

MARCIA A. LECLERC  
MAYOR

# TOWN OF EAST HARTFORD

740 Main Street

East Hartford, Connecticut 06108

(860) 291-7270

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PURCHASING DEPARTMENT

WWW.EASTHARTFORDCT.GOV

## TOWN OF EAST HARTFORD, CT INVITATION TO BID

BID #16-20

RE: R.F.P. – Citizen Relationship Management/311 Software

Proposals will be received at the Office of the Purchasing Agent, Town Hall,  
740 Main Street, East Hartford, Connecticut, 06108 until Wednesday, April 13, 2016 at  
11 a.m. at which time they will be publicly opened and recorded.

Information and Specifications are available at the above office or on the Town of East  
Hartford bid's website at <http://www.easthartfordct.gov/bids>

The right is reserved to reject any or all bids when such action is deemed to be in the best  
interest of the Town of East Hartford, Connecticut

Michelle A. Enman  
Purchasing Agent  
(860) 291-7271

**TOWN OF EAST HARTFORD**  
**STANDARD INSTRUCTIONS FOR PROPOSAL**

1. Sealed proposals will be received by the Purchasing Agent until the date and time specified on the title sheet. Proposals received later than the date and time specified will not be considered and will be returned unopened. **Proposals will not be accepted via fax or e-mail.**
2. All proposals will be opened and recorded and are subject to public inspection. Firms may be present or be represented at all openings.
3. Municipalities are exempt from any sales, excise or federal taxes. Fees must be exclusive of taxes and will be so construed.
4. The Town of East Hartford reserves the right to reject any or all proposals or any part of any or all proposals and to waive any informality when such action is in the best interest of the town and also reserves the right to extend an awarded proposal by mutual consent and negotiate any terms, conditions and prices if it is in the best interest of the town.
5. Firms should familiarize themselves with the items and/or conditions set forth in the Request for Proposal specifications. Failure to be informed will not be accepted as an excuse from fulfillment of the requirements.
6. In case of an error in the extension or addition of prices, the unit price will govern. The Town will not be subject to any price increases after an award if not part of the original proposal terms.
7. For professional services - a selected town committee will evaluate all responses and make a recommendation to the Mayor. **If deemed necessary** by the committee, an interview may be required as part of the selection process.
8. Please include a corporate resolution with your submittal dated the same day as the submittal. Sample formats for Corporations and Professional Corporations, Limited Liability Company and Partnerships (including Limited Partnership and Limited Liability Partnership) are attached in this packet.
9. Per Town Ordinance Sec. 10-10 (d): The Town shall not award a bid to any bidder who owes a delinquent tax to the Town. Bidders certify by virtue of their signature on the bid sheet that neither the bidder nor any business or corporation in which the bidder owns and interest is delinquent in tax obligations to the town.
10. The bidding entity is required to provide evidence from the Connecticut Secretary of State that they are in good standing and qualified to conduct business in the State of Connecticut.

# **INSURANCE REQUIREMENTS**

## **A CERTIFICATE OF INSURANCE WILL ONLY BE REQUIRED OF THE AWARDED BIDDER**

### **INSURANCE INDEMNIFICATION CLAUSE**

The Town of East Hartford, CT is to be named as an “**additional insured**” and an additional insured policy endorsement must be submitted with the certificate of insurance and the nature of the project is to be stated on the certificate.

### **INDEMNIFICATION**

**AGENCY** agrees to indemnify and hold the Town of East Hartford, CT harmless against and from any and all claims by or on behalf of any person arising from or in connection with:

A: Any act, error, omission, negligence or fault of **AGENCY** or any of its agents, servants, employees and sub-contractors.

B: Any accident, injury or damage whatsoever caused to any person occurring during the performance of this contract.

Further, the **AGENCY** agrees to indemnify and hold harmless the Town of East Hartford, CT against and from all reasonable costs, counsel fees, expenses and liabilities incurred in or with respect to any such claim and any action or proceeding brought thereon; and in any case any action or proceeding shall be brought against the contractor by reason of any such claim, contractor upon notice from the Town of East Hartford, CT agrees to resist and defend such action proceeding, unless **AGENCY** causes the same to be discharged and satisfied.

