SUBJECT: Approval to award contract for a Citizen Relationship Management (CRM) System to QScend Technologies for a not-to-exceed amount of $22,900

SUBMITTING DEPARTMENT: City Manager's

CITY MANAGER APPROVAL:

EXPENDITURE REQUIRED	$ 22,900
AMOUNT BUDGETED	$ 24,000
APPROPRIATION REQUIRED	$ 22,900
LINE ITEM NUMBER	101-172.00-986.000

BACKGROUND INFORMATION:

The Citizen Relationship Management System (CRM) was an approved capital outlay project in the Fiscal Year 2011-12 budget. The purpose of implementing a new system is to improve upon the efforts already in place throughout the City and offer an enhanced and direct line for residents to contact their municipality for service. To date the current process of receiving comments and request for service from citizens is adequate, however, these interactions are not documented or measured. The end goal of this endeavor is to use the results from the newly installed CRM software and measure the results, evaluate performance and increase accountability of staff members. Citizen satisfaction is a measure City staff strives for annually. The most recent National Citizens Survey conducted in 2010 showed the City receiving an 89% "excellent or good" rating pertaining to quality of service provided by Novi employees. A nine percent (9%) increase from the previous score received in the 2008 addition of the survey. Regardless which department a resident would encounter, their issue would be able to be addressed.

A request for proposal (RFP) was advertised in January generating three responses from interested firms. All three proposals were evaluated by the qualification based system. (QBS). Specific attention was given to firms who have had experience working with and linking to CityWorks and BS&A software packages. Departments of Public Services and Community Development respectively are utilizing these two software packages to improve their respective workflow systems and integrate with the Novi Enterprise Asset Management system. The firm that had the most comprehensive proposal and was the only firm with a prior working relationship with CityWorks and BS&A was QScend technologies.

Included in the proposal by QScend is pricing for a branded mobile application. At this time Administration will not be pursuing this option as a more comprehensive solution to the City's mobile presence is currently being evaluated. In the meantime residents will still be able to download a stock version of QScend's mobile application to quickly submit requests for services or to identify a hazard with a picture from a smartphone. City staff

anticipates a proposal for a Novi brand mobile application to be included as a Service Improvement for the 2013-14 Budget. As this project originated in the 2011-12 Budget it will be included in the 1st quarter budget amendment for fiscal year 2012-13.

RECOMMENDED ACTION: Approval to award contract for a Citizen Relationship Management (CRM) System to QScend Technologies for a not-to-exceed amount of $22,900

	1	2	Y	N
Mayor Gatt				
Mayor Pro Tem Staudt				
Council Member Casey				
Council Member Fischer				

	1	2	Y	N
Council Member Margolis				
Council Member Mutch				
Council Member Wrobel				

City of Novi

QBS Group Total for RFP Citizen Relationship Management System

5/8/2012 3:00 p.m.

	BS&A	Comcate	QSCEND	Total
Evaluator 1	140	155	305	**600**
Evaluator 2	85	180	335	**600**
Evaluator 3	140	160	300	**600**
Evaluator 4	100	180	320	**600**
Evaluator 5	75	245	280	**600**
Evaluator 6	255	100	245	**600**
TOTAL	**795**	**1020**	**1815**	**3630**

CONTRACT FOR CITIZEN RELATIONSHIP MANAGEMENT SYSTEM

THIS CONTRACT FOR SERVICES ("Contract"), shall be considered as made and entered into as of the date of the last signature ("Effective Date"), and is between the City of Novi, a Michigan municipal corporation, whose address is 45175 W. Ten Mile, Novi, Michigan 48375, (hereinafter referred to as "Client"), and __**QScend Technologies**____, whose address is _**231 Bank Street, Waterbury CT 06702** , (hereinafter referred to as "Vendor").

THE CLIENT AND VENDOR AGREE AS FOLLOWS:

<u>**Article I.**</u>   **Statement and Performance of Work.**

For payment by the Client as provided under this Contract, Vendor shall perform the services described on and in Schedule A, which is attached hereto and made a part of this Contract by this reference, in a competent, accurate, efficient, timely, good, professional, thorough, complete and responsible manner, and in compliance with the terms and conditions set forth below.

<u>**Article II.**</u>   **Timing of Performance.**

Performance of this Contract shall commence on __July 23, 2012_____, and performance of the work shall be completed according to the timing set forth as part of Schedule A. The completion date for all services as described in Schedule A shall be <u>October 15, 2012</u>. The timing for performance of any such work may be extended if allowed in writing by the Client in its sole discretion.

<u>**Article III.**</u>   **Contract Price and Payment**.

Subject to the terms and conditions of this Contract, the Client agrees to pay Vendor an amount not to exceed $22,900 for services as specifically set forth in the completed Proposal attached which are part of the attached Schedule A, which shall include the cost for year one of installation ($7,100), the annual subscription fee ($7,800), and integration services (not to exceed $6,000).   Such payments are in exchange for and consideration of the timely and satisfactory performance and completion of the work required under and pursuant to this Contract. The Client agrees to pay Vendor amounts due for services performed within thirty (30) days of receipt of an itemized billing/invoice from Vendor detailing all materials provided and work performed in connection with the billing and the hours and charges applicable to each such item.   Such itemized billings shall be submitted and shall be paid only upon satisfactory completion of the work itemized in the billing.

All costs and expenses incurred by Vendor under this Contract are deemed to be included in the amounts set forth in Schedule A, unless specifically identified in Schedule A as reimbursable expenses and such expenses have been approved by the Client or its designee.   Vendor will obtain written approval of the Client prior to proceeding with any work that is not stated on Schedule A; otherwise, the Client will not

be billed for such extra/additional work.

Payments shall be made upon verification of invoices received by the Client. All payments to Vendor shall be submitted by mail at Vendor's address first listed above, unless Vendor provides written notice of a change in the address to which such payments are to be sent.

Article IV: Termination.

A. 1. For cause: In the event that either party shall breach the terms and conditions of this Contract, the aggrieved party may notify the other party, in writing via certified mail, of such breach and demand that the same be remedied within ten (10) days. If the defaulting party fails to remedy the breach as demanded, the aggrieved party shall then have the right to terminate by giving the defaulting party thirty (30) days written notice. In addition, if at any time a voluntary petition in bankruptcy shall be filed against either party and shall not be dismissed within thirty (30) days, or if either party shall take advantage of any insolvency law, or if a receiver or trustee of any of a party's property shall be appointed and such appointments shall not be vacated within thirty (30) days, the other party shall have the right, in addition to any other rights of whatsoever nature that it may have at law or in equity, to terminate by giving thirty (30) days' notice in writing of such termination.

2. For convenience: The Client may terminate this services Contract, in whole or in part, without showing cause upon giving thirty (30) days written notice to the Vendor. The Client shall pay all reasonable costs incurred by the Client up to the date of notice of termination.   The Vendor will not be reimbursed for any anticipatory profits that have not been earned up to the date of notice of termination.

B. In the event this Contract is terminated before completion, the Client shall not be responsible to make any further payments for work performed under this Contract after the effective date of such termination, and shall pay Vendor for such materials as have been delivered and for such work as has been completed and is eligible for payment under the terms of this Contract through the date of such termination. In all events, the Client shall only be responsible to make the payments described in the preceding sentence if, at the Client's request, Vendor continues to fully perform its duties and obligations in full compliance with the terms of this Contract through the effective date of the termination.

Article V: Independent Contractor/Vendor Relationship.

A. In the performance of this Contract, the relationship of Vendor to the Client shall be that of an independent contractor and/or vendor and not that of an employee or agent of Client. Vendor is and shall perform under this Contract as an independent contractor and/or vendor, and no liability or responsibility with respect to benefits of any kind, including without limitation, medical benefits, worker's compensation, pension rights, or other rights or liabilities arising out of or related to a contract for hire or employer/employee relationship shall arise or accrue to either party as a result of the performance of this Contract.

Vendor, as an independent contractor and/or vendor, is not authorized to enter into or sign any agreements on behalf of the Client or to make any representations to third parties that are binding upon the Client.

B. Vendor represents that it will dedicate sufficient resources and provide all necessary personnel required to perform the work described in Schedule A in accordance with the terms and conditions of this Contract. Except as may be specifically stated and agreed to in Schedule A, Vendor shall perform all of the work under this Contract and no other person or entity shall be assigned or sub-contracted to perform the work, or any part thereof, unless approved by the Client in advance.

Article VI: Liability and Insurance.

A. Vendor agrees to indemnify and hold harmless Client , its elected and appointed officials and employees, from and against any and all claims, demands, suits, losses and settlements, including actual attorney fees incurred and all costs connected therewith, for any damages which may be asserted, claimed or recovered against the other party by reason of personal injury, death and/or property damages which arises out of or is in any way connected or associated with the actions or inactions of a party in connection with this Contract.

B. Vendor shall provide evidence of adequate insurance coverage in the types and amounts set forth on Schedule B, which is attached hereto and incorporated herein by this reference. Such insurance shall be maintained at the specified level of coverage throughout the term of this Contract, including any extension of such term, and will cover all work, acts and omissions by and on behalf of Vendor in connection with this Contract.

Article VII: Limitation of Liability

IN NO EVENT SHALL VENDOR BE LIABLE TO ANYONE UNDER THIS AGREEMENT FOR ANY INDIRECT, INCIDENTAL, SPECIAL, CONSEQUENTIAL, RELIANCE OR COVER DAMAGES, OR DAMAGES FOR LOSS OF PROFITS, REVENUE OR DATA OR FOR COSTS OF PROCUREMENT OF SUBSTITUTE GOODS OR SERVICES, INCURRED BY CLIENT OR ANY THIRD PARTY, WHETHER IN ACTION IN CONTRACT OR TORT, EVEN IF VENDOR HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES. VENDOR'S AGGREGATE LIABILITY FOR DAMAGES HEREUNDER SHALL NOT EXCEED THE AGGREGATE AMOUNTS PAID TO VENDOR BY CLIENT PURSUANT TO THIS CONTRACT FOR THE PROFESSIONAL SERVICES THAT ARE THE SUBJECT OF THE CLAIM OVER THE THREE (3) MONTH PERIOD IMMEDIATELY PRECEDING THE EVENT THAT GAVE RISE TO SUCH CLAIM.

Article VIII: General Provisions.

A. _Entire Agreement._ This instrument, together with the attached Schedules, contains the entire Contract between the Client and Vendor.   No verbal agreement, conversation, or representation by or between any officer, agent, or employee of the parties hereto, either before or after the execution of this Contract, shall affect or modify any of the terms or obligations herein contained.

B. _Compliance with Laws_. This Contract and all of Vendor's work and practices shall be subject to all applicable state, federal and local laws, ordinances, rules or regulations, including without limitation, those which apply because Client is a public governmental agency or body. Vendor represents that it is in compliance with all such laws and eligible and qualified to enter into this Contract.

C. _Governing Law_. This Contract shall be governed by the laws of the State of Michigan.

D. _Assignment_. Vendor shall not assign this Contract or any part thereof without the written consent of the Client. This Contract shall be binding on the parties, their successors, assigns and legal representatives.

E. _Dispute Resolution_ The parties agree to make reasonable efforts to resolve any dispute arising between the parties prior to pursuing litigation. Such efforts shall include the escalation of the dispute to a senior manager of each party who has full authority to resolve the dispute on behalf of the party. In the event that Client brings a lawsuit for alleged breach of this Agreement, and Client does not fully prevail in the litigation, Client agrees that Vendor shall be paid its reasonable attorneys' fees and costs for defending the litigation.

F. _Third Parties._ It is the intention of the parties hereto that this Agreement is not made for the benefit of any private third party. It is acknowledged that Client may receive a portion of the funding for the payments under this Contract from one or more private sources, and it is understood by Vendor that it is hired by Client to work exclusively for Client (and by extension for the Township should the work be accepted and implemented by the Township) and Vendor agrees that no private party or parties will be allowed to hold sway or influence, in any way, over Vendor's performance of the work.

G. _Notices_. Written notices under this Contract shall be given to the parties at their addresses contained in this Contract by personal or registered mail delivery to the attention of the following persons:

> Client: City Manager Clay J. Pearson and City Clerk Maryanne Cornelius
> Vendor: QScend Technologies _

H. _Changes_. Any changes in the provisions of this Contract must be in writing and signed by the Client and Vendor.

I. _Waivers_. No waiver of any term or condition of this Contract shall be binding and effective unless in writing and signed by all parties, with any such waiver being limited to that circumstance only and not applicable to subsequent actions or events.

J. _Jurisdiction and Venue of Contract_. . This contract shall be considered for all purposes, including the establishment of jurisdiction and venue in any court action between the parties, as having been entered into and consummated in the City of Novi, Oakland County, Michigan.

K. *Conflict*. In the event of any conflict or inconsistency between the above provisions of this Contract and either or both of the attached Schedules, the provisions in the above text shall govern.

IN WITNESS WHEREOF, the Client and the Vendor have executed this Contract in Oakland County, Michigan, as of the date first listed above.

