THE CITY OF COLORADO SPRINGS

REQUEST FOR INFORMATION

Date Issued: March 26, 2024

R24-054MZ

SERVICE REQUEST MANAGEMENT SOFTWARE

THE CITY OF COLORADO SPRINGS

REQUEST FOR INFORMATION (RFI) – Service Request Management Software RFI

Date Issued: March 26, 2024

Project #: R24-054MZ

RFI MEETING: NONE SCHEDULED RESPONSES

DUE: April 23, 2024 2:00PM

Responses must be posted to Bidnet (www.bidnetdirect.com) by 2:00 PM April 23, 2024. Respondents must provide a response in accordance with the Statement of Work. The Statement of Work lists all information requested. Respondents may submit responses in their own format with no page or format limitations.

CONTACT:

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QUESTIONS DUE: April 9, 2024 1:00PM emailed to michael.zeller@coloradosprings.gov

1. OBJECTIVE

The City of Colorado Springs is soliciting information from potential sources interested in, and capable of providing a Service Request Management solution that would integrate with, or be part of, a larger Customer Relationship Management (CRM) system. The City currently does not utilize a comprehensive customer relationship management solution but does utilize Accela CRM for citizen requests. The Colorado Springs Communications Department has an objective to replace the current GoCOS! application (Accela CRM) and improve the citizen engagement experience. GoCOS! is a digital engagement tool that allows citizens to report issues and access various resources. This request will support the Mayor of Colorado Springs' vision to create a culture of transparency, accessibility, and proactivity.

The City is looking for a Commercial-Off-The-Shelf (COTS) product(s) that are modifiable or configurable to meet specific City requirements with a focus on interoperability, reliability, usability, availability, and scalability.

The City is looking for a service request management solution to accommodate multiple, disparate City departments, users, and systems that will utilize the tool.

While the City of Colorado Springs is currently focused on identifying a Service Request Management platform – the City believes this platform is part of a broader, integrated eco-system of applications which would include such systems as a Customer Relationship Management (CRM) system, Email and SMS Text Marketing System, an Omni-Channel Call Center Management solution, along with a robust capability to integrate with other key municipal systems which provide the management for back-end tasks and work orders which are often the means by which a citizen request is fulfilled.

This Request for Information (RFI) will accomplish the following:

A. Describe the requirements that are desired to meet the City's needs for a Service Request Management system.
B. Solicit responses to questions and high-level scenarios in relation to a Customer Relationship Management system.
C. Describe Request for Information submission requirements.

It is the City's intent in issuing this Request for Information (RFI) to determine whether there are a sufficient number of interested and qualified sources that provide these services, and to obtain rough cost estimates for budgetary purposes.

2. REQUEST FOR INFORMATION DEFINITION

Responses to this RFI are considered non-binding and are only used to gather information to be used for budgetary and specification preparation purposes. It will also be used to determine the number of companies that exist in the industry for a possible

future competitive procurement.

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.

The City also requests that each vendor provide responses to the questions and scenarios listed in Exhibit B.

It is not the intent of the City to award a contract as a result of this RFI. However, in the event that the responses indicate little or no interest, the City reserves the right to pursue a competitive negotiation process or to consider an unsolicited proposal without issuing a formal RFP if it is in the best interest of the City. However, if this RFI determines that there are sufficient interested and qualified vendors/contractors and favorable cost estimates, the City may issue a formal RFP (Request for Proposal) for these services. If an RFP is issued, then all firms that responded to this RFI will be added to our source list and will be formally invited to propose.

