City of Chicago
Clarifying Questions Template

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Request For Proposal (RFP) for
CRM Modernization Software and Implementation Services
Specification #119440
Addendum #1
Monday, October 21, 2013

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ID	Question	City Response	RFP Reference Document Name	Reference Document Section
CQ-001	In section 4.2.4.1 Implementation Plan, please clarify whether the City is requesting that we provide a separate MS Project plan in addition to the table provided, or do we just complete the table provided?	The City requests that Respondents provide a separate detailed project plan including the information as requested in section 4.2.4.1. The Respondent may use the table provided or other similar method to detail the requested information related to City personnel as outlined in this section.	RFP Document	Section 4.2.4.1 Implementation Plan
CQ-002	Recognizing that a world-class solution may require a diverse set of resources, does the City allow the use of non-local talent (including non-US based employees) as part of the development and testing of the proposed solution?	There is no prohibition on the use of non-local talent (including non-US based employees) as part of the development and testing of the proposed solution. However, overall projects goals specified within the RFP remain the same unless good faith efforts can be shown in a waiver request.	RFP Document	
CQ-003	To clarify is the scope requested related to the public awareness and engagement campaign focused only on the designing?	Please refer to the CRM Modernization RFP, section 2. Scope of Services	RFP Document	
CQ-004	Is there an existing integration methods and tools that should be assumed in the estimate for sending data to OBIEE, Archiving tool etc.	Data will be integrated using data marts (i.e., Kimball) techniques. The primary integration tool is Kettle/Pentaho, while options are available for Informatica and Oracle Golden Gate.	RFP Document	
CQ-005	Is definition of new OBIEE reports considered in scope based on the new design of the end state CRM system that would be implemented by the OBIEE team?	Yes, the design of new reports cannot be defined at this moment given its dependency of the structure of the new CRM system. Thus, it is considered in-scope.	RFP Document	
CQ-006	Are there specific security requirements or certifications that must be considered? (e.g., data is double encrypted at rest, client side encryption)	Review Exhibit 9 of the CRM_Modernization_RFP_Final document. The exhibit lists out the new Information Security Policies which formalize the Security and Internal Control standards that the City of Chicago has adopted to mitigate security risks to employee and constituent data as well as to comply with applicable regulations including the Health Information Portability and Accountability Act (HIPAA), Health Information Technology for Economic and Clinical Health (HITECH) Act, and the Payment Card Industry's Data Security Standards (PCI-DSS).	RFP Document	

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CQ-007	For just in time training can other products be included in the solution set or is all training to be Train the Trainer based?	Instructor-led and train-the-trainer training programs are desired by the City. The City will consider best practice methods of training to ensure successful implementation and knowledge transfer.	RFP Document	
CQ-008	What is the expected timeline for the 3 phases (pilot, extended, full agency deployment) within the 5 year timeframe?	The City requests that Respondents provide a best practice recommendation regarding the project timeline and approach for this initiative within the 5 year timeframe.	RFP Document	
CQ-009	What roles and resources are expected to be available from Chicago to support the ongoing support and maintenance of the end product?	As required roles and resources are identified during this project, the City will make those resources available. The City requests that Respondents provide their recommendation regarding the roles and resources needed for support and maintenance based on their proposed solution.	RFP Document	
CQ-010	Are there existing application maintenance process , procedures, and tools that must be leveraged? If yes, other options / ideas be recommended?	There are currently no existing application maintenance process, procedures, and tools that must be leveraged. Please recommend other options / ideas.	RFP Document	
CQ-011	Is there a limit or preference to the number of products / solutions that make up the final recommended solution?	The City requires a robust, maximized solution that will fully meet the documented business requirements while utilizing a minimum number of products/solutions.	RFP Document	
CQ-012	Does Chicago 311 have a preference related to using out of the box functionality of the selected technology vs. customization?	The City prefers a solution utilizing out of the box functionality of the selected technology, maximizing configuration capabilities, while minimizing customization.	RFP Document	
CQ-013	For Service request creation via social media - Are Facebook and Twitter the only two social media to be considered?	In addition to Facebook and Twitter, the City will consider additional social media tools based on the needs of the business and future social media developments.	Spec119440Exhibit1	10.00 Social Media, 10.06
CQ-014	Can you share the technical blue print of the existing technical landscape?	N/A. As the City pursues new technology and strategies for CRM, the focus will be on the new technical landscape in support of this initiative.	Spec119440Exhibit1	9.00 Integration, 9.02

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CQ-015	What information will be required to integrate with the data archive system?	Key information which can be used to summarize and analyze service requests. For instance, this would include a ticket number (to link current and archive data), duration of requests from open-to-close, intermediate steps during the ticket, dates of service requests, etc. Other data, such as database timestamps, log information, and other technical information that has no analytic value will not be used for OBIEE reporting on archived data.	Spec119440Exhibit1	9.00 Integration, 9.02
CQ-016	What is Illinois Local Records Act?	A link to the Illinois Records Act is included in Section 3.7 of the RFP.	Spec119440Exhibit1	8.00 General IT, 8.44
CQ-017	What is the underlying technology of the CHI TEXT application?	The CHI TEXT application technology is provided by Agent511. For additional technology related questions please refer to the company's website.	Spec119440Exhibit1	7.00 Mobile, 7.11
CQ-018	What interfaces are required for integration with third-party mobile application development firms?	Please refer to the Functional and Technical Requirements document, reference number 9.16.	Spec119440Exhibit1	7.00 Mobile, 7.25
CQ-019	Is integration or compatibility anticipated with the systems and data of sister agencies (e.g., Chicago Transit Authority, Chicago Public Schools), and should that capability be considered in-scope?	The City desires a solution that will allow for future integration with the systems and associated data of sister agencies. However, that capability is not in scope for this project.	RFP Document	
CQ-020	Does the appropriate solution need to communicate with or integrate with the 911 emergency response system?	While the proposed solutions do not have to immediately integrate with the current 911 system, the city does consider future integration desirable. Though it is not a requirement of the solution, adding any details about future expansion in those terms would be a plus.	RFP Document	

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CQ-021	Can the City please further define their use of the term SAAS or Cloud? Specifically, is the City looking for a Mullet-Tenant solution where their environment would be coexisting with the environment of other customers and where all customers of a vendor are on the same code line and therefore have to be upgraded on the vendor's schedule multiple times a year? Or is the City looking for a single tenant SAAS model where their environment is not coexisting with other customers and they are on their own code line in a SAAS environment where they control the timing of their upgrades and enhancement on their schedule?	The City is looking for a commercially available software solution hosted in a multi-tenant environment by the software provider and available via the Internet.	RFP for CRM Modernization Software and implementation Services: Specification No. 119440	Sections 1.1
CQ-022	What types of users will be access the software?	There are two both external and internal users. External users (constituents) will be entering requests via the web and social media outlets such as Facebook, Twitter, and mobile apps. Internal users are call center agents and departments/vendors that will use the client software and mobile platform for entering and resolving service requests.		
CQ-023	What types of functional enhancements is the City expecting for their 311 contact center?	The City is interested in improvements to our current call center environment for better service to constituents. The City open to innovation that could include but is not limited to the following: 1. Better Quality control and monitoring of our staff within the call center for call handling. 2. Customer service satisfaction templates to better understand and respond to our constituents' needs.		
CQ-024	How old is the Vesta software (a telecom application used by AT&T)?	Vesta was installed in 2010. A system integration is not a part and would be kept separate from this RFP.		