WITNESS AND DATES
OF SIGNATURES:

CITY OF NOVI

_____

_____
By: Robert J. Gatt

Date: _____
Its: Mayor

_____

_____
By: Maryanne Cornelius

Date: _____
Its: Clerk

VENDOR

_____

_____
By:

Date: _____
Its:

Pricing

June 18, 2012

QScend Technologies, Inc.   City of Novi, MI
231 Bank St   Additional services
Waterbury, CT 06703
203-757-6000
203-759-0519 fax

Integration services between Cityworks Work Order system using QAlert API and Cityworks Work Order API : not to exceed $6,000 (all services included)

Novi-branded citizen app for Android and iPhone (powered by Report2Gov): $4,900 one-time fee (all services included)
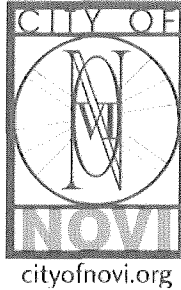
CITY OF NOVI

CITIZEN RELATIONSHIP MANAGEMENT SYSTEM

COST PROPOSAL FORM

cityofnovi.org

We the undersigned as proposer, propose to furnish to the City of Novi, according to the specifications, terms, conditions and instructions attached hereto and made a part thereof:

Cost for year one installation and setup $ ___ $7,100 _____

Monthly or Annual cost/subscription fee of software $ ___ $650/Month _____

Integration fees to connect with CityWorks and BS&A $ _Depends on level of__
                                                        Intergration_____

DAYS TO DELIVER ARO (after receipt of order) ___12 Weeks _____

EXCEPTIONS TO SPECIFICATIONS:

1. Additional on-site training is available for $2,000/Per day
2. Novi-Specific citizen app is available for $4,900
3. QAlert mobile management application is available and priced based on the number of devices.

COMMENTS: __We are ready, willing and able to provide the required integrations but__ need more specificity before accurately providing a budget for this.

We acknowledge receipt of the following Addenda: $1 (Issued 5-1-2012)

(please indicate numbers)

THIS PROPOSAL SUBMITTED BY:

Company (Legal Registration) __Qscend Technologies__

Address __231 Bank Street__

City __Waterbury__ State __CT__ Zip __06702__

Telephone __203.757.6000__ Fax __203.759.0519__

Agent's Name __Sean Williams__

Agent's Title __Regional Account Manager__

Signature __[signature]__

E-mail __Sean.Williams@QScend.com__

Date __5-4-2012__

CITY OF NOVI
CITIZEN RELATIONSHIP MANAGEMENT SYSTEM

Please return this page with your Cost Proposal Form

If your company is awarded the item(s) referenced in the bid proposal, other governmental entities may wish to use this contract and will issue a purchase order or contract for the item(s) awarded in the bid proposal following minimum order/contract requirements set forth in the bid documents. Each entity will provide their own purchase order and delivery location(s) and must be invoiced separately to the address indicated on their purchase order.

1. EXTENSION OF AWARD TO THE MITN (MICHIGAN INTER-GOVERNMENTAL TRADE NETWORK) PURCHASING COOPERATIVE: *OPTIONAL*

Numerous Counties, Cities, Townships, and Authorities of the State of Michigan are members of the MITN (Michigan Inter-governmental Trade Network) Purchasing Cooperative. Other associate entities are also members of the Cooperative in the Tri-County area. Please visit www.mitn.info website to view the entire list of participating agencies.

(X) If an award is made to __QScend Technologies__, it is agreed that the contract will be extended to other MITN Purchasing Cooperative members and associate entities under the same prices, terms, and conditions.
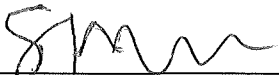
(   ) Our company is **NOT** interested in extending the contract to those MITN members listed on the website.

2. EXTENSION OF AWARD TO THE NOVI COMMUNITY SCHOOL DISTRICT, CITY OF NORTHVILLE, NORTHVILLE COMMUNITY SCHOOL DISTRICT, AND THE WALLED LAKE CONSOLIDATED SCHOOLS: *OPTIONAL*

The City of Novi is working with the Novi Community School District, City of Northville, Northville Community School District and the Walled Lake Consolidated Schools to discover opportunities to optimize procurement services.

(X) If an award is made to __QScend Technologies__, it is agreed that the contract will be extended to Novi Community School District, City of Northville, Northville Community School District and the Walled Lake Consolidated Schools under the same prices, terms, and conditions.

(   ) Our company is **NOT** interested in extending the contract to Novi Community School District, City of Northville, Northville Community School District and the Walled Lake Consolidated Schools under the same prices, terms, and conditions.

Vendor Signature: _____

Company Name: __QScend Technologies_____

Date: __5-4-2012_____

Proposal for the City of

Novi, MI

Response to Customer/Citizen Relationship Management System (CRM) RFP (Technical Proposal)

Presented by **Sean Williams**

sean.williams@qscend.com

Executive Summary

Executive Summary

The entire team at QScend Technologies is very excited about the possibility of partnering with the City of Novi on this important citizen service initiative. We have thoroughly reviewed the RFP and are fully prepared to perform the task of deploying the City's new Citizen Relationship Management (CRM) initiative.

Cities across the country use QAlert to improve citizen service, manage workflows, and increase performance measurement. Cities large and small around the country are using QAlert's powerful reporting functionality to:

- View the requests for service within individual departments
- Collect specific data to better allocate precious manpower
- Document needs for process re-engineering and resources

Among the many reasons why QAlert is a nationally recognized CRM success story:

- QAlert is licensed *for unlimited users,* so there are no limitations for a large scale deployment either now or in the future.

- You can host QAlert in your data center *or* let us host the application in our state-of-the-art data centers.

- QAlert is the only municipal CRM system available which offers the option of a mobile management application. Using QAlert Mobile, employees can reduce inefficiencies and improve workflows in the field using an iPad.

- QScend can build a Novi-specific branded citizen mobile application for iPhone and Android. Your citizens will be able to submit service requests directly from the Novi application, which is free to download.

In our proposal you will find QAlert feature descriptions, as well as an explanation of the business processes involved in setup and deployment of your new CRM platform. QScend is fully prepared to integrate with the systems laid out in the RFP. Specific answers to the questions laid out in the RFP can be found in this proposal as well.

Company Background

Company Background

QScend Technologies, Inc. is an industry leader in web-based software solutions and services for local government organizations. Hundreds of municipalities and thousands of users access the company's products for a variety of citizen service related functions, including website content management, electronic newsletter distribution, citizen service request management, and 311 call center functionality.

Some of our most well-known cities such as Reno, NV, Providence, RI, and Newark, NJ use QScend's robust CRM software, QAlert, to accept, track, route and manage citizen service requests on a daily basis. Mayor Cory Booker and the City of Newark, for example, use QAlert to power their 311 call center and use its' cutting edge mapping technology and reporting capability to manage service requests and dramatically reduce avoidable, redundant costs throughout City government. Providence uses the citizen service related data collected in QAlert to power the City's ProvStat office and uses the statistical analysis derived from ProvStat to measure performance. Reno uses QAlert to power and manage Reco Direct, the City's non-emergency call center for housing and managing all citizen service requests. And many other cities have embraced the power of QAlert to track and manage every request for service that comes into City Hall.

Founded in 1998 by Keith LeBeau, QScend Technologies was the first company to relocate into Waterbury, Connecticut's Information Technology Zone.

Proposed CRM System

How QAlert Benefits Novi

In the course of doing business with municipal governments since 1998, we have become recognized experts in the field of e-government web applications. Drawing on that experience, we will make sure that your citizen service initiative:

- Provides a state of the art e-government platform;
- Leverages human capital and reduces the administrative burden for City departments; and,
- Improves citizen service.

QAlert™

Administration Features

- Automatic GEO Coding of Service Requests
- Dynamic GIS Integration
- GIS Export Capabilities
- Integration with Third-Party ODBC Reporting Tools
- Product Suite Integration
- Stored Citizen Contact Information
- Street Database Integration
- User Password Management and Recovery
- VUEWorks Work Order and Asset Management Integration
- Custom Fields management
- Customer satisfaction estimator

Call Center Features

- OneScreen View
- Auto-Population of Citizen Data
- Easy Access to Knowledgebase Articles
- On-the-fly Matching of Related Requests
- Systematic Searching

Citizen Interface

- Commenting on Service Requests
- Login Option
- Self Service FAQ
- 24/7 Web Form Availability

Knowledge Base

- Citizen Self-Service Center Option
- Article Delivery via Email
- Article Access for Call Takers
- Article Authoring Permissions
- FAQ-only Option
- FAQ for Website Visitors
- Matching by Type for Call Takers
- Mandatory Knowledge Base Review before Service Request
- Most Popular Question Designation
- New Question Designation

My Service Requests

- On-the-fly MapPoint mapping of Service Request Data
- Personalized Responder Area per User
- Re-opening of Closed Requests
- Search Options to Locate Service Requests
- Unlimited Activity Entry per Request
- Unlimited File Attachments to Service Requests
- Viewing by Service Request Status

QAlert™

Notification
- Auto-Call Telephone
- Automatic on Creation and Closing
- Email Option
- Postal Mail Option Indicator
- Telephone Call Indicator
- Staff Triggered Updates

Reporting
- Audit Reports by User and Activity
- Download Reports
- Email Report Delivery
- Integrated District Information and Reporting
- On-the-fly MapPoint mapping of Request Data
- On-the-fly Report Building Tools
- Report Sharing
- Report Scheduling
- Reports by type, street, user, and more
- Shared Reports
- Upload Report Files
- User-Specific Dashboards
- And many more customizable reports

Routing
- Delayed Routes
- Escalation Routing
- Individuals or Groups
- Inherit from Main Type to Subtypes
- Internal Re-Routing Option

Service Request Types
- Default Comment Prompts
- Public and Private Types
- Unlimited Parent Types
- Unlimited Child Types
- Custom Fields

Website Integration
- Attachment Options
- Customizable Web Form
- Customizable Confirmation Page
- Customizable Introduction Page
- Email Verification on Submissions
- Site Search Engine

Administration Features
- Automatic GEO Coding of Service Requests
- Dynamic GIS Integration
- GIS Export Capabilities
- Integration with Third-Party ODBC Reporting Tools
- Product Suite Integration
- Stored Citizen Contact Information
- Street Database Integration
- User Password Management and Recovery
- VUEWorks Work Order & Asset Management Integration

Call Center Features
- OneScreen View
- Auto-Population of Citizen Data
- Easy Access to Knowledgebase Articles
- On-the-fly Matching of Related Requests
- Systematic Searching

Citizen Interface
- Commenting on Service Requests
- Login Option
- Self Service FAQ
- 24/7 Web Form Availability

QAlert™

Knowledge Base

- Citizen Self-Service Center Option
- Article Delivery via Email
- Article Access for Call Takers
- Article Authoring Permissions
- FAQ-only Option
- FAQ for Website Visitors
- Matching by Type for Call Takers
- Mandatory Knowledge Base Review before Service Request
- Most Popular Question Designation
- New Question Designation

My Service Requests

- On-the-fly MapPoint mapping of Service Request Data
- Personalized Responder Area per User
- Re-opening of Closed Requests
- Search Options to Locate Service Requests
- Unlimited Activity Entry per Request
- Unlimited File Attachments to Service Requests
- Viewing by Service Request Status

QAlert™ Mobile

- Enables Smartphone users to report service requests directly to City
- Full management application for staff

Our Commitment to Novi

QScend Technologies is fully committed to making your CRM software as easy and smooth as it can be. Our experienced and knowledgeable technicians will complement your staff's expertise, working with you each step of the way to ensure success. We are experienced at collaborating with our customers' key personnel to manage your project in a timely and efficient manner.

Additionally, it is important for the City to have accountability across departments. As you will see from the following pages, QAlert is specifically designed with this in mind. Routing and escalation procedures ensure that no service request is left untended.

QAlert can be hosted either in our environment or in yours, and we have the ability to move the application between hosting environments as needed.

QAlert and You

QAlert is a CRM system designed for cities such as Novi. It allows you to quickly accept citizen service requests and route them directly to the departments responsible for resolving the issues.

Secure and completely Web-based, QAlert provides an interface for both the public and your staff to manage all inquiries. Using QAlert, you can:

- Accept, track, and manage citizen service requests

- Log service requests and immediately notify the appropriate department for resolution

- Trigger automatic notification to submitters, via e-mail, of receipt and resolution

- Record all action taken on each service request

- Include document and image attachments for enhanced records

- Escalate, or delay route, service requests not handled in a timely manner

- Customize reports to meet your exact needs, and schedule delivery of those reports

- Reduce phone calls, walk-in requests, and 911 non-emergency inquiries

- Become a more efficient staff

Our staff is available for after-hours telephone support 24 hours a day, 7 days a week.

QAlert Key Features at a Glance

Feature	Description	Benefit
One Screen Functionality	311 Call Center Ready	**Quick and Easy Access for Maximized Response Times** Provides call takers with all the tools they need, on one screen, to respond quickly and efficiently to citizen requests. Ajax–enabled data completion automatically adds caller's personal contact information to the service request record.
Knowledge Base	Repository of Key Municipal Information	**Shared Knowledge** Its the power of information at the fingertips of all your employees for unified delivery to your citizens via Web interface, telephone conversation and/or email.
Enterprise Reporting	Generate reports on every available data source	**Get What You Want When You Want It** Customize, create, collaborate, schedule, and deliver reports based on the information required for your users to do their jobs.
Customizable Reporting Dashboard	Personalized According to Your Specifications	**Data at a Glance** View a combination of tables and graphs reflecting the information most critical and relevant to each of your users.

| Integrated Mapping | Microsoft Virtual Earth™ Maps Highlight Municipality Features | It's All Right Here

No need to go jumping around from screen to screen. Overlay your GIS data (lot, block, and more) onto the Virtual Earth maps. View your service request data and reports in map format right inside QAlert. |
|---|---|---|
| My Service Requests | Routed Service Requests by User Log In | Individual Accountability

If it's in this list, it's your responsibility. Know exactly what citizen service request you need to address, displayed in list or map view. Access entire service request history for each routed issue. |
| Service Request Escalation | Delayed Routing | Don't Lose the 'Sticky Note'

It's all about responsiveness. Set up timers to remind the appropriate department or user about a service request for which no action has been taken. No citizen concerns will fall through the cracks. |
| Citizen Self Service | Web Interface | 24/7 Access

Citizens can search your online knowledge base, enter service requests, and check status of their service requests. Implement these features according to your requirements. |

City-Wide Solution

You can choose to implement QAlert in any number of ways. Below is a sample breakdown by department as to the different service request types each may use QAlert to track data relating to the sample issues and use the reporting tool.