3. EXISTING SYSTEMS

The City currently uses several applications as part of its suite of customer relationship management, but it is not centralized. The applications include:

- Accela CRM (service request management)
- Accela Citizen Access (service request management/case management)
- Cartegraph (asset management)
- Mailchimp (email marketing)
- Constant Contact (email marketing)
- Drupal (website)
- Citibot (chatbot)
- OpenCounter (permitting)
- Facebook, Twitter, Instagram, Nextdoor, YouTube (social media)
- ArcGIS/ESRI (geographic information system)
- Tyler (computer-aided dispatch)

4. HIGH LEVEL REQUIREMENTS

A Service Request Management System will need to have these features:

1. Cradle-to-grave case management for a customer request
2. User-friendly interface
3. Ability to interface with Accela, Cartegraph, Citibot, ESRI, MailChimp, and other applications
4. Ability for customers and City staff to upload/attach photos, shapefile/GIS files, and other documents to a ticket
5. Custom and canned reports to provide detailed reporting and analytics

6. Workflow automation
7. Payment Processing
8. Role-based access control
9. Automated email and/or text notifications
10. A centralized customer database
11. Ability to track time spent on the resolution of an issue
12. Searchable fields
13. Highly configurable
14. ADA compliant
15. Easy access from any mobile device
16. Support multiple languages
17. Data security

** For detailed requirements, please see Exhibit C.

5. RESPONSE SUBMISSION

Vendors are encouraged to consider carefully if their products and services are consistent with what is being sought in this process. Responses should be prepared simply and economically while still providing pertinent details of the vendor's ability to meet the requirements specified in the requirements document included as Exhibit C.

Responses should include the following basic information:

1. Company name, address, phone number and e-mail address of the contact person.
2. Short biography of company, its history, key staff, and business characteristics.
3. High-level description of the products and services offered by the vendor and why they are a good fit for the City's requirements.
4. Technical understanding of the scope of work, approach, and innovativeness in providing services.
5. Annual budgetary cost estimate for each of the services respondent can provide (use Exhibit A, additional information may also be submitted).
6. Potential cost savings ideas. Considering the extensive and varied scope, are there some ideas the City should consider in our analysis of this requirement which may reduce the annual cost of these services?
7. References from at least three clients. Indicate if the company has been awarded other contracts from a federal, state, or local government entity, and describe any associated cooperative (i.e., piggyback language).

6. COST OF RESPONSES

The City of Colorado Springs is not liable for any cost incurred by vendors in preparing their response. Respondents may be asked to clarify or expand upon information provided.

7. PROPRIETARY INFORMATION

If a response contains information that the respondent does not want disclosed to the public, or used for any purpose other than the evaluation of this response, all such information must be indicated with the following or similar statement:

"The information contained on pages ____, ____, and _____shall not be duplicated or used in whole or in part for any purpose other than to evaluate the response provided. If a contract is awarded to this firm as a result of the submission of such information, the City of Colorado Springs shall have the right to duplicate, use, or disclose this information to the extent provided in the contract. This restriction does not limit the City of Colorado Springs' right to use the information herein if obtained from another source."

All such nondisclosure items specified in the response shall be subject to disclosure as provided in the Colorado Open Records Act (CORA) or as otherwise provided by law.

8. RESPONSE MATERIAL OWNERSHIP

All material submitted in response to this RFI becomes the property of the City of Colorado Springs except for software products that are made available for demonstration purposes and proprietary material.