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CQ-025	Would the City please confirm that Sections 1,2 and 3 of RFP document "RFP Constituent Relationship Management" are informative only and do not require responses or acknowledge of each point in the proposal response document	Specific submittal requirements that demonstrate the Respondent's ability to meet the expectations and requirements described throughout the RFP are contained in Section 4. Failure to comply with any instructions in any Section of the RFP may be cause for rejection.	CRM Modernization Project (Specification 119440)	Sections 1, 2 and 3
CQ-026	How many mobile software licenses does the City anticipate for the departmental field workers?	The City desires a mobile solution that is easily scalable to meet the needs of the business. The number of anticipated mobile software licenses will be best determined based on the solution selected.	CRM Modernization Project (Specification 119440)	Section 2.1.2 Software License Count
CQ-027	Does the current Vesta telephone system have any CTI capabilities?	The current Vesta does not include the CTI add on feature. However, Respondents can allow for system integration for possible consideration by the City at some point in the future.	CRM Modernization Project (Specification 119440)	Section 2.1.3.2 Telephony
CQ-028	Does the current Vesta telephone system have a CTI desktop?	The current Vesta does not include the CTI add on feature. However, vendors can allow for system integration for possible consideration by the City at some point in the future.	CRM Modernization Project (Specification 119440)	Section 2.1.3.2 Telephony
CQ-029	Since the training will be conducted on-site in the City, how many training rooms does the City have available and how many computer positions are available in each room?	The City will ensure that adequate resources are available for training conducted on-site.	CRM Modernization Project (Specification 119440)	Section 2.2.5 Training
CQ-030	Taking into consideration shift work for the training, will the City accept training classes that are conducted during evening, night and weekend shifts?	The City is flexible and would possibly consider training outside of regular business hours if necessary.	CRM Modernization Project (Specification 119440)	Section 2.2.5.3 Other Training Considerations
CQ-031	Please provide a list of assets and inventory expected and please identify if the assets and inventory are expected to be part of the CRM solution or stored in external systems interfaced with the CRM system.	Assets and inventory will be stored in a separate external asset management system that will interface with the selected CRM solution.	CRM Modernization Project (Specification 119440) Exhibit 1	Tab 1, Service Request Management, 1.16

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CQ-032	Please clarify. If the resident is anonymous, there would be no information to redact.	Constituents choosing to be anonymous will not have any information listed. However, the City would like to be able to mask and redact information as needed through an option/toggle button for sensitive requests (i.e. FOIA, subpoenas, etc.)	CRM Modernization Project (Specification 119440) Exhibit 1	Tab 1, Service Request Management, 1.36
CQ-033	Please clarify how the City wants to achieve "unlimited in length" activity notes. Can this be across activities within a service request?	The City will not set a limitation. Each Respondent is expected to provide their software's maximum character length of standard fields.	CRM Modernization Project (Specification 119440) Exhibit 1	Tab 1, Service Request Management, 1.41
CQ-034	Please clarify what the City is requesting for this requirement.	The knowledge base should be able to record and categorize inquiries based on informational topics, events, programs, initiatives, etc.	CRM Modernization Project (Specification 119440) Exhibit 1	Tab 1, Service Request Management, 1.52
CQ-035	Please provide a simple use case to illustrate this requirement.	In Exhibit 1 - Functional and Technical Requirements, Service Request Management, Routing & Escalation, Requirement 1.68 will be deleted.	CRM Modernization Project (Specification 119440) Exhibit 1	Tab 1, Service Request Management, 1.68
CQ-036	Please clarify if this alert is simply volume related within a time frame or if a geo area is also required.	This should allow for address and/or user-defined geographical areas (i.e. ward, block, street, polygon drawn areas, etc.)	CRM Modernization Project (Specification 119440) Exhibit 1	Tab 1, Service Request Management, 1.74
CQ-037	Does the City intend to keep its current SMS interface solution?	The City desires to keep its current SMS solution.	CRM Modernization Project (Specification 119440) Exhibit 1	Tab 1, Service Request Management, 1.76
CQ-038	Please explain what the City means by "structured" emails and specify the structural components (e.g., carriage returns / line spacing) that are required to meet this requirement.	Structured inbound emails refers to the system's ability to process or interpret emails that may be using a template. For example, a resident may email the City using a pre-defined form or template for a specific type of inquiry. The CRM system would have the ability to identify that and process it accordingly.	CRM Modernization Project (Specification 119440) Exhibit 1	Tab 1, Service Request Management, 1.95
CQ-039	Please provide additional information on what the City considers "push notifications" responses.	If the City pushes out notifications such as road closures, street sweeping, etc., the CRM system will need to provide the ability to accept a response from the recipient of that notification, which could be for example in either a text or email format.	CRM Modernization Project (Specification 119440) Exhibit 1	Tab 1, Service Request Management, 1.983

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CQ-040	Please explain what you mean by "transfer banner ads"	When banner alerts are created in the CRM system, this requirement focuses on the ability of users when creating the alert to assign or transfer it to multiple channels in the system (e.g., internal City users, residents via self service, etc.)	CRM Modernization Project (Specification 119440) Exhibit 1	Tab 2, Resident Self Service, 2.02
CQ-041	Please explain what the City means by "a limitless number of web links".	In some instances content may be pushed out via web links. This requirement focuses on the CRM system having the ability to push out as many web links as the City requires when communicating with its users.	CRM Modernization Project (Specification 119440) Exhibit 1	Tab 2, Resident Self Service, 2.05
CQ-042	Please clarify if delivering a customer satisfaction survey via "phone" is accomplished via call back by an agent.	We will not have a call back option. We are seeking customer feedback through an IVR system, online, text, and/or smart phone application.	CRM Modernization Project (Specification 119440) Exhibit 1	Tab 3, Workflow, 3.14
CQ-043	Please clarify if the City expects this functionality inside the CRM application or accessible from within the CRM application.	Links from the CRM to other URLs with driving and mapping applications are encouraged.	CRM Modernization Project (Specification 119440) Exhibit 1	Tab 4, Knowledge Base Management, 4.10
CQ-044	Please provide a simple use case to illustrate this requirement.	For example, agents and/or constituents through self-service could get information regarding parking, transportation, and/or directions as needed.	CRM Modernization Project (Specification 119440) Exhibit 1	Tab 4, Knowledge Base Management, 4.10
CQ-045	Please provide a simple use case to illustrate this requirement. We do not understand why an agent must always search the knowledge base to enter a service request if not required.	For example, a caller is reporting a cab complaint for which a service request is taken. Given that additional forms are required for follow up, the agent could in turn email that documentation to the caller directly from the knowledge base to expedite processing.	CRM Modernization Project (Specification 119440) Exhibit 1	Tab 4, Knowledge Base Management, 4.13
CQ-046	Please provide additional information on what types of metrics the City is requesting on the articles.	The metrics would include but are not limited to 1) number of hits viewing specific article/topic 2) last audit/updated date and 3) rating on successful usage.	CRM Modernization Project (Specification 119440) Exhibit 1	Tab 4, Knowledge Base Management, 4.43
CQ-047	Please provide further explanation on this requirement.	Knowledge Base Management should have the ability to scrap and compare information to web content data from various sources to ensure most updated version.	CRM Modernization Project (Specification 119440) Exhibit 1	Tab 4, Knowledge Base Management, 4.46

