

RFP 2351 – QUESTIONS/ANSWERS

1. Appendix A, Section 1 and Section 2. Please provide the charts in Word or Excel format.
We will post Appendix A, Sections 1 and 2 in WORD Format.

2. Invitation to Bid (ITB), page 4 - “This form must be signed, in addition to the RFP response.” Please clarify where bidder is to include a signature separate from the ITB forms. **Change the signature requirements to read “Proposers are required to sign the following:**
 - **The first page of the RFP (Invitation to Bid Document)**
 - **The RFP Binding Signatures Page**
 - **The cover page of the Proposal**
 - **The Affidavit of Compliance – Living Wage Provision Document. This form needs to be notarized.**
 - **EBE Forms A & B, if proposer is utilizing a City Certified EBE firm. EBE Form B needs to be notarized.**
 - **The Cost Proposal Document, Appendix B should be signed and the name of the proposer should be added.**

Note: The signatures on the original copies of the proposal documents must be a manual signature. No facsimiles.

3. Is it required that each page of the Invitation to Bid (ITB) document be signed by proposer or only the final page? **Refer to answer for question 2 above.**

4. Is the signed ITB document to be included as the first document in the Technical Proposal?
No! Refer to Proposer’s Document Submission Checklist provided with addendum #2 for document submission sequence.

5. Please clarify if the forms Living Wage Affidavit and EBE A and B to be included as Attachments to bidder’s technical proposal? **Yes.**

6. If no proposal information is designated proprietary/confidential, is the form required?
Yes. It should be signed and submitted as an attachment to the Proposal even if nothing is designated as Confidential or Proprietary.

7. Please clarify that no response to insurance requirements must be submitted with bid.
Proposers are not required to submit the insurance documents with their proposal.

8. Attachment A, page 3, II Timetable - Please provide a date after which bidders can be assured no amendments or clarifications will be posted and final proposals can be prepared. Given how close the teleconference will be to the proposal due date, a definite closure date for amendments is essential for final proposal preparation. **The closure date of 2/18/2010 is still tentative. The last addendum, which is to provide written answers to the questions asked during the teleconference, to this RFP is scheduled to be posted by February 5, 2010. However, we will consider extending the RFP closing date if the extension does not interfere with the go live date of November 1st.**
9. Attachment A, page 14, Section E, 2 Software; page 18, Section I. This section requires a response that includes cost information. Elsewhere the proposer instructions clearly prohibit including cost information with the technical proposal. Please clarify the separation of the Cost. **All cost proposal documentation must be provided in a single, sealed, clearly marked sealed envelope. It is not to be included with the technical proposal. The required original copy, the thirteen (13) required copies and the CD-ROM of the cost proposal documentation should be contained in this sealed envelope along with any other supporting documentation requested elsewhere in the Scope or addendum #2.**
10. Page 19, Section J: Cost Proposal. The RFP states, all cost proposals should be submitted separately in a clearly marked enveloped marked "cost proposal". Please clarify what is to be considered the 'cost proposal' and included in the separate envelope. This appears to refer to Section J, Appendix B; but Section E. requires cost information to be included as does Section I, Appendix A. **Refer to the answer to question 9 above.**
11. In the technical proposal, is it acceptable to discuss the cost effectiveness, cost savings or relative costs of solution aspects as long as actual price/cost amount is not mentioned? **Yes.**
12. Should the same pricing chart be used for providing pricing for other phases? **Yes**
13. Please clarify if bidders can explain assumptions used for pricing other phases? **Yes**
14. Regarding the Appendix B form: Please clarify if bidder can bid Option I, Option II or both. **Different solutions can be submitted on separate Appendix B forms. If a proposer fills out both Options I and II, we would assume that they are proposing a solution involving both (partly hosted and partly non-hosted – an 'and' not an 'or'. Thus separate forms for different solutions are suggested.**
15. Please clarify if a signature is required for the Cost Proposal. **Yes. Refer to answer provided for Question 2.**

16. Page 22, Payment Expectations - "Vendors should be prepared to discuss their experience with and willingness to negotiate a contract based on this expectation." Please clarify if this is to be included in proposal, and if so, where. **The response to this requirement shall be identified in the table of contents and provided in a separate section of the proposal response. Refer to the Proposer's Document Submission Checklist provided with addendum #2 for details.**
17. Can you provide a list of firms who have downloaded RFP 2351 – CRM and Unified Call Center? **No! We do not have a means for accessing this information.**
18. Is there some specific requirement for starting implementation on 5/17, or can the City be flexible and start up to 90 days after signed contract? **The City wishes to start implementation as soon as possible after a contract is signed in an effort to have the Call Center operational by the last quarter of 2010.**
19. While the Oracle database is preferred, will packages running under Microsoft SQL Server also be equally considered? **Yes**
20. Can you provide the names of the companies and their contact information for those companies which responded to the earlier RFI for CRM?