EXHIBIT A – BUDGETARY DATA

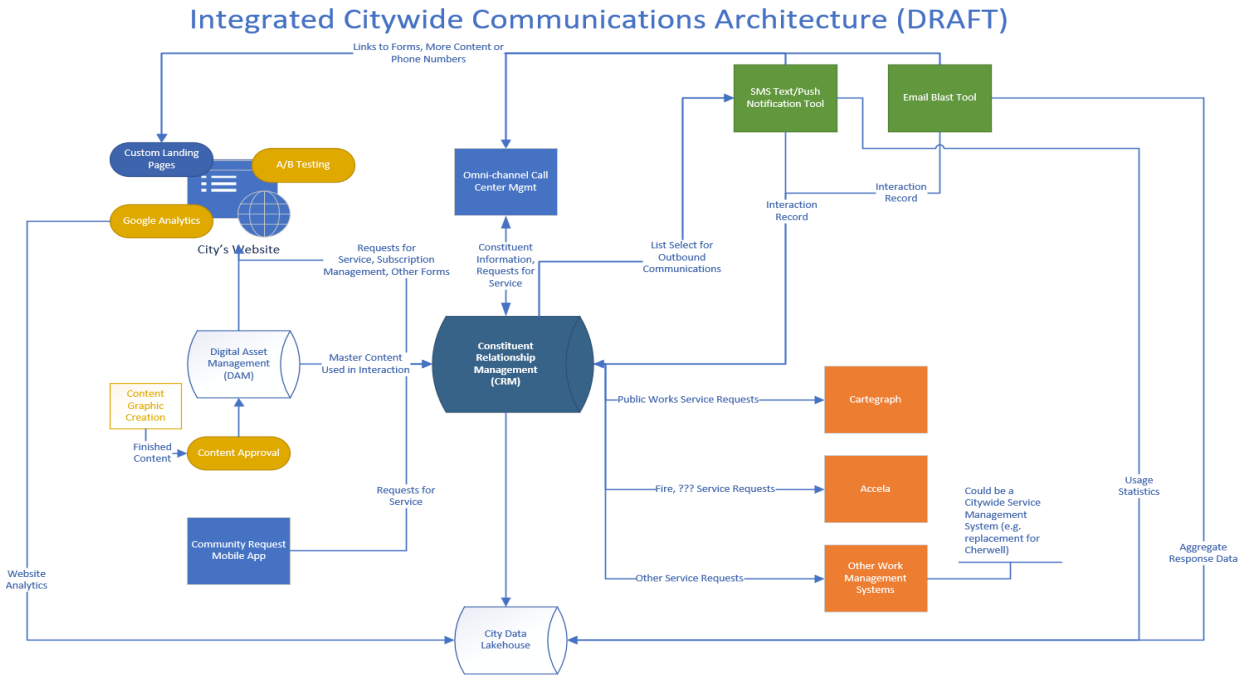
CITIZEN REQUEST MANAGEMENT SOFTWARE (PLEASE INDICATE BUDGETARY PRICING ONLY IF APPLICABLE TO YOUR SOLUTION)

Project Areas	**Cost**
Service Request Management Software	$
Software Licensing (Cost Breakdown)	$
Hardware - application/web servers (if applicable)	$
Data Conversion	$
Annual Hosting Services (if applicable)	$
Data Interface Cost	$
Annual Software Maintenance/Support	$
Project Management	$
Professional Services	$
Estimated Travel Expenses	$
Go Live Assistance	$
Training Costs (Breakout Costs related to Deployment & Configuration, Train the Trainer, On-site, Manuals, Courses, etc.)	$
Implementation Costs	$
Custom/Additional System Functionality	$
Any other cost not specifically addressed	$
Data Storage Costs annually	$

EXHIBIT B – SCOPE OF WORK

1. How does this solution fit into the broader integrated ecosystem described above? Is it a module of a broader application that can already address some of this functionality? Or is it integrated out-of-the-box with other platforms from other vendors or partners that can provide this type of capability?

2. What would your solution recommendation be if the City of Colorado Springs wished to have a cohesive solution for these capabilities – such as the reference architecture below – which solutions/products would you recommend for each piece of the architecture?



1. Describe your approach to the following scenarios – what are the various steps which would need to be taken and which supporting technologies would be used to accomplish each step?

   Scenario A: The City wants to share a positive story regarding how the City has effectively responded to the community's desire for effective infrastructure and roads by executing a direct-to-resident marketing campaign detailing the steps the City has taken to improve the City's roads. The content will include information and direct links which allow residents to report roadway issues they discover and will promote the City's mobile solution which will allow them to report issues at the issue location.

   Scenario B: The City wants to send a follow-up survey to all of the residents who

reported issues with the City's traffic signals to gather more information on their experience to improve City services.