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CQ-048	Please provide a simple use case to illustrate this requirement.	The knowledge base should have the ability to perform keyword searches of applications, documents, website, etc. to identify possible duplicative content and prompt user to verify before uploading to the system.	CRM Modernization Project (Specification 119440) Exhibit 1	Tab 4, Knowledge Base Management, 4.49
CQ-049	Please explain what the City means by "wizards" for report writing.	Wizards are automated step by step guides to assist users in completing a task.	CRM Modernization Project (Specification 119440) Exhibit 1	Tab 5, Reporting, 5.30
CQ-050	Please provide a simple use case to illustrate this requirement.	For example, a flag will alert key operational management staff of service requests exceeding specified transfer limitations to expedite for resolution.	CRM Modernization Project (Specification 119440) Exhibit 1	Tab 5, Reporting, 5.63
CQ-051	Is the City looking for an AVL (Automatic Vehicle Location) system to map the location of City crews? If yes, does the City currently have a system in place today and please provide information on that system? If no, please provide clarification as to what the City is requesting with this requirement.	The City is not looking for an AVL as part of this initiative. The City desires the ability to map locations for all identified field assets.	CRM Modernization Project (Specification 119440) Exhibit 1	Tab 6, GIS, 6.42
CQ-052	Please explain what the City means by "history of asset maintenance" and quantify how much history should be available.	Examples of "History of asset maintenance" would include but not limited to information such as the dates and times when maintenance work was performed on an asset. It would also include the type of maintenance performed over a period of time. The amount of history that should be available will be determined based on the asset. The information displayed will be imported from the City's asset management system which will need to interface with the CRM solution.	CRM Modernization Project (Specification 119440) Exhibit 1	Tab 6, GIS, 6.46
CQ-053	Please clarify what "web interfaces" includes given that requirement 7.33 addresses "mobile interfaces" and specify the audience (e.g., Citizens) for the "web interfaces" training guides.	The City will use its discretion to determine whether "web interface" training guides are necessary. If so, we will seek AVI formats to educate users on usage.	CRM Modernization Project (Specification 119440) Exhibit 1	Tab 7, Mobile, 7.34

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CQ-054	Please describe what "compatible" means and specify what packages need to be integrated and how they are expected to be integrated.	The proposed solution should work with/integrate with the City's MS Outlook system.	CRM Modernization Project (Specification 119440) Exhibit 1	Tab 8, General IT, 8.24
CQ-055	Please provide clarification on what the City is requesting with "lookup lists or full text descriptions for all coded data.".	The City desires the ability to locate information quickly and easily.	CRM Modernization Project (Specification 119440) Exhibit 1	Tab 8, General IT, 8.26
CQ-056	Please provide a simple use case to illustrate this requirement.	A possible use case example would be: The City initiates special projects that require large amounts of data from the CRM system.	CRM Modernization Project (Specification 119440) Exhibit 1	Tab 8, General IT, 8.48
CQ-057	Please explain what "queue" means in this requirement.	In this instance, the term queue refers to system's ability to generate a list of data that may need to be processed. The reports that may be generated would include a listing of the data in the queue and any specific parameters or properties of the data	CRM Modernization Project (Specification 119440) Exhibit 1	Tab 8, General IT, 8.55
CQ-058	Given that Hansen was listed also under 9.06, are there two Hansen interfaces or just one Hansen interface?	There is one bi-directional Hansen interface. Requirement 9.06 is a duplicate and will be deleted.	CRM Modernization Project (Specification 119440) Exhibit 1	Tab 9, Integration, 9.10
CQ-059	Please provide a simple use case to illustrate this requirement.	For example, the City can push out emails to both internal/external users from the CRM as necessary using the Outlook application.	CRM Modernization Project (Specification 119440) Exhibit 1	Tab 9, Integration, 9.13
CQ-060	Please describe the intended role of Oracle BIEE given this will be a hosted (SaaS) solution.	Reporting through OBIEE will still be necessary as it provides a mechanism to integrate data from CRM with other data sources, such as weather, social media, and other city data systems. OBIEE users will be able to generate reports that compare trends of requests, location of requests, and patterns of requests against other sources. This will allow them to discover underlying patterns, correlations, and trends to allow city users to be proactive and make data-driven decisions.	CRM Modernization Project (Specification 119440) Exhibit 1	Tab 9, Integration, 9.15

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CQ-061	Does the City intend to keep its current Open311 interface solution?	Yes. However, a comparable Open311 solution will be considered if needed.	CRM Modernization Project (Specification 119440) Exhibit 1	Tab 9, Integration, 9.16
CQ-062	Please describe what the City sees as database configuration that should be available given this will be a hosted (SaaS) solution.	Tab 11 reference 11.18 refers to a solution that "provides the ability to manage system configuration settings (e.g., set variables and screen layout to determine how the application will operate in the City environment)." This section is for security management and enforcement purposes. You will need to list out your functions and capabilities for database management . Some include but not limited to: Monitoring of all database activities and protection against insiders with privileged access, manage/monitor access to sensitive data, allowing specific hosts or database users to access database... In the context of a database, and specific to the question, it will vary according to solution(s) provided by the vendor. "In the case of third-party deployments, the configuration will generally be defined relative to the default configuration." See the NIST database security checklist: http://csrc.nist.gov/pcig/cig.html for available security checklists (or benchmarks) that provide detailed low level guidance on setting the security configuration of operating systems and applications.	CRM Modernization Project (Specification 119440) Exhibit 1	Tab 11, Security, 11.18
CQ-063	Please describe what "security event" means in context of this requirement.	By definition, "A security event is a change in the everyday operations of a network or information technology service, indicating that a security policy may have been violated or a security safeguard may have failed." Depending on the solution and/or service, respond with all the components that log, alert and report. Include the level of detail and any correlation or prevention capabilities offered.	CRM Modernization Project (Specification 119440) Exhibit 1	Tab 11, Security, 11.30