Building Department
- Building Codes
- Building Inspections
- Construction Permits

Business Development
- Sites Available
- Tax Incentives

City Clerk
- Bingo & Raffle Licenses
- Minutes and Agendas
- Open Public Records
- Clerk-Ordinances

Elderly Services
- General-Elderly
- Medicare / Insurance Issues
- Mr. Fix-It Home Repairs

Municipal Aging Office
- SeniorNet

Fire Department
- Code Questions/Violations (FD)
- Emergency Information
- Fire Safety Education
- Fire Safety Issues
- Hydrants
- Smoke Detector Inspections
- Tours/Programs

Health
- Adult Clinics
- Children's Clinics
- Child Care Facilities
- Guest Speaker-Health Ed
- Health Code Violations
- HIV/AIDS
- Rodent/Insect Problems
- Well Water
- Vaccination Clinics

Housing
- Affordable Housing
- Certificate of Re-Occupancy
- Code Violations-Housing
- Housing Inspection
- Housing Overcrowding
- No Heat/Hot Water

Police Department
- General Questions
- Citizen Police Academy
- Firearms Purchase Permits
- Graffiti
- PD Tours

Public Works
- Drainage/Storm Water
- Garbage
- Paving
- Potholes
- Recycling
- Snow Plowing
- Street Marking
- Street Sweeping

Traffic/Parking
- Handicapped Parking
- Traffic Lights/Parking Signs
- Parking Authority
- Traffic-Speeding

Water/Sewer
- Hook-Ups
- Manhole Cover Replacement
- Payments

Zoning
- Advertisement Signs
- Building Inquiries
- Land Use Inquiries

Page | 16   PROPOSAL FOR THE CITY OF NOVI

How QAlert Works

QAlert is ideal for cities seeking to receive and manage service requests via the telephone, via smartphone and over the web.

The Call Center tab, which affords call takers the advantage of the One Screen view, users can enter a new service request; link to related requests (if appropriate); access the knowledge base for more information; view the entire history of a service request; and search quickly for any request in the system.

In the Service Requests tab, your users can see just what they are responsible for addressing. Working with an interface that mimics popular client-based products, they can easily navigate through the service request types list and the requests they need to resolve.

Responders can:

- Search for related open or closed issues
- Record all activity related to each issue
- View the history related to each issue
- Upload attachments and photos specific to each request
- Re-route requests to other users as needed
- Notify citizens with the check of a box
- View service requests on a map

QAlert makes it easy for responders to address issues using the Activities tab. Once notified via email of a new service request, users log in to the control panel to begin addressing the citizen concern. While they are adding activities or closing service requests, they can trigger update notifications to submitters with the check of a box.

The service request data remains in the system for as long as you need it. You can refer to any service request at any time, as well as draw reports based on days, weeks, or years worth of data. Users can choose from existed pre-designed reports or customize their reports however they would like. They also can schedule those reports for delivery via email in a variety of formats. There is no limit to the way you can design and tailor a report to view the data exactly as you need.

Easily respond to a service request by adding an activity and triggering a response to a citizen

Reroute service requests to other departments, or link like service requests together for ease of response.

Print or export the entire service request record for your files, reporting purposes or work order purposes.

View all the action taken or posted to a service request on one screen.

Among the strongest features in QAlert is the high-powered reporting area enables users to customize their reports exactly how they need them by tailoring the system's existing reports, or starting from scratch. The resulting reports can be shared among users within your municipality or shared with QAlert users elsewhere.

PROPOSAL FOR THE CITY OF NOVI

The robust reporting tool in QAlert can give a dashboard view of City performance and specific, customized reports can be generated to drill down to display very specific information.

Individual reports can be scheduled to be delivered to a users email with whatever regularity the user chooses

Your citizens can access QAlert through your website via an entry page that describes your system. This is a tailored message on your website that you control and edit as you see fit. Depending on how you implement QAlert into your site, your citizens can then go to the submission form for send in their service request or to a citizen self–service area where they can search an FAQ database before submitting a request.

At either entry point, if you so choose, you can allow your citizens to create and access an account that will enable them to see the service requests they have submitted, check their progress, and add updates.

Welcome, John Doe

I'm not John Doe – Manage my contact info
Create a new service request – Sign out

Thank you for using the City's citizen self help center.
Below you will see a list of your current and past service requests. Click on any one to view it's details.
To add information to any open or in progress request, click "Add Comment".

Your Recent Requests

Requ			
Open			
5952			ient
5951	## Service Request 5951		ient
5950			ient
* - This	**Record Details**		

Request ID:	5951	Date:	1/12/2009 7:22:00 AM
Request Type:	Pot Hole		
Submitter:	John Doe	District:	
Address:	502 STRAITS TURNPIKE	Cross Street:	
Comments:			

Record Activity
Add a comment to this service request

Date:	1/12/2009 7:22:00 AM
User:	anonymous
Comments:	Service Request Open - ID 5951 Routed To: pete Comments

Welcome, John Doe

I'm not John Doe – Manage my contact info
Create a new service request – Sign out

Thank you for using the City's citizen self help center.
Below you will see a list of your current and past service requests. Click on any one to view it's details.
To add information to any open or in progress request, click "Add Comment".

Your Recent Requests

Request ID	Street Address	Request Type	Date Updated	
Open				
5952	322 BUCKINGHAM STREET	Flooding	1/12/2009 7:32:00 AM	Add Comment
5951	502 STRAITS TURNPIKE	Pot Hole	1/12/2009 7:22:00 AM	Add Comment
5950	121 MAIN STREET	Abandoned Vehicle	1/12/2009 12:20:00 PM	Add Comment

* - This is a linked service request

QAlert Mobile Management Application (Optional)

Available for iPad

QAlert Mobile allows your employees in the field to view requests in real time, enter comments that can be sent directly to the citizen and close service requests as soon as they are completed.
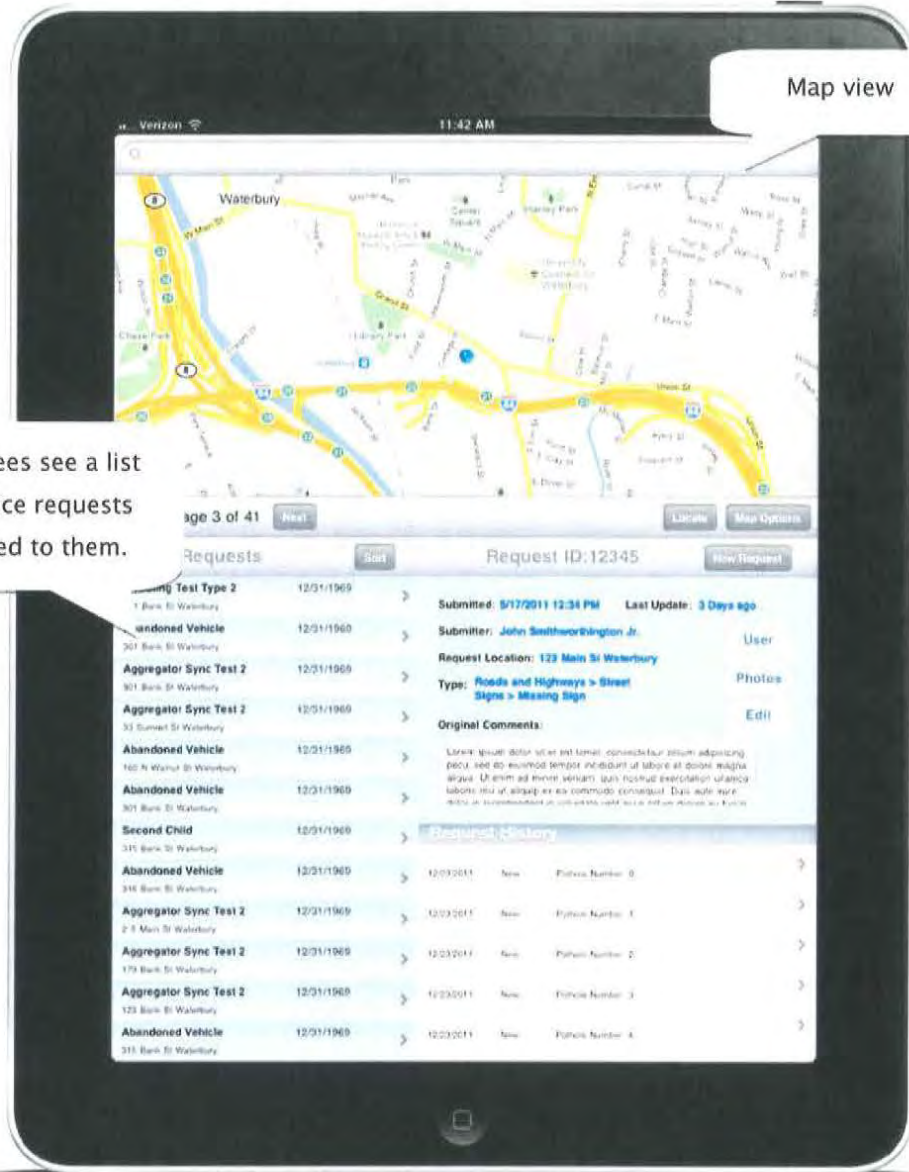
Map view

Employees see a list of service requests assigned to them.