Scenario C: The City wants to conduct a "listening tour" – in-person meetings held at various locations around the city on specific dates that are open to citizens. The City wishes to promote and invite residents to attend and request that they pre-register for a specific event so the City can ensure that the City has a large enough facility and sufficient resources and team members present. The City also wants to send each resident who attended the summarized notes for the information which was captured from the listening tour session which they attended.

Scenario D: The City is about to start a new public works effort in a specific neighborhood within the City. By law, the City must notify residents in that neighborhood of the upcoming work and how it will impact them. Not every resident in the neighborhood has previously interacted with the City, so they may not have a record in the City's constituent relationship management system.

Scenario E: The City is working to raise community awareness of the City's overall emergency operations and disaster recovery plans for the area in the event of a natural disaster, such as a wildfire or flood. The City wishes to use as much direct-to-resident communication as possible. The City has put together a packet of resources to help community members plan and to help them create their own "evacuation go bags". The City wants to know how many residents download this content from the website and would also like to know which communication channel drove them to the website, as the City will also be broadcasting media spots and promoting on social media.

Scenario F: The City has agreed to be the central point of donation collections for a community-wide effort to raise funds to support a family-oriented homeless shelter as this is a tremendous need in the City. The City needs to promote and market this donation campaign and drive residents to an online site where they can make one-time donations or set-up recurring ongoing donations.

Scenario G: The City wants to inspire greater community engagement. As such, the City is offering residents an opportunity to subscribe to notifications and information which they will find relevant by driving them to a central online site where they can select and manage the topics and types of content they wish the City to send them, along with the channel in which they'd like to receive it (email, text message, push notification, etc.).

2. The City operates on an annual budget cycle where proposed budget requests for the next year must be submitted 6 months to a year in advance before budget can be approved. In order to better plan for the budget that may need to be requested to procure and implement the full eco-system described above, please provide ballpark costs for each component of your recommended eco-system

solution (itemized, as we may have to implement in phases over multiple years), and please list out estimated costs for training or anticipated professional services, along with any ongoing maintenance costs. These estimates are non-binding and intended to be used to help the City formulate cogent budget requests for future years as the City works to build out the desired eco-system.

EXHIBIT C – DETAILED REQUIREMENTS

1. **Workflow Automation**

Must Have

a. The City wants the ability to define questions related to a specific type of issue so that residents are prompted to enter additional information

b. The City wants the ability for residents to confirm the details/info entered prior to submitting the ticket so that tickets are more accurate

c. The City wants the resident to receive an email confirmation when the ticket is submitted so that the resident knows the ticket was submitted successfully

d. The City wants the confirmation of the ticket to also appear in the app so that the resident knows the ticket was successfully submitted

e. The City wants the ability to define work flows so that tickets can be routed to the correct department, team, or person within the application.

f. The City wants the ability to define or route tickets based on geographical areas so that department staff who work in a specific geographic area receive the appropriate tickets

g. The City wants the ability for customized error messages to be displayed based on criteria of a ticket so that residents are informed of criteria that is not being met through a request

2. **User-friendly interface**

Must Have

a. The City wants the solution to be ADA compliant so that those with disabilities can use the system effectively

b. The City wants the solution to support multiple languages (multilingual), including Spanish, so that people who speak or read languages other than English can use the app

c. The City wants the ability for residents to attach multiple photos and videos as part of a ticket so that staff have additional visual information to help them work on tickets

d. The City wants the ability to search for keywords, ticket types, and knowledge articles in the app so that residents and staff can quickly find relevant information within the app

e. The City wants the ability to search for tickets based on keywords, locations, request type, date/time of submission, resolution, usernames, emails, and ticket numbers so that staff can quickly find relevant information

f. The City wants the ability for residents to view or preview files from staff from the application regardless of the device's operating system so that residents can easily and quickly view documents from the mobile device

g. The City wants the ability for residents to submit a request without an account so that people uncomfortable sharing their information can still submit requests

h. The City wants the ability for field staff to utilize the ticket management system from their mobile device (i.e. an app to manage requests) so that staff can update requests from their phones while being away from a desktop computer

I. The City wants the ability to update requests offline so that staff can update and manage requests without internet access

j. The City wants the ability to create a public-facing knowledge base, including self-help articles and educational videos and photos, to that residents can self-service on tickets.