Arlington Computer Products, John Gibbs, 737-6886
EDS, an HO Company, Craig Edland, 972-605-2609
Lagan Technologies, Inc., Tom Mazur, 312-291-4177
Oncontact Software, Courtney Kettleon, 262-375-5163
Oracle USA, Sheri Ross, 651-332-0455
Plus Consulting, LLC, Alyssa Francecone, 412-206-0160
WebQA, Inc., Jennifer Snyder, 630-985-1300 X213
Accela, Inc., Julian D. Munoz, 925-659-3247
AmberLeaf Partners, Inc., John Kariotis, 312-961-5406
Carahsoft Technology Corporation, Tyler Holly, 703-871-8658
Government Outreach, Tim Schmidt, 925-292-2768
Hansen Information Technologies, Steven Kains, 856-216-1237
Intelligov Software, Inc., Clark French, 410-953-0311
Motorola Inc., Kenny Leverett, 1-770-505-1208
RightNow Technologies, Inc., Dan Hartman, 630-874-5877
Wipfli LLP & Microsoft, Terry Kerscher, 431-9300

21. Which City department (e.g. ITMD, City Clerk, DPW) will be the primary sponsor for this project and provide oversight and direction? **A Call Center team with all departments will be involved in the process – with the primary sponsor being the Department of Administration until a Call Center Director is recruited.**
22. Is the City considering issuing another RFP for project management services for this project, or is the selected vendor responsible for providing all project management? **Another RFP will not be issued.**

23. Based on the RFI response and the City's requirements analysis for this RFP, does the City believe that a COTS solution is currently available that meets all the stated requirements, or does the City believe some customization will be required? **COTS is the preferred solution.**
24. Does the amount included in the 2010 capital budget for this project include any infrastructure costs, such as phone systems or facilities, or is the full amount appropriated intended for implementation services? **There is a minimal amount set aside for facilities.**
25. In our research, a couple of the vendors informed us that sometime last year, they responded to an RFI from the City of Milwaukee for a CRM and UCC solution. Affinity would like to inquire if information from the RFI is available through the Freedom of Information Act. If the RFI and responses are available, we would appreciate your guidance on how to go about requesting them. **Yes. Please send an email to Michael Drzewiecki at mdrzew@milwaukee.gov requesting this information and we will get back to you on the cost for making the copies. Also refer to the answer to question #20 for a listing of the firms that responded to the RFI.**
26. Is this contract Firm Fixed Price or T&M? **Fixed Price Preferred**
27. What is the budget? **\$950,000.00.**
28. What is the estimated user count? **The City wishes the vendor to quote us the total start up and ongoing costs for both the functionality detailed in this RFP (phase 1) and for when all non-911 service requests for all City departments flow through the system (all phases completed). We have added an addendum to the cost sheet to make this clear. The City will pursue additional funding via a number of channels to meet any shortfall. Since license approaches vary from vendor to vendor should describe the options and give the best pricing model for the following:**
- a. **Call Center Agents (37 at peak times)**
 - b. **Call Center Managers/Directors (using the system as well as reporting) – 20 concurrent users**
 - c. **NSS users by function (assuming NSS is the only system we are replacing) and other work order users. 75-300 depending on field usage – lets also ask DNS about their user base.**
 - d. **At full implementation we estimate virtually all City workers will be utilizing this system to report and fulfill service requests – upwards of 4,000 users.**
29. Will you consider a pure cloud based solution? **Yes**
30. Intro calls for a consolidation of four call centers into a Unified Call Center. Do you desire the different call center user groups to have any independence and control on how their particular user groups access the system, or should all users across all groups use the same interface? **Call takers will not maintain any former user group identity. We desire one common interface for all call takers.**

31. Item VI Vendor Proposal, Section B: Company Information – Should we include company information for all team members or just the prime? **The information on the team members should be provided under Item VI, Section C: Project Team and Qualifications.**
32. The RFP and RFI Q&A specify different delivery methods for the proposal. Can you please clarify how you want to receive the RFP response? **All of the proposal copies must be submitted to:**

**City of Milwaukee
Department of Administration
Business Operations Division
Procurement Services Section
200 E Wells Street, Room 601
Milwaukee, WI 53202
Attn: Michael Drzewiecki**

Refer to Section II, Selection Process and Timetable in the Scope for additional details.