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CQ-064	Can you please share the names and contact information of the attendees from the bidders conference?	The Pre-Submittal attendee list can be found at the following website: http://www.cityofchicago.org/city/en/depts/dps/provdrs/contract/svcs/pre-bid_and_pre-submittalconferenceattendees.html	RFP 119440	
CQ-065	What is the budget for this project?	The City will evaluate each response based on the overall value of its offering.		
CQ-066	Do you want the integration to the back office City systems to be point-to-point or through an enterprise service bus (ESB)?	The City desires integration to the back office systems through web services.	RFP 119440	2.1.3.1
CQ-067	Do you want vendors to price all 3 phases or just phase 1 (pilot)?	The City requests Respondents to provide pricing for all 3 phases (the entire project implementation).	RFP 119440	2.2.1
CQ-068	What is the City's ideal for required environments, e.g., Dev.-Staging-Prod, or Dev.-Training-Staging-Prod-D?	Please refer to the Functional and Technical Requirements document, reference number 8.22.	RFP 119440	
CQ-069	Which CTI solution does the City use beyond the listed Vesta?	Not applicable	RFP 119440	
CQ-070	How does the City currently uses its CTI to CRM solution? Can the City provide the use cases, i.e., screen pop, storing customer information obtained from the IVR, routing based on IVR information, etc.?	Not applicable	RFP 119440	
CQ-071	Will the Pilot phase include any CRM integrations to other backend systems? If so, which systems will need to be in scope for the Pilot?	The Pilot phase will need to include CRM integrations to the backend systems utilized by the participating departments. Please refer to the RFP, section 2.2.1 Phased Implementation.	RFP 119440	
CQ-072	Does the City currently have or have plans to use an ESB it for its integration? If so, what system and version of the product will be used. If not, will the City consider using one as a consolidated bid with the CRM? Are the integration dataflow real-time, batched or both?	The City desires integration to the back office systems through web services. The City would welcome vendor recommendations and approaches to integration. The integration dataflow is real-time and batched.	RFP 119440	
CQ-073	Please describe the use case for the City's Outlook integration to its existing CRM.	There is currently no integration between the City's Outlook and the existing CRM.	RFP 119440	

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CQ-074	Where are the information/knowledge articles sourced by the agents kept today, and what type are they generally, e.g., hard copy documents, website, online articles/manuals (pdf, doc, xls. Etc.), database, etc.	Information is currently held in hard copy manuals of documents from a variety of formats (pdf, word, excel, etc.) as provided by various city departments and/or sister agencies. Agents also use the website to communicate information to the public.	RFP 119440	
CQ-075	In Section 2.2.5.1.1, the City requires that "In addition to the instructor-led training program, please provide a comprehensive training program that leverages a train-the-trainer methodology for comparative purposes." Can you clarify whether the City requests a proposed training program, including pricing, for two options, namely a skills transfer and train-the-trainer approach that leverages City trainers and resources to deliver the instructor-led training described in 2.2.5.2.1, as well as for the Respondent to deliver those courses primarily, with participation and support from the City?	Instructor-led and train-the-trainer training programs are desired by the City. The City will consider best practice methods of training to ensure successful implementation and knowledge transfer.	RFP 119440	2.2.5
CQ-076	In Section 2.2.6, the City describes a potential integration with the City directory application. Can you describe this directory and application (.e.g. web-based, file/document, structured database) and its underlying technology?	The potential integration will be with the City Directory application in APEX and structured database.	RFP 119440	2.2.6
CQ-077	Can you please confirm that your telephony platform has a CTI interface? Please provide the telephony switch or infrastructure details including vendor and version number of the CTI interface.	The telephony platform to be used does not currently have a CTI interface.	RFP 119440	2.1.3.2
CQ-078	Do the City require to migrate the attachments associated to the case data? If so, what format are they and how are they currently stored? Do they need to be brought in/linked to the data that needs to be imported?	The City requires that the attachments associated with case data are linked. The current attachments, which are pictures in jpeg format, are stored in FileNet.	RFP 119440	

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CQ-079	Support service levels are generally defined by the service provider and based on the level of support purchased by the customer. Please clarify if the support service levels are negotiable based on the service provider chosen.	The City will review the proposed service levels to ensure that they are acceptable and meet the needs of the business.	RFP	RFP page 37, item 4.2.4.6
CQ-080	The RFP does not specify where Respondents are to provide ADA Compliance response and associated VPATs. Is an Appendix to the proposal sufficient?	An appendix is acceptable providing the ADA Compliance response and associated VPATS.	RFP	RFP page 21, item 2.2.7.1 ADA Compliance
CQ-081	Please define what you mean by concurrent users vs. named users	Concurrent users= number of users is greater than the number of licenses granted, but only the number of users equal to the number of licenses can utilize the system at the same time. Named users=number of users equals the number of licenses to be used.	RFP	RFP Page 10, item 2.1.2 Software License Counts
CQ-082	RFP 4.2.13 asks for an Exceptions section as part of the response as well as RFP 4.2.2.6. Should Respondents duplicate their answers in both sections or will the City be issuing an addendum to the RFP to remove one of the requirements?	Please answer both questions.	RFP	RFP Page 34, item 4.2.13 and RFP Page 31, item 4.2.2.6
CQ-083	How will the system interact with asset linkages and inventory?	Assets and inventory will be stored in a separate external asset management system that will interface with the selected CRM solution.	RFP Exhibit 1 - Functional & Technical Requirements	RFP Exhibit 1, Requirement 1.16
CQ-084	Is the unique identifier in 1.34 the same identifier for requirement 1.33?	Yes, it is the same. We will establish an identifier for profile tracking for opted-in constituents.	RFP Exhibit 1 - Functional & Technical Requirements	RFP Exhibit 1, Requirement 1.34
CQ-085	Do you want to capture the resident information even if the resident wants to remain anonymous? If you want the user to remain anonymous, what information would you like to be captured?	There will be no need to capture resident information if they choose to remain anonymous. In this case, we will only need service request location and details from flex notes/questions.	RFP Exhibit 1 - Functional & Technical Requirements	RFP Exhibit 1, Requirement 1.36
CQ-086	What is the literal limit to the length of the text field for activity notes?	Please see response to CQ-033	RFP Exhibit 1 - Functional & Technical Requirements	RFP Exhibit 1, Requirement 1.41
CQ-087	How would the routing of cases or service request be handled or like to be handled? Is this as simple as email notifications to the outside agency?	Service requests could be routed via multiple channels such as CRM directly, email, electronic fax, open source interface, etc.	RFP Exhibit 1 - Functional & Technical Requirements	RFP Exhibit 1, Requirement 1.58

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ID	Question	City Response	RFP Reference Document Name	Reference Document Section
CQ-088	Can you specify all document types?	The system should allow the sharing of service request related information via word doc, excel, pdf, images (i.e. GIF, TIF, JPG, etc.)	RFP Exhibit 1 - Functional & Technical Requirements	RFP Exhibit 1, Requirement 1.99
CQ-089	Is "quick recording" an audio recording or text/data recording? Something else?	This refers to quick recording of information in a text/data format.	RFP Exhibit 1 - Functional & Technical Requirements	RFP Exhibit 1, Requirement 3.05
CQ-090	Can you provide an example of a user defined workflow?	The system should have the ability to use multiple activities and outcomes combined with directional questions to route the appropriate response and/or service.	RFP Exhibit 1 - Functional & Technical Requirements	RFP Exhibit 1, Requirement 3.10
CQ-091	Please provide an example of a directional script and its intended use.	For example, based on the way a caller responds to question A, then the agent could either skip down to question D, change topic, or modify service type code as applicable.	RFP Exhibit 1 - Functional & Technical Requirements	RFP Exhibit 1, Requirement 4.28
CQ-092	Can you please provide more specifics when you talk about coded data?	The system should provide basic descriptions and appropriate field definitions for all service type codes.	RFP Exhibit 1 - Functional & Technical Requirements	RFP Exhibit 1, Requirement 8.26
CQ-093	Please define your intentions on the requirements for a tiered architecture and virtualization support since this is supposed to be a true cloud/SaaS solution.	In Exhibit 1 - Functional and Technical Requirements, General Information Technology (IT), Network, Requirements 8.29 and 8.31 are deleted from RFP.	RFP Exhibit 1 - Functional & Technical Requirements	RFP Exhibit 1, Requirement 8.29/31
CQ-094	Please clarify if a Tier 4 data center rated by TIA is required, as Tier 4 data centers are generally reserved for hosting mission critical computer systems.	A Tier 4 class data center as defined by the Uptime Institute is a requirement. If the system cannot address this requirement please use the comments section to explain your firm's response/approach.	RFP Exhibit 1 - Functional & Technical Requirements	RFP Exhibit 1, Requirement 8.65
CQ-095	Simply says Microsoft .NET and J2EE. Please provide clarification on these requirements.	The solution provides the ability to support the following development technologies: Microsoft .NET and J2EE.	RFP Exhibit 1 - Functional & Technical Requirements	RFP Exhibit 1, Requirement 9.20/21