Should Have

l. The City wants an accessible way for visually-impaired residents to geo-locate where a ticket should be submitted on a map so that the tool is accessible to visually-impaired residents

m. The City wants the ability for tickets to be made logged in a publicly-viewable feed so that tickets can be viewable by people other than the original ticket requestor

n. The City wants residents to be able to determine if a ticket can be viewed publicly or privately so they can control who sees their ticket

3. **GIS Integration**

Must Have

a. The City wants the ability for a resident to enter the location of a ticket so that the primary address and/or street can be entered

b. The City wants the application to ingest and conform to the City's valid street name list so that street names and service request locations are accurate

c. The City wants the application to consume and interact with GIS REST Service files so that assets that have been identified in a REST file on other programs such as Cartegraph are mapped identically to the request

d. The City wants a non-parcel, non-polygonal-based GIS solution so that ticket pins are designated to a single latitudinal/longitudinal coordinate for the accurate location of issues

e. The City wants the ability to upload attachments to a specific ticket from an API integration so that tickets includes GIS information as part of their workflow for task creation

4. **Omni-channel**

Must Have

a. The City wants the ability to create email marketing communication to reach residents by email

b. The City wants the ability for residents to submit a ticket through an online portal so that residents have an additional channel to submit a ticket

c. The City wants the ability for the solution to be embedded into a Drupal website so that the solution integrates with the City's website

d. The City wants the ability for staff to create a new ticket on behalf of a resident who submits over the phone or email, including the ability to assign it to the resident’s name and email so that service requests are centralized

Should Have

e. The City wants the ability to segment audiences on email lists so that email communication can be specifically distributed to different audiences

f. The City wants a phone number that a resident can text to initiate a ticket so that residents have multiple channels to submit a ticket

g. The City wants to provide residents the option to receive a text message regarding the status of their issue so that residents stay updated on the progress of their issue
h. The City wants email notifications sent to the resident with their ticket status changes so that residents are informed of the status of their ticket

Could Have
i. The City wants the ability to send push notifications to residents so that residents are informed on updates and information related to the application and the City

5. Case Management
Must Have
a. The City wants a list of predefined issues so that a resident can select their issue to report (i.e., graffiti, pothole, etc.)
b. The City wants the ability to transfer tickets between departments so that tickets can be routed to multiple departments
c. The City wants the ability to see who a ticket is assigned to so that administrators can ensure the correct staff member is working on a request
d. The City wants the ability to assign a due date/Service Level Agreement (SLA) based on a defined criteria so that staff have data of how quickly tickets are being responded to and deadlines are being met
e. The City wants the ability to assign a priority to the ticket based on certain criteria so that staff members can prioritize tickets appropriately
f. The City wants a historical log of actions taken on a specific ticket so that staff have an overview of all actions taken on a ticket
g. The City wants the ability to designate multiple tickets as duplicate tickets, or a master ticket, so that staff can work on, respond to, and notify residents from a single ticket rather than multiple tickets
. h. The City wants the ability to include how many hours a staff member worked on a ticket so that staff can track in the short-term and long-term how many hours are dedicated to tickets, areas of town, departments, or a specific staff member
i. The City wants the ability to customize how tickets are closed so that tickets are closed in an appropriate manner
j. The City wants the ability to create an internal knowledge base to include articles, blog posts, and in-request notes so that staff can discuss issues, retrieve department and service data, and enable rapid responses to requests for information
k. The City wants the ability to have automatic notifications and triggers for ticket reminders for staff so that tickets are completed by their due date and Service Level Agreement
l. The City wants the ability to correspond with internal staff on a ticket as a part of the case management of the ticket so that communication related to tickets is visible and centralized
m. The City wants canned or pre-written responses that can be saved and utilized for common responses, as well as can be customized based on customer data, so that time is saved from writing similar or identical responses to requests