### **A. GENERAL REQUIREMENTS**

The **AGENCY** shall be responsible for maintaining insurance coverage in force for the life of this contract of the kinds and adequate amounts to secure all of the **AGENCY** obligations under this contract with an insurance company(ies) with an AM Best Rating of A-VII or better licensed to write such insurance in the State of Connecticut and acceptable to the Town of East Hartford, CT

The insurer shall provide the Town of East Hartford, CT with **Certificates of Insurance signed by an authorized representative of the insurance AGENCY(ies)** prior to the performance of this contract describing the coverage and providing that the insurer shall give the Town of East Hartford, CT written notice at least thirty (30) days in advance of any termination, expiration, or any and all changes in coverage. Such insurance or renewals or replacements thereof shall remain in force during the **AGENCY** responsibility under this contracts.

The **AGENCY** at the **AGENCY’S** own cost and expense, shall procure and maintain all insurance required and shall name the Town of East Hartford, CT as Additional Insured on all contracts, except Workers’ Compensation and Professional Errors & Omissions coverage’s.

B. SPECIFIC REQUIREMENTS:

1) Workers' Compensation Insurance

The **AGENCY** shall provide Statutory Workers' Compensation Insurance, including Employer's Liability with Limits of:

\$100,000 Each Accident  
\$500,000 Disease, Policy Limit  
\$100,000 Disease, Each Employee

2) Commercial General Liability Insurance

The **AGENCY** shall carry Commercial General Liability Insurance (Insurance Services Officer Incorporated Form CG-0001 or equivalent). As per occurrence limit \$1,000,000 is required. The Aggregate Limit will be not less than \$2,000,000. Any deviations from the standard unendorsed form will be noted on the Certificate of Insurance.

3) Business Automobile Liability Insurance

The **AGENCY** shall carry Business Automobile Liability Insurance (Insurance Services Office Incorporated Form CA-00001 or equivalent). A per occurrence limit of \$1,000,000 is required. "Auto Auto" (symbol 1 or equivalent) is required. Any deviations from the standard unendorsed form will be noted on the Certificate of Insurance.

C. **OTHERS: PROFESSIONAL SERVICES – ARCHITECTS, ENGINEERS, ET AL.**

The **AGENCY** shall carry Errors & Omissions coverage in the amount \$1,000,000 per occurrence for all professional services contracts only. If the insurance coverage is written on a claims made basis, an extended reporting period of at least 3 years after substantial completion of the project is required.

The Town reserves the right to amend amounts of coverage required and type of coverage provided based on work or service to be performed.

D. SUBCONTRACTOR'S REQUIREMENTS:

The **AGENCY** shall require its subcontractors and independent contractors to carry the coverages set forth in section B and C above and will obtain appropriate Certificates of Insurance before the subcontractors and independent contractors are permitted to begin work.

The **AGENCY** shall require that the Town of East Hartford, CT be named as Additional Insured on all subcontractors and independent contractors insurance before permitted to begin work.

The **AGENCY** and all subcontractors and independent contractors and their insurers shall waive all rights of subrogation against the Town of East Hartford, CT, and its officers, agents, servants and employees for losses arising from work performed by each on this contract.

RESOLUTION FOR CORPORATIONS AND PROFESSIONAL CORPORATIONS  
(required)

(TO BE TYPED ON CORPORATION LETTERHEAD PAPER)

I \_\_\_\_\_, Secretary of \_\_\_\_\_  
(Name of Corporation's Secretary) (Legal name of Corporation)  
a Corporation duly organized and operating under the laws of \_\_\_\_\_ and  
(State)

Qualified and authorized to do business in the State of Connecticut, DO  
HEREBY CERTIFY that the following is a true, correct and accurate copy of a  
Resolution duly adopted at a meeting of the Board of Directors of such  
Corporation, duly convened and held on \_\_\_\_\_, at which meeting  
a duly constituted quorum of the Board of Directors was present and voted in  
favor of such Resolution. I further CERTIFY that such Resolution has not been  
modified, rescinded or revoked since the date on which it was enacted, and it is  
at present in full force and effect:

RESOLVED: That the following Officers of this Corporation, or any one  
them: \_\_\_\_\_

\_\_\_\_\_,  
(Name and title of Officer or Officers)  
is empowered to execute and deliver in the name and on behalf of this  
Corporation contracts, bids and other documents to the Town of East Hartford, State of  
Connecticut, and are further authorized to affix the Corporate Seal to such documents  
and to bind the Corporation to such contracts, bids and other documents.

IN WITNESS WHEREFORE, the undersigned has affixed his/her signature and the  
Corporate Seal of the Corporation, this \_\_\_\_\_ day of \_\_\_\_\_.

