



CITY OF PHILADELPHIA

Office of Property Assessment

REQUEST FOR INFORMATION

FOR

CUSTOMER RELATIONSHIP MANAGEMENT (CRM) SOFTWARE

August 4, 2025

Deadline for questions, requests for clarification,
or requests for additional information

August 8, 2025 by 5:00 PM
(Local Philadelphia Time)

City Responds to Questions

August 13, 2025

Responses to RFI Due

August 20, 2025 by 5:00 PM
(Local Philadelphia Time)

CHERELLE L. PARKER, Mayor
James Aros, Jr., Chief Assessment Officer, Office of Property Assessment



CUSTOMER RELATIONSHIP MANAGEMENT (CRM) SOFTWARE

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CUSTOMER RELATIONSHIP MANAGEMENT (CRM) SOFTWARE REQUEST FOR INFORMATION

I. RESPONSE CALENDAR

Post Request for Information	August 4, 2025
Deadline for questions, requests for clarification, or requests for additional information (email james.aros.jr@phila.gov and jennifer.nguyen@phila.gov)	August 8, 2025 before 5:00 PM (Local Philadelphia Time)
City Responds to Questions (http://www.phila.gov/rfp)	August 13, 2025
Responses to RFI Due (email james.aros.jr@phila.gov and jennifer.nguyen@phila.gov)	August 20, 2025 before 5:00 PM (Local Philadelphia Time)

These dates are estimates only and the City reserves the right, in its sole discretion, to alter this schedule as it deems necessary or appropriate. Notice of changes will be posted on the City's website at [https://www.phila.gov/rfp/additional opportunities](https://www.phila.gov/rfp/additional_opportunities).

II. PURPOSE OF REQUEST FOR INFORMATION

The City of Philadelphia (City) is embarking on a significant initiative to upgrade and modernize its administrative business processes and related legacy technology systems that currently support its business operations. As part of this initiative, the Office of Property Assessment (OPA) intends to implement a new Customer Relationship Management (CRM) software. The City, through its OPA, has issued this Request for Information (RFI) in order to solicit statements of interest, capabilities, and Rough Order of Magnitude (ROM) cost estimates from all Respondents interested in, and capable of, providing commercial off-the-shelf (COTS) software or is a CRM developer as part of the City's solution. OPA is part of the City of Philadelphia's Department of Finance, and this effort is being supported by the Finance Program Management Office (FPMO).

Respondents are asked to provide OPA with information regarding their available COTS products and solutions or their capability in developing and customizing CRM software, subject to the following guidelines:

- Identify only COTS products that are modifiable or configurable to meet specific City requirements, and that focus on interoperability, reliability, usability, availability, capacity and scalability
- Present the software solution's interoperability and operational requirements in accordance with the International Organization for Standardization Open Systems Interconnection (OSI) model
- Include an architectural diagram of the solution with a description of the solutions scalability; responses may include one or more models or solutions
- Describe the configurability of the software to meet the specified requirements and services.

Responses should include implementation, integration, and/or configuration services. If, the software can be installed and configured only by the Respondent, that must be clearly stated in the Response, including the reasons why that is the case.

Respondents may, in the City's discretion, be invited to engage in discussions with the City's project team and/or demonstrate their products, services and solutions.

No contract will be awarded pursuant to this RFI. Anyone who does not respond to this RFI is not precluded from responding to any future solicitation issued by the City. The City intends to procure software for this project as soon as reasonably possible, in accordance with the City's procurement laws and practices for software purchases, which may include, but are not limited to, the use of existing City contracts or certified cooperative purchase agreements. Respondents will not be bound by the ROM cost estimates provided in their responses to this RFI in a future procurement. The City also reserves the right to not procure any software.