View/upload pictures

City–branded Citizen App

Available for iPhone, Android, HTML5
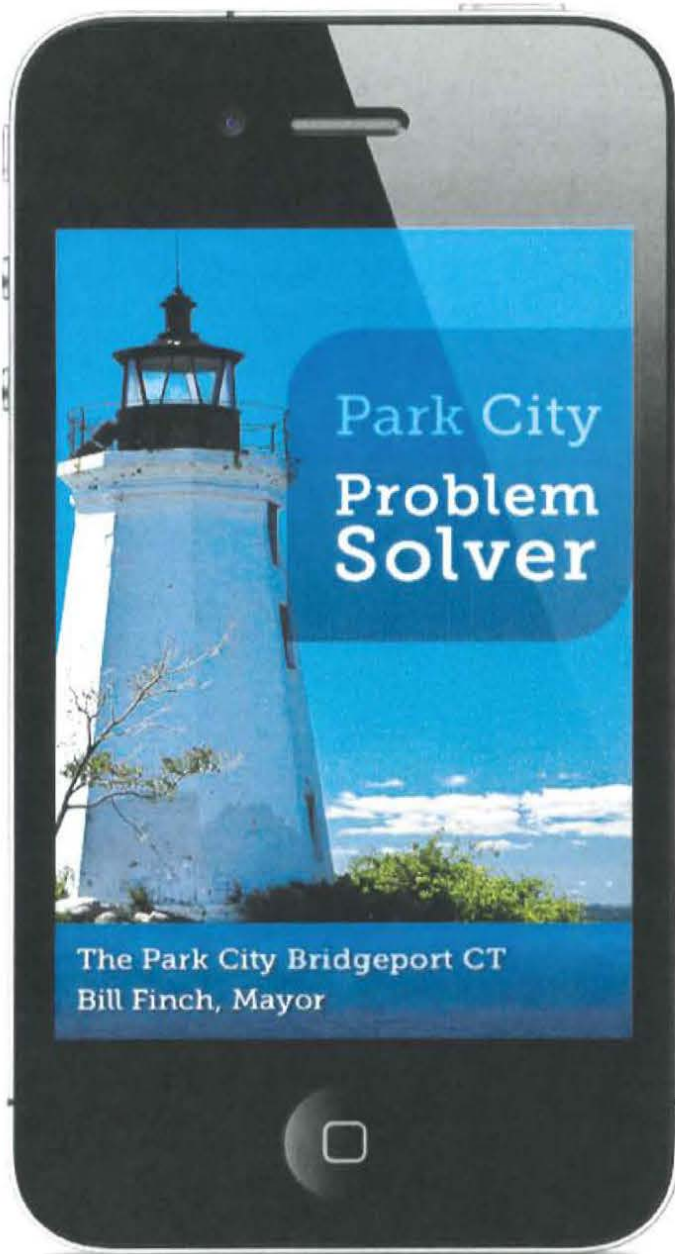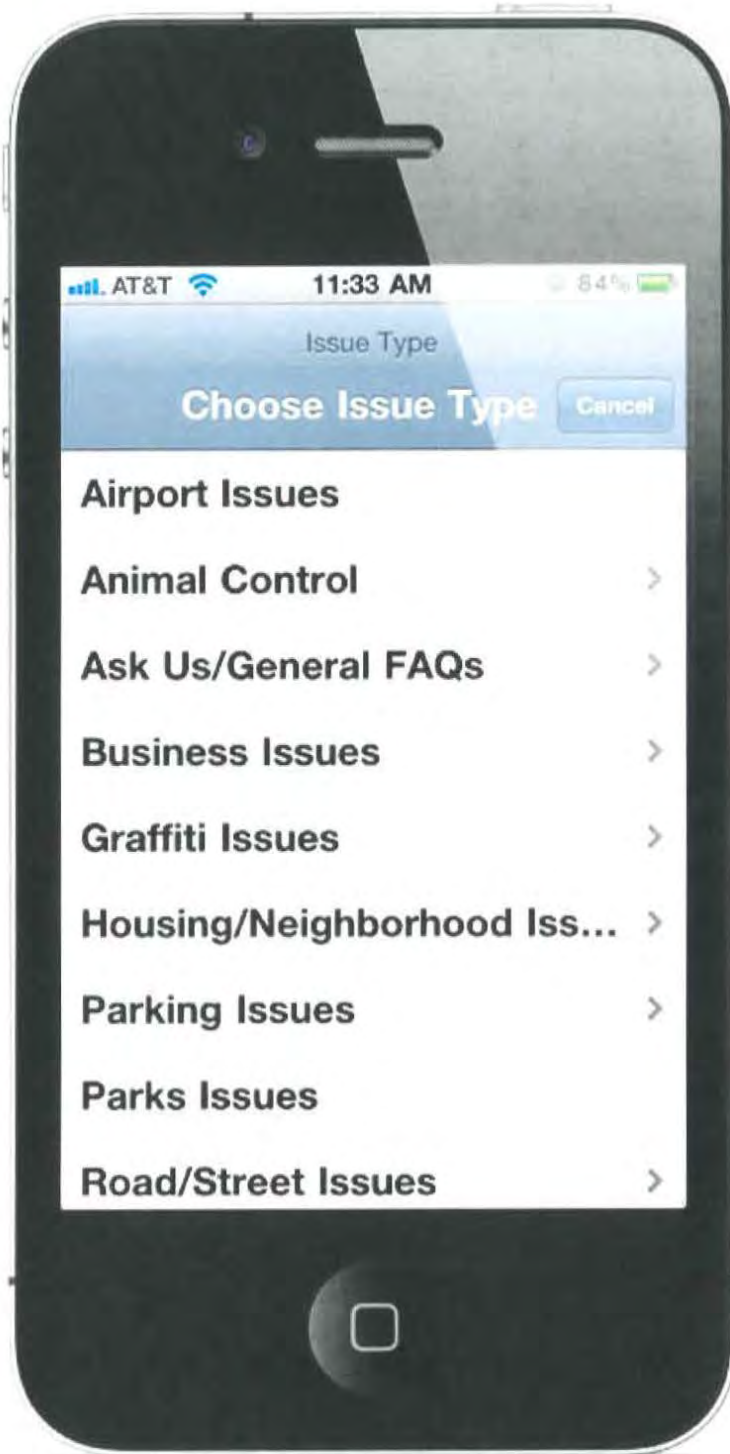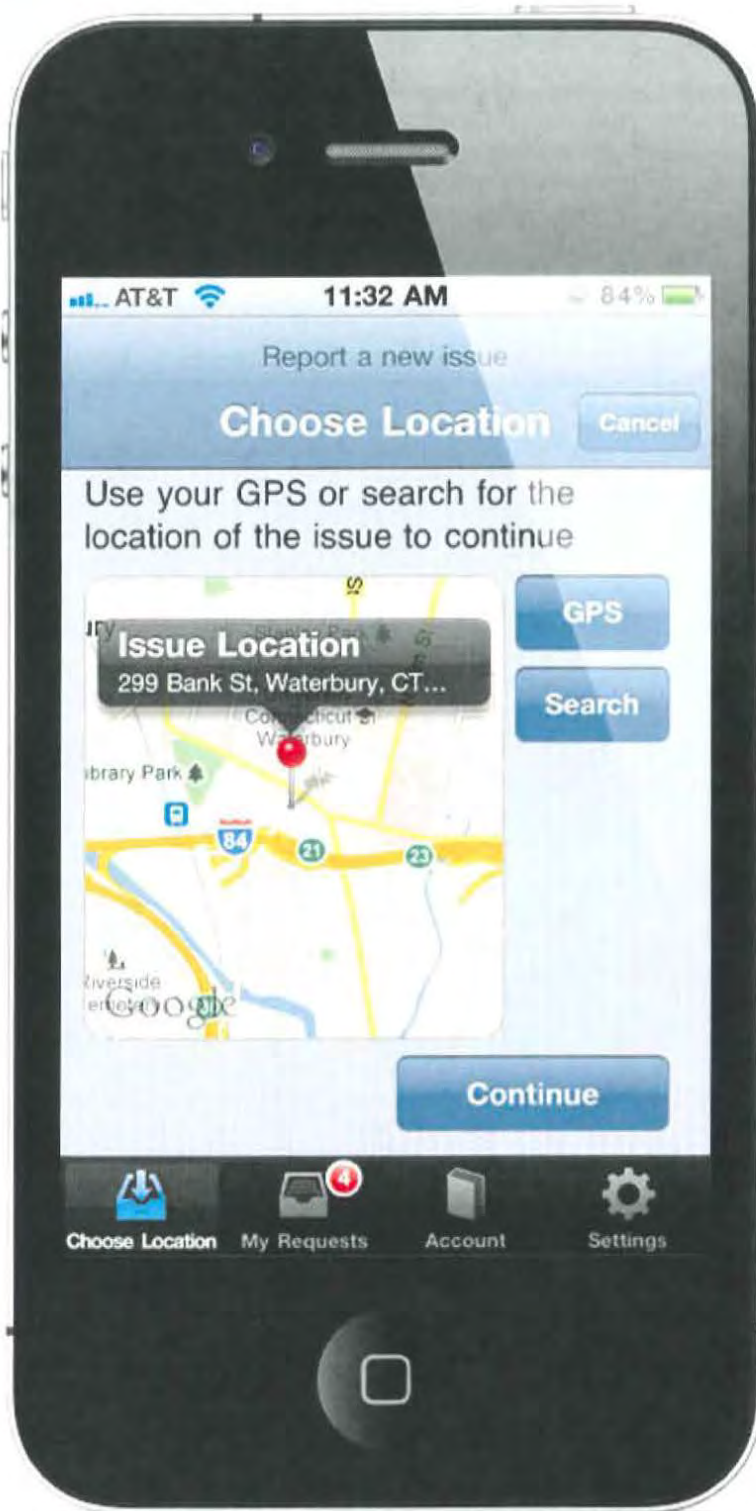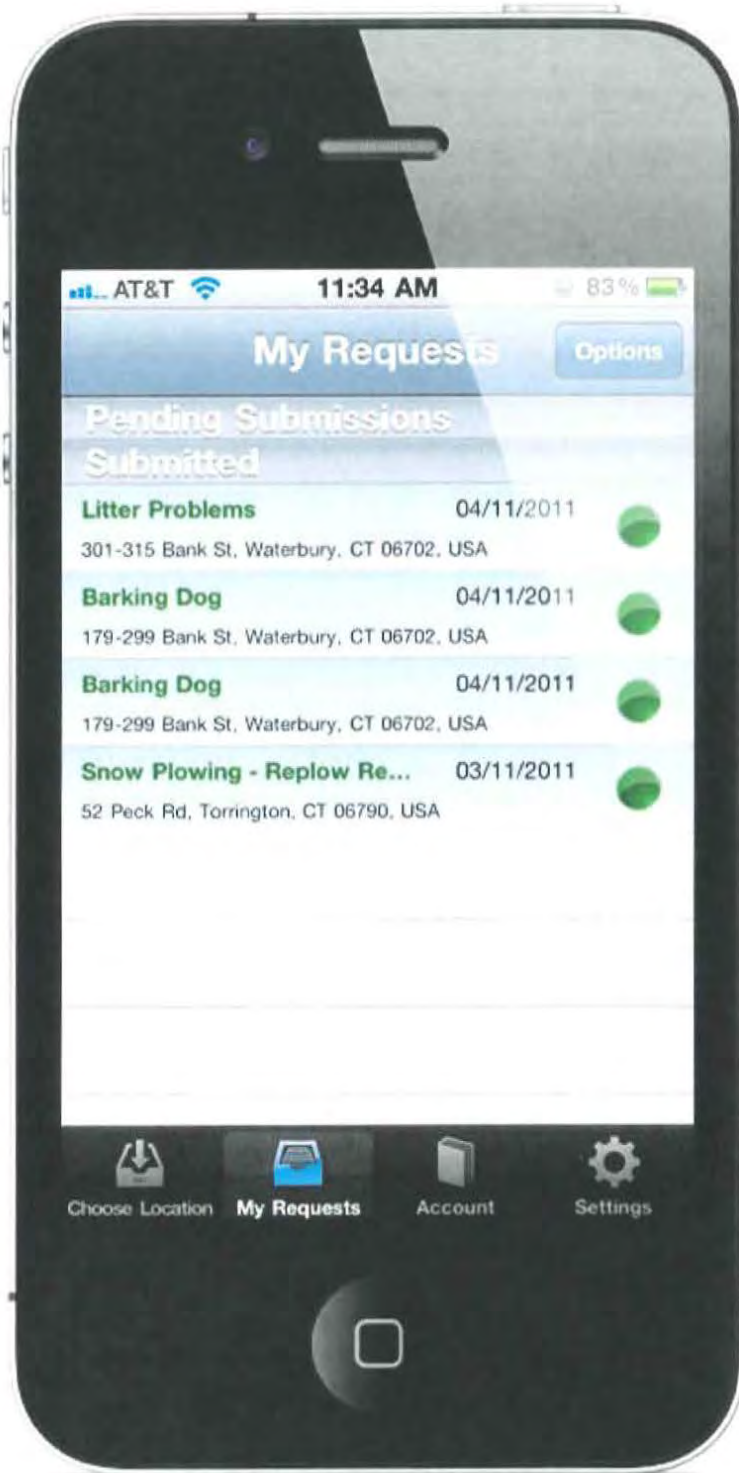
Work Plan / Methodology

Project Management Process & Timeline

Task 1: Discovery
20 working days

- Kick-off meeting
- Review technical environment
- Define department stakeholders
- Define individual and group roles and responsibilities
- Developing business intelligence
- Prepare importable data

Week 1

Week 2

Task 2: Implementation
4 working days

- Install and configure software
- Upload data
- Installation verification

Week 3

Task 3: Testing
5 working days

- Functions and features checkout test
- Process / Work flow test
- Beta testing

Week 4

Task 4: Training
7 working days

- Administrator session
- Department head session
- Call taker session
- Department staff session
- VueWorks WOM training

Week 5

Task 5: Deployment
31 working days

- System acceptance
- Soft launch
- Go live

Week 6

Week 7

Week 8

Week 9

Week 10

(Project **Timeline**)

Methodology

Implementing new software can be an incredible task, but certainly one that can be completed within a reasonable time frame.

Based on our years of experience, and on feedback from our customers, we've put together a general timeline that can have your software implemented within a respectable time frame.

On the following pages, you'll get a sense of what to expect at each stage in the process. Keep in mind that should we need to adjust the timeline, we can do so according to your needs.

Phase 1 Discovery

Key Objectives

- Establish project objectives and align overall focus
- Establish and prioritize business and technical requirements
- Identify/uncover internal and external success criteria
- Establish project plan with deadlines for all deliverables

Tasks

- Conduct stakeholder interviews
- Develop technical requirements document
- Establish project vision and visual/creative theme
- Develop implementation and staffing plan

Phase 2 Installation

Key Objectives

- Install and test software
- Creative review/assessment

Tasks

- Configure software proprietary per municipality
- Set up development domain in DNS

Phase 3 Design

Key Objectives

- Analyze approval process
- Define editable components
- Develop data migration plan
- Create technical design environment

Tasks

- Align content and functionality
- Refine visual design
- Validate technology standards to meet requirements
- Develop migration plan

Phase 4 Legacy Data Migration

Key Objectives

- Identify project maintenance
- Perform Quality Assurance Testing
- Establish Training timeframe

Tasks

- Ensure core functionality
- Manage revisions
- Perform Quality Assurance testing
- Set training dates

Phase 5 Training

Key Objectives

- Define administrators
- Define access and approvals
- Administrator training
- Train the trainer/user training

Tasks

- Hold pre-training session with responders
- Perform administrator training
- Perform training
- Ensure client education and knowledge transfer
- Perform Publisher Training

Phase 6 Deployment

Key Objectives

- Finalize deliverables
- Finalize design/elements
- Implement solution to final production environment

Tasks

- Ensure solution meets requirements
- Review final production version

QScend Staff

The key QScend personnel assigned to this project will include:

Name/Title	Experience	What We Do
Keith LeBeau President	• B.S. in Business Administration • 25 years Industry experience, from Cobol applications programming to Senior Management	• CEO of QScend Technologies • Provides direction in day to day operation • Researches E-government trends to ensure QScend as industry leader • Provides leadership, guidance and experience throughout all phases of product development and throughout all QScend departments • Manages customer relationships and provides project management
Travis Lent Vice President, Software Development	• Certified in Windows operating systems and Web server environments • 12 years industry experience in client–server application programming, database design, programming and administration, internet development and graphic design. • Fluent in multiple programming languages including Visual Basic, Microsoft .Net, ASP, PHP, JavaScript, and Universe Basic. • Fluent in Microsoft SQL Server Database design and administration.	• Programming Team leader • Responsible for programming QScend applications • Responsible for developing and implementing new features • Provides experience and expertise to guarantee 100% satisfaction for customer support and technical questions

Craig Sandor Project Manager	• 12 years of experience in software technical support and project management • Fluent in HTML, CSS, along with many commonly used design tools. • Experienced as a network administrator both Windows and Linux based web, email, and FTP servers. • Veteran of more than 100 web application and content management systems implementations.	• Directs all tasks and staff members associated with each project • Provides consulting, quality assurance and quality review of each project • Directs design team and programming • Responsible for initial configuration, set up and functionality of each site • Oversees website cutover from production to live status.
Ed Dzitko Director of Training & Education	• BA in Communication (Public Relations and Advertising) • 10 years in journalism • 10 years in public relations • 10 years of teaching, training, and public speaking experience	• Creates online training videos and documentation. • Develops classroom training materials • Tutors/instructs people of any profession and skill level • Develops/delivers monthly webinars • Develops pre-launch style guides, Q & As and client helps

Training with QScend Academy

The mission of QScend Academy is to service all levels of QScend educational needs within your organization. The programs are designed to train anyone who may use the 'Q' products — frontline staff, managers, administrators, and IT staff — increasing your organization'S productivity from top to bottom.

