



CITY OF PHILADELPHIA

Office of Innovation and Technology

REQUEST FOR INFORMATION

FOR

CUSTOMER RELATIONSHIP MANAGEMENT (CRM) TOOL

February 4, 2019

Information Session	February 19th, 2019 at 1 PM
Deadline for questions, requests for clarification, or requests for additional information	March 1st, 2019 before 5 PM (Local Philadelphia Time)
City Responds to Questions	March 8th, 2019
Responses to RFI Due	March 15th, 2019 by 5 PM (Local Philadelphia Time)

JAMES F. KENNEY, Mayor
Mark Wheeler, CIO, Office of Innovation and Technology

CUSTOMER RELATIONSHIP MANAGEMENT (CRM) TOOL

TABLE OF CONTENTS

I.	RESPONSE CALENDAR.....	1
II.	PURPOSE OF REQUEST FOR INFORMATION	1
III.	RFI CONTACT INFORMATION FOR QUESTIONS, REQUESTS FOR CLARIFICATION.....	2
IV.	ABOUT THE CITY OF PHILADELPHIA AND OIT	3
V.	INFORMATION SESSION	3
VI.	ANTICIPATED SOLUTION REQUIREMENTS	4
VII.	SUBMISSION GUIDELINES.....	5
VIII.	USE OF RESPONSES.....	7
IX.	HOW TO SUBMIT RESPONSES	7
X.	CONFIDENTIALITY AND PUBLIC DISCLOSURE.....	7
XI.	RIGHTS AND OPTIONS RESERVED	8
XII.	PUBLIC DISCLOSURE.....	9

**CUSTOMER RELATIONSHIP MANAGEMENT (CRM) TOOL
NAME OF RFI
REQUEST FOR INFORMATION**

I. RESPONSE CALENDAR

Post Request for Information	February 4 th , 2019
Information Session	February 19 th , 2019 at 1 PM (Local Philadelphia Time) 1234 Market Street, Suite 1800 Philadelphia, PA 19107
Deadline for questions, requests for clarification, or requests for additional information (email Suzanne.Patton@phila.gov and Gayle.Ruggeri@phila.gov)	March 1 st , 2019 before 5 PM (Local Philadelphia Time)
City Responds to Questions (http://www.phila.gov/rfp)	March 8 th , 2019
Responses to RFI Due (email Suzanne.Patton@phila.gov and Gayle.Ruggeri@phila.gov)	March 15 th , 2019 before 5 PM (Local Philadelphia Time)

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 City intends to implement a new enterprise Customer Relationship Management (CRM) Tool, or a package of integrated tools. The City, through its Office of Innovation and Technology (OIT), 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 as part of the City's solution.

Respondents are asked to provide OIT with information regarding their available COTS products and solutions, 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 March 1, 2019 to:

Suzanne Patton, IT Project Manager
Office of Innovation and Technology
Suzanne.Patton@phila.gov

Gayle Ruggeri
Office of Innovation and Technology
Gayle.Ruggeri@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 <http://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 <http://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 OIT

The City of Philadelphia is the largest city in the Commonwealth of Pennsylvania and the fifth-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.

As an operating department of the City, OIT provides technology and telecommunication services to the City, its employees, and the community. There are over 25,000 city employees in Philadelphia.

V. INFORMATION SESSION

An Informational Session to review the requirements of this RFI will be held in Philadelphia, Pennsylvania at the time and location indicated below.

<u>Date</u>	<u>Location</u>
February 19th, 2019, 1 PM (Local Philadelphia Time)	1234 Market St, Suite 1800 Philadelphia, PA 19107

Attendance at the Information Session is optional but recommended.

There will be a conference call dial-in number for the Information Meeting

To receive the dial-in information:

- email Suzanne Patton, suzanne.patton@phila.gov, by 05:00 PM on February 15th, 2019 Local Philadelphia Time
- include the name and email address of who is to receive the dial in information.

VI. ANTICIPATED SOLUTION REQUIREMENTS

The proposed solution should include the following functionality:

- All standard/core Customer Relationship Management functionality
- A Robust Knowledge Base
- Field Service functionality (e.g., service orders, job status, tracking of vehicle locations)
- Built in and customizable workflows
- Ability to integrate with the City's existing Systems (see Appendix A)
- A customer portal to request City Services
- Self service capabilities
- Multiple communication channels for constituent communications (text, email, etc.)
- Constituent information collected should include at a minimum:
 - Contact Information (Name, Address, Phone Number(s), email address(es))
- 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), Health Insurance Portability and Accountability Act (HIPAA), Criminal Justice Information Services Security Policy (CJIS), Federal Information Security Management Act of 2002 (FISMA), Payment Card Industry (PCI) Data Security Standard (DSS), and U.S. IRS requirements.
- Tracking of constituent demographic information
- Ability to provide a comprehensive overview of service tasks, workloads, and employee skills to effectively assign resources and accelerate case resolution
- Support file attachments in standard file types (e.g., DOCX, XLSX, PPT, PDF, GIF, JPG, WAV, AVI, ZIP, etc. up to 50 MB)
- The ability to create and update segmented lists, recruit subscribers, customize emails by subscription category, and embed multimedia information
- 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 B for the languages the City supports)
- Change Management that includes the review and approval of proposed changes using a change approval workflow
- Audit logs on all data
- Built-in and Custom Dashboards, Reporting, and Analytics
- E-commerce capability
- Website is mobile friendly/responsive