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CQ-096	When is an award expected to be announced?	All Respondents will be notified in writing of status upon completion of evaluation process.	REQUEST FOR PROPOSAL ("RFP") FOR CRM MODERNIZATION SOFTWARE AND IMPLEMENTATION SERVICES Specification No. 119440	4.2.1 Cover Letter
CQ-097	Are there timelines in mind defined for implementing the 3 phases discussed in the RFP?	The City requests that Respondents provide a best practice recommendation regarding the project timeline and approach for this initiative within the 5 year timeframe.	REQUEST FOR PROPOSAL ("RFP") FOR CRM MODERNIZATION SOFTWARE AND IMPLEMENTATION SERVICES Specification No. 119440	2.2.1. Phased Implementation
CQ-098	Would the Partnership consider allowing the respondent to further break down, and refine the phases. For example, implementing core 311 CRM in the first phase and then integrating with other technologies in 2nd phase?	The City requests that Respondents provide a best practice recommendation regarding the project timeline and approach for this initiative within the 5 year timeframe. We will consider all reasonable approaches informed by leading practices.	REQUEST FOR PROPOSAL ("RFP") FOR CRM MODERNIZATION SOFTWARE AND IMPLEMENTATION SERVICES Specification No. 119440	2.2.1. Phased Implementation

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ID	Question	City Response	RFP Reference Document Name	Reference Document Section
CQ-099	Regarding communications channels, can you please identify the source(s) of the data/requests? How do the internet interfaces differ from the 311 interface? Generated In house (5%) & In house Interface (4%) a) Please further explain the channel Generated In house. Walk Ins - How do residents file complain by walking in, and what city premises? CDOT Permit - What is this channel for creating Service Request B) Do all employees have access to the internal interface? C) Do internal employees need to use their credentials to access the internal interface? D) Please provide details on channels "Generated In-House" and "In House interface"	The 311 web portal is the self-service internet option for constituents to request various city services. Other internet interfaces are for targeted service types on the Open 311/Spot311 platform via web along with the use of smartphone apps and texting options to request services and get status updates. A) Generated In House are those service requests manually inputted by department staff while Mass Entry are auto-close service requests capturing additional work completed by field staff relating to existing service requests. Each department determines whether to accept Walk-in traffic at their various satellite office locations. We currently have a subsystem (NSR) to handle permitting for Transportation/Water. CDOT Permit represents those service types inputted relating to that subsystem and our existing CRM. B) Access control to internal interfaces are limited to specific staff depending on the interface. C) Internal employees given access credentials can use a single sign on to CRM to validate across the interfaces. D) In House interface represents the various department subsystems.	REQUEST FOR PROPOSAL ("RFP") FOR CRM MODERNIZATION SOFTWARE AND IMPLEMENTATION SERVICES Specification No. 119440	1.2.3. Multi-Channel Design
CQ-100	Chicago's Data Portal posts more than 500 data sets that are available to the public to make their government more accessible to them - What information will the data sets have?	A complete list of datasets and the information within them are provided at http://data.cityofchicago.org.	REQUEST FOR PROPOSAL ("RFP") FOR CRM MODERNIZATION SOFTWARE AND IMPLEMENTATION SERVICES Specification No. 119440	1.2.4. Transparency and Accountability

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ID	Question	City Response	RFP Reference Document Name	Reference Document Section
CQ-101	Do city departments have access to the existing CRM application to access service requests raised by residents? If yes, how many users of those 30 departments will need access to the new CRM application? Do these 30 departments also have the ability to raise service requests on behalf of residents? Other than accessing residents' service requests, what other CRM functionality will these departments need to access? In case these departments do not have access to the existing CRM application, how would they then update the service request information back to the CRM ?	City departments do have access to the existing CRM application to access service requests raised by residents. All users will need access to the new CRM application/functionality.	REQUEST FOR PROPOSAL ("RFP") FOR CRM MODERNIZATION SOFTWARE AND IMPLEMENTATION SERVICES Specification No. 119440	1.3 Current State
CQ-102	Telephony system - Does the telephony system communicate with the existing CRM system? Is there any IVR self service functionality currently available?	Vesta, our telephony system, does not communicate with the existing CRM. The call center has an auto-attendant for the selection of transfer options when a live operator is unavailable.	REQUEST FOR PROPOSAL ("RFP") FOR CRM MODERNIZATION SOFTWARE AND IMPLEMENTATION SERVICES Specification No. 119440	2.1.3.2 Telephony
CQ-103	In the existing citizen portal, depending on the service type selected, different service request pages are called with different sub domains. 1) https://servicerequest.cityofchicago.org 2) http://311request.cityofchicago.org (spot reporters service) Are these 2 different applications? If yes, is the proposed solution required to replace both these applications? Also, there is no mention of spot reporters in the RFP. Where can we find more information about this?	In the existing resident portal there are 2 different applications. One is used for service requests that are not configured for Open311. The spot reporters service is for service requests that are configured for Open311. It is desired that the proposed solution provide an optimum approach to handling both Open311 configured service requests and non-Open311 configured service requests.	REQUEST FOR PROPOSAL ("RFP") FOR CRM MODERNIZATION SOFTWARE AND IMPLEMENTATION SERVICES Specification No. 119440	This question arose while reviewing the Chicago website.

