



**VILLAGE OF GURNEE
325 NORTH O'PLAINE ROAD
GURNEE, ILLINOIS 60031**

REQUEST FOR PROPOSAL

**CITIZEN RELATIONSHIP MANAGEMENT (CRM) AND PUBLIC
RECORDS (FOIA) REQUEST TRACKING SYSTEM**

ISSUE DATE: APRIL 5TH, 2019 - NOON

PROPOSAL DUE DATE: MAY 6TH, 2019 – 3:00 P.M.

INTRODUCTION

The Village of Gurnee is committed to ensuring the highest level of service to its residents and those requesting public records. To this end, the Village is seeking to implement a Citizen Relationship Management System solution to facilitate non-emergency service requests from residents as well as a Public Records (FOIA) Request Management System to assist with requests for public records.

The Village is requesting proposals from qualified professionals to provide a Citizen Relationship Management (CRM) System and/or a Public Records Request Management System (PRRMS) as well as maintenance/support services. The successful company will provide, implement, and support the system that will be used to accept, respond to, and track costs and activities related to citizen requests and requests for public records.

BACKGROUND

The Village does not currently have a centralized system to manage and track requests from the public. Additionally, there is no method for automated routing or assignment of requests, workflow or escalation of requests. The Village would like to ensure that all requests are responded to or fulfilled in a timely manner and have the ability to track time/costs associated with requests that come in. Further, the Village wishes to gather data on the number and types of requests, names of requestors, nature of the documents requested, staff time incurred, and costs.

The Village seeks to enter into an agreement with a reputable and experienced company. The term of agreement will be dependent upon the quality of the proposals received. The intent is for a long-term solution.

SOFTWARE LICENSING, HOSTING AND PLATFORM

The Village is willing to consider offers with the traditional software licensing model where the Village would pay up-front for the license of the software and pay regular (often times yearly) support cost; likewise the Village is willing to consider software packages delivered utilizing the Software as a Service Model (SaaS). The Village is also willing to consider hosting the software on-premises or in the cloud.

CRM SYSTEM FUNCTIONS

The CRM systems at a minimum must be able to provide the following basic functionality:

- Web and mobile application-based submittal of service requests by residents and Village staff.
- Management and organization of service requests by Department and service request category.
- Service request management includes intake, routing, categorizations, resolution, and reporting.
- Self-servicing options for citizens through a web portal, responsive web application, and/or mobile application.
- Real time access to data by staff and residents.
- Displaying service request data on maps.
- Automated messaging for providing status updates to residents.
- A centralized and user-friendly knowledge base.

- A consistent approach to address service requests or inquiries submitted by residents.
- Direct communication between Village Departments and residents.
- Advanced querying and reporting capabilities.

PRRM SYSTEM FUNCTIONS

The PRRM System at a minimum must be able to provide the following basic functionality:

- Web application-based submittal of requests by citizens.
- Management and organization of requests by Department.
- Request management includes intake, routing, and reporting.
- Payment collection and/or third-party integration for the collection of all costs associated with some requests.
- Self-servicing options for citizens through a responsive web application, web portal or mobile application.
- Real time access to data by staff and users.
- Automated messaging for providing status updates to requests.
- A centralized and user-friendly knowledge base.
- A consistent approach to address requests or inquiries submitted by citizens.
- Direct communication between Village Departments and requestors.
- Advanced querying and reporting capabilities.
- Compliance with 5 ILCS 140 - Illinois Freedom of Information Act
- Automated timelines for response based on the type of request
- The option to make previous requests public or internal-only

ROLES AND SECURITY

The System must provide role-based access control in order to ensure that access is only granted to authorized-users, i.e., roles will be created for various job functions. The permissions to perform certain operations will be assigned to specific roles. Members or staff (or other system users) will be assigned particular roles, and through those role assignments acquire the permissions to perform a function within the System.