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

- citizens may be both part a part of the government
- engagement is on a transactional basis
- the focus is on compliance

- there may be multiple silos across departments
- there are multiple regulations, standards, and policies governing security, collection/use of data, and procurement of systems

See Appendix C for Sample Use Cases

The overarching goal of this initiative is to improve the current AAA system process by enhancing the workflow process, eliminating data entry redundancy, providing integration with external agency systems, and adhering to best-practices while continuing to meet applicable federal regulatory requirements such as CJIS and HIPAA compliance.

The City is also looking to improve daily operations, which means more streamlined and improved quality of services for our customers.

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 XYZ Solutions. 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. Responses that describe solutions which are completely custom software may, in the City's discretion, be rejected without review.

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 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 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 services, methodology, and typical schedule. Include the pricing model for training services and the methodology and schedule.

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.

Responses to vendor questions – these are things you can get answers to in the presentations

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 OIT to select a software product for a Customer Relationship Management Tool. Responses may also be used to assist OIT 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:

Name	Gayle Ruggeri@phila.gov
Department	Office of Innovation and Technology
email	Gayle.Ruggeri@phila.gov

Responses are due March 15th, 2019 before 5:00 pm, Local Philadelphia Time.

Note: Response document(s) are limited to 30 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 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.

RFI Question Template Exhibit

Respondent Name:		
Question Number	RFI Section # <i>(If applicable)</i>	Question(s)
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		
11.		
12.		

Appendix A – Applications Integrations

The tool should be able to integrate with or import/export data from the following applications (at a minimum) using APIs (list not exhaustive):

- 311 Systems
- ArcGIS Online REST API
- Call Center Systems
- Courts' Systems
- Employment Systems
- ESRI's ArcGIS Server feature services
- Financial Systems
- Health Systems
- Housing Systems
- Human Resource Systems
- L&I Systems
- Multiple Revenue Systems
- Office 365 Suite
- PHL Contracts
- Prisons' System
- Procurement Systems
- Public Safety Systems
- Records Systems
- Recreation's Systems
- Help Desk and Work Order Systems: SysAid, Permofo, Cityworks, Maximo
- Utilities' Systems

Appendix B Language Translation

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

Afrikaans	French	Kyrgyz	Serbian
Albanian	Frisian	Lao	Sesotho
Amharic	Galician	Latin	Shona
Arabic	Georgian	Latvian	Sindhi
Armenian	German	Lithuanian	Sinhala
Azerbaijani	Greek	Luxembourgish	Slovak
Basque	Gujarati	Macedonian	Slovenian
Belarusian	Haitian Creole	Malagasy	Somali
Bengali	Hausa	Malay	Spanish
Bosnian	Hawaiian	Malayalam	Sundanese
Bulgarian	Hebrew	Maltese	Swahili
Catalan	Hindi	Maori	Swedish
Cebuano	Hmong	Marathi	Tajik
Chichewa	Hungarian	Mongolian	Tamil
Chinese (Simplified)	Icelandic	Myanmar (Burmese)	Telugu
Chinese (Traditional)	Igbo	Nepali	Thai
Corsican	Indonesian	Norwegian	Turkish
Croatian	Irish	Pashto	Ukrainian
Czech	Italian	Persian	Urdu
Danish	Japanese	Polish	Uzbek
Dutch	Javanese	Portuguese	Vietnamese
Esperanto	Kannada	Punjabi	Welsh
Estonian	Kazakh	Romanian	Xhosa
Filipino	Khmer	Russian	Yiddish
Finnish	Korean	Samoan	Yoruba
	Kurdish (Kurmanji)	Scots Gaelic	Zul

Appendix C – Sample Use Cases

The CRM system will be administered by the Office of Innovation and Technology and used across the City, to include the Executive Management, as well as other departments across the City.

Sample Use Cases are listed below.

Help Desk or Work Order Operations	Business License, Grant or Permit Approval Path	Case Management
<ul style="list-style-type: none">•Record, categorize, and track inquiries and responses•Preferably to have one citizen "front door" and for various departments to have the ability to coordinate services behind the scenes through the CRM•Integrates with email, web, social media and mobile clients•Configurable approval path depending on nature of operation•Applicable to wide range of operations: taxes, human services, education, IT, etc.•Reports / queries / metrics	<ul style="list-style-type: none">•Integrates with separate licensing, taxation and health sytem RDBMS•Configurable approval path depending on license type•Manages interactions back and forth between staff and systems for tax accounts, health inspections, commerce grants, zoning permits, etc.•Maintains transparency of process for City and customers•Reports / queries / metrics	<ul style="list-style-type: none">•Applicable to wide range and scales of use: human resources, zoning appeals, law cases, health and medical, recruitment, event managemnet, etc.• Maintains appropriate privacy and security standards including HIPPA, CJIS, IRS•Configurable access to all or portions of data depending on security level•Reports / queries / metrics