33. Who is currently providing your call center services? Are those call centers owned/operated by the city or do you outsource? If outsourced, to whom/how long? If outsourced, is your partner(s) on the list to respond? **City of Milwaukee owned and operated**
34. Appendix A – General System Architecture: “The proposed application must be a COTS package with no or minimal customization.” What do you consider minimal? **The least possible amount to fulfill the RFP requirements**
35. From the requirements matrix:
- a. *4. Ability to provide wizards and templates for document creation.*
Can you please clarify and provide a few simple use case examples? **Common reports (performance matrix reports) should be able to be created once with a wizard and reused after using the template.**
 - b. *54. Provide ability to forecast and perform what-if scenarios based on historical, current and projected data.*
Can you please clarify and provide a few simple use case examples? **EX: How many water main breaks can we expect in 2011? How long will it take to fill a pot hole if we add an additional crew? How much of a backlog will occur if we eliminate a street light crew over what period of time? What will the maximum time to answer a call go to with various amounts of staffing for call center operators?**

Functional:

- c. 12. *Provide maintenance of a list of translators, within or without the City, and the languages they translate.*
Do you have a data source(s) for this? **No**
- d. 85. *Geographic and functional districting by section.*
Can you please explain? **Different department and divisions have different districts for example, construction inspector districts, forestry, street lighting, paving, boiler inspectors, etc. Work orders that are entered into the system should 1)determine what district is appropriate by type and 2) assign the appropriate district based on that geography by the location of the call.**
- e. 106. *System does not allow user to select a recipient with ownership type of "Mortgagee in Foreclosure" in recording system.*
Can you clarify the use case "select"? **The term "select" means that when creating a violation order (or other violation record that is mailed to recipients), the user can pick recipients from either the Department of Neighborhood recording system or the Assessor's Remast ownership information.**
- f. 121. *System provides an easy way to duplicate services for a range of addresses or multiple services per address.*
Can you please clarify and provide a simple use case example? **A range of street addresses have a street light outage or a single address needs board up permit, water shut off and garbage pickup.**
- g. 339. *System automatically creates appointments for periodic inspections and puts on inspectors' routesheets.*
Are there specific time frames when the appointments should be created and specific users to assign? **Yes. Inspectors are assigned to districts (most geographically-based districts) and we currently block off time ranges in those districts which are generally available for appointments. Also, the system must check to make sure that the inspector assigned to a district doesn't already have a specific time blocked off within his/her own appointment calendar for other things within those time frames.**
- h. 503. *System provides online scheduling of RRI and VBR appointments by property owners.*
So this needs to be a public-facing form, correct? **Yes.**
- i. 576. *The annual inspections of these fire prevention permit items are concomitant with the regular fire inspections.* How do they need to be concomitant? **The inspections need to be performed at the same time, so they need to be scheduled together.**

36. The CRM system will be directly tied to the existing AIM process – can the city further define the AIM process and the data required for this process? **The accountability in Management Program (AIM) is a method for the Mayor to manage city government. AIM is modeled on the Baltimore CitiStat program. At regularly scheduled meetings, individual department heads meet with the Mayor, the Budget Director, Human Resources Director, and other key staff to review the department’s performance in a systematic way. AIM analysts review a department’s performance data and establish a meeting agenda. All parties then discuss the performance data and look for successes and strategize ways to improve service delivery and performance metrics. The Mayor then issues directives to the departments based on these meetings and follow-up memos are issued to the departments that set the stage for subsequent meetings.**

Because the city has a largely decentralized IT environment, performance data is currently collected using a variety of legacy IT systems. This data is often difficult to analyze depending on the data format and the report writing capabilities of these legacy systems. Additionally, many of these legacy systems are inadequate at tracking a service request from call intake through the various departmental steps taken to resolve a call. AS a result, it is difficult for AIM analysts or departmental managers to identify the location of the process bottlenecks that lead to service delays, or even agree when a service request is “resolved.” The AIM process has been hampered by these legacy systems.

A central goal of the CRM project is to make it simpler to collect and analyze data relating to the types and volumes of citizen service requests, the geographical dispersion of these requests, and departmental response times. The City also seeks a CRM solution that can seamlessly serve as a backend work-order management system so that AIM analysts can better identify service delivery problems and hold the appropriate staff accountable for improvement.