SYSTEM SPECIFICATIONS

Questions related to the Village's desired CRM & PRRM system specifications and requirements are contained in **Attachment A: Questionnaire**. Vendors must fill out and return the questionnaire with their proposals. Responses to this questionnaire will be evaluated by the Village's selection committee.

SERVICES TO BE PROVIDED

The selected vendor will be required to perform the following services:

Initial System Set-up

Perform all necessary work to setup the system (i.e. software installation, creating user access, design portals to incorporate Village graphics, etc)

Project Plan and Management

The successful vendor shall provide extensive project management for the implementation of the proposed system. Vendor is expected to guarantee the successful, timely completion of those aspects of the project over which it has control.

Vendor must provide a project plan for achieving the objectives of the project including an explanation of the role of all vendor personnel, the role of Village of Gurnee staff, and an overall project timeline.

Key components to include in the project plan shall include an estimated timeframe, overview of deliverables, assumptions, and assumed vendor and Village responsibilities.

The vendor shall provide a qualified Project Manager who will be responsible for overseeing all aspects of the services to be provided to implement the proposed system. The Project Manager shall serve as the vendor's primary contact for management and administration of the project.

The primary duties of the Project Manager include, but are not limited to:

- Implement the project plan discussed above.
- Facilitate communication between project team members from the Village and vendor.
- Make commitments and decisions on behalf of the vendor team.
- Implement changes to the project plan.
- Manage project progress, including issues and potential schedule changes.
- Attend and participate in progress review meetings.
- Provide regular status updates to Village staff.

Training Requirements

The selected vendor shall provide the Village with a comprehensive training program to assist with the facilitation, implementation, and comprehensive use of their proposed system.

The training plan shall support the following user groups:

- System Administrators
- End-Users

Key factors in an effective training program are expected to include:

- Instructors shall demonstrate a thorough knowledge of the material covered in the courses and familiarity with the training manuals, system documentation tools, and training aids used in the courses.
- The Village has the right to video record, for internal use only, all training sessions. These materials are valuable in refresher training and follow up training. All training aids, materials, and recordings prepared to accomplish this service become the property of the Village.
- System Administrator training will cover the entire system with in-depth sessions for each functional area.
- End user training will be focused on functional positions and workflow processes. All personnel comprising a specific functional position in a department will be trained on the system's use specific to their needs.
- Training shall be provided in the use of all report and query functions for users who will be creating and modifying reports.

- Quick reference guides which provide instruction to basic, often used functions shall be provided.

Ongoing Service and Upgrades

Following expiration of any warranty period, the selected proposer will be required to provide maintenance services, including, but not limited to, telephone and online technical and user support, as well as on-site services if necessary.

PROPOSAL SUBMITTAL PROCEDURES

Respondents shall submit two (2) hard-copies plus one electronic version of the RFP response document. RFP documents must include all the information described under “Required Submittal Information” below.

The deadline for receipt of proposals is May 6th, 2019, by 3:00 pm, CDT. The Village of Gurnee reserves the right to extend the proposal submittal date, if needed.

Deliver/send to:

Village of Gurnee
ATTN: Eric Venden, GIS Coordinator
325 North O’Plaine Road
Gurnee, IL 60031

Interviews of selected firms may be scheduled as needed to make a final decision.

Questions regarding this Request for Proposal should be directed to Eric Venden at 847-599-7585 or ericv@village.gurnee.il.us.

VENDOR DEMONSTRATIONS

Demonstration of selected finalists will be scheduled beginning 13th and be completed by May 24th, 2019. All demonstrations will be held onsite at the Gurnee Village Hall. A webinar-based presentation may be allowed if mutually agreed upon by both parties. All costs associated with such product demonstrations will be the sole responsibility of the vendor. If invited to perform a demonstration, the demonstration product must be on the version and platform proposed.