(Affix Corporate Seal Below)

\_\_\_\_\_  
(Typed name of Corporation's Secretary)

\_\_\_\_\_  
SIGNATURE OF SECRETARY

Resolution for Limited Liability Company (required)

(TO BE TYPED ON LIMITED LIABILITY COMPANY LETTERHEAD PAPER)

The undersigned, all of the members [or, if applicable, the managing member] of

\_\_\_\_\_

(legal name of LLC)

A Limited Liability Company duly organized and operating under the laws of

\_\_\_\_\_ and

(State)

qualified and authorized to do business in the State of Connecticut, DO

HEREBY CERTIFY that the following is a true, correct and accurate copy of a Resolution duly adopted at a meeting of the Members of such Limited Liability Company, duly convened and held on \_\_\_\_\_, at which meeting a duly constituted quorum of the voting Members was present and voted in favor of such Resolution. We further CERTIFY that such Resolution has not been modified, rescinded or revoked since the date on which it was enacted, and it is at present in full force and effect:

RESOLVED: That the following Members of this Limited Liability Company, or any one them: \_\_\_\_\_

\_\_\_\_\_

(Name and title of Members)

is empowered to execute and deliver in the name and on behalf of this Limited Liability Company, contracts bids and other documents to the Town of East Hartford, State of Connecticut, and are further authorized to seal to such documents and to bind the Limited Liability Company to such contracts, bids and other documents.

IN WITNESS WHEREFORE, the undersigned have executed this resolution, this \_\_\_\_\_ day of \_\_\_\_\_.

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Have all necessary parties sign and indicate their name and title, such as member, managing member etc..

Resolution for Partnership (including Limited Partnership and Limited Liability Partnership) (required)

(TO BE TYPED ON PARTNERSHIP LETTERHEAD PAPER)

The undersigned, all of the partners (or, if a Limited Partnership, all of the general partners, or if a Limited Liability Partnership, all of the partners) of \_\_\_\_\_, a partnership (or, if applicable, a Limited Partnership or Limited Liability Partnership) duly organized and operating under the laws of \_\_\_\_\_ and qualified and authorized to do business in the State of Connecticut, DO

HEREBY CERTIFY that the following is a true, correct and accurate copy of a Resolution duly adopted at a meeting of the voting partners of such partnership duly convened and held on \_\_\_\_\_, at which meeting a duly constituted quorum of the voting partners was present and voted in favor of such Resolution. We further CERTIFY that such Resolution has not been modified, rescinded or revoked since the date on which it was enacted, and it is at present in full force and effect:

RESOLVED: That the following partners, or any one of them: \_\_\_\_\_

\_\_\_\_\_,  
(Name and title of Partners)

is empowered to execute and deliver in the name and on behalf of this partnership, contracts, bids and other documents to the Town of East Hartford, State of Connecticut, and are further authorized to seal to such documents and to bind the partnership to such contracts, bids and other documents.

IN WITNESS WHEREFORE, the undersigned have signed this resolution on, this \_\_\_\_\_ day of \_\_\_\_\_.  
(day) (month and year)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Have all necessary partners sign and indicate their name and title, such as partner, general partner, etc.

# **TOWN OF EAST HARTFORD CITIZEN RELATIONSHIP MANAGEMENT SOLUTION REQUEST FOR PROPOSAL**

## **I. INTRODUCTION**

Citizen Relationship Management/311 Software. The CRM system should be able to capture service request details, route the service request to the appropriate department, track workflow progress, establish escalation procedures and provide high-level reporting. The application must contain a knowledge base to allow customer service representatives to accomplish first call resolution. This solution must have the option to be maintained and hosted by the Town of East Hartford (Town). All product updates will be made available upon release. Training for all is to be conducted by the vendor on-site. Implementation of CRM system with recommended Best Practices.

## **II. REQUIREMENTS**

The 311 CRM systems at a minimum must be able to provide the following basic functionality:

- Capture service request and 311 call detail
- Comprehensive call taker data collection
- Track service request activities
- Executive level reporting
- Must be perpetually licensed
- Must be able to run in the cloud or run in Town of East Hartford data center
- SQL Based
- Citizen and call taker knowledgebase
- Users have point-and-click retrieval of all request related information
- Users have ability to re-route service request to proper service provider, or alternatively to return to originator with a “proper provider unknown” designation
- Users have easy close-out process
- Must provide online mapping capabilities and integration with East Hartford’s GIS System
- Must have access to the CRM system 7 days a week, 24 hours a day.
- Users can enter multiple requests without having to reenter the caller’s name, address and telephone number
- Users can enter multiple service request simultaneously without having to complete one before the other
- 311 CRM system must have the ability for a standard web service interface to other systems, including but not limited to work orders, timekeeping and asset management<sup>1</sup>
- Must be able to build reports and export data to Excel directly from CRM system
- Must be able to generate charts and graphs directly from CRM system
- Users have the ability to enter a previous caller’s telephone number and search the database to see if the caller’s information is already in the system, with the option to automatically enter the caller’s name and address into the present request
- Application is capable of running on a virtual server
- Meet all requirements and specifications in the Request for Proposal and Invitation to Bid including without limitation those in Exhibit A, and have satisfactory responses in Exhibits B, C, and D so as to show the bid meets legal requirements for responsive and

responsible bidders. Any exceptions must be noted in accordance with the Town's procedures and Connecticut law. The bidder is responsible for understanding these requirements.