Private On-Site Training

On-site training is a premium education solution for municipalities that wish to train a large number of staff. A QScend Academy education specialist will design a custom single- or multi-day course for your organization, and then visit your location to guide the training.

Interactive Online Training

QScend is pleased to offer a series of interactive, scenario-based, online training classes. This high-quality, web-based education courseware, allows members of your organization to learn at their own pace — and without leaving the office. QScend's online classes are based on the award-winning Adobe® Captivate™. Powerful and engaging training simulations enable anyone to rapidly develop the skills required to excel with the QScend suite of products.

- Watch — Flash movies show mouse movements and text captions that describe on-screen actions.

- Listen — Instructor-led audio narration guides trainees along.

- Interact — Practice actual procedures with mouse clicks and interactive quizzes and tests.

- Learn — Gain knowledge right from your desk — no travel required.

1-On-1 Distance Learning

Distance learning is designed for the busy professional who does not have the time to leave the office, but needs 1-on-1 training on the QScend product line. Distance learning courses, done live and delivered via the Web by our product experts, provide a personal touch and feedback as users learn in their home or office.

Annual User Group

The QScend Academy organizes our annual User Group meeting. This gathering of municipal managers, IT directors, Pubic Information Officers, communication officials, clerks, and other municipal professionals provides a unique opportunity for the exchange of ideas on using technology to improve citizen service. In addition to the forums, round table, and best practice discussions, many hands-on QScend training sessions are available.

Vendor Questionnaire

**CITY OF NOVI
CITIZEN RELATIONSHIP MANAGEMENT SYSTEM
(CRM)
VENDOR QUALIFICATIONS QUESTIONNAIRE**

Failure to answer all questions could result in rejection of your proposal.

Name of Firm _____ Qscend Technologies _____

Address: _____ 231 Bank Street _____

City, State Zip _____ Waterbury, CT 06702 _____

Telephone ___ 888.878.3006 _____ Fax _____ 203.759.0519 _____

Mobile ____ 203.558.5815 _____

Agent's Name (please print) ___ Sean Williams _____

Agent's Title ___ Regional Account Manager _____

Email Address: ___ Sean.Williams@QScend.com _____

Website _____ www.QScend.com _____

1. Organizational structure: Corporation, Partnership, etc. __ Corporation _____

2. Firm established:_____ 1998 _____ Years in business: _____ 14 _____

3. Has your firm filed for Chapter 7 or Chapter 11 within the last ten (10) years?

   No __X__   Yes _____Reason: _____

4. Under what other or former names has your organization operated?
   _____ N/A _____

5. How many full time employees? _____ 16 _____ Part time? _____ 0 _____

6. Please state the year Vendor started in the business of selling Citizen Relationship Management system solutions to City and Local Governments?
   _____ 1999 _____

7. Where is the Vendor's closest support facility and sales office?

   Support facility location: _____ Waterbury, CT _____

   Sales office location: _____ Waterbury, CT _____

8. Toll-free Support telephone number (if available) _____ 888.878.3006 _____

   Hours of Operation _____ 24/7 _____

9. What is the Vendor's average response time (hours) for a telephone response to a service call? ___ 10 Minutes _____ Where is the nearest service location from which a technician would be dispatched? _____ N/A _____

10. What is the Vendor's guaranteed maximum response time (hours)? ___ 1 Hour _____

11. Please list the Vendor's sales in the most recent 4 years:

    2011 _____39_____   2010 _____46_____

    2009 _____31_____   2008 _____22_____

12. Please list the number of NEW Citizen Relationship Management System installation the vendor has completed in the last three years:

    2011 _____37_____   2010 _____32_____   2009 _____24_____

13. How many fully operational installations for Citizen Relationship Management systems has the Vendor completed as follows:

Location	Michigan	Nationally
City Government	1	81
County Government	1	12
Other		
TOTAL OVERALL	2	93

14. Name of Customer/Citizen Relationship Management system Vendor is proposing:

    QAlert

15. How long has the current version of the Vendor software been in production?

    Version 7 2010

16. How often does the vendor normally release product upgrades or enhancements?

    Once Per Year

17. Please describe any plans the Vendor has to do a major re-write of their application software and/or merge their application software with that from another vendor.

    We are regularly adding features (Often customer-driven features). It is likely a new version will be deployed by the end of 2012.

18. Does the Vendor have a User Group?   Yes _____X_____   No _____

19. Will the Vendor provide all periodic enhancements to the software at no additional charge, beyond the annual support agreement?   Yes _____X_____   No _____

20. Does the Vendor provide product upgrades automatically or on demand?

    Automatically

21. Do upgrades or enhancements require third party implementation assistance?

Yes _____No _____X_____. If yes, what is the percentage of required assistance? _____%.

22. How many instances has the Vendor software interfaced with CityWorks and/or BS&A Suite "Building Module"

Municipality	CityWorks or BS&A
Warren	BS&A
Ongoing – CityWorks	Qscend is a partner with CityWorks and as such are in discussion with several CityWorks customers

23. What database environment(s) does the Vendor proposed management system software currently operate on? How many installations are currently implemented using each of the database environments?

Proposed Database Environment	Number of Installations
All SQL Server	All
Other Database Environments	Number of Installations

24. Will the Vendor guarantee that the system will operate at least 98% of the time during the first 2 years of operation? Yes _____X_____ No _____

25. What is the query tool and report writer that Vendor is proposing?
_____ Built in report writer. Customer can also use any reporting tool. _____
_____

26. What is the Vendor's hourly rate for implementation assistance _beyond_ that which is included in Vendor's bid?

Skill Set	Hourly Rate
	$95/Hour

27. Are any of the implementation services provided by third party partners?
Yes _____No _____X_____ if yes, please list: _____
_____
_____

28. **CRM system**

ITEM	REQUIREMENT	Y	N	COMMENTS
1	CRM system is web based thus no client application needs to be installed.	X		
2	CRM system is available in licensed, hosted, or both versions.	X		
3	Must be able to run CRM system in multiple browsers. Please list.	X		Chrome, IE, FireFox, ETC.
4	CRM system has a single database supporting multiple users	X		
5	CRM system allows user to select a date from a pop-up graphical calendar. A pop-up calendar is available on all date fields; however, date can be entered manually.	X		
6	CRM system has online mapping capabilities - Allow service requests to be tagged with a geographic location	X		
7	Drop-down list values can be found by starting to type-a-head and value can be selected by point and click retrieval.	X		
8	The CRM system can handle large search returns [over 500 items]?	X		
9	CRM system allows authorizations and passwords to be administered according to a pre-defined client profile or user-role that determines which tables, screens, processes, etc. a person is permitted to access.	X		
10	CRM system is password protected.	X		
11	Users can change their own password at any time.	X		
12	Password is not displayed while being typed.	X		
13	Staff users can be assigned multiple user roles.	X		
14	Administrators are able to suspend user access when a user is terminated.	X		
15	Session automatically logs out after a predetermined time of inactivity and a password screen appears.	X		
16	CRM system is scalable and robust (i.e. Successful implementation consisting of over 1,000 concurrent users).	X		
17	CRM system provides an audit trail of all database and table changes (e.g. date/time and person making changes)	X		

Item	Requirement	Y	N	Comments
18	CRM system has built-in file and record locking capabilities to prevent simultaneous updating of records.	X		
19	Administrators are able to limit input and viewing capabilities via user security group.	X		
20	CRM system-wide spell check capability	X		
21	CRM system is available to user 7 days a week, 24 hours a day.	X		
22	CRM system has one click close out process.	X		
23	CRM system is able to show all current and previous requests from a citizen by name, address, or telephone number.	X		
24	CRM system is able to connect with or provide a mobile application for Android, Apple and Blackberry Operating Systems	X		Not Blackberry
25	CRM system allows citizen to specify desired method of communication, phone, e-mail, text, social media, etc.	X		

29. Technical Requirements

Item	Requirement	Y	N	Comments
1	The software is able to use MS SQL Server DB Platform.	X		
2	The software writes directly to the MS SQL Server database without hitting any intermediate or proprietary database.	X		
3	The software uses SQL and OLEDB standards.	X		
4	Open Architecture: No proprietary hardware requirements	X		
5	Compatible with or co-resident with Windows 2003/2008 Server Operating systems.	X		
6	CRM system supports side-by-side load balanced web servers.	X		
7	All communication between web client and server(s) is done via TCP/IP.	X		
8	CRM system has real-time interface with CityWorks by Azteca Systems	X		Additional Service Required
9	CRM system has real-time interface with BS&A Suite "Building Module"	X		Additional Service Required
10	Provide industry standard documentation for your product.	X		

ITEM	REQUIREMENT	Y	N	COMMENTS
11	Provide customization documentation.	X		
12	Provide user documentation.	X		

30. **Citizen Relationship Requirements**

ITEM	REQUIREMENT	Y	N	COMMENTS
1	CRM system has the ability to create custom request types.	X		
2	CRM system has the ability to create custom request workflows for each request type.	X		
3	Requests can be submitted directly by citizens over the web and via an operator (correspondence by phone, fax, email, mail, or in person).	X		
4	All requests are automatically given a unique, sequential, time/date stamped ID number which is searchable.	X		
5	Requests can be exported to external applications using XML and stored procedures.	X		
6	Requests can be created by external applications and imported into the CRM system using XML and stored procedures.	X		
7	CRM system allows for the identification of duplicate requests (by location, type, date range, and vicinity).	X		
8	CRM system is able to reassign a request to a different person/department at any point along the way.	X		
9	CRM system is able to route requests automatically to the person/department responsible for the request.	X		
10	CRM system is able to route requests into queue/tray where designated staff can accept and take responsibility for request.	X		
11	Simple information requests can be setup to immediately supply the requested information, and automatically close the request without passing it to staff.	X		
12	Multiple documents of any file type can be added to requests.	X		
13	CRM system has an automatic escalation process which includes an email to management when deadline is not met after a predetermined and configurable time.	X		

ITEM	REQUIREMENT	Y	N	COMMENTS
14	CRM system must have multiple levels of escalations available for requests.	X		
15	CRM system allows other management staff to receive emails when particular requests are entered.	X		
16	Notes can be added to requests. Notes include date/time stamp and the user entering comment.	X		
17	CRM system allows notes to be tagged as internal or external (external notes can be viewed on a public website where internal notes can only be viewed by designated staff). Default shall be to internal.	X		
18	CRM system is able to show history of edits and updates made to a request.	X		
19	CRM system has the ability to provide an audit trail of escalations, postponements, case notes, and other key information pertaining to the case.	X		
20	CRM system is able to automatically notify citizen and staff when request is completed.	X		
21	Requests can be designated for public access or internal access only.	X		
22	Workflows created in the CRM system can include tasks (activities) in series and in parallel.	X		
23	Staff can view the entire workflow of a request to see what tasks (activities) come before and after.	X		Depends on permission levels granted by the city
24	CRM system allows supervisor staff to close tasks (activities) on behalf of staff reporting to them.	X		
25	Customized sets of questions can be created in the CRM system and asked prior to request creation.	X		
26	CRM system allows different sets of questions to be attached to different requests	X		
27	CRM system allows answers to questions be in various forms (e.g. text box, radio button, dropdown, etc.).	X		
28	CRM system allows requests to be given a priority (e.g. High, low, etc.) Based on answers to the submission questions.	X		
29	Requests can be determined and assigned based on answers to submission questions.	X		Uncertain what this means

ITEM	REQUIREMENT	Y	N	COMMENTS
30	When staff is away sick or on vacation, the CRM system can automatically assign requests (including any or all of its tasks (activities)) to a different user.	X		
31	CRM system allows requests to have a scope of visibility (i.e. allow more sensitive or confidential requests to be visible and accessible only to specific staff).	X		
32	Tasks (activities) in a request can be designated as mandatory or optional.	X		
33	Requests can be reassigned to a different case type if request was accidentally submitted incorrectly.	X		
34	Requests can be reassigned to a different department/staff at any point along the way.	X		
35	Location maps can be printed from the CRM system of complaint location.	X		
36	CRM system is able to track resource usage including staff, vehicles, and materials which can be recorded against a task (activity).	X		
37	Requests can be automatically closed after tasks (activities) have been completed.	X		Manually by user
38	Requests and tasks (activities) can be postponed and automatically reactivated.	X		
39	CRM system allows closed requests to be re-opened.	X		
40	CRM system has the ability for users to know how many service requests are currently in the queue waiting to be served.	X		
41	CRM system has the ability for users to know the average time spent with each request.	X		
42	CRM system has the ability for users to know how many requests have been entered.	X		
43	CRM system is able to create anonymous requests.	X		
44	CRM system has correspondence management that allows emails to be created and mailed within the CRM system through Microsoft Outlook.	X		
45	CRM system has correspondence management that allows letters to be created and batch printed.	X		
46	CRM system allows call takers to use an interactive map to identify and select a problem location.	X		

