



**BOARD OF CONTRACT AND SUPPLY  
CITY OF PROVIDENCE, RHODE ISLAND**

**REQUEST FOR INFORMATION**

Item Description: RFI for Constituent Services Software with 311 Functionality

Date to be opened: Monday, May 8, 2023

Issuing Department: Information Technology

**QUESTIONS**

- Please direct questions relative to the submission process, how to fill out forms, and how to submit a response to the Purchasing Department.
- Email: [purchasing@providenceri.gov](mailto:purchasing@providenceri.gov) - Please use the subject line "RFI Question"
  
- Please direct questions relative to the specifications outlined to the issuing department's subject matter expert:  
To: Bonnie Howland, Application Project Manager  
Email: [bhowland@providenceri.gov](mailto:bhowland@providenceri.gov) - Please use the subject line "RFI Question"

**Pre-bid Conference**

There will be no pre-bid conference for this solicitation.



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**INSTRUCTIONS FOR SUBMISSION**

RFI submissions will be considered bids, offered by bidders, for the purpose of these instructions.

Bids may be submitted up to **2:15 P.M.** on the above meeting date at the **Department of the City Clerk, Room 311, City Hall, 25 Dorrance Street, Providence.** At 2:15 P.M. all bids will be publicly opened and read at the Board of Contract Meeting in Room 305, on the 3<sup>rd</sup> floor of City Hall.

- Bidders must submit **2 copies** of their bid in sealed envelopes or packages labeled with the captioned **Item Description** and the **City Department to which the RFP and bid are related and must include the company name and address on the envelope as well.** (On page 1).
- If required by the Department, please keep the original bid bond and check in only one of the envelopes.
- Communications to the Board of Contract and Supply that are not competitive sealed bids (i.e. product information/samples) should have “**NOT A BID**” written on the envelope or wrapper.
- Only use form versions and templates included in this RFI. If you have an old version of a form do not recycle it for use in this bid.
- The bid envelope and information relative to the bid must be addressed to:

**Board of Contract and Supply  
Department of the City Clerk – City Hall, Room 311  
25 Dorrance Street  
Providence, RI 02903**

**\*\*PLEASE NOTE: This bid may include details regarding information that you will need to provide (such as proof of licenses) to the issuing department before the formalization of an award.**

*This information is NOT requested to be provided in your initial bid by design.*

**All bids submitted to the City Clerk become public record. Failure to follow instructions could result in information considered private being posted to the city’s Open Meetings Portal and made available as a public record. The City has made a conscious effort to avoid the posting of sensitive information on the City’s Open Meetings Portal, by requesting that such sensitive information be submitted to the issuing department only at their request.**



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**Certificate Regarding Public Records**

Upon behalf of \_\_\_\_\_ (Firm or Individual Bidding),  
I, \_\_\_\_\_ (Name of Person Making Certification),  
being its \_\_\_\_\_ (Title or "Self"), hereby certify an  
understanding that:

1. All bids submitted in response to Requests for Proposals (RFP's), Requests for Information (RFI's) and Requests for Qualification (RFQ's), documents contained within, and the details outlined on those documents become public record upon receipt by the City Clerk's office and opening at the corresponding Board of Contract and Supply (BOCS) meeting.
2. The Purchasing Department and the issuing department for this RFP/RFI/RFQ have made a conscious effort to request that sensitive/personal information be submitted directly to the issuing department and only at request if verification of specific details is critical the evaluation of a vendor's bid.
3. The requested supplemental information may be crucial to evaluating bids. Failure to provide such details may result in disqualification, or an inability to appropriately evaluate bids.
4. If sensitive information that has not been requested is enclosed or if a bidder opts to enclose the defined supplemental information prior to the issuing department's request in the bidding packet submitted to the City Clerk, the City of Providence has no obligation to redact those details and bears no liability associated with the information becoming public record.
5. The City of Providence observes a public and transparent bidding process. Information required in the bidding packet may not be submitted directly to the issuing department at the discretion of the bidder in order to protect other information, such as pricing terms, from becoming public. Bidders who make such an attempt will be disqualified.

I affirm by signing below that I am duly authorized on behalf of Bidder, on  
this \_\_\_\_\_ day of \_\_\_\_\_ 20\_\_\_\_\_.

\_\_\_\_\_  
Signature of Representation

\_\_\_\_\_  
Printed Name



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## **Introduction**

The City of Providence is the capital of Rhode Island and has a population of approximately 183,000 residents. Services are delivered by more than 5,000 employees across City Departments, Providence Schools, and the Providence Water Supply Board. The Smiley Administration aims to be the “best run City in America” and critical to achieving this goal is having a modern technology platform to facilitate the reporting and tracking of issues that may require City services in response. The City invites sealed responses to this Request for Information (RFI) for a Constituent Relationship Management (CRM) System that includes modern 311 functionality. The 311 system is envisioned to be a non-emergency phone line and online platform that will be used by the City and the community to report and resolve issues related to public services and concerns. The system should be designed to provide residents with a modern, quick and easy way to report issues and receive updates on the status of their request. Once an issue is reported, the appropriate city departments or agencies are notified and work to resolve the reported issue.

## **Existing Conditions and Technology**

The Providence Information Technology Department maintains and is trained on the use of Microsoft technologies, including Windows Server, SQL Server, Active Directory, IIS, and desktop Windows and Office platforms. All versions should be the latest available or one version prior. The system must be able to be implemented and integrated within a Windows environment. City employees currently use Microsoft 365.

The City currently utilizes a web-based service request management system as the main constituent request intake. Constituents submit requests via a web portal, a mobile device, by calling phone, or walking-into the Mayor’s Center for City Services (MCCS) This software is mainly used by the Mayor’s Center for City Services department (MCCS), with other city departments having limited access to the system. The MCCS department is responsible for all intake and follow-up constituent requests as well as all incoming mail and correspondence. We are looking to replace the current outdated software with a complete Constituent Relationship Management system that can manage both web-based and paper-based requests. The current 311 system receives and processes an average of 15,500 cases per year for a wide range of issues ranging from sidewalk repairs, potholes, and graffiti issues to housing code violations and abandoned property.

The City employs advanced GIS technology to support various functions across different departments. GIS analysts utilize ESRI software to develop and manage multiple geodatabases that store spatial information. However, the current CRM system does not allow for efficient and comprehensive review of service-related data at the departmental level. The proposed system should address this issue by enabling faster and broader access to data analysis.



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City Departments utilize various systems for workflow management. The scope of this RFI does not include the management of tasks within departments but instead, will need to integrate with these systems to report and then close out tickets.

**Request for Information**

Providence offers a range of services to our residents, such as waste management, public safety, parks and recreation, pothole and sidewalk repairs and more. To enhance our communication and engagement with our residents, we are looking for a constituent relationship management (CRM) system that can help us manage, improve and maintain our interactions with our residents. Additionally, we are seeking a 311 system that will enable us to manage and track service requests from our residents more efficiently and effectively, but also enable better communication across city departments that engage within the system.

Our goal is to find a CRM system that can help us achieve our vision of being the best run city in America. To do this, we need a system that can capture and manage various types of communication across multiple channels, such as email, telephone, social media, smart devices, website, live chat or web app. We also need a system that can automate workflows and tasks, such as sending reminders, assigning leads, and updating records. Moreover, we need a system that can track performance and outcomes, such as customer satisfaction, revenue growth, and retention rates. And finally, we need a system that can provide actionable insights to enhance our decision making and strategy development. The CRM system should also meet our requirements for scalability, security, user-friendliness, and compatibility with our existing software platforms.

We are seeking a solution that offers the following features to enhance service delivery and customer satisfaction:

- A user-friendly, accessible web portal and mobile app that enables users to easily submit, track, and rate their service requests online or via mobile device .
- A robust workflow engine that automatically routes and assigns service requests to the relevant departments and staff members, as well as sends alerts and reminders to ensure timely resolution.
- Ability to integrate seamlessly with existing workflow processes and systems that use Brightly, Asset Essentials Platform, to send workorders, receive updates and complete cases.
- Ability to integrate seamlessly with existing workflow processes and systems that use OpenGov ViewPoint Cloud building and permitting, to send workorders, receive updates and complete cases.
- Middleware options available to integrate into existing and future work streams throughout the city.
- A comprehensive dashboard and reporting tool that provides real-time data and insights on service performance and quality, as well as identifies opportunities for improvement and



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optimization. It should have reporting and analytics features to help us monitor correspondence volume, response time, heatmaps and other key metrics. Customizable drag/drop dashboarding.