n. The City wants the ability for staff to attach multiple files to a ticket and correspondence, including .png, .jpeg, .pdf, .xls, .txt, .doc, .mov, .html, .avi, .tif so that staff can respond to residents with necessary information through additional documents
o. The City wants the ability to provide multiple levels of access and permissions so that the City can maintain proper security protocols and ensure appropriate administrative privileges based on a staff agent's role
p. The City wants the ability to bulk upload files so that staff don't have to upload files individually
q. The City wants the ability to automated delegation to another staff member on a workflow if a primary assignee is unavailable so there is a seamless workflow across teams and departments

Should Have

r. The City wants the ability to generate multiple tasks from one ticket so that more than one department can be assigned to a ticket to address issues related to the ticket
s. The City wants the ability to reopen a ticket so that any issues or concerns that arise after closing a ticket can be addressed
t. The City wants the ability to process and receive payment for services that take place through the solution so that the City can provide a seamless experience for users to pay invoices within the system
u. The City wants the ability to automatically generate document website links from documents uploaded to a ticket so residents can view documents through a web link
v. The City wants the ability to categorize multiple tickets under a common that tickets can be tracked related to a specific event
w. The City wants the ability to format text (underline, bold, italicize, increase size, etc.) within the application response/commenting field so that communication with residents is more flexible, clear, and user-friendly
x. The City wants a customizable customer satisfaction survey to be sent after completed tickets so that staff have data on customer service related to the ticket request process

6. **API/Integrations**

Must Have

a. The City wants the ability to integrate all data and file attachments from any ticket, including photos, videos, comments contact information, status, status updates, and locations, to other software solutions, both individually (event driven) or in bulk, so that tickets across broader case management tickets are integrated
b. The City wants the new software to integrate with Cartegraph so that assets impacted by tickets can be identified and worked on in Cartegraph
c. The City wants the app to integrate with the City's chatbot via Citibot so that tickets can be created and managed across the chatbot
d. The City wants the app to integrate with ESRI/ArcGIS products so that the solution integrates with the City's GIS systems
e. The City wants an open API so that the solution integrates into multiple systems the City currently uses for other work
f. The City wants the app to utilize the City’s current SSO/MFA functionality so that only authorized users have access to the application

Should Have

g. The City wants the new software to integrate with Accela Civic Platform so that other tickets across broader case management tickets are integrated

h. The City wants the solution to integrate with Mailchimp to capture emails and phone numbers so that residents can sign up for texts and emails for other City news

7. **Reporting and Analytics**

Must Have

a. The City wants the ability to produce advanced reports and analytics so that staff have real-time analysis of requests and customer data from the application

b. The City wants reporting tools that can analyze tickets by geo-location, user demographics, request type, date of requests, keywords, status, department, priority, staff member handling the request, and more so that the City can utilize data to inform decision-making and provide advanced reporting

c. The City wants to create reports that can be sent to agents automatically so that staff are regularly informed on ticket status, volume of tickets, SLAs, etc. through an automated process

d. The City wants to provide geographically-based reporting on a map of data from tickets so that staff or residents can see data from tickets distributed across a map

e. The City wants the ability to automatically create dashboards and graphs within the solution based on data from request types so that staff can see real-time and historical analysis of requests

f. The City wants the ability to export data files into .csv/.xls files to import data files into other data analysis systems

8. **Customer Relationship Management capabilities**

Must Have

a. The City wants a centralized customer database so that customers interacting with the City can be tracked in a single location

b. The City wants the ability to combine data (customer information) from multiple City applications related to a single customer so that customers interacting with the City can be tracked in a single location

c. The City wants the ability to track how many tickets a user has made so that staff can be informed of the use of resources (including time, personnel, and money)

d. The City wants residents who create an account to have a historical log of their own ticket history so they can view all of their own tickets at any time in their account