Item	Requirement	Y	N	Comments
47	CRM system has the ability to add user defined fields for citizens, locations, and cases to capture, search, and record on these fields.	X		
48	Ability to merge duplicate caller information	X		
49	A correspondence management module is available to track email and mail correspondence.	X		
50	Different screen view, from what citizens see, for City employees	X		
51	For the purpose of data retention the can data be completely deleted from the application after a set period of time?	X		

31. **Knowledge Base (KB)**

Item	Requirement	Y	N	Comments
1	CRM system has a knowledge base (KB) component that utilizes web content management functionality.	X		
2	KB is accessible through username/password permissions.	X		Optional
3	Workflows can be built into KB to allow users to approve, simply edit, and publish content in real time.	X		
4	KB has the ability to publish frequently asked questions.	X		
5	KB has the ability to publish frequently requested documents.	X		
6	KB has native searching capabilities.	X		
7	KB can be separated into internal and external sites.	X		
8	KB has the ability to post and record results for a survey.	X		
9	KB has the ability to show public events (e.g. county fair) in a calendar format.	X		

32. **Integration**

ITEM	REQUIREMENT	Y	N	COMMENTS
1	CRM system must be able to send bi-directional information (depending on technology of host system) in real time using a variety of methods including XML, stored procedures, web services etc.	X		
2	CRM system is OLEDB/SQL compliant.	X		
3	The vendor is responsible for the creation of the integration connectors.	X		
4	The support and maintenance of the integration component is managed by the vendor and covered as part of their support and maintenance agreement.	X		
5	Work with the other vendor(s) and the agency to create the integration connectors	X		
6	CRM system may use a middleware to communicate with other applications.	X		

33. **Internet**

ITEM	REQUIREMENT	Y	N	COMMENTS
1	Citizens have the ability to login and enter requests over the internet.	X		
2	Citizens are able to add attachments to their requests.	X		
3	CRM system allows citizens to login and track their requests over the internet.	X		
4	CRM system has a public bulletin board component that allows common requests to be displayed.	X		
5	Citizens do not need to login in order to view the public bulletin board.	X		
6	Ability to completely customize the "look and feel" of the website. The site can be configured by the organization to have the same color, fonts, backgrounds, and header as the organizations main website.	X		
7	Internet CRM system uses cascading style sheets.	X		
8	CRM system is scalable to accommodate multiple Internet customers performing transactions simultaneously.	X		

9	Internet CRM system is scalable across multiple servers.	X		
10	Internet CRM system uses Microsoft IIS.	X		

34. Reporting

ITEM	REQUIREMENT	Y	N	COMMENTS
1	CRM system has standard reports which are customizable.	X		
2	Reports will be available based on user permissions (i.e. different users will have reports available to them)	X		
3	Management users can view detailed reports to analyze performance.	X		
4	Reports can be previewed and printed from a web browser.	X		
5	Reports can be exported from CRM system (e.g. MS Excel, PDF, etc.)	X		
6	Reports can integrate to GIS to provide map based reports.	X		
7	Ability to add document templates into workflow (i.e. force letters and emails to be automatically created from a template and sent to citizen).	X		
8	CRM system has an interactive management Dashboard report	X		
9	CRM system has separate employee screen providing real-time "performance data" of their respective case load	X		
10	Reports can be scheduled to auto run and sent by email.	X		

35. What is the brand name of all products and software proposed by Vendor?

Product and Brand Name
QAlert – CRM System
QAlert Mobile (Optional) – Mobile management app for ipad
Report2Gov (Optional) – Citizen app

36. What are the qualifications of your staff to be assigned to this project, including the primary contact to be assigned?

Primary contact for project management – Keith LeBeau

*   Resumes for staff can be found on page 34 of our proposal

37. Provide detail for any other expenses not included above
1. Additional on-site training: $2,000/Day

2. Mobile management app for ipad: Pricing based on number of devices

38. Please state any exceptions, issues or alternatives to the City's requirements.
None

39. Claims & Suits: Does your firm have any litigation pending or outstanding against your organization or its officers?   If yes, please provide details.

No ___X___   Yes _____

_____

_____

_____

40. **References**: Provide at least three (3) references for projects that are comparable in scope to this bid. Several references from municipalities would be desirable.

Company __Can be found on page 38 of proposal_____

Address _____

Phone _____Contact name _____

Company _____

Address _____

Phone _____Contact name _____

Company _____

Address _____

Phone _____Contact name _____

41. Provide any additional information you would like to include which may not be included within this Questionnaire. You may attach additional sheets.

THE FOREGOING QUESTIONNAIRE IS A TRUE STATEMENT OF FACTS:

Signature of Authorized Company Representative: _____

Representative's Name (please print) ___Sean Williams_____

Date ____5-4-2012_____

References

References

City of Warren, MI

Honorable James Fouts, Mayor
Mr. James Hartley, CitiStat Coordinator
Phone: 586.574.4680
Email: jhartley@cityofwarren.org

City of Terre Haute, IN

Honorable Duke Bennett, Mayor
Mr. Brad Speidel, Information Technology Director
Phone: 812.244.2316
Email: brad.speidel@terrehaute.in.gov

Iosco County Road Commission

Ms. Michelle Edrington
Phone: 989.362.4433
Email: michelle@ioscoroads.org

City of Danbury, CT

Honorable Mark Boughton, Mayor
Phone: 203.797.4500
Email: m.boughton@ci.danbury.ct.us

Page | 40

Included with QAlert™

✓ 100% Web-based Municipal CRM

✓ Integrated website form for citizen submission of service requests

✓ Automatic notification to citizens via postal mail

✓ Automatic notification to citizens with text-to-voice phone call

✓ Unlimited categories and sub-categories for service request types

✓ Automatic routing to individuals or groups of individuals based on category types

✓ Email verification of submissions from the Web

✓ Citizen Log-in to view service request status

✓ Pre-population of questions or information based on service request type

✓ Stores citizen contact information

✓ Add unlimited activities and history to a service request

✓ Automatic notification to citizens via email

✓ Flexible search options to find any service request

✓ Integrates with street database for validation

✓ Automatic geo-coding of service request types

✓ Linking to related service requests

✓ Build maps of service request data

✓ GIS export capabilities

✓ Dozens of configured reports

✓ *My Service Requests* area for responders to view open / in progress / closed service request for which they have responsibility

✓ Full data importing via CSR files

✓ Add unlimited file attachments (pictures, documents, etc.) to any service request

✓ Escalation of service requests that aren't completed in a timely fashion

✓ Integrates with district information for reporting by district

✓ Built-In dashboard and graphical Web-based reporting

✓ Integration with third-party ODBC compliant reporting tools

✓ Delayed routing

✓ Voter registration list import

✓ OneScreen™ call taker interface optimized for 311 or call center staff

✓ Dynamic linking of related service requests

✓ Integration with VUEWorks™ Work Order and Asset Management system

✓ Dynamic GIS Integration

✓ On-the-fly Microsoft® MapPoint® for mapping related requests and searching for requests

✓ Auto-populates citizen contact info

✓ Private and shared reports

✓ Report builder

✓ Report generation scheduling

✓ Knowledge base FAQ

✓ Knowledge base author permissions

✓ Knowledge base emailing

✓ Full service citizen self-help area

NOTICE - CITY OF NOVI
REQUEST FOR PROPOSALS

CITIZEN RELATIONSHIP MANAGEMENT SYSTEM

The City of Novi will receive sealed proposals for **Customer/Citizen Relationship Management System (CRM)** according to the specifications of the City of Novi.

Sealed technical proposals, with <u>cost proposals sealed in a separate envelope</u>, will be received until **2:00 P.M.** prevailing Eastern Time, **Tuesday, May 8, 2012**. Proposals shall be addressed as follows and delivered to:

CITY OF NOVI
CITY CLERK'S OFFICE
45175 W. Ten Mile Rd.
Novi, MI 48375-3024

OUTSIDE OF MAILING ENVELOPES/PACKAGES MUST BE PLAINLY MARKED "CUSTOMER/CITIZEN RELATIONSHIP MANAGEMENT SYSTEM RFP" AND MUST BEAR THE NAME OF THE PROPOSER.

The City reserves the right to accept any or all alternative proposals and award the contract to other than the lowest proposer, to waive any irregularities or informalities or both; to reject any or all proposals; and in general to make the award of the contract in any manner deemed by the City, in its sole discretion, to be in the best interest of the City of Novi.

Sue Morianti
Purchasing Manager

Notice dated: April 19, 2012

NOTICE TO PROPOSERS:
The City of Novi officially distributes RFP documents through the Michigan Intergovernmental Trade Network (MITN). **Copies of RFP documents obtained from any other source are not considered official copies**. The City of Novi cannot guarantee the accuracy of any information not obtained from the MITN website and is not responsible for any errors contained by any information received from alternate sources. Only those vendors who obtain RFP documents from the MITN system are guaranteed access to receive addendum information, if such information is issued. If you obtained this document from a source other than the source indicated, it is recommended that you register on the MITN site, www.mitn.info and obtain an official copy.

CITY OF NOVI

**CUSTOMER/CITIZEN RELATIONSHIP MANAGEMENT SYSTEM
(CRM)CITIZEN RELATIONSHIP MANAGEMENT SYSTEM**

INSTRUCTIONS TO PROPOSERS

cityofnovi.org

This RFP is issued by the Purchasing Office of the City of Novi.

<u>IMPORTANT DATES</u>

RFP Issue Date	Thursday, April 19, 2012
Last Date for Questions	Monday, April 30, 2012 by 5:00 p.m. Submit questions via email to: Victor Cardenas, Assistant City Manager vcardenas@cityofnovi.org
Response Due Date	**Tuesday, May 8, 2012 by 2:00 p.m.**

<u>TYPE OF CONTRACT</u>
If a contract is executed as a result of the bid, it stipulates a fixed price for products/ services.

<u>PROPOSAL SUBMITTALS</u>
An **UNBOUND COMPLETED ORIGINAL and Six (6) copies** of each proposal, **with Cost Proposal Form submitted in a separate sealed envelope**, must be submitted to the Office of the City Clerk. **DO NOT INCLUDE ANY COSTS/FEES IN YOUR TECHNICAL PROPOSAL.** No other distribution of the proposals will be made by the Vendor. Proposals must be signed by an official authorized to bind the Vendor to its provisions.

FAILURE TO SUBMIT PRICING ON THE PROPOSAL FORM PROVIDED BY THE CITY OF NOVI MAY CAUSE THE BID TO BE CONSIDERED NON-RESPONSIVE AND INELIGIBLE FOR AWARD. PRICING SHALL BE SUBMITTED IN A SEPARATE SEALED ENVELOPE.

<u>CHANGES TO THE RFP/ADDENDUM</u>
Should any prospective Proposer be in doubt as to the true meaning of any portion of the Request for Proposal, or should the Proposer find any patent ambiguity, inconsistency, or omission therein, the Proposer shall make a written request (via email) for official interpretation or correction. Such request shall be submitted to the specified person by the date listed above. The individual making the request shall be held responsible for its prompt delivery.

Such interpretation or correction, as well as any additional RFP provisions that the City may decide to include, will be made as an addendum, which will be posted on the MITN website at www.mitn.info . Any addendum issued by the City shall become part of the RFP and shall be taken into account by each proposer in preparing their proposal. Only written addenda are binding. It is the Proposer's responsibility to be sure they have

obtained all addenda.   Receipt of all addenda must be acknowledged on cost proposal form.

SUBMISSION OF PROPOSALS

Proposals must be submitted in a sealed envelope. Outside of mailing envelope must be labeled with name of vendor and name of RFP. Failure to do so may result in a premature opening or failure to open such proposal.

To be considered, sealed proposals must arrive at City Clerk's Office, on or before the specified time and date. There will be no exceptions to this requirement. Proposal is considered received when in the possession of the City Clerk. Vendors mailing proposals should allow ample time to ensure the timely delivery of their proposal.   Proposals received after the closing date and time will not be accepted or considered. Faxed, emailed, or telephone bids are not acceptable. The City of Novi shall not be held responsible for lost or misdirected proposals. The City reserves the right to postpone an RFP opening for its own convenience.

Proposals must be clearly prepared and legible and must be signed by an Authorized Representative of the submitting Company on the enclosed form. Proposals must show unit and total prices. **ANY CHANGES MADE ON PROPOSAL FORMS MUST BE INITIALED OR YOUR PROPOSAL MAY BE CONSIDERED NON-RESPONSIVE.**

A proposal may be withdrawn by giving written notice to the Purchasing Manager before the stated due date/closing time.   After the stated closing time, the bid may not be withdrawn or canceled for a period of One Hundred and Twenty (120) days from closing time.

Proposers are expected to examine all specifications and instructions. Failure to do so will be at the proposer's risk.

Failure to include in the proposal all information requested may be cause for rejection of the proposal.

Any samples, CDs, DVDs or any other items submitted with your proposal will not be returned to the vendor.

No proposal will be accepted from, or contract awarded to any person, firm, or corporation that is in arrears or is in default to the City Novi upon any debt or contract, or that is in default as surety or otherwise, or failed to perform faithfully any previous contract with the City.

USE OF THE CITY LOGO IN YOUR PROPOSAL IS PROHIBITED.

CONSIDERATION OF PROPOSALS

In cases where items are requested by a manufacturer's name, trade name, catalog number or reference, it is understood that the proposer intends to furnish the item so identified or an item of "equal" quality and value as determined by the City of Novi.

Reference to any of the above is intended to be descriptive, but not restrictive, and only indicates articles that will be satisfactory. Bids of "equal" quality and value will be considered, provided that the proposer states in his/her bid what he/she proposed to furnish, including literature, or other descriptive matter which will clearly indicate the character of the item covered by such bid.