### ***III. Training***

Must provide a training and implementation plan. The training and implementation plan should include at a minimum, but not limited to:

- identification of training requirements in order for an individual to be fully trained on the use of the software
- required number of days needed for individual training
- technical training and requirements necessary to have a fully functional CRM system.

All training would need to be conducted on a normal Monday-Friday business day schedule. If possible, the training and implementation plan should identify training costs based on an individual basis or on a graduated scale based on a quantifiable grouping of individuals.

### ***IV. Warranty and Maintenance Period***

The software should provide 1 years of maintenance for at least a period of one year from the date of acceptance of installed CRM system. Costs for annual maintenance must be included

### ***V. Data Integration and Sources***

The Proposed solution may be required to integrate with all of a part of the following systems (pulling data):

- **Vision (assessing data)**
- **People Forms (GIS and Work Order Management)**
- **QDS**
- **View Permits**
- **Home Grown Access Databases**

Proposal should include cost of developing interfaces (if any) in the form of an hourly rate.

### ***VI. Qualifications***

1. Proposer shall be an authorized distributor and installer of specified software.
2. The Proposer and its technicians shall possess all certifications and licenses required to sell, install, maintain and support all software required.

### ***VII. Work History***

Proposer shall provide references on installed CRM systems of the same scope over the last 5 years for entities that are approximately the size of Troy. The company name, contact person, telephone number and service dates are required. The Town reserves the right to contact any or all work history contacts and to conduct an independent investigation of the bidder.

**Questions Deadline: Wednesday, April 6, 2016 at 4:30 p.m.**

All questions must be submitted by email to [jcarrero@easthartfordct.gov](mailto:jcarrero@easthartfordct.gov). Answers to potential bidders' questions received before April 6, 2016 at 4:30 p.m. will be posted on the Town of East Hartford's website at [www.easthartfordct.gov/purchasing/bids](http://www.easthartfordct.gov/purchasing/bids) for public review.

***Three original bid proposals must be received by the Town of East Hartford Purchasing's Department no later than Wednesday, April 13, 2016 @ 11:00 A.M. Late submission shall not be considered. The original bid proposals must be mailed or hand-delivered to:***

**Michelle Enman, Purchasing Agent  
Town of East Hartford  
Purchasing Department  
740 Main Street  
East Hartford, CT 06108**

**No computer or fax submissions will be accepted.**

## IX. Submittals

Vendors shall submit the following information:

1. Title page showing the proposal subject; the vendors name and title, address and phone number and the date of submission.
2. Executive Summary briefly stating the Proposer's understanding of the CRM system requested and the ability to meet the Town's objectives and specifications.
3. Detailed Proposed Solution
4. Description in detail of how the Proposer will achieve the CRM solution.
5. Exhibit "A" Specification Worksheet
6. Cost of Bid: **Proposer must provide itemized pricing for all components of the CRM solution. Detailed pricing** is required for the required solution and for optional software and equipment.
7. Provide details and documentation on vendor and employee qualifications as referenced in Section VI. Submit this information on Exhibit "B" and "C" Qualification Worksheets. Submit any other pertinent documents with these worksheets.
8. Provide work history details on Exhibit "D" Client Work History Worksheet.
9. The Town of East Hartford reserves the right to request additional and/or supplemental information or explanation from any bidder.

## Exhibit “A” Specifications

### A. Support & Maintenance

ITEM	REQUIREMENT	Y	N	COMMENTS
1	All company support staff is located in North America.			
2	Customer Care Staff are dedicated to support & implementation. (i.e. time is not split between development and support)			
3	There is a toll free 800 number at which live support is available for any issue 24 hours a day, 7 days a week (CST).			
4	“24-7” Live support for CRM system down issues, 24 hours/day, 7 days/week, 365 days/year.			
5	24 hour a day incident reporting and tracking is available through the company website.			
6	Remote or dial in support is available			
7	The company has standard incident escalation procedures. Please explain.			
8	All support calls and incidents are tracked in a customer relationship management CRM system (CRM).			
9	The support department resolves 95% of issues within 24 hours.			
10	The company has a software upgrade policy, where the maintenance support contract includes all releases free of charge.			
11	The company has a product development “roadmap” and development cycle.			
12	New releases of the software are released on a regular basis, at least once a year for continual development of the product incorporating customer enhancement requests, industry requirements and market needs.			