AIM analysts would therefore desire a CRM solution with sophisticated query and report writing capabilities to:

- Easily run reports that show call volume by type of service request.**
- Departmental response time to service requests through the various steps needed to resolve a call (from initial inspection to work crew assignment, to completion of work)**
- Integration with the City’s GIS infrastructure to easily create maps that show the location of calls for service for a defined time period**
- Easily create reports that compare metrics on a quarter-to-quarter basis or current year-to-date versus prior year-to-date basis.**
- Identify response times and work volume by work crew or field staff.**

The City also intends to implement Service Level Agreements that clarify response time goals, and run performance reports that compare actual performance to these goals.

37. Requirement #21 in General system Architecture states - Provide a citizen interface on the web for self reporting. Is the city looking for a web-portal that provides the ability for citizens to submit and review service requests online? **Yes**
38. Would the city entertain granting an extension for the RFP due date? **Refer to the answers given for questions #8, #106, and #111.**
39. Requirement #2 in General System Architecture states – Ability to provide non-proprietary extensibility using standard, commonly available web-based or Microsoft-based tools and languages. Will the city entertain applications that use proprietary tool sets? **They will be considered, but preference will be given to the preferred architecture which was detailed.**
40. Requirement #65 in Reports/Data Analytics appears to be cut off. Can the city provide the entire requirement? **Provide an ad-hoc reporting platform with pre-defined filtering criteria to enable the end-user to generate reports as needed. For example, overdue work orders, current open work orders, closed work orders, etc.**
41. Will you consider an "out of state" vendor for this award? **Yes**
42. What's the current "full-time" / "part-time" headcount on this project? **Currently, a dozen managers work on this project on a part-time basis.**
43. What's was annual contract amount for year 2009. **The department did not exist in 2009.**
44. In addition to the work order systems currently in use, are there any other system that are currently being used by the four call centers that will remain in place after the CRM implementation? **Water Works uses the Enquesta system. Permit Center is a .NET/SQL Server application developed in-house. GovQA will remain until a future phase.**
45. Is the deadline for Phase I (mentioned on page 10) the same go live date of November 1, 2010? **Yes.** Is there an anticipated date for the soft launch (mentioned on page 16) **to be determined with vendor.**
46. Is Imaging or integration with an imaging solution (Oracle IPM) a requirement of the system? **The bidder is to specify their proposals imaging capabilities in RFP Section E #8.**
47. The RFP states that you do not anticipate integration with existing legacy systems, however several systems are listed in the requirements section (e.g., Permitting, Assessor, etc.) – do you have a list of the anticipated integration points? **No integration with existing legacy call center systems is anticipated, but there will be integration with other types of system such as property valuation, addresses databases and GIS for example.**
48. During the warranty period, is it a requirement that the support technician be on-site? **No**
49. Can you further describe the requirement, “Provide security access for controlling processing priority”? **Processing priorities would typically be determined by processing rules in the CRM. Only authorized users should be able to adjust these priorities.**

50. If the ability to distribute a report by fax may be done through a third party fax-to-email service, should that cost be included? **Yes**
51. The requirement that the system provide integration GovQA says that Phase II will eliminate this interface, what are the dates and scope for Phase II? **Dependent on Phase I completion**
52. Can you clarify the requirement in 83.a? **What is unclear?**
53. I'd like to participate on the City of Milwaukee Bid # CIMIL-0000002351 pre-proposal conference call that's scheduled for February 1, 2010. Please provide me with a dial-in number. **The teleconference call-in numbers will be provided to those proposers responding to addendum #2.**
54. In order to provide a comprehensive and thorough response, would the City entertain granting an extension for the RFP due date? **Refer to the answers provided for questions #8, #106, and #111.**
55. The CRM system will be directly tied to the existing AIM process – can the City further define the AIM process and the data required for this process? **Please refer to the answer provided for question #36.**
56. Requirement #21 in General system Architecture states - Provide a citizen interface on the web for self reporting. Is the City looking for a web-portal that provides the ability for citizens to submit and review service requests online? **Yes**
57. Requirement #2 in General System Architecture states – Ability to provide non-proprietary extensibility using standard, commonly available web-based or Microsoft-based tools and languages. Will the City entertain applications that use proprietary tool sets? **They will be considered, but preference will be given to the detailed preferred product set.**
58. The City states that it does not anticipate that the CRM system will be integrated with existing legacy systems. However, there are references in the RFP that indicate integration may be required. Please clarify whether the CRM system will need to integrate to: **No integration with existing legacy call center systems is anticipated, but there will be integration with other types of system such as property valuation, addresses databases and GIS for example.**
- a. ESRI products **Yes – GIS interface**
 - b. ConTrack (GovQA) **Interface in phase 1 removed in future phase**