The demonstration of software should include, but is not limited to, the following elements:

- Brief vendor introduction, background of firm, and relationship with software developer.
- Explanation and demonstration of how users navigate through the system.
- Explanation of system concepts related to service requests, public inquiries, and public records requests.
- Demonstration of workflow automation during the life cycle of a service request or public records request.
- Demonstration of “Search” or “Inquiry” capabilities.
- Demonstrate the process of an “over the counter” service request or public records

- request.
- Demonstration of request entry and workflow.
 - Demonstration of unique design concepts or user features which the vendor would like to illustrate.
 - Demonstrate the dashboards for various Village staff based on their role and how these assist with request routing and request response.
 - Demonstrate mapping functions with a discussion of how the system integrates with the Village's GIS.
 - Demonstrate mobile application and request entry on a mobile device.
 - Demonstrate customization features and reporting capabilities.
 - Demonstration of System Security capabilities and configuration.
 - Discussion of system design and architecture as it benefits system administration, usage, and longevity.

The Village will allow as much as 4 hours for the vendor demonstration.

REQUIRED SUBMITTAL INFORMATION

Respondents should prepare a proposal bound with each section labeled for the Village, which addresses their approach to the scope of work, a timeline for completion, and the deliverables that would be received by the Village. A detailed budget of costs associated with each of the items in the scope of work must accompany the proposal.

Respondents must include the following information in their submittal to include any sub-contractors/sub-consultants as well. Additional relevant back up material can be included with the proposal. The information received will be evaluated for responsiveness to the overall project, qualifications, references, cost, and ability to perform the work in a timely manner.

1. **Cover Letter & Contact Information:** Include the name, address, phone number fax number, and email address of the firm and primary contact person on the cover page of the proposal.
2. **Executive Summary:** Include a one or two page overview of the RFP response. Include differentiating factors in comparison to perceived competitors.
3. **Company Profile:** Include the location of the main headquarters for the company, as well as any other local or regional offices. List the number of years the company has been doing business under the current name. Describe company history, growth, staff size, and ownership. Detail any acquisitions by or of the company. Summarize the past 3 years of audited Financial Statements, including the name of the auditing firm. List the names of the software products the company currently offers. Include any corporate alliances and business partnerships. Describe the nature of any pending litigation, liens, or claims filed against the firm.
4. **Personnel Resumes:** Include the names and qualifications of the individuals that will perform the work. Attached resumes are acceptable in addition to a summary in the written proposal. A description or organizational chart describing the roles of each employee must be included. Sub-consultants that may be utilized for other professional services must be included. This includes identifying any third party software products

that will be used.

5. **Client References:** A list of all clients that have purchased the company's software products over the past 10 years, at a minimum. For clients who have implemented their system within the last five years, please include the client's contact information including phone number and email address. Also, please list the web address for public facing request portals for clients utilizing your product. Please identify those clients whose projects were similar in size and scope to this project for the Village of Gurnee. Select references will be contacted regarding the client's satisfaction with software and services provided.
6. **System Overview:** Provide an overview of the product(s) you propose to utilize for this project. Include a description of key features and functionality. Describe the aspects of your product that set your solution apart from your competition. Please provide samples of user interfaces, which can include screen shot samples with narrative descriptions.
7. **Application Requirements Checklist:** Please respond to all questions contained in the attached "Application Requirements Checklist" with regards to the software product you propose to deliver. If you need additional space for comments regarding a specific question, feel free to attach additional pages for your comments.
8. **System Requirements:** List all recommended system requirements. Describe the technologies on which the program is based, including development environment used, database systems, programming languages, supported operating systems, web servers, supported browsers and browser versions, and required plug-ins.
9. **Quality Assurance & Data Protection Procedures:** Describe your company's proposed approach to ensure that data will be entered accurately and correctly. Describe how data integrity is maintained within the operation of the program. Describe how access to information is secured. Describe recommended backup procedures.
10. **Support Services:** Describe the technical support services offered by your company. These services may include on-site support, remote support, VPN access, telephone support, and training services. Please describe all methods your company uses to provide remote support to clients. List the number of professionals in your company dedicated to user support. Also list any user groups that may exist.
11. **Version Control and Product upgrades:** Describe the method of version control, the frequency of updates (excluding critical fixes), and the method of providing updates, upgrades, service packs and hot fixes. Describe how new software versions and software updates are tested prior to release. Describe how 'customizations' are handled with regards to updates, upgrades, service packs, and hot fixes.
12. **Warranty:** Please include warranty information for any and all products, including third party software and all contractor/subcontractor services, including installation and data conversion, and the methods used to dispute claims against those warranties.
13. **Project Planning & Schedule:** Explain your firm's approach to project planning for the proposed system. Please provide a proposed project schedule which indicates the timing of key tasks that must be completed by your company and the Village of Gurnee.
14. **Cost:** The total project cost must be broken down by each deliverable item or task. The vendor should use their best judgment, based on all information contained in this RFP, to determine all core software, optional software, and professional services which are needed to result in a highly successful project for the Village. Pricing shall remain valid for a minimum of 180 calendar days from the proposal due date. Deliverable costs may

