Attorney's Office, Finance, Fire, Human Resources, Information Technology, Municipal Court, Parks & Community Services, Planning & Building, Police Department, Public Works Department and City Council.

9. What is the primary method used today for citizens of the City to interact with the various Departments that are in scope for this proposal? *E-mail is the primary method*

by which most departments received citizen requests. Some requests come via the City's website.

10. Will the City make available the individuals who have technical expertise with the applications that the proposed CRM solution will integrate with? **Yes**
11. Will each City Department require an individual solution for the creation of issues and service requests, or will they all align to working within the same environment? **The intent is for the solution to be deployed City-wide and a cross functional team will be convened to align processes.**
12. Does the City currently have an established Case Management system to track interactions with its citizens? **No**
13. Does the City have established processes in place to submit, review, and retire the knowledge and information that it shares on its current web portal? **Yes, there is established processes for submit and review. More informal process for retiring data.**
14. Does the City have established approvals and workflows for the various requests it receives today? **See response to question 2 above.**
15. Does the City have established service level agreements in place for the various issues and service requests it receives today? **No**
16. To accurately price our offering to the City, please note: how many people will be responding to inquiries from constituents? **Approximately 100-150, but likely to be perhaps 50 power users/responders.**
17. On page 6 of the RFP there is a table with applications currently used by the City, a description of the function of the application, and an "integrate/interface" column. Does "yes" in the "integrate/interface" column indicate integrations/interfaces with these applications is a requirement? **We anticipate a business need for all these integrations. Please indicate if they're currently developed or need to be created.**
18. On page 13 of the RFP, item b indicates that requirements section 3 must be included with proposals in MS Word format. Will the City please provide "Exhibit A – Key Functional and Technical Requirements" in MS Word format for potential vendors to complete? **Word format has been posted to the RFP posting on the City of Kirkland's website.**
19. In Exhibit A, item 17 indicates the ability to translate information into multiple languages is important. What languages would the proposed software need to support? What specific types of information would need to be translated (please provide examples)? **The City has an interest in making information more available in different languages. Please tell us the language capabilities you have.**
20. In Exhibit A, item 21 indicates an integration with Microsoft Outlook and Exchange Server for email and workflow approval is a requirement. Would you please provide more information about this need, specifically what functionality around workflow approval is required? **The City uses Microsoft outlook as its email client. We would like to be able to assign requests and approve.**
21. Please confirm that item 30 in Exhibit A indicates that it is important for the City to have the ability to use non-keyboard special characters in notes, emails, and passwords. Describe how your application deals with non-keyboard special characters, for example emoji's.

22. Please clarify what is meant by “user” in Exhibit A, item 33. Does this refer to an end-user (non-admin level user)? **Yes, Power users should have the ability to customize. Admin level will be limited.**
23. Please clarify item 69 in Exhibit A. Specifically, how does this item relate to item 18? **This had been removed from the word document that was posted. It was included in error.**
24. Please clarify item 76 in Exhibit A. What level of modification to standard reports does the City require? Specifically, does the City want the ability to modify the selection criteria (e.g. date ranges, request types, etc.) within standard reports, or does the City want the ability to modify selection criteria and the columns of information that display in the report? **It is desirable to be able to do both.**
25. Has the City set aside any funding for this project? If so, what dollar amount has been budgeted for this project? **The City has set aside funding, but we are looking for vendors to propose solutions and related costs for our consideration.**
26. It also states that we should not modify font, numbering, format, etc. Can you please let me know where I can get this package? I am only aware of the PDF file on the following site: **Word format has been posted to the RFP posting on the City of Kirkland’s website. [http://www.kirklandwa.gov/depart/Finance and Administration/doingbusiness/BusinessOpportunities.htm](http://www.kirklandwa.gov/depart/Finance%20and%20Administration/doingbusiness/BusinessOpportunities.htm)**
27. Vendor instructions in section 6.d require the following: “description and examples of user, administrator, and technical system references and help materials, e.g. procedures, definitions, configuration, ERD, API's, etc. “
1. Does the vendor need to include a sample of each reference or help material, or a sample of one of these is suffice? Some of these documents can be very extensive. **Examples are not required. Please describe the types of documentation that will be provided with the product you are proposing using this list as a guide.**
28. In the general requirements exhibit it states: “Configurable electronic forms that can be filled in, routed online for approval and update the database”
1. Is this a feature request for a BPM or Content Management Tool that routes documents and electronic forms? **No, but the intent is to minimize data entry as it relates to constituent requests.**
 2. Is this a feature that can be provided in a Case or Request Management module that allows to include request specific fields depending on the request type with its proper workflow routing capabilities? **Yes**
29. In the general requirements exhibit it states: “Context sensitive field help” Can you please elaborate or give an example? **If a user hovers over the field, some description/field help will be provided.**
30. In the general requirements exhibit it states: “Generate letters, mailing labels, emails, faxes, consolidate communications”
1. Is the solution expected to provide Faxing capabilities? Is there an expectation to provide integration with a city Fax Server, Telephony Service or some other Fax Service? **Desirable but not a requirement.**
31. In the core functionality section of the exhibit it states: “Ability to define and configure validation lists and categories in req #18”

1. Can you please elaborate or give an example of this functionality that is referring to? [See response to 23 above.](#)
32. Can you please indicate the expected amount of users per user types?
 1. Power Users – Create Requests and Use full features. [50](#)
 2. Light Users – Update Requests and use Reports. [100](#)
 3. Admin Users – Only administrative use like user maintenance, security roles, configuration, etc. [5](#)
 4. Read Only Users – Only read information and view online system reports. [Up to 100](#)
33. Can you please elaborate on the departments and service request types to be implemented by department? [This will be taken in consideration for a phased approach. See department list on question 8 above. We anticipate service request types could range from questions to requests for service.](#)
34. We understand the city is seeking for a SaaS model, but the Pricing Summary Form does not provide a way to include details for the software monthly or yearly fees per license type or hosting per the number of users. Can you please indicate how to best use the current Pricing Summary Sheet for completing this RFP? Should we just use the On-Going section of the Pricing Summary Form and add all yearly costs, then provide separate detailed documentation on how this is distributed? [Yes](#) In this case the hour's column would not be used for licensing/hosting costs? [Understood](#)
Whether companies from Outside USA can apply for this? (like, from India or Canada) [Yes, but how this will not adversely impact project execution should be explained.](#)
35. Whether we need to come over there for meetings? [Yes, we expect onsite presence at key junctures in the project.](#)
36. Can we perform the tasks (related to RFP) outside USA? (like, from India or Canada) [Yes, but how this will not adversely impact project execution should be explained.](#)
37. Can we submit the proposals via email? [No, see the requirements on page 13 of the RFP.](#)