59. Please confirm the City's preference for the vendor to provide Train the Trainer services? **The bidder is to specify the types and amounts of training they are proposing in RFP Section E #11. Expected numbers of users of the system are detailed in the answer to question #28.**
60. Please specify any conversions from existing applications and what data entities (i.e., service requests, knowledge base/FAQs, etc.,) need to be converted? **Neighborhood Service NSS data will need to be converted as well as historical data from the DPW Call Center Oracle database.**
61. Regarding System Warranty and Maintenance, is this for the COTS maintenance or the maintenance of the configurations of the COTS, or both? **Both**
62. Can the vendor assume that the City will be responsible to combine the separate Avaya installations at the four difference call centers into a single Avaya virtual call center? **The plan is to combine the call center functions at primarily one site with the exception of one virtual call center intake at the City Hall.**
63. Will all project work be required to be performed on-site, i.e., at the City's facility in Milwaukee, WI? **No**
64. Can some of the project work be performed by the vendor's staff who are located outside of the United States? **Yes? As long as the Living Wage requirements are adhered to.**
65. For the purpose of pricing the Hosting option, please provide the duration, e.g., 1 year, 3 years, 5 years, etc., of the Hosting period the City desires to contract as part of the award. **For the purposes of this RFP response the vendor should assume a 5 year period. This will be negotiable.**
66. Should Single sign on based on active directory be included in scope? **No**
67. What is the implementation time-frame for the city wide active directory? Can we assume this will be in place before the CRM project gets into User Acceptance phase (2 months before go-live)? **No, single sign on is likely to occur after implementation.**
68. What are the requirements around web based service request entry? **Citizen self report service requests over the web. Look at www.milwaukee.gov/eservices and www.milwaukee.gov/mpw/requests/services.htm for examples.**
69. Does the web site need to have some authentication mechanism for users to enter service request? **This depends on the request type.**

70. Who are the intended users of the web based service request entry? Citizens or City workers? **Citizens and City workers.**
71. Does the city currently have a web based service request system? **Yes – there are currently two request systems (E*Services in the main city request system and another exists specific for DPW)**
72. Does the City currently have a designated disaster recovery site? **No**
73. Are there any other alternative means of receiving a service request besides call, and web entry? Like emails? **Not at this time.**
74. Appendix A: General System Architecture, Point a. There is a mention of seamless integration. What type of integration is required/preferred? **Web Services will be required as the key integration component across and between the City's disparate application systems and the proposed CRM solution.** Is it possible to list the legacy systems that the CRM system will integrate to and the supported technology? **Reference the 'System Integration' area of the RFP's 'General Requirements' #85 thru #92.** Is the integration limited to work orders/service request? **No**
75. Can these systems pass statuses back to the CRM system? If yes, what is the mechanism through which these systems can pass information? **Currently, varies by application.**
76. Appendix A, point 21. What are the requirements around citizen self reporting? Will the citizens have a login to check the status of work orders/service requests? **Currently depends on the service type and what application the user used to enter the request (E*Services or DPW application)**
77. Appendix A, point 22. Should multiple language support be part of the implementation proposal? **The City is interested in how/if vendors support multiple languages.**
78. Appendix A, Point 70, is it possible to provide more information on NSS and the type of data to be converted. An example record will help. **The Neighborhood Services System (NSS) contains information and processes on almost all activities performed by the Department of Neighborhood Services, including property recording, requests for service, violations, permits, fire and other periodic inspections, facades, Residential Rental Inspection (RRI) Program, Vacant Building Registration (VBR), Fire Prevention Permit (FPP) Program, Neighborhood Improvement Program (NIP), pre-foreclosure, inspector routesheets, employee mileage, tax roll and other charges, cashiering, etc. NSS is written in MAGIC and stored in PERVASIVE. There are Millions of NSS records.**
79. Appendix A, Point 90. Should mobile device integration be part of the scope? **Yes**