- Ability to auto-search records as staff enter caller information and auto-merge cases.
- Ability to customize workflows based on your city's processes and procedures.
- Ability to enter multiple requests per intake screen without re-entering caller information.
- Ability to access both an operator screen and a manager's screen. Manager's screen can quickly show overdue cases and staff workloads.
- Operator and manager back-end system is responsive and can be used on various desktop and mobile devices.
- Ability to search cases by submitting staff member, in addition to by constituent case type, department or address.
- Ability to search by how request was received (i.e., phone calls into center, live chat, local event, US mail, app, etc.).
- Option for users to sign up to receive case status updates via telephone, text or email and choose the time of day to receive updates.
- Ability to search for all open or closed cases.
- Ability to run department-specific reports (specifically easy report generation).
- It can generate maps and reports that show the locations and frequencies of specific complaints, such as noise, litter, or graffiti. These hotspots can be displayed by point or by street segment, depending on the preference of the user. The maps and reports can also be filtered by geographic area, such as community, ward, or region.
- It includes initial training for the city staff on how to use the solution effectively and efficiently. It also provides yearly training sessions to keep the staff updated on new features and best practices.
- It has a responsive technical support team that can assist the city staff with any issues or questions they may have regarding the solution. The technical support team is available 24/7 via phone, email, or chat.
- It allows the city staff to add private comments to each complaint case that are not visible to the public or included in the printout of the case. This feature enables internal communication and documentation among the staff members.
- It can send automated emails to the complainants throughout the process with updates, when their cases are completed, informing them of the outcome, including a picture if appropriate and thanking them and ask for their feedback. This feature enhances customer satisfaction and trust in the city services.
- It can automatically translate the content of the public application into other languages, especially Spanish. This feature increases accessibility and inclusivity for residents who speak different languages.
- It can customize the input fields for each complaint type according to the city's requirements. For example, it can separate street number, unit number, and street name fields for address information. This feature improves data quality and consistency.



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- It can migrate data from the existing platform to the new solution without losing any information or functionality. This feature ensures a smooth transition and continuity of service for both staff and residents.
- It can export data in various formats such as CSV, PDF, XML, JSON etc., for other reporting purposes or open data initiatives. This feature facilitates data sharing and analysis across different platforms and stakeholders.
- It can attach data from GIS layers to each complaint case such as zoning information property boundaries etc., This feature provides additional context and insight for each case.
- It can interface with city phone systems such as IVR (Interactive Voice Response) or CTI (Computer Telephony Integration) to enable residents to report complaints via phone calls. This feature expands service delivery channels and convenience for residents.
- It can integrate with City parking fines system to push notices to pay fines related to parking violations reported through complaints this feature streamlines enforcement processes.
- Ability to manage records by constituent, rather than by case, as well as store all correspondence with each constituent (via email, US mail, texts, phone).
- Azure SSO authentication for users.
- Have knowledge base capability.
- Allows for email messages and push messages to be sent through the CRM to users with more than 100 characters

**Correspondence Management**

- It will allow staff members to easily track all forms of constituent communication.
- It will track all incoming and outgoing business (both electronic/paper based) correspondence for the Mayor and general city correspondence
- It should be compatible with our current email platform
- It should have intelligent scanning capability of paper-based correspondence
- It should have intelligent routing of correspondence (scanned/email) with preset parameters/keywords sending to appropriate email recipient(s).
- Customizable workflow - It should be able to handle unique workflow requirements, including the ability to route correspondence to specific departments or individuals for review, approval, and response.
- Security – It should have robust security features to protect confidential information and prevent unauthorized access.
- Reporting and analysis – It should have reporting and analytics features to help us monitor correspondence volume, response time and other key metrics. Customizable drag/drop dashboarding.

This is a request for information (RFI) to solicit information from CRM system providers who can offer a suitable solution for our 311 service needs and requirements as well as correspondence management. The purpose of this RFI is to help us identify potential vendors and solutions, and to prepare a request for proposal (RFP) for the next stage of procurement.



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To respond to this RFI, please provide us with comprehensive information about your company profile, CRM system functionality and performance, pricing structure, implementation methodology, training and support options, customer testimonials, and any other relevant information that can assist us in making a sound decision.

If you are interested in participating in this RFI process and providing us with information on your CRM based 311 system, please submit your response by May 8, 2023. Please include the following information in your response:

- A brief overview of your company and your experience in providing CRM based 311 systems to municipal government agencies.
- A detailed description of your CRM based 311 system's features and functionalities, as well as how they meet our requirements.
- A description of the integration process with other municipal software systems, middleware or custom programming.
- A demonstration or sample of your CRM based 311 system's user interface and user experience for both citizens and staff members. Demonstrations will be scheduled following the submission deadline.
- A brief (up to two pages each) outline of other municipal software solutions offered by your company.
- A pricing estimate that outlines the five-year costs of licensing, implementation, training, maintenance, support, and upgrades for your CRM based 311 system. Please break down the estimate for year one implementation and licensing, and years 2-5 costs and user licenses.