The City hereby reserves the right to approve as an "equal", any item proposed which contains minor or major variations from specification requirements, but which may comply substantially therewith.

RESPONSIVE PROPOSALS
All pages and the information requested herein shall be furnished completely in compliance with instructions. The manner and format of submission is essential to permit prompt evaluation of all proposals on a fair and uniform basis. Unit prices shall be submitted if space is provided on proposal form. In cases of mistakes in extension, the unit price shall govern. Accordingly, the City reserves the right to declare as non-responsive, and reject an incomplete proposal if material information requested is not furnished, or where indirect or incomplete answers or information is not provided.

EXCEPTIONS
The City will not accept changes or exceptions to the RFP documents/specifications unless Vendor indicates the change or exceptions on "Exceptions" section of the proposal form. In this RFP, it is also acceptable for the Vendor to indicate exceptions to the specifications in the Vendor Questionnaire.   If Vendor neglects to make the notation on the proposal form but writes it somewhere else within the RFP documents and is awarded the contract, the change or exception will not be included as part of the contract. The original terms, conditions and specifications of the RFP documents will be applicable during the term of the contract.

CONTRACT AWARD
The contract that will be entered into will be that which is most advantageous to the City of Novi, prices and other factors considered.   The City reserves the right to accept any or all alternative proposals and to award the contract to other than the lowest proposer, waive any irregularities or informalities or both, to reject any or all proposals, and in general, to make the award of the contract in any manner deemed by the City, in its sole discretion, to be in the best interests of the City of Novi.

After contract award, notification will be posted on the MITN website at www.mitn.info.

SELECTION PROCESS
This document is a Request for Proposals. It differs from an Invitation to Bid in that the City is seeking a solution as described herein, and not a bid meeting firm specifications for the lowest price. As such the lowest price will not guarantee an award recommendation. Competitive sealed proposals will be evaluated based on criteria formulated around the most important features of the service, of which qualifications, experience, capacity and methodology, may be overriding factors, and price may not be determinative in the issuance of a contract or award. The proposal evaluation criteria should be viewed as standards that measure how well a vendor's approach meet s the desired requirements of the city. Those criteria that will be used and considered in evaluation for award are set forth in this document. The City will thoroughly review all proposals received. The two highest ranked vendors will be invited to conduct a presentation to the evaluation committee. A contract will be awarded to a qualified vendor submitting the best proposal.

PROPOSAL EVALUATION CRITERIA

Proposals will be evaluated by the Qualifications Based Selection (QBS) process using the following criteria:

1. Overall system functionality and responsiveness to the intent of the requirements.
   a. Software configuration, design, technical specifications.
   b. Flexibility, ease of modification, and simplicity of operation by the users.
   c. Successful demonstration of how the CRM handles the citizen service requests provided.

2. Implementation plan and vendor support level.
   a. Delivery and Installation Schedules.
   b. Availability and quality of training proposed by the vendor.
   c. Quality of ongoing maintenance and technical support

3. Vendor Experience and Capability
   a. Experience and technical expertise of the staff assigned to this project
   b. Vendor resources
   c. Past performance (Feedback from references and current clients that use the proposed software).

4. Demonstrated integration with CityWorks and BS&A suite "Building Module (Building.NET)".
   a. Usage of the Cityworks Application Program Interface (API)

5. Reporting functions/statistical analysis

6. Cost, cost containment, and payment terms. Cost will be evaluated based on a five-year life cycle (Including software system initial purchase, implementation services, support services after installation, and annual recurring costs).

The evaluation committee will evaluate and rank the proposals on the basis of the apparent greatest benefit to the City of Novi. Shortlisted proposers may be asked to provide a presentation to the evaluation committee during the evaluation period. No negotiations, decisions, or actions shall be initiated by any firm as a result of any verbal discussion with any City employee prior to the opening of responses to this document. The City of Novi reserves the right to select, and subsequently recommend for award, the proposal which best meets its required needs, quality levels, and budget constraints. The City of Novi reserves the right to reject any and all proposals, to make an awarded based directly on the proposals, or to negotiate further with one or more firms. The City of Novi further reserves the right to make the final determination of actual equivalency or suitability of proposals with respect to requirements outlined herein.

The City of Novi may award a contract based on initial offers received, without discussion of such offers. Proposer's initial offer should therefore, be based on the most favorable terms available from a price and technical standpoint. The City may, however, have discussions with those proposers that it deems in its discretion to fall within a competitive range.

GENERAL CONDITIONS

INSURANCE
A certificate of insurance naming the City of Novi as an additional insured must be provided by the successful proposer prior to commencement of work. A current certificate of insurance meeting the requirements in Schedule B of the Sample Agreement is to be provided to the City and remain in force during the entire contract period.

TAX EXEMPT STATUS
It is understood that the City of Novi is a governmental unit, and as such, is exempt from the payment of all Michigan State Sales and Federal Excise taxes. Do not include such taxes in the bid prices. The City will furnish the successful proposer with tax exemption certificates when requested. The City's tax-exempt number is 38-6032551.

The following exception shall apply to installation projects: When sales tax is charged to the successful proposer for materials to be installed during the project, that cost shall be included in the "Complete for the sum of" bid price and not charged as a separate line item. The City is not tax exempt in this case and cannot issue an exemption certificate.

FREIGHT CHARGES/SHIPPING/HANDLING
All bid/proposal pricing is to be F.O.B. destination.

DOWN-PAYMENTS OR PRE-PAYMENTS
Any bid proposal submitted which requires a down-payment or prepayment prior to delivery and full acceptance of the item(s) as being in conformance with specifications will not be considered for award.

INVOICING
Invoices must be mailed to: City of Novi, Attn: Finance Department, 45175 W. Ten Mile Road, Novi, MI 48375

CONTRACT TERMINATION
The City may terminate and/or cancel this contract (or any part thereof) at any time during the term, any renewal, or any extension of this contract, upon thirty days (30) days written notice to the Vendor, for any reason, including convenience without incurring obligation or penalty of any kind.   The effective date for termination or cancellation shall be clearly stated in the written notice.

TRANSFER OF CONTRACT/SUBCONTRACTING
The successful proposer will be prohibited from assigning, transferring, converting or otherwise disposing of the contract agreement to any other person, company or corporation without the expressed written consent of the City of Novi. Such approval shall not constitute a basis for privity between the City and any subcontractor. Any subcontractor, so approved, shall be bound by the terms and conditions of the contract. The vendor shall be fully liable for all acts and omissions of its subcontractor(s) and shall indemnify the City of Novi for such acts or omissions.

NON-DISCRIMINATION
In the hiring of employees for the performance of work under this contract, neither the vendor, subcontractor, nor any person acting in their behalf shall by reason of religion, race, color, national origin, age, sex, height, weight, handicap, ancestry, place of birth, sexual preference or marital status discriminate against any person qualified to perform the work required in the execution of the contract.

ACCEPTANCE OF PROPOSAL CONTENT
Should a contract ensue, the contents of the proposal of the successful Proposer may become contractual obligations. Failure of a vendor to accept these obligations may result in cancellation of the award.

DISCLOSURE
All documents, specifications, and correspondence submitted to the City of Novi become the property of the City of Novi and are subject to disclosure under the provisions of Public Act No. 442 of 1976 known as the "Freedom of Information Act". This Act also provides for the complete disclosure of contracts and attachments hereto. This means that any informational material submitted as part of this RFP is available without redaction to any individual or organization upon request.

ECONOMY OF PREPARATION
Proposals should be prepared simply and economically, providing a straightforward and concise description of the vendor's ability to meet the requirements of the bid. Emphasis should be on completeness and clarity of content. Included in the response must be a point by point response to the Requirements and other sections of the bid.

The City of Novi is not liable for any costs incurred by proposers prior to issuance of a contract.

INDEPENDENT PRICE DETERMINATION

By submission of a proposal, the vendor certifies, and in case of a joint proposal, each party hereto certifies as to its own organization, that in connection with the proposal:

(a) The prices in the proposal have been arrived at independently without consultation, communication, or agreement, for the purpose of restricting competition, as to any matter relating to such prices with any other vendor or with any other Competitor; and
(b) No attempt has been made or will be made by the vendor to induce any other person or firm to submit or not submit a proposal for the purpose of restricting competition.

Each person signing the proposal certifies that:

(c) He is the person in the vendor's organization responsible within that organization for the decision as to prices being offered in the proposal and that he has not participated an will not participate in any action contrary to (a) and (b) above; or
(d) He is not the person in the vendor's organization responsible within that organization for the decision as to prices being offered in the proposal but that he has been authorized in writing to act as agent for the persons responsible for such decisions in verifying that such persons have not participated, and will not participate, in any action contrary to (a) and (b) above, and that as their agent, does hereby so certify; and that he has not participated, and will not participate in any action contrary to (a) and (b) above.

A proposal will not be considered for award if the sense of the statements required in the proposal has been altered so as to delete or modify the above.

CITY OF NOVI

CUSTOMER/CITIZEN RELATIONSHIP MANAGEMENT SYSTEM (CRM)

SPECIFICATIONS

Scope of Work

The City of Novi is seeking proposals from qualified firms to provide, install, implement, train and support a customer/citizen relationship management system.   The proposed system will integrate with two established workflow management software applications in the City's prominent citizen interaction departments, Public Services and Community Development. The selected application will work seamlessly with these two departments. Requests for services will be made by citizens via the chosen system which will populate the information in the respective workflow management system for the specific department. Vice-versa when Novi staff completed the requested task the chosen system will then receive the resolution and notify the requestor.

The system should be web based and the information received by and entered into the system shall be protected and **owned** by the City of Novi. Information entered into the system should be accessible and downloadable at any point of the agreement with "vendor."

The proposed system must be designed to meet the following objectives:

Functional Requirements
- Be designed to provide citizens with an easy way to connect with the City in whatever fashion is most suitable to the citizen (internet, email, telephone, text message, etc.).
- Allow citizens to track the status of their request through their unique log-in and specific case number assigned by software.
- Be user friendly. Employees should be able to learn to use the software with minimal time and training. It is not practical for employees to memorize numerous functions and keys. This goal cannot be achieved if it takes too much time to navigate through the system.
- Record information about each citizen interaction, including the nature of the issue and follow-up activities, in a time efficient manner.
- Allow citizens to easily attach additional documentation to a web service request.
- Basic processes such as data entering and information accessing should not be complicated.
- Be flexible enough to allow changing, editing and deleting records if necessary, while still providing an audit trail.
- The back-end database that the CRM uses must be stable and reliable. It should be easy to modify and update while in operation.
- Allow service requests to be tagged with a geographic location.
- Provide comprehensive, real-time information on citizen requests to assist management in measuring results, identifying areas for improvement and supporting the setting of consistent service standards.

- Include a searchable knowledge base that can provide answers to frequently asked questions and provide staff members with prepared scripts for providing information or soliciting information about requests.
- The knowledge base should be available and searchable to citizens via the internet.
- Log, track, prioritize and take action on calls/requests.
- Wireless and mobile field service delivery.
- Provide automated/template email responses to citizens. Provide manager and/or supervisor a dashboard of all contact center activity.
- Allow manager and/or supervisor the ability to reassign activities to meet workload needs.
- Provide detailed measurable of request resolution status, types of request being made, and normal performance measures/dashboards. All of which will be easily exported for reporting purposes.

Integration Requirements
- Real-time interface with Cityworks by Azteca Systems.
- Real-time interface with BS&A Suite, (Building Module).
- Integration with Microsoft Windows Active Directory.
- Integration with Microsoft Exchange 2010 and/or Outlook 2010

Support Requirements
- The CRM must come with excellent vendor or developer support. Such support shall not only be limited to installing the system.
- A technical help service shall be made accessible in case problems or inquiries arise about software operation. This service should be available 24/7 through phone, email or other forms of immediate communication.
- Provide remote and on-site maintenance service as needed, and specify normal response time guarantee.
- Instructional materials, training, and expert advice should be available upon request.
- Software Releases and Upgrades should be included as part of the Annual Maintenance costs.

Training Requirements
- On-Site training shall be provided for City of Novi personnel as follows:
- System Administration training for key Information Technology and Administrative personnel in configuring and troubleshooting the CRM software proposed.
- A test environment that mirrors the production environment should be available for on-going training of agents and testing of software releases.

Current Citizen Service Requests
As part of the submittal, the vendor should describe how their system would handle the following common service requests beginning from the initial citizen contact to the final resolution of the request (Appendix B). After an initial review of proposals, selected vendors may be requested to demonstrate how these requests and possibly others are processed in a live system.

1) Sanitary Sewer Stoppage
2) Signal or Streetlight not working
3) Overgrown grass complaint from neighbor

Response Format

To facilitate the analysis of responses to this RFP, the Vendor is required to prepare their response in accordance with the instructions outlined in this document.

Proposals shall be prepared as simply as possible and provide a straightforward, concise description of the Vendor's capabilities. *EMPHASIS SHOULD BE CONCENTRATED ON ACCURACY, COMPLETENESS, AND CLARITY OF CONTENT.* All parts, pages, figures, and tables should be numbered and labeled clearly. The response should be organized as follows:

Section	Title
1	Executive Summary
2	Company Background
3	Proposed Customer/Citizen Relationship Management System
4	Work Plan/Methodology
5	Vendor Questionnaire
6	References
7	Pricing Forms

Instructions relative to each part of the response to this RFP are defined in the remainder of this section.