80. What type of mobile devices is currently in use? **Various.** Is it intended to continue with these devices? **Yes. If vendors require specific devices or configurations this should be noted in the RFP response.**
81. Will additional devices be procured to support the implementation? Is there a preferred device? **At some point in time additional devices may be purchased for field personnel. We are open to whichever of these would best meet our needs for connectivity and portability: laptops/tablets/UMPC's/Netbooks.**
82. Appendix A, Point 92. Besides the ability to attach photos, what are the process requirements with the mobile device? **The mobile devices must have the ability to update DNS records remotely in real-time and to be able to operate in connected and non-connected modes. If non-connected, the device stores records that are created and then uploads them when real-time connection resumes.**
83. Appendixes A, Point 93, are GPS devices currently in use? **No.** Are they interlaced with spatial data? **N/A**
84. Appendix A, Point 100, assuming this is related to NSS, please confirm. **Yes.**
85. Also, does the new CRM system generate bills? How is the collections done? Should the new system provide an end to end invoicing, payment, collections function? **Yes. It needs to generate bills for DNS. If bills remain unpaid, the unpaid charges are put on the taxroll. The system automatically generates electronic reports of unpaid charges that can be sent to the Assessor's Office to place on the taxroll. Yes, the new system should provide end to end invoicing, payment and provide electronic reports of unpaid charges. Please read the requirements pertaining to DNS for more details.**
86. If these functions are to be included, then how are the payments sent? Should any bank/credit card interfaces be included? **DNS accepts checks, cash, Visa and MasterCard.**
87. Who are the current credit card processors, clearing houses? **U S Bank.**
88. Requirement 263, Permits. Our understanding is that the current SQL server based permitting system will stay and the new CRM system should integrate with the permitting system. Or is the intent to replace the permitting system and meet the requirements outlined in this section. **This references the needs for permit data to/from NSS which is the immediate need. Long term, the City wishes to have a single call intake and work order tracking system.**

We assume it is Milwaukee's intention to have all of the Use Cases listed in the Work Processes section of Appendix A, Section 2 as part of Phase 1 of this project. Can the City please confirm that assumption? **Yes.**

If so can the city provide details on the number and type of city personnel (e.g. SME's, technical developers, database administrators, etc.) that will be available for the implementation of this environment? **There are various city people and positions that will be available on a part-time basis, including administrators, managers and functional experts. Proposers should include an estimate of the number and skills of the necessary personnel to implement their solution successfully.**

89. Appendix A, 291. Should the requirements under Periodics be included in the CRM system? **Yes**
90. Are there any other conversion requirements besides bringing over property data from NSS? **Historical data from an Oracle table of DPW calls would also be included.**
91. Please provide any master data (citizen records, vendors, contractors etc.) that is held in the systems interfacing with the new CRM system. Is it possible to list these entities and any migration requirement to the new CRM system? **The city would be open to additional consolidation efforts as time and budget permits.**
92. In the Appendices on requirement, can you please specify which requirement is to be filled by the new CRM system and which are description of current processes/system that the CRM system will interface with? **All are to be included in the CRM system**
93. Is Screen pop functionality required? **Alternatives would be considered**
94. Is Computer telephony integration a requirement? **Not at this time, as stated the City intends to use the 286-CITY phone number and not implement 311 at this time.**
95. Do the call center agents typically handle calls from different channels (web, calls, emails etc.)? Is interaction blending, where the inbound and outbound work queues are blended and managed a requirement? **Currently it is envisioned that call center agents will take phone calls only. Web request intakes will be part of the CRM and require no call center agent interaction. Vendors could/should supply additional information on other channels that their product supports.**

96. Do the call center agents make outbound calls? Should the calls be systemically driven? (i.e. the system provides the next call to be made to a customer? If yes, what are the rules around which the outbound calls have to be made? **It is not anticipated that call center agents will make outbound calls with the exception of possibility citizen satisfaction surveys.**
97. Will the calls be routed through the AVAYA system in the future? Or should the new CRM system route the calls? **In the case where a call center agent is required to transfer a call, vendor should provide a solution which is supported by their product.**
98. Is call scripting (where the agent is guided through a step by step script including language as the call is handled) a requirement? **Yes**
99. What are the expectations on Training development and training delivery to call center agents? Should the responder provide services for end user training delivery? If yes, how many participants can be expected per class? **The proposer is to specify the types and amounts of training they are proposing in RFP Section E #11. Expected numbers of users of the system are detailed in the answer to question #28.**
100. What is the total number of trainees? **Refer to the answer to question #28.**
101. Is a phased implementation/rollout acceptable? **Yes, proposer may detail this in their implementation plan if this is part of their solution.**
102. Are there any restrictions around using offshore delivery resources if the responder deems appropriate? **Minimum wage provisions of the Living Wage Affidavit must be adhered to regardless of location of workers.**
103. Will remote access be provided to the implementation team? **Yes**
104. If there are integration requirements, what systems require integration and what type of interface is required to that system (e.g. one way, bi-directional, comprehensive middleware, batch, etc.)? If there are no true integration requirements, then is the assumption that the historical information in the legacy systems is not part of the new solution? **Historical information will be batch loaded into the system. Interfaces will also be required for GIS data, address, property information, etc.**