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CQ-104	What services are currently used for SMS integration (CHI text)?	The current SMS services used includes the ability to request City services, check status of services requests, request City related information, Opt-in to receive City alerts, request information related to towed or relocated vehicles.	REQUEST FOR PROPOSAL ("RFP") FOR CRM MODERNIZATION SOFTWARE AND IMPLEMENTATION SERVICES Specification No. 119440	2.2.8. Social Media Integration
CQ-105	What is the need for having a separate case management system, "Adaptive Enterprise Solutions", does this component include functions which cannot be managed by the existing CRM system?	The Enterprise Case Management system, Adaptive Enterprise Solutions, is used for Human Infrastructure related services.	REQUEST FOR PROPOSAL ("RFP") FOR CRM MODERNIZATION SOFTWARE AND IMPLEMENTATION SERVICES Specification No. 119440	2.2.3. System Interfaces and Integration
CQ-106	What information would be shared from the CRM application with the Socrata Open Data Portal?	311-specific data typically includes a list of all service requests for a given type, the service request number, current status of request, and location information.	REQUEST FOR PROPOSAL ("RFP") FOR CRM MODERNIZATION SOFTWARE AND IMPLEMENTATION SERVICES Specification No. 119440	2.2.3. System Interfaces and Integration

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CQ-107	Can you please provide examples of what type of edits you would like to make to the GIS through the CRM?	Examples of the type of GIS edits are: Street_names, X,Y coordinates, Ward boundaries, Police & Fire district boundaries	REQUEST FOR PROPOSAL ("RFP") FOR CRM MODERNIZATION SOFTWARE AND IMPLEMENTATION SERVICES Specification No. 119440	6.18 The solution provides the ability to update reference inventory and/or assets on a GIS data layer as prescribed by specific task(s), including the ability of authorized personnel to edit the GIS data layers containing the assets.
CQ-108	Is geography-based staff assignment based on current location or fixed address?	The geography-based staff assignment will be based on both current location and fixed address.	CRM Modernization Software and Implementation Services, Specification # 119440	Exhibit 1 - 1.62
CQ-109	What is already in place to identify and filter our duplicate service requests? Would we need to link duplicate requests to the work orders (in Hansen)?	As a standard, we currently have the option to use a single service type code by address and multiple buffers including whole block, proximity within 10 addresses greater/less than subject location, or exact match. In addition, we have implemented custom configuration to link duplicates from multiple service type codes as necessary. We would like to expand this multiple service code duplication functionality as a standard through user defined GEO area options (i.e. polygon drawn, radius, etc.). Given that we want the CRM to be the core system, we have no need to link duplicate checking through various subsystems.	CRM Modernization Software and Implementation Services, Specification # 119440	Exhibit 1 - 1.27
CQ-110	Which non-English languages need to be supported? Are multiple languages to be supported internally by agents?	At minimum, we would like for the public self-service web portal to support English, Spanish, Polish, Chinese, and Arabic due to our diverse population. Multiple languages for the call center agents are not necessary. We have access to language line interpretation services when needed.	CRM Modernization Software and Implementation Services, Specification # 119440	Exhibit 1 - 2.04

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ID	Question	City Response	RFP Reference Document Name	Reference Document Section
CQ-111	Can more detail be provided around the expectations for integration with each of the external systems? What integration methods are available? What data will be transferred? How many transactions do we expect? What is the expected frequency of the integrations (e.g., hourly, daily, real-time)?	Please refer to the Functional and Technical Requirements document, reference numbers 9.1 - 9.21. In addition, each interface will be evaluated separately regarding best method of integration, data to be transferred, number and frequency of transactions.	CRM Modernization Software and Implementation Services, Specification # 119440	Exhibit 1 - 2.20
CQ-112	What is meant by a (directional) script with regards to knowledge base management?	See response to CQ-091	CRM Modernization Software and Implementation Services, Specification # 119440	Exhibit 1 - 4.28, 4.30
CQ-113	What is the expectation around reporting from the live system versus business intelligence/dashboards?	The live system will provide up-to-date information on requests, while OBIEE solution may have a delay in data. Specifically, the OBIEE solution will allow integration of various data sources, such as weather, social media data, and data from other city data systems. We would like to minimize the delay of information from 311 into OBIEE; however, reasonable concerns about the impact on the performance of the CSR database are warranted.	CRM Modernization Software and Implementation Services, Specification # 119440	Exhibit 1 - 5.01
CQ-114	What is meant by an "event"? Who will be entering/administrating these "events"? Are these the same events described in 10.03 and 10.04?	Examples of events would be items such as Taste of Chicago, marathons, street closures, etc. Yes, these are the same types of events described in 10.03 and 10.04.	CRM Modernization Software and Implementation Services, Specification # 119440	Exhibit 1 - 4.17, 4.18, 5.15
CQ-115	Does the archived data need to be reported in the live system or from the data warehouse?	All of the archived data must be reported from the data warehouse. Depending on configuration, select archive data, which has current relevance, would need to be reported in live system. However, the solution can be engineered so relevant data is not archived.	CRM Modernization Software and Implementation Services, Specification # 119440	Exhibit 1 - 5.10
CQ-116	Does the current GIS system allow for embedding of maps within another application or the web?	Static maps (map images) can be generated and displayed in a non-GIS application or website. Interactive maps can be embedded in websites using iFrames. ArcGIS Server map services can be called from non-GIS applications.	CRM Modernization Software and Implementation Services, Specification # 119440	Exhibit 1 - 6.12

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CQ-117	Would you please clarify what is meant by querying "using a drawing tool"?	As an example, an end user needs to be able to draw/select a geographical area (e.g. by drawing a circle, a rectangle, a polygon) within a map to select and filter data within that location.	CRM Modernization Software and Implementation Services, Specification # 119440	Exhibit 1 - 6.48
CQ-118	Will the field service workers be on a standardized mobile device? Which device? Would a mobile web site/application suffice for mobile workers?	Field service workers will use standard City approved devices based on the needs of the user departments.	CRM Modernization Software and Implementation Services, Specification # 119440	Exhibit 1 - 7.01
CQ-119	At what point does redaction need to occur (e.g. on intake vs. when agent is reading or responding to the request)?	We would prefer the ability to redact information via an option/toggle button when printing sensitive requests (i.e. subpoenas, FOIA, etc.)	CRM Modernization Software and Implementation Services, Specification # 119440	Exhibit 1 - 8.11
CQ-120	Can you please clarify what is meant by software version control?	The City requires the ability to ensure all City devices used in the field are running the same and most current versions of the selected software at all times.	CRM Modernization Software and Implementation Services, Specification # 119440	Exhibit 1 - 8.16
CQ-121	What is meant by thin client access to web browser?	A light weight front end that allows users access to a web browser.	CRM Modernization Software and Implementation Services, Specification # 119440	Exhibit 1 - 8.27
CQ-122	What is meant by the queue being visible and reportable to City personnel? What type of reports are generated from these queues?	In this instance, the term queue refers to system's ability to generate a list of data that may need to be processed. The reports that may be generated would include a listing of the data in the queue and any specific parameters or properties of the data that have been built into the system or defined by the City.	CRM Modernization Software and Implementation Services, Specification # 119440	Exhibit 1 - 8.55