Executive Summary

This part of the response to the Request for Proposals should be limited to a brief narrative not to exceed two (2) pages, describing the vendor's system. The summary should contain as little technical jargon as possible, and should be oriented toward non-technical personnel. The Executive Summary should not include cost quotations.

Company Background

Vendors must provide information about their company so that the City can evaluate the Vendor's stability. The City, at its option, may require the Vendor to provide additional documentation to support and/or clarify requested information.

Using not more than two (2) pages, the Vendor should outline the company's background including a brief description (e.g., past history, present status, future plans, company size, etc.) and organization charts.

If the Vendor is proposing to use a subcontractor on this project, please provide background information on the subcontractor, Vendor relationship with that firm and the specific services and/or products that the subcontractor will be providing on the project. A complete list of subcontractors is required.

Proposed Citizen Relationship Management System

The Vendor is required to provide a general description of the proposed system and overall technical solution. Responsive Vendors must address each section of this Request for Proposal and indicate how the City's objectives will be fulfilled.

- Overall system functionality
- Implementation
- Vendor Experience
- Integration

Work Plan/ Methodology
The proposer shall provide a work plan that will address the objectives as discussed herein.

Your work plan shall identify the tasks to be performed by your company and the timeframe to complete them. It must also identify who on the company's team will be performing the tasks and related experience. Proposals shall include implementation (start-up) strategies, communication and coordination procedures/recommendations.

Vendor Questionnaire
The Vendor must respond completely to the Vendor Questionnaire.

Client References
The Vendor must provide at least three (3) references from clients that are similar in size and complexity to the City and located within close proximity. References from the Michigan government sector clients are preferred.

Pricing Information
Costs for the Vendor's proposed solution should be submitted on Cost Proposal Form and sealed in an envelope separate from Vendor's technical proposal. Do not include any cost/fees/pricing in your technical proposal.

CITY OF NOVI

CITIZEN RELATIONSHIP MANAGEMENT SYSTEM RFP

ADDENDUM #1

INTENT: This addendum has been issued to modify and/or interpret the original specifications for the bid/RFP named above. Unless otherwise instructed, the information contained within this Addendum shall take precedence over anything contrary in the original specifications, and shall hereinafter be considered as part of the package.

RESPONSE: The Contractor shall verify receipt of this Addendum on the Cost Proposal Form.

CONTENTS: Included in this Addendum are two (2) pages of written addenda description.

QUESTIONS:

1. With the 2 Apps below, how is data typically exchanged with Web Services, Msg Queues, flat files?

   Real-time interface with Cityworks by Azteca Systems.
   Real-time interface with BS&A Suite, (Building Module).

   Answer: Both of the applications above are MS-SQL based. This presents the selected vendor solution with multiple possibilities for data exchange. We will look to the vendor to analyze and suggest the best possible interface between their application and the two listed above.

2. Describe Real time? How quickly should data be exchanged?

   Answer: The City of Novi strives to achieve the highest of customer service levels. To this end it is important that the frontend application (call for service) be routed to the back office application as quickly as possible. Conversely, once the service request has been resolved it is imperative that the back office application push that information to the frontend application so the customer can be notified as soon as possible. The timeliness of this process will be evaluated when selecting a solutions provider.

3. Any bidirectional data interfaces required to these systems?

   Answer: Please see the answer provided to the "Describe Real Time" question above.

4. What OS do they operate on (Windows Unix)?

   Answer: The two back office applications (Cityworks and BS&A Suite) operate in a Windows based environment.

5. Are any other DB Platform allowed to be used other MS SQL Server?

   Answer: While the City prefers to maintain a MS-SQL environment we will consider other database platforms.

Sue Morianti
Purchasing Manager

Notice dated: May 1, 2012

SCHEDULE B

A.   Insurance Requirements

The vendor will not commence work, nor will the City of Novi sign a contract, until vendor has obtained and delivered to the City of Novi the certificate of insurance required under this contract. All insurance carriers must be acceptable to the City of Novi and licensed and admitted to do business in the State of Michigan.

A new certificate of insurance will be provided to the City of Novi at the time of policy renewal any time during the entire length of the contract.

1.   <u>Coverage:</u> The Vendor shall maintain at its expense during the term of this Contract, the following insurance:

a.   **Worker's Compensation** insurance with the Michigan statutory limits and Employer's Liability insurance with minimum limits of **$100,000** (One Hundred Thousand Dollars) each accident.

b.   **Commercial General Liability Insurance –** The Contractor shall procure and maintain during the life of this contract, Commercial General Liability Insurance, Personal Injury, Bodily Injury and Property Damage on an "Occurrence Basis" with limits of liability not less than **$1,000,000** (One Million Dollars) per occurrence combined single limit.

c.   **Automobile Liability** insurance covering all owned, hired and non-owned vehicles with Personal Protection insurance to comply with the provisions of the Michigan No Fault Insurance Law including Residual Liability insurance with minimum bodily injury limits of **$1,000,000** (One Million Dollars) each person and **$1,000,000** (One Million Dollars) each occurrence and minimum property damage limits of **$1,000,000** (One Million Dollars) each occurrence.

2.   <u>Deductibles:</u> The Vendor shall be responsible for payment of all deductibles contained in any insurance required hereunder.

3.   <u>Insured:</u> All policies shall name the Vendor as the insured.

4.   <u>Cancellation Notice:</u> All policies shall include the following language: "Should any of the above policies be cancelled before the expiration date thereof, the issuing insurer will mail 30 days written notice to the certificate holder named on this certificate; alternately, contractor may agree to provide notice of such cancellation or reduction".

5.   <u>Additional Insured:</u> All policies include the following language "The City of Novi, their officers, agents, employees and volunteers, all boards, commissions and/or authorities and board members, including employees and volunteers thereof are added as additional insured." Certificates of Insurance evidencing such coverage shall be submitted to Purchasing Manager, City of Novi, 45175 W. Ten Mile Rd., Novi, MI 48375 prior to commencement of performance under this Contract and at least 15 days prior to the expiration dates of expiring policies.

6. If any work is sublet in connection with this Contract, the Vendor shall require each subcontractor to effect and maintain at least the same types and limits of insurance as fixed for the Contractor.

7. The provisions requiring the Vendor to carry said insurance shall not be construed in any manner as waiving or restricting the liability of the Contractor under this contract.

8. The City of Novi has the authority to vary from the specified limits as deemed necessary.

9. If, during the term of this Contract, changed conditions or other pertinent factors should in the reasonable judgment of the City of Novi render inadequate insurance limits, the Vendor will furnish on demand such additional coverage as may reasonably be required under the circumstances. All such insurance shall be effected at the Vendor's expense, under valid and enforceable policies, issued by the insurers of recognized responsibility which are well-rated by national rating organizations and are acceptable to the City.

10. Hold harmless/Indemnity

a. The Vendor agrees to save harmless and defend the City of Novi against and from any or all liability, loss or damages (including without limitations, fees and expenses of attorneys, expert witnesses and other consultants) which the City of Novi may suffer as a result of claims, demands, costs, or judgments against it arising from , out of or in consequence of the performance of this agreement, excepting only such liability, loss or damage as shall have been occasioned by the sole negligence of the City of Novi, it's officers, agents, or employees.

b. The Vendor agrees that is it its responsibility and not the responsibility of the City of Novi to safeguard the property and materials used in performing this contract. Further, the Vendor agrees to hold the City of Novi harmless for any loss of such property and materials used pursuant to the Vendors performance under this contract.

c. The Vendor shall not discriminate against any employee, or applicant for employment who is qualified to perform the work required in the execution of this contract because of religion, race, color, national origin, age, sex, height, weight, handicap, ancestry, place of birth, sexual preference or marital status. The Vendor further covenants that it will comply with the Civil Rights Act of 1973, as amended; and the Michigan Civil Rights Act of 1976 (78. Stat. 252 and 1976 PA 453) and will require a similar covenant on the part of any consultant or subcontractor employed in the performance of this contract.

QSCEND MASTER LICENSE AGREEMENT

This MASTER LICENSE AGREEMENT ("Agreement") is between QScend Technologies, Inc., with offices located at 231 Bank Street, 2ⁿᵈ Floor, Waterbury, CT 06702 ("Licensor"), and City of Novi, a Michigan municipal corporation, whose address is 45175 W. Ten Mile, Novi, Michigan 48375 ("Licensee").

This Agreement is being entered into in connection with that certain **CONTRACT FOR SERVICES: CITIZEN RELATIONSHIP MANAGEMENT SYSTEM** dated July 23, 2012 ("Services Contract").

1. License Grant. Licensor grants Licensee, a limited, non-exclusive, non-transferable, non-refundable License to use the licensed products ("Licensed Materials"), for a time period and as further defined in an attached Contract for Citizen Relationship Management System ("CRMS Contract"). In connection with this Agreement, Licensor will provide certain installation and/or implementation services pursuant to the CRMS Contract.

2. Ownership. The Licensed Materials and any copies thereof are the sole property of Licensor. The Licensed Materials are licensed and not sold and are protected by United States and international intellectual property laws, as well as certain international treaty provisions.

3. Restrictions. Licensee may not: (a) make electronic copies of the Licensed Materials (for other than backup purposes); (b) rent, lease, sublicense or (c) reverse engineer, decompile or disassemble the Licensed Materials.

4. Fees and Payment. Applicable license fees defined in an attached CRMS Contract are (a) due upon receipt of invoice and (b) exclusive of shipping, applicable taxes, duties or other similar fees, all of which are the responsibility of and shall be paid by the Licensee.

5. Upgrades and Support. Licensor may, at its sole discretion, release new versions ("Updates") of the Licensed Materials that contain improvements or enhancements. If Licensee purchases or otherwise receives an Update, this Agreement shall be extended to include such Update. All other support and maintenance provided are pursuant to the terms of Licensor's then-current Maintenance Support Program.

6. Term. Consistent with the term of the CRMS Contract, this Agreement shall remain in effect unless it is terminated by either party giving a written thirty (30) day notice of intent to terminate. Upon termination, Licensee shall immediately cease to use any of the Licensed Materials.

7. Limited Warranties. Licensor warrants that, for a period of 90 days after receipt by Licensee (the "Warranty Period") (a) the Licensed Materials shall perform substantially in accordance with its then-current functional specifications. This warranty covers only problems reported to Licensor during the Warranty Period. Licensee represents, warrants and covenants that, in connection with its use of the Licensed Materials, it will not input, store, maintain, or otherwise use personally-identifiable information, including any protected financial or health-related information protected by federal or state law.

8. Licensee Remedies. Licensee's sole and exclusive remedy, under any warranty or legal theory shall be limited to the replacement of the Licensed Materials.

9. Disclaimer. EXCEPT FOR THE EXPRESS WARRANTIES SET FORTH IN THIS LICENSE, LICENSOR MAKES NO OTHER WARRANTIES RESPECTING THE LICENSED MATERIALS, EXPRESS OR IMPLIED, INCLUDING IMPLIED WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE AND ACCURACY OF CONTENT.

10. Limitation of Liability. IN NO EVENT SHALL LICENSOR BE LIABLE TO ANYONE UNDER THIS AGREEMENT FOR ANY INDIRECT, INCIDENTAL, SPECIAL, CONSEQUENTIAL, RELIANCE OR COVER DAMAGES, OR DAMAGES FOR LOSS OF PROFITS, REVENUE OR DATA OR FOR COSTS OF PROCUREMENT OF SUBSTITUTE GOODS OR SERVICES, INCURRED BY LICENSEE OR ANY THIRD PARTY, WHETHER IN ACTION IN CONTRACT OR TORT, EVEN IF LICENSOR HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES. LICENSOR'S AGGREGATE LIABILITY FOR DAMAGES HEREUNDER SHALL NOT EXCEED THE AGGREGATE AMOUNT ACTUALLY PAID FOR THE SOFTWARE LICENSE DURING THE THREE (3) MONTH PERIOD IMMEDIATELY PRECEDING THE EVENT THAT GAVE RISE TO SUCH CLAIM.

12. Confidentiality. Licensee acknowledges that the Licensed Materials (and the components thereof) contain unique, confidential and secret information and is the trade secret and confidential proprietary product of Licensor. Subject to the laws of the State of Michigan regarding disclosure of public records (e.g., the Michigan Freedom of Information Act) Licensee shall not allow any person or entity to copy the Licensed Materials in whole or in part in any manner except as expressly permitted in this Agreement.

13. Miscellaneous. Except as may be amended by the CRMS Contract, this Agreement is the complete and the exclusive statement of the mutual understanding between the parties and supersedes any other Agreement relating to the Licensor's Software or Professional Services provided. Neither the rights nor the obligations arising under this Agreement are assignable or transferable by Licensee without Licensor's written consent. This Agreement shall be construed, adjudicated and enforced in accordance with the laws of the State of Michigan in the United States of America. Should for any reason, a provision or part thereof be determined to be invalid and contrary to, or in conflict with, any existing or future law or regulation of a court or agency having valid jurisdiction, such determination shall not impair the operation or affect the remaining provisions. All remaining provisions will continue to be in full force and effect, binding the Parties. Licensee shall not export or re-export the Licensor's Products without the written consent of Licensor. Sections 2, 3, 10, 11 and 12 will survive any termination of this Agreement.

IN WITNESS WHEREOF, the Parties have caused this Agreement to be duly executed on their behalf, effective from the date set forth below.

ACCEPTED: QScend Technologies, Inc. **ACCEPTED: Licensee, City of Novi, Michigan**

_____   _____
Signature   Signature

_____   _____
Print Name   Print Name

_____   _____
Print Title   `   Print Title

_____   _____
Date   Date