105. We assume it is Milwaukee's intention to have all of the Use Cases listed in the Work Processes section of Appendix A, Section 2 as part of Phase1 of this project. Can the City please confirm that assumption? If so, can the city provide details on the number and type of city personnel (e.g.; SMEs, technical developers, database administrators, etc.) that will be available for the implementation of this environment? Can the City provide information what personnel would be available for a detailed testing phase? **Refer to answer provide for question #88.** Has the city considered at least a month long testing phase as part of the November 1 implementation date? If so, how long is the City expecting testing to take? **Proposers should include an estimate of the length of time testing will take based on the complexity of their proposed solution. Please include an appropriate amount of time in your project schedule as the City wishes to fully test the applications functionality before implementation.**
106. The project overview and requirements listed in the RFP seem to indicate that the City is planning to implement a consolidated call center application and replacement of existing back-office solutions for work order management and permitting. Given the expected delivery timeframe of 5 months – and the risks that stem from such a tight timeline – will the City consider a multi-phase approach to the implementation in order to achieve the best chance for a successful project? **Proposers should suggest a timeline/approach to implement their product successfully, as requested in the RFP**
107. Page five of the RFP states, “Phase I will include service and information requests and other business activity that currently flow through the Parking Information Desk, DPW Call Center and Water Works.” On page 10, the RFP states, “a Unified Call Center that will take all public calls for information about City services and programs and calls for services that currently are handled by the DPW Call Center, the Parking Information Desk, the Department of Neighborhood Services and Water Works (only infrastructure maintenance).” **Clarification: Parking, current DPW call center, Neighborhood Services, and Water Works (non-billing) are included in this project.**
108. Department of Neighborhood Services is listed in one section but not the other. Can the City confirm that the Department of Neighborhood Services call center is part of phase 1 of this project? **Yes. DNS is in phase 1**
109. It appears that the city is seeking a single application for front-end constituent relationship management and back office work order management. Please elaborate on why the city thinks it needs a single application to meet these two distinct and separate functional areas. Is the City amenable to applications from two or more partners who can present a best of breed solution for those distinct functional areas (CRM and Work Order)? **Yes.** Or does the city prefer a single application vendor to handle all of these requirements? **No. The City is looking for the best possible solution.**

110. In the City's published annual budget, it states that there is \$950,000 dedicated to the Unified Call Center project. Can the City please confirm that this is the available funding for Phase 1? Is additional funding expected for follow on phases? **\$950,000 is the funding that has been budgeted for the CRM technology. It may also include hardware, if the chosen solution physically resides at the City. This funding was based on the City's Request for Information. This funding is to provide a core CRM system to handle DPW, Parking, Water Works, and DNS service requests/work orders as well as city-wide knowledge database.**

The Common Council may authorize additional funding for implementation of the service requests for other departments such as Police non-emergency, health department, etc. in future years. However, proposers should not assume additional funds will be allocated.

Additional funding has been included in the city's operating budget for call center staff.

111. Can the City explain what is driving a November 1 Go Live date? **The City wishes to have the Call Center operational by the last quarter of 2010.** Can the city clarify what they are expecting by November 1 and what is expected in follow-on phases (if any)? **All requirements are necessary for a target date of November 1. Additional departmental functions and workflows will be added to the CRM in future phases.** In our experience, a project with this level business process change and this short a timeline has a low chance of success. Is the City open to extending the length of this project? If so, how long? **Refer to the answers provide to question #8, #106, and #111.**
112. In Appendix A, Section 1, Functional Requirements, Citizen Management Functions, #13, the RFP states, "Provide users with the ability to link service records if they are inter-related, which will allow access to each profile from the other." We assume 'service records' is equivalent to a unique set of service requests tied to a specific customer. Please confirm our assumption is correct? **No. The requirement references the ability to link records. For example, a pot hole repair request may be called in or logged as a service request from multiple individuals. The records should be linked to each other – so that they are not all counted as separate pot holes, require multiple actions to update the status or potentially generate additional unnecessary work orders for a single incident.**