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ID	Question	City Response	RFP Reference Document Name	Reference Document Section
CQ-123	Would you please provide more details on each of the integration points? What methods (e.g., SOAP, REST, flat file) are available and/or used today for integration into each system and what data will be transferred? How many transactions are anticipated per system? What is the expected frequency of the integrations (e.g., hourly, daily, real-time)?	Please refer to the Functional and Technical Requirements document, reference numbers 9.1 - 9.21. In addition, each interface will be evaluated separately regarding best method of integration, data to be transferred, number and frequency of transactions.	CRM Modernization Software and Implementation Services, Specification # 119440	Exhibit 1 - 9.04 - 9.14
CQ-124	Which of the following is the system expected to provide: blogs, wikis, searches, and forums? What is meant by "searches"?	The City desires all the items listed: blogs, wikis, searches, and forums. Searches = queries and look ups.	CRM Modernization Software and Implementation Services, Specification # 119440	Exhibit 1 - 10.02
CQ-125	End-User Training (630 in the Foundational Departments, 75 call takers and supervisors in the 311 Call Center and 200 in other departments) indicates the Selected Respondent shall provide instructor-led training for 200 City personnel in "other departments." Will the respondent be responsible for training all of these City personnel in person and on-site, in addition to developing training software and materials?	The respondent will be responsible for developing training software and materials along with providing in person and on-site "train-the-trainer" sessions for a portion of designated City personnel within the anticipated 3000+ users.	CRM Modernization: Spec No. 119440	Section 2.2.5.2.1 of the RFP
CQ-126	Software License Counts: Will the Full Entry Users need the same level of functionality as the Call Center Users and Operators? Or just a subset of that functionality?	Functionality of the system will be consistent for call center and department users. Access control will be done on role based assignments.	CRM Modernization: Spec No. 119440	Section 2.1.2 of the RFP
CQ-127	Software License Counts: Will the City need to support the CRM application on a mobile platform for any of its internal users (iPad, Android, iOS, tablets, etc.)? If so, how many users will need to be supported?	Yes. The City will require that the CRM application is supported on a mobile platform for its field service workers. The number of users will need to be determined based on the needs of the business and the solution that is selected.	CRM Modernization: Spec No. 119440	Section 2.1.2 of the RFP
CQ-128	Data Migration (City's Telephone Directory): What is the City Directory application based on? What kind of interface will be necessary?	Please see response to CQ-076.	CRM Modernization: Spec No. 119440	Section 2.2.6 of the RFP

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ID	Question	City Response	RFP Reference Document Name	Reference Document Section
CQ-129	Web Portal Implementation (City Conducted Focus Group for Smart Chicago Initiative): Will the residents' feedback be made available to us before the RFP responses are due? Or will the feedback be made available during the project?	The residents' feedback will be made available during the project.	CRM Modernization: Spec No. 119440	Section 2.2.7 of the RFP
CQ-130	Data Migration (City's Existing Service Requests): Approximately how many fields exist on the existing service requests that must be migrated into the new CRM solution? Are the existing service request records currently associated with an Account and/or Contact record? If yes, are the existing Account and/or Contact records the same as the customer profile information that must be migrated from the water billing and City Sticker application databases?	The service request table contains 40 Columns (although an SR is comprised of more from other tables). The service request records are associated with a service request number.	CRM Modernization: Spec No. 119440	Section 2.2.6 of the RFP
CQ-131	Work Order Integration: Can work orders be created directly in Hansen and/or Infor EAM (formerly DataStream) without being initiated from a service request? If yes, do these work orders need to trigger the creation of a service request in the new CRM Solution or be visible from the new CRM Solution?	Work orders can be created directly in Hansen and/or Infor EAM (formerly Datastream) without being initiated from a service request. The City will need to determine the best approach regarding the need to trigger the creation of a service request in the new CRM Solution or make the service request visible from the new CRM Solution.	CRM Modernization: Spec No. 119440	Section 2.2.3 of the RFP
CQ-132	Enterprise Case Management: What type of data will be coming from the Adaptive Enterprise Solutions Integration application into the new CRM solution?	Human infrastructure related services data will be coming from the Enterprise Case Management: Adaptive Enterprise Solutions Integration application into the new CRM solution.	CRM Modernization: Spec No. 119440	Section 2.2.3 of the RFP
CQ-133	Will the City provide respondents a 2 week extension of the due date (until November 22) to submit responses?	The revised due date for the RFP responses will be November 22, 2013.	CRM Modernization: Spec No. 119440	cover page

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CQ-134	Section 2.4.1 of the RFP is very clear that the City is only interested in a SaaS solution for its new CRM system. This was reiterated at the pre-proposal conference, where it was stated that the City wants a "pure cloud" software solution. We understand this to fundamentally be a requirement for a solution that includes all hardware, software, and services in a subscription-based pricing model. However, not all SaaS solutions are capable of meeting the City's requirements for virtualization, stated in Exhibit 1 - Functional and Technical Requirements. Specifically, requirement 8.31: "The solution is able to run in a virtual environment (VMware or RHEV)." Does the City require a SaaS solution that is virtualized? If so, this seems to exclude some SaaS solutions that are not virtualized.	The City is looking for a commercially available software solution hosted in a multi-tenant environment by the software provider and available via the Internet.	CRM Modernization (RFP 119440)	Sections 2.4.1 and Exhibit 1, Requirement 8.31

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CQ-135	Page 37 of the RFP states "Respondent must describe their previous specialized experience on all recent CRM software implementation projects for both public and private sector organizations with more than 500,000 constituents that have commenced or been deployed within the last five years. " However, in Exhibit 3 – Company Profile Form and Project Reference Form - COMPANY PROFILE INFORMATION, item number 12 states "12) Number of installed CRM solutions commenced or deployed in the last 4 years:" Would the City please clarify whether it is looking for CRM software experience from the past five years or past four years.	Please answer both questions; questions differ as one is requiring all CRM experience over the last 4 years whereas the other is looking only at CRM implementations over 500,000 constituents.	RFP Document	4.2.5.2 Company References and Exhibit 3 - Company Profile and Reference Form
CQ-136	What Communication Services solution is the City planning to use (e.g. Cisco, Avaya, etc.)? Is the City planning to use an existing Communication Services solution or implement a new one?	The Communication Services solution the City is planning to use is Avaya.	RFP Document	Exhibit 1 Functional and Technical Requirements - Communications Management & Multi-Channel Integration, pg. 56
CQ-137	Can the city provide its GIS architecture overview so that we can better understand its GIS data integration requirements?	The City currently uses Esri ArcGIS Server 9.3.1 on Windows Server and Esri Spatial Data Engine version 9.3.1 running on Solaris, with an Oracle 10g database. Custom applications have been developed in Java and JavaScript, and those applications are hosted on Linux servers in Oracle WebLogic containers. A custom-developed web service layer (Enterprise Location Services) has been developed to allow external applications to interact with GIS.	RFP Document	

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CQ-138	Is there a pre-existing MDM solution that the CRM solution will need to integrate with that manages customer identification, de-duplication, or will the new 311 system be the customer master after the imports from the sources identified in the RFP?	There is not a pre-existing MDM solution that the CRM solution will need to integrate with. The new CRM system will not be the customer master.	RFP Document	
CQ-139	The RFP states "The Selected Respondent will work with the City to identify bi-directional channels to collect and process feedback and to develop tactics to utilize to build "common ground" with residents". Has the City conducted any research to understand resident needs and preferences?	The City has previously conducted research to understand resident needs and preferences. However, additional research will be needed as the City pursues a new CRM strategy.	RFP Document	2.2.2.1 Strategic Planning, pg. 13
CQ-140	If you've done research, does it include internal stakeholders? Does this include call center reps?	The internal stakeholder departments should have the ability to utilize multiple channels of communications for implementing strategic problem solving as described. The Call Center staff will primarily use the CRM but should not be limited to the multiple access channels if warranted.	RFP Document	2.2.2.1 Strategic Planning, pg. 13
CQ-141	For resident outreach programs like the hackathons and meet-ups, , should we assume that the City would organize and promote these experiences while the agency facilitates and synthesizes findings?	The resident outreach program will include several partners and is under development.	RFP Document	2.2.2.2 Education and Outreach, pg. 13
CQ-142	Can we assume that any digital property would need to address the languages currently supported in the 311 section of the City of Chicago site?	Any digital property would need to address the languages currently supported in the 311 section of the City of Chicago site. The City also desires the ability to add languages as needed.	RFP Document	
CQ-143	Can you briefly describe the relevant agency/partnership landscape for your digital activities and the role that the selected agency would play within it (i.e. Branding agency? Advertising agency? Public Relations agency?, etc.)	Our current example of relevant agency/partnership is Open311 based on approved third party application developers using their agency branding and any public relations activities to help market our partnership. The City's branding includes PSA's and ad campaigns where feasible. We welcome additional joint efforts.	RFP Document	

