



City of Santa Fe, New Mexico

200 Lincoln Avenue, P.O. Box 909, Santa Fe, NM 87504-0909
www.santafenm.gov

Alan Webber, Mayor

Councilors:

Signe I. Lindell, Mayor Pro Tem, District 1

Renee Villarreal, District 1

Peter N. Ives, District 2

Carol Romero-Wirth, District 2

Roman "Tiger" Abeyta, District 3

Chris Rivera, District 3

Mike Harris, District 4

JoAnne Vigil Coppler, District 4

May 22, 2019

NOTE TO PROPONENTS

ADDENDA #1 TO RFP # 19/43/P

Customer Relationship Management (CRM) System

Reason for Addendum:

Questions & Answers for RFP #19/43/P

Will the system be used for all 12 departments or managed by Constituent Services?

The system will be used by all departments, but it will be managed by our Constituent and Council Services Department.

What system will the CRM tool need to integrate with?

Tyler EnerGov 19.1.2 is the primary system.

What phone system do you currently use?

Avaya CMS R18

You have 110 folks currently in the CRM. Will that be the same number on the new system?

No, we will be reducing the number by approximately half.

Any thoughts on the current CRM System and the amount of records you want to retain into the new system?

The City will need to transfer over one year from our current Customer Relationship Management (CRM).



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What will you do with the current case management?

The new system will be replacing the current system.

How do you receive and filter the current cases?

We currently receive constituent requests from constituents through the self-service portal or a staff member enters them based on a phone call, email or walk-in customer request. The work orders are then assigned to staff by department / division.

What do you have in the current system that allows you to keep track of issues on a broader scope with multiple work orders for the same topic?

We currently enter these issues individually, but ideally the new system will allow them to be grouped or bundled.

When do you want the system up and running?

The system will need to be functional within 90 days of the contract approval. This will include training, roll out, and transition.

What application is need for the system integration?

Cloud Solution

What are the volume of requests submitted in a year?

In 2018 we processed approximately 5,000 requests.

On an annual basis, how many unique constituents are expected to access the system?

Constituents are the primary user, the vast majority of them are unique inputs.

How many are by non-registered users?

The system currently allows for anonymous submissions. Ideally, the new system would not allow anonymous submissions, instead submissions without an account.

On a monthly basis, what is the expected number of logins by constituent users?

Constituents can receive updates via email or can log into the system to check a status of their request. We don't currently track how often they login to their accounts.



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Could the City provide a desired format and the expected content for proposal responses?

The City expects a proposal response that adequately responds to the needs outlined in the proposal.

"The core services the City of Santa Fe provides include water, waste water, and solid waste, infrastructure and community services...."

Q: What other departments will be on the new CRM solution. Will Economic Development, Parks and Rec, Libraries?

We will have all Departments on the system, including Divisions within the Departments. Examples: Parking, Transportation, Public Works, Public Utilities, Police, Parks and Recreation, Land Use, Community Services, Mayor's Office, Council Services, and the City Manager's Office.

Does the City desire a Cloud based solution or an on-premise CRM solution? If Cloud based, is a FedRAMP approved NIST 800-171 Security standards a requirement for cyber and security?

Which modules of the Tyler solution are currently being used by the Departments? For example, is the City using the Tyler Munis Utility Billing and Revenue Management? Which modules must we integrate with on the EnerGov HR? Tax Billing? Public Safety?

The City is using Munis Financials (Budget, Project ledger, purchasing, accounts payable, contracts, general billing, and fixed assets) and HCM for all HR functions, including payroll. The city is using Energov for community development and its internal cashing system for payment acceptance.

Which brand of software version of Call Center is in use and will be used to integrate with the new CRM?

The phone system is Avaya.

Which brand and software version is the City using for the Work Order and Case Management system? Can you provide a list of the various department work order systems and whether they are on-premise or hosted in the cloud? Is there a public-facing API on the existing Work Order and Case Management systems?

The City will employ Tyler's Work Order system, which does not include a public facing API, although that API is under discussion.

How many records are currently stored in the customized CRM that was installed in 2012?



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There are approximately 30,000 requests.

How many records do you anticipate going forward to be stored in the new CRM solution?

The City requires at least one year of records be transitioned into the new system.

Does the City currently have a list of Frequently Asked Questions publically available?

We do not, but would like to develop one as part of the new CRM system launch.

There is a reference to 110 active internal staffer users that access the administrative side of the system. Do all of these users perform the same function, or are they all part of smaller business groups? (i.e., are all of these staff Tier 1 or do some of these staff handle escalations pertaining to a particular department, like senior centers?)

We currently do not have escalations within a department, but would welcome the use of a tiered system.