include, but need not be limited to, the following:

- a. Core Software Licenses – The cost per user seat, number of concurrent users, or by site.
- b. Optional Software Modules – The cost per user seat, number of concurrent users, or by site for optional, add-on modules of software or mobile applications. The vendor should make a recommendation regarding which optional software modules are appropriate based on the size, scope and objectives of this project.
- c. Software Maintenance Fees & Support Costs – The cost of annual software maintenance and support fees for the first five years after implementation. Please specify if these fees include new software versions, minor software upgrades, fixes, and comprehensive support, help desk support, cost of installing upgrades & new versions, etc.
- d. Implementation Services – Costs for installing and configuring the system, performing any necessary customization, etc.
- e. Training – Enumerate costs for on-site training, off-site training, or Internet facilitated training. On-site training must be included as part of system installation. Please estimate the appropriate amount of training and expected level of computer skills needed for the Village of Gurnee staff based on positions and roles. Also describe training options for future employees and/or refresher training.
- f. Travel and Expenses – Travel costs and expenses for on-site implementation services.

EVALUATION AND SELECTION

An evaluation team will evaluate proposals on a variety of quantitative and qualitative criteria including client references. The proposal selected shall provide the most cost-effective approach that best meets the stated objectives. The lowest-priced proposal will not necessarily be selected.

The Village of Gurnee reserves the right to reject any or all responses to the RFP, to negotiate directly with any responding or other party irrespective of the information provided in the RFP responses, to advertise for new RFP responses, to accept any RFP responses deemed to be in the best interests of the Village of Gurnee, to waive any irregularities and technicalities, or to otherwise proceed in the best interest of the Village of Gurnee in its sole discretion. The Village of Gurnee has the right to follow up with any responding party to obtain additional information if deemed in the best interest of the Village.

Acceptance of any response to the RFP should not be construed as a contract nor shall it indicate any commitment on the part of the Village of Gurnee for any future action.

The Village of Gurnee does not represent that any proposal will be implemented or that any individual respondent will be the party contracted with. In the event the Village selects a respondent's proposal, implementation of the proposal will be through separate, written agreement. Proposals and all ideas contained therein shall not be deemed proprietary to the

respondent and may be used by the Village of Gurnee in any manner deemed in its best interest.

COSTS INCURRED BY VENDOR

The Village shall not be liable for any costs incurred by the Vendor in preparing or submitting a proposal to the Village or for any cost incurred prior to the execution of a formal agreement. The Village shall incur no costs for vendors selected to perform on-site demonstrations. Proposals should be prepared simply and economically, providing a straightforward, concise description of the Vendor's capabilities to satisfy the requirements of the proposal.

CONFIDENTIALITY OF RECORDS

Respondents must identify each portion of their proposals which they deem confidential and note each page as such. Respondents must provide justification of what materials, upon request, should not be disclosed by the Village of Gurnee. Nonetheless, the Village of Gurnee is a governmental agency, and as such, its records may be subject to disclosure to the public under 5 ILCS/140.