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CQ-144	Will the scope of the project include all components within cityofchicago.org or just the department of 311 services section? Is there a desire to ultimately have the 311 content as a standalone property?	Please refer to the CRM Modernization RFP, section 2.2.7. 311 Web Portal Implementation.	RFP Document	
CQ-145	Are there any websites, microsites or web properties not located under the www.cityofchicago.org domain that should be considered in scope for this project?	No. However, the City desires to have the ability to add based on business needs.	RFP Document	
CQ-146	Is the City developing APIs beyond CHI TEXT, Facebook and Twitter that we should be anticipating?	The City is not developing additional APIs at present. However, additional APIs may be developed in the future.	RFP Document	
CQ-147	Has there been a content assessment or content strategy done on the existing 311 content?	The City conducts reviews of content on the existing 311 portal to ensure content and associated links are current.	RFP Document	
CQ-148	Have the City conducted a competitive analysis on other states' 311 experiences? Would you expect that to be included in this engagement as a way to establish a common ground with internal stakeholders?	The City has conducted a competitive analysis on other states' 311 experiences. However, the analysis will not be included in this engagement.	RFP Document	
CQ-149	Should vendors assume that we would develop content or content strategy and create style guides for the City's internal staff to publish content?	The City would expect to partner with the selected vendor to develop content or content strategy and create style guides for the City's internal staff to publish content.	RFP Document	
CQ-150	Will the types of customer transactions include commerce transactions such as purchasing CTA passes?	Examples listed are currently used in our existing CRM. However, each vendor can offer expanded options within their proposals for the City's consideration.	RFP Document	Exhibit 1 Functional and Technical Requirements - Documentation Management (2.20), pg. 59
CQ-151	Are there any specific Project Management or Governance methodologies in place that the selected agency would be required to adhere to or that would require specific training/certification?	It is required that the selected vendor utilizes the PMI standard methodologies, tools, and templates currently in place at the City.	RFP Document	4.2.4.2 Project Management, pg. 35
CQ-152	Is there an anticipated timeline for the phases in the 3-phase implementation plan? Is this RFP bid for the entire 3 phase approach and implementation or for the five years?	The City requests that Respondents provide a best practice recommendation regarding the project timeline and approach for this initiative within the 5 year timeframe.	RFP Document	2.2.1 Phased Implementation, pg. 12

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CQ-153	Are there existing branding and/or visual style guidelines in place that will need to be adhered to during design activities?	Yes. The City's digital design team will need to be engaged during the design activities.	RFP Document	
CQ-154	The RFP states "This strategy must break down the departmental silos that exist...". Does the City want the vendor to specifically call out the operational, educational and governance-related activities designed to connect internal constituents necessary to drive program adoption?	The City would welcome vendor recommendations and approaches to drive program adoption.	RFP Document	2.2.2.1 Strategic Planning, pg. 13
CQ-155	What is workflow group from functional perspective?	The group workflow is based on structures that vary from department to department. Examples include bureaus, divisions, subdivisions, etc. Access to workflows should be configurable based on a department's organization and preference.	Spec119440Exhibit1	3.00 Workflow, 3.20
CQ-156	Exhibit 1 states "The solution provides the ability for residents to create a user-defined map with updated service request content." What does it mean by user defined map?	The user should be able to receive updated service request content through mapping by GEO areas, polygon drawn layers, single and grouped address locations etc.	Spec119440Exhibit1	2.00 Resident Self-Service, 2.03
CQ-157	Exhibit 1 states "The solution provides the ability to conduct on-line transactions and reservations…". What type of transaction is this? Can you provide more details?	Examples listed are currently used in our existing CRM. However, each vendor can offer expanded options within their proposals for the City's consideration.	Spec119440Exhibit1	2.00 Resident Self-Service, 2.20
CQ-158	Exhibit 1 states "The solution provides the ability to audit a request based on user-defined criteria." What type of audit does this refer to? Can you please provide more information?	The system will provide a status and pertinent information based on a requester selecting related flex notes/questions, list of values, geo area selections etc.	Spec119440Exhibit1	1.00 Service Request Management, 1.55
CQ-159	Exhibit 1 refers to "the shortest distance daily route". What is shortest distance daily route for service requests?	In Exhibit 1 - Functional and Technical Requirements, Service Request Management, Routing & Escalation, Requirement 1.66 will be deleted.	Spec119440Exhibit1	1.00 Service Request Management, 1.66

City of Chicago
Clarifying Questions Template

Key

Question Input
No Input

Clarifying Questions

ID	Question	City Response	RFP Reference Document Name	Reference Document Section
CQ-160	The RFP requires submittal the most recent three years of audited financial statements. Our prepared financial statements for the past three years will total over 400 pages. Would it be acceptable to the City for us and our software provider to provide a link to all financial statements online or electronically rather than hard copy?	Reference to weblink is not acceptable, but one (1) complete set of financial statements on CD-ROM or flashdrive is acceptable.	RFP Document	4.2.8 Financial Statements
CQ-161	For Mobile Field Service Worker application what mobile device OS (Android, iOS, Windows, Blackberry etc.) needs to be supported and what form factors (Smart phone, tablet, mini tablet)?	Field service workers will use standard City approved devices based on the needs of the user departments.	RFP Document	
CQ-162	Please explain integration between social media and mobile? Do you expect user Facebook or Twitter comments to create a Service Request through the app?	The City requires the ability to utilize existing and future social media tools as channels used by residents to interact with the City. Interaction would include, but is not limited to, the ability to submit service requests via these channels.	RFP Document	
CQ-163	Explain requirement number 11.32 regarding warning banner being presented for a mobile user.	The solution should provide the City the ability to create banners for items they consider important, such as road closures, changes to City events, etc. and then have those banners automatically pushed to the web or mobile devices being used by City personnel or by residents.	RFP Document	Exhibit 1 Functional and Technical Requirements - Intrusion Detection, Alerts, and Reporting, pg 90
CQ-164	Please provide more clarity on 7.26 requirements about supporting Motorola device. Does the City only want to support Motorola devices for resident facing and Field force solution?	No. The mobile solution should be device agnostic and not limited to only Motorola devices.	RFP Document	Exhibit 1 Functional and Technical Requirements - Resident Facing Mobile Application, pg 77
CQ-165	What kind of MDM/MAM solution is in place to manage mobile device security and mobile applications?	The City is currently using Motorola's Mobility Services Platform for the CSR mobile devices.	RFP Document	
CQ-166		**END OF DOCUMENT**		