113. Appendix A, Section 2, #734 states, “System tracks the time it takes from application date to project close out and creates a report disclosing the breakdown of time for each event (status) during the application process. This report identifies which items and tasks contributed to the [...rest of sentence is missing].” This statement appears to be incomplete. Is there more to this requirement?
Requirement should read: System tracks the time it takes from application date to project close out and creates a report disclosing the breakdown of time for each event (status) during the application process. This report identifies which items and tasks contributed to the overall length of the project. The report should make comparisons between housing agencies, programs, inspectors, application review, etc.
114. Because some of the answers to the questions above have a direct impact on our approach (and the proximity of the answers to the proposal due date) will the city grant a four week extension to the proposal due date? **Refer to the answers provided for question #8, #106, and #111.**
115. What specific non-software support is being requested? **If the vendor is responding with a hardware configuration, warranties or support for the hardware should be included. Also, non-software support might include configuration, project management, training, etc.**
116. The requirements contain a significant volume of requirements supporting case management and workflow. However, the requirements to manage call center productivity and quality seem light, if there at all. Is this by design? Please explain.
Telephony system (Avaya) will provide some of this and we would expect to use the reporting functionality in the CRM for others.
117. Has the City already evaluated CRM software solutions based on the requirements in the RFP? If so, what were the results of this evaluation? **No. RFI in the summer of 2009 provided the City with details necessary to put together this RFP– evaluation was not conducted on the responses.**
118. Has the City looked at other unified call centers and CRM systems at other governmental units? If so, what were the results of these reviews? **Yes. In preparation for the project City staff has seen the City of Chicago 311 Center and WE Energies call center.**
119. Has a budget been approved for all the requirements in the RFP? **The budget was approved for 2010 by the Mayor and the Common Council**

120. Page 17 of Attachment A Scope of Services states:
- ii. Building Permit Inspections: How has the vendor's system been used to manage the work flow of building permit inspections? Has the system been used by contractors to schedule timely inspections? How has the system been used to track other elements of the permitting process? What were the major obstacles to use the vendor system for this activity? How were these obstacles overcome? **Exactly. These are the questions which we would like the proposer to provide answers to. There does not seem to be a question from the proposer here – just a statement saying these are the questions which are being asked.**
121. Will the City be issuing a separate RFP to replace the existing DCD-Development Center's system? **This is not included in the Phase 1 project scope.**
122. Will this CRM System eventually replace the existing DCD-Development Center's system? **To be determined at a later date.**
123. Do you have laptops or tablet pc's in use today for field inspectors/code enforcement officers? **DNS currently has 26 laptops/tablets deployed in the field.**
124. What is the estimated number of inspectors that require a Mobile solution? **DNS has 142 inspectors that would require a mobile solution.**
125. Does the City have a preference for .NET or Java-based solutions? **No**
126. The Mayor's 2010 budget under Capital Improvements lists: Unified Call Center
 CRM 9990 R999 New Borrowing \$950,000 Does this line item represent the entire budget for this project in 2010 or will other departments contribute based on their individual requirements? Does this line item include operational expenditures or capital expenditures only? **The \$950,000 represents capital expenditures only as described above. Other departments are not expected to contribute based on their individual requirements, but proposers should highlight areas in their proposal that present cost risk. Additional funds in the 2010 budget for one quarter of the call center operations are listed in the 2010 Adopted Budget under "Unified Call Center."**
127. Based on the 448 items listed in the Functional Requirements and the Specific Work Processes, automation, real-time integration, outbound communication, reporting, invoicing, payment, and collection processes have been identified. Are you looking for the vendor to implement all items listed under "Functional Requirements" and "Specific Work Processes" or would you like the vendor recommend a solution that will meet the \$950,000 in the mayor's budget? **All requirements are necessary.**
128. Of the "Functional Requirements" and the "Specific Work Processes" listed, what are the minimum required integration points to provide an operation call center day one? **All requirements are necessary at the full implementation date, November 1, 2010.**

129. In line item 899, real-time access to “Outside City Systems”, are required. Does current Call Center staff have access to each required application or will integration be required? **Integration will be required.**
130. Will the combined call center be in one location? **The plan is to combine the call center functions at primarily one site with the exception of one virtual call center intake at the City Hall.**
131. If multiple locations, could you please describe network connectivity between the locations including LAN, WAN and PSTN connections? **LAN**
132. Will Call Center be open for business 24x7x365? If not, what will the general hours be? **24x7x365**
133. Will each group require a tiered escalation process? If so, how many tiers will be required in each of the four groups? **Escalation will be defined for various service types, not for the “four groups” whose call centers are being combined via this project. The escalation for each service category may be zero, one, two, or a higher number of escalations involving different conditions and elapsed times for each. We need the escalation features to be very flexible.**
134. Will the database used by the integrated call center CRM require “fail-over”? **The bidder needs to bid a configuration which will provide for the desired 24x7x365 availability.**

REF: QUESTIONS-ANSWERS RFP 2351