There is a reference to the city's GIS system built on ESRI standards using ArcGIS technology. Can you please provide detail on how the typical user accesses and uses this GIS information? Is there a preference of user experience for the new CRM system? Example, Does a map pop up in the agent workspace or just a URL?

The CRM shall consume data from the GIS application in such a way as to not utilize a separate record for GIS data. That is, if the CRM requires data, it shall pull the GIS record from the GIS system and display it as is.

The City makes a statement regarding "via multiple service channels". In appendix "A" there appears to only be mention of Telephone--what are the other channels that the City would be interested in regards to their CRM system (i.e., Chat, SMS, Email, Messenger, etc.)?

Yes, the CRM should provide multiple communication mechanisms, including SMS, email, messenger and phone.

Does the City of Santa Fe have an existing contract relationship with any Microsoft Azure cloud suite of products?

While the City does employ the cloud-based Office 365 suite, it does not utilize the Azure cloud.

What is your volume of service requests? You said on the pre bid, 5-7k. Is this per year or per month?

This is per month.



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Would you accept a mobile responsive site as opposed to an actual mobile application?

The preference is an actual mobile application.

Do you reimburse for travel?

No, it should be part of your negotiation

What are your insurance requirements?

You will be required to obtain a City Business License, with that you will need to provide proof of insurance.

Are you opposed to the solution replacing both/either Tyler integrations?

We currently have a custom solution, that will be replaced by the new system.

Which departments utilize the Tyler Munis and Energov integrations?

Our Land Use Department and Finance Department utilize these integrations.

What other systems will/may need to be integrated into the new solution? (ie. Active directory, Outlook, etc)?

Outlook would preferably be integrated.

Can you disclose your budget?

No

Are you willing to extend the response deadline?

No, responses are due on June 7, 2019 at 2 p.m.

What are all the legacy systems that departments use that this new solution will replace?

There is a custom system that will be replaced.

Do you have the knowledge articles, FAQ's and other documentations already authored? Or is part of the solution requirements to create these public or internal facing documents?

We have some knowledge or FAQ's that we can provide, but will need the solution to help implement into the public facing system.



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Is the City of Santa Fe opened to a phased implementation approach?

No

What is the extent of data that must be exposed through RESTful services?

The city's preference is that any data that can be consumed by any city software application should be exposable via RESTful services. For example, code enforcement data generated within CRM should be available to Tyler Energov.

What is the nature of integration with Tyler Munis/Energov?

The City's preference is that data is will not require multiple entry points. That is, if data is generated in Energov that requires CRM action, that data would flow between the systems without a user signing in and entering said data within both applications (and vice-versa).

Please provide details about the integration needs with the City's ESRI GIS software resources.

The CRM shall consume data from the GIS application in such a way as to not utilize a separate record for GIS data. That is, if the CRM requires data, it shall pull the GIS record from the GIS system and display it as is.

Can we use similar Attachment capabilities of the current CRM application? "Maximum of 6 file uploads. 2 MB max per file. Allowed file types: image, text/word document, pdf, spreadsheet"

Yes

Do we need capability to remove a service request if constituent has put it in by mistake and the processing is not started yet?

Yes

Though not seen in the current system, do we need a capability of edit/removal of the previously uploaded files or comments?

The capability to edit, but track edits.

In the current system, how many unique users login to Self Service Portal every month?



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It fluctuates between months, but generally between 5k and 7k per year.

What is the expected number in the next three to five years?

The City doesn't have a projected increase, we have seen an increase over the last few years, but the increase has been minimal and largely based on natural disasters. Additionally, we hope the use of FAQ's and a live chat function paired with additional outreach and information will maintain or reduce the number of requests.

How many Categories or Constituent Request exists (like Pothole Repair, utility Bill, Street light not working etc.)?

We currently have about 90 different categories.

Would you be open to Salesforce as a cloud-based solution?

Yes, the City is open to a cloud-based solution, provided the solution meets all established security standards and protocols and allows for direct data access for business intelligence purposes.

Contact Center – What is that brand integrated with the system?

Currently, there is no integrated call center system

Could the City provide a desired format and the expected content for proposal responses?

In addition to the format stated/described within the RFP, a technology architecture diagram/description is preferred.

Does the City desire a Cloud based solution or an on-premise CRM solution? If Cloud based, is a FedRAMP approved NIST 800-171 Security standards a requirement for cyber and security?

The city prefers a cloud-based solution; the stated standard is not overtly required, but is desired. Vendors shall provide their respective security protocols, inclusive of data encryption protocols.



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The City will employ Tyler's Work Order system, which does not include a public facing API, although that API is under discussion.

All other pertinent information for RFP # 19/43/P will remain the same.

RECEIPT ACKNOWLEDGE BY PROPONENT