

**CITY OF PHILADELPHIA**  
**Office of Property Assessment**  
**REQUEST FOR INFORMATION FOR**  
**CUSTOMER RELATIONSHIP MANAGEMENT (CRM) SOFTWARE**

**Please see below the City's responses to questions received for further information relating to the RFI:**

- 1) Would you kindly confirm if this is an entirely new effort or is there an incumbent currently providing these services? If so, would you please provide the incumbent contract details?

*This is an entirely new effort.*

- 2) What will be the contract value for this opportunity?

*The contract value will be determined once OPA has a clearer understanding of the market's available products and services, along with their respective cost ranges.*

- 3) Are there any set-aside considerations for this opportunity?

*The City of Philadelphia's Office of Economic Opportunity (OEO) provide ranges for Minority, Women, and Disabled-owned Business Enterprises (M/W/DSBE) participation in City contracts. The City of Philadelphia has a citywide goal of 35% M/W/DSBE utilization for its contracts.*

- 4) Can City please provide a breakdown of estimated number of users who need access to the solution by user group? Examples include: Contact Center Agents, IT Admin & Support Staff, Internal Users, External users? What are the City's requirements for user roles and access levels within the new system?

*Users:*

- *Internal Users: Up to approximately 300*
- *External Users: Up to approximately 580,000*

*Internal users would include OPA staff and our third-party call center staff. Minimum internal user requirements include the ability to:*

- *View and download documents for all accounts*
- *Some users should be able to import/export data*

- *Some users should be able to remove and add documents to specific accounts*
- *IT staff should have the ability to create new user accounts (mainly internal), modify and disable existing accounts, and reset passwords if needed*
- *Support Staff should be able to reset passwords for taxpayers*

*External users would be the City of Philadelphia property owners. Minimum external user requirements include the ability to:*

- *Create a user profile and securely log into the portal using unique credentials.*
- *View and download documents related to their account such as, but not limited to, Change of Assessment notices, abatement related documents, FLRs, and formal appeals*
- *Electronically submit their appeals (FLR and formal appeal) and abatement application*
- *Upload supporting documents for their appeals and applications*
- *Change their password*

5) What user authentication and access control mechanisms are required (e.g., SSO, MFA)?

*A username and password are required for this portal, with the option for property owners to enable MFA.*

6) Provide more details in regards to ‘Third-party integrations’:

a. Are there other legacy systems or databases that the CRM must interface with? Please provide name for each.

*i. Other than CAMA, No*

b. What are the specific integration points required between the CRM and the Tyler Technologies CAMA system?

*i. To be determined based on solutions capabilities*

c. Should the integrations be one-way or two-way, and will any middleware be necessary?

*i. Two-way integration*

7) What are your data privacy and security requirements (e.g., encryption standards, compliance frameworks like CJIS, HIPAA, etc.)?

*The City of Philadelphia has a set of IT standards, that includes data privacy and security requirements, for purchased software or services relating to information systems. Additional details on the IT standards will be released in the RFP.*

- 8) What communication channels are essential (e.g., SMS, email, chatbot, phone)? Please specify each needed with CRM

*Phone, text, email, and chatbot*

- 9) Is there any expectation of data to be migrated in the new CRM solution? If yes, please clarify the following:

- a. What is the expected data volume to be migrated?

*i. To be determined based on solutions capabilities.*

- b. What data formats are required for import and export (e.g., CSV, XML, JSON)?

*i. Formats may include, but not limited to, CSV and .xlsx*