III. RFI CONTACT INFORMATION FOR QUESTIONS, REQUESTS FOR CLARIFICATION

All questions (see RFI Question Template Exhibit) and requests for clarification concerning this RFI must be in writing and submitted via email no later than 5:00 pm, Local Philadelphia Time, on August 8, 2025 to:

Jennifer Nguyen
Office of Property Assessment
Jennifer.Nguyen@phila.gov

James Aros Jr.
Office of Property Assessment
James.Aros.Jr@phila.gov

Responses to questions and requests for additional information shall be at the sole discretion of the City. Any additional information and/or responses to questions will be posted only on the City's website at https://www.phila.gov/rfp/additional_opportunities . No additional information and/or responses to questions will be sent by email. Nothing in this RFI shall create an obligation on the City to respond to a Respondent submitting a response.

The City may, in its sole discretion, issue addenda to this RFI containing responses to questions, clarifications of the RFI, revisions to the RFI or any other matters that the City deems appropriate. Addenda, if any, will be posted on the City's website at [https://www.phila.gov/rfp/additional opportunities](https://www.phila.gov/rfp/additional_opportunities). It is the Respondent's responsibility to monitor the Additional Opportunities site for Addenda and to comply with any new information.

Oral responses made by any City employee or agent of the City in response to questions or requests for information or clarification related to this RFI are not binding and shall not in any way be considered as a commitment by the City.

If a Respondent finds any inconsistency or ambiguity in the RFI or an addendum to the RFI issued by the City, the Respondent is requested to notify the City in writing by the above deadline for questions and requests for information or clarification.

IV. ABOUT THE CITY OF PHILADELPHIA AND OPA

The City of Philadelphia is the largest city in the Commonwealth of Pennsylvania and the sixth-most populous city in the United States with over 1.5 million residents. Additionally, due to its rich historic and cultural heritage, the region is visited by more than 40 million people each year.

Philadelphia is located in the southeastern section of Pennsylvania and the coterminous city/county covers 143 square miles. The City is bordered by the following counties: Bucks, Montgomery and Delaware in Pennsylvania, and Burlington, Camden and Gloucester in New Jersey.

The Office of Property Assessment (OPA) determines the value of all real property, for approximately 580,000 parcels, in the City and County of Philadelphia via mass appraisal valuation. For the most recent city-wide revaluation, OPA sent out approximately 530,000 Assessment Notices for Tax Year 2025. This number varies from year to year based on the number of properties receiving new values. Table 1 includes data on Assessment Notice communications sent out annually via OPA through US mail over the past 5 years. The increasing cost of postage, and supply chain disruptions when procuring envelopes, has caused OPA to evaluate the feasibility of delivering a variety of office communications to Residents via electronic means.

Table 1: Assessment Notice Communications for Tax Year 2022 through Tax Year 2026

Tax Year	1st Mailing	2nd Mailing	3rd Mailing	Total Notices
2026	3,898	TBD	0	TBD
2025	529,837	19,471	38,767	588,075
2024	2,462	849	0	3,311
2023	543,258	9,274	16,558	569,090
2022	2,333	0	0	2,333

Returned mail has historically been around 10%. While the Commonwealth requires the City to deliver Assessment Notices via the United States Postal Service, there are additional communications issued from OPA for which a CRM solution would not only be more convenient for City Residents but would also reduce postage expenses. Other notices include:

- Communications around Abatement applications – confirmations of receipt, notices of denial/approval
- Communications around First Level Review (FLR) and BRT appeal applications – confirmations of receipt, notices of denial/approval
- Miscellaneous other notices – notices of exemption approval/denial, new address notices, notices of subdivisions/consolidations, etc.

OPA is seeking to implement an online platform that would enable Philadelphia Residents to sign up for portal access to view their property notifications (including abatement and FLR status information, other communications, and Assessment Notice letters via a secure portal and possibly receive other communications via email.

V. RESERVED

VI. ANTICIPATED SOLUTION REQUIREMENTS

The proposed solution should include the following functionality:

- All standard/core Customer Relationship Management functionality
- A Robust Knowledge Base
- Built-in and customizable workflows
- Ability to integrate with Tyler Technologies' Computer Assisted Mass Appraisal (CAMA) system
- Customer self-service capabilities: access and submit OPA and BRT related forms and documents
- Multiple communication channels for constituent communications (text, email, chatbot, etc.)
- Constituent information collected should include at a minimum:
 - Contact Information (Name, Address, Phone Number(s), email address(es))
- The system should be able to collect Property Identifiers (e.g., Parcel Number, OPA Account Number)
- The ability to use built-in privacy-by-design and privacy-by-default methodologies to comply with (including but not limited to) the General Data Protection Regulation (GDPR)
- Support file attachments in standard file types (e.g., DOCX, XLSX, PPT..PDF, GIF, JPG, .WAV .AVI, ZIP, etc. up to 50 MB
- Ability to search on all data using a variety of criteria and to extract data in the standard file formats

- Provide Limited English Proficiency (LEP) individuals with meaningful access to the system (See Appendix A for the languages the City supports)
- Audit logs on all data
- Built-in and Custom Dashboards, Reporting, and Analytics
- Portal is mobile friendly/responsive

Please note that CRM for government is often significantly more complex than CRM for the private sector as:

- citizens may also be a part of the government
- engagement is on a transactional basis
- the focus is on compliance
- there may be multiple silos across OPA and BRT
- there are multiple regulations, standards, and policies governing security, collection/use of data, and procurement of systems

See Appendix B for Sample Use Cases

The overarching goal of this initiative is to enhance taxpayer experience and operational efficiency. This solution will enable secure, user-friendly digital access to certain OPA and BRT related documents - allowing taxpayers to electronically submit and retrieve documents such as change of assessment notices, abatement related documents, FLRs, and formal appeals - anytime, from anywhere.

VII. SUBMISSION GUIDELINES

The City expects each Respondent to include in their response to this RFI the following items in the order listed:

Company Overview:

Include company name, physical address, phone number, fax number, and web address, a brief description of the company, its services, business size (total revenue and number of employees), and point(s) of contact, including name, address, phone and email address. Note the company's operations including the number of years the company has been supporting this solution; location of company's headquarters and all other office locations; and three years of financial data to ensure company stability.

If applicable, please describe any subcontractors or partners with which you have worked. Resumes need not be included.

Experience:

Describe your company/organization's relevant experience (and that of partners, when applicable) with providing commercial off-the-shelf (COTS) software or developing CRM software. Identify

your experience with clients of similar size and scope to the City of Philadelphia, including client name, engagement title, description of engagement, the solution implemented, and the methodology used, cost, the start and completion dates of the project, as well as, the name, address and telephone number of a contact person.

Product/ Software Solution:

Identify one or more COTS solutions that meet the City’s requirements or describe solutions which are completely custom software. Responses that describe solutions which are completely custom software may be scrutinized more than COTS solutions at the City’s discretion.

A major goal of this RFI is to provide Respondent with an opportunity to inform the City and OIT about their respective software solution’s interoperability and operational requirements in reference to the OSI model. Respondents are encouraged to include in their response an architectural diagram of the solution with a description of the solution’s scalability. Respondents are welcome to provide one or more models or solution sets to meet this requirement for an integrated interoperable solution set.

Infrastructure/Architecture Model:

Identify the infrastructure/architecture model(s) you provide and support, and whether they are on-premise, hosted off-premise, or Software-as-a-Service (SaaS) models.

Supplement this request with an interoperable architectural diagram outlining each OSI layer requirement for enablement, sustainment, reliability, redundancy, and growth. Highlight your anticipated annual upgrade and patch release schedule.

Key Features:

Identify best of breed features included in the proposed COTS or custom software solution(s), including, at a minimum, the Key Features in Section VI. Anticipated Project Requirements.

Support and Maintenance Model:

Provide the anticipated ongoing software maintenance and support services required to sustain the solution including frequency of upgrades and patches/bug releases and the estimated timeframes to complete. Outline the services in your support model including available service level agreements.

Training Model:

Outline the services in your training model for administrative and end user training including the training and support services, methodology, and typical schedule. Include the pricing model for training services and the methodology and schedule. Please also include documentation on user processes, ongoing technical support, and update/upgrade policies.

Reporting and Key Performance Indicators (KPIs):

Provide the standard and custom reporting included in your solution and the available KPIs. Include information on data input and export capabilities; security and auditing, and dashboards and metrics.

Pricing/Licensing Model:

Include a general pricing model and costs for the software based upon the information provided in this RFI. This pricing should also indicate the licensing model, (i.e. licensing by individual users, by core, by seat etc.), descriptions of the hosting models available, and estimates of associated costs. Include cost estimates for ongoing support and maintenance for three years, and when those support and maintenance costs begin (i.e. at time of purchase, after implementation, etc.). If applicable, include a list of additional items or services/software needed to operate the system that are not included and must be provided/purchased by the City.

Respondents will not be bound by any cost estimates included in responses to this RFI.

VIII. USE OF RESPONSES

Responses to this RFI may be used by OPA to select a software product or solution for Customer Relationship Management Software. Responses may also be used to assist OPA in gathering information for planning purposes, and for purposes of identifying sufficient resources for an implementation initiative.

The City does not intend to announce any further actions taken pursuant to this RFI. If any such announcements are made, at the sole discretion of the City, those announcements will be posted with the original RFI. In some cases, at the City’s sole discretion, the City may issue an RFP. The City will notify Respondents to this RFI once the RFP has been posted on the City’s website.

The City will notify you if additional information is required in order to evaluate your response to this RFI. Absent such follow up from the City, we respectfully request that respondents refrain from requesting additional information on the status of this RFI. In order to protect the integrity of the City procurement process, City personnel will not respond to requests for additional information on the status or outcome of this RFI, other than as described above.

IX. HOW TO SUBMIT RESPONSES

Respondents should submit their responses electronically (hard copies are unacceptable) in MS Word or Adobe PDF format, as a single document (see note below), to:

Jennifer Nguyen
Office of Property Assessment
Jennifer.Nguyen@phila.gov

James Aros Jr.
Office of Property Assessment
James.Aros.Jr@phila.gov

Responses are due August 20, 2025 before 5:00 pm, Local Philadelphia Time.

Note: Response document(s) are limited to 15 MB; if necessary, please submit multiple files or zip/compress the file(s)

X. CONFIDENTIALITY AND PUBLIC DISCLOSURE

Respondents shall treat all information obtained from the City which is not generally available to the public as confidential and/or proprietary to the City. Respondents shall exercise all reasonable precautions to prevent any information derived from such sources from being disclosed to any other person. No other party, including any Respondent, is intended to be granted any rights hereunder.

XI. RIGHTS AND OPTIONS RESERVED

In addition to the rights reserved elsewhere in this RFI, the City reserves and may, in its sole discretion, exercise any or more of the following rights and options with respect to this RFI if the City determines that doing so is in the best interest of the City:

1. Decline to consider any response to this RFI (“response”); cancel the RFI at any time; elect to proceed or not to proceed with discussions or presentations regarding its subject matter with any Respondent and with firms that do not respond to the RFI; to reissue the RFI or to issue a new RFI (with the same, similar or different terms);
2. Select a COTS package or solution from a vendor that does not respond to this RFI, or elect not to proceed with any procurement;
3. Waive, for any response, any defect, deficiency or failure to comply with the RFI if, in the City’s sole judgment, such defect is not material to the response;
4. Extend the Submission Date/Time and/or to supplement, amend, substitute or otherwise modify the RFI at any time prior to the Submission Date/Time, by posting notice thereof on the City web page(s) where the RFI is posted;
5. Require, permit or reject amendments (including, without limitation, submitting information omitted), modifications, clarifying information, and/or corrections to responses by some or all Respondents at any time before or after the Submission Date/Time;
6. Require, request or permit, in discussion with any Respondent, any information relating to the subject matter of this RFI that the City deems appropriate, whether it was described in the response to this RFI;

7. Discontinue, at any time determined by the City, discussions with any Respondent or all Respondents regarding the subject matter of this RFI, and/or initiate discussions with any other Respondent or with vendors that did not respond to the RFI;
8. To conduct such investigations with respect to the financial, technical, and other qualifications of the Respondent as the City, in its sole discretion, deems necessary or appropriate;
9. Do any of the foregoing without notice to Respondents or others, except such notice as the City, in its sole discretion, may elect to post on the City web page(s) where this RFI is posted.

This RFI and the process described are proprietary to the City and are for exclusive benefit of the City. Upon submission, responses to this RFI shall become the property of the City, which shall have unrestricted use thereof.

XII. PUBLIC DISCLOSURE

By submitting a response to this RFI, Respondent acknowledges and agrees i) that the City is a “local agency” under and subject to the Pennsylvania Right-to-Know Law (the “Act”), 65 P.S. §§ 67.101-67.3104, as the Act may be amended from time to time; and ii) responses may be subject to public disclosure under the Act. In the event the City receives a request under the Act for information that a Respondent has marked as confidential, the City will use reasonable efforts to consult with Respondent regarding the response and, to the extent reasonably practicable, will give Respondent the opportunity to identify information that Respondent believes to be confidential proprietary information, a trade secret, or otherwise exempt from access under Section 708 of the Act.

Notwithstanding anything to the contrary contained in this RFI, nothing in this RFI shall supersede, modify, or diminish in any respect whatsoever any of the City’s rights, obligations, and defenses under the Act, nor will the City be held liable for any disclosure of records, including information that the City determines in its sole discretion is a public record and/or information required to be disclosed under the Act.

Appendix A - Language Translation

The City currently supports the translation of 103 different languages and requires the CRM to be able to support translations for at least the following languages:

- Albanian
- Arabic
- Bulgarian
- Burmese
- Cambodian
- Cantonese
- French
- German
- Haitian creole
- Italian
- Mandarin
- Polish
- Portuguese
- Russian
- Spanish
- Swahili
- Turkish
- Ukrainian
- Vietnamese

APPENDIX B – SAMPLE USE CASES

The CRM system will be used and administered by the Office of Property Assessment (OPA) and potentially the Board of Revision of Taxes (BRT).

The following use cases illustrate key functionalities expected from the CRM software:

User Profile and Secure Access

Property owners should be able to create a user profile and securely log into the portal using unique credentials (email and password). Each user account must be associated with one or multiple OPA account numbers, depending on the number of properties owned. The portal should integrate with the existing Computer Assisted Mass Appraisal (CAMA) system to ensure data consistency.

Notice of Valuation

- Users should be able to opt into receiving Notices of Valuation electronically, in lieu of traditional mail.
- Users should be able to access, view, and download Notices of Valuation for each tax year through the portal.

Abatements

- Users should be able to complete and submit abatement application forms directly through the portal.
- The system should integrate with CAMA to prepopulate required abatement documents (approval, denial, or related notices).
- Users should be able to view and download relevant documentation, including approval or denial notices.
- Privacy and data protection standards must be maintained, particularly for sensitive information such as Social Security Numbers and Employer Identification Numbers (EINs) included in applications.

First Level Reviews (FLRs)

- Users should be able to complete and submit FLR forms online.
- Users should also have the ability to view and download a blank FLR form if not already submitted through the portal.
- Integration with the CAMA system should enable automated notifications regarding FLR submissions, decisions, and withdrawal communications.

Board of Revision of Taxes (BRT) Appeals

- Users should be able to complete and submit formal appeal forms through the portal.
- Users should have access to view and download blank BRT appeal forms if needed.
- The portal should integrate with both the CAMA and BRT systems to provide timely updates, including appeal receipt confirmations, hearing schedules, and decisions.

RFI Question Template Exhibit

Respondent Name:		
Question Number	RFI Section # <i>(If applicable)</i>	Question(s)
1.		
2.		
3.		
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