## B. CRM system

ITEM	REQUIREMENT	Y	N	COMMENTS
1	CRM system is web based thus no client application needs to be installed.			
2	CRM system is available in licensed, hosted, or both versions.			
3	Must be able to run CRM system in multiple browsers on multiple platforms (PC, MAC, Android, IOS). Please list.			
4	CRM system has a single database supporting multiple users			
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.			
6	CRM system has securable online mapping capabilities.			
7	Drop-down list values can be found by starting to type-a-head and value can be selected by point and click retrieval.			
8	The CRM system can handle large search returns [over 500 items]?			
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.			
10	CRM system is password protected.			
11	Users can change their own password at any time.			
12	Password is not displayed while being typed.			
13	Staff users can be assigned multiple user roles.			
14	Administrators are able to suspend user access when a user is terminated.			
15	Session automatically logs out after a predetermined time of inactivity and a password screen appears.			
16	CRM system is scalable and robust.			
17	CRM system provides an audit trail of all database and table changes (e.g. date/time and person making changes)			
18	CRM system has built-in file and record locking capabilities to prevent simultaneous updating of records.			
19	Administrators are able to limit input and viewing capabilities via user security group.			

ITEM	REQUIREMENT	Y	N	COMMENTS
20	CRM system-wide spell check capability			
21	CRM system is available to user 7 days a week, 24 hours a day.			
22	CRM system has one click close out process.			
23	CRM system is able to show all current and previous requests from a citizen by name, address, or telephone number.			
24	CRM system must provide data dictionary and ability to create customized reporting using SSRS or similar toolset			

## C. Technical Requirements

ITEM	REQUIREMENT	Y	N	COMMENTS
1	The software follows open database standards.			
2	The software is able to use a common SQL Server DB Platform.			
3	The software writes directly to the SQL Server database without hitting any intermediate or proprietary database.			
4	The software uses SQL and OLEDB standards.			
5	Open Architecture: No proprietary hardware requirements.			
6	Compatible with or co-resident with Windows 2008+ Server Operating systems. If on-site.			
7	CRM system supports side-by-side load balanced web servers if on site.			
8	System must allow custom field definition.			
9	Provide Mobile Application for IOS and Android for administration management and end user reporting.			
10	Provide industry standard documentation for your product.			
11	Ability to import reference tables to utilize system for services such as housing code enforcement.			
12	Provide customization documentation.			
13	Provide user documentation.			

## D. Customer Relationship Requirements

ITEM	REQUIREMENT	Y	N	COMMENTS
1	CRM system has the ability to create custom request types.			
2	CRM system has the ability to create custom request workflows for each request type.			
3	Requests can be submitted directly by customers over the web and via an operator (correspondence by phone, fax, email, mail, mobile application or in person).			
4	All requests are automatically given a unique, sequential, time/date stamped ID number which is searchable.			
5	Requests can be exported to external applications using XML and stored procedures.			
6	Requests can be created by external applications and imported into the CRM system using XML and stored procedures.			
7	CRM system allows for the identification of duplicate requests (by location, type, date range, and vicinity).			
8	CRM system is able to reassign a request to a different person/department at any point along the way.			
9	CRM system is able to route requests automatically to the person/department responsible for the request.			
10	CRM system is able to route requests into queue/tray where designated staff can accept and take responsibility for request.			
11	Simple information requests can be setup to immediately supply the requested information, and automatically close the request without passing it to staff.			
12	Multiple documents of any file type can be added to requests.			
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.			
14	CRM system must have multiple levels of escalations available for requests.			
15	CRM system allows other management staff to receive emails when particular requests are entered.			
16	Notes can be added to requests. Notes include date/time stamp and the user entering comment.			

ITEM	REQUIREMENT	Y	N	COMMENTS
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.			
18	CRM system is able to show history of edits and updates made to a request.			
19	CRM system has the ability to provide an audit trail of escalations, postponements, case notes, and other key information pertaining to the case.			
20	CRM system is able to automatically notify citizen and staff when request is completed.			
21	Requests can be designated for public access or internal access only.			
22	CRM system allows supervisor staff to close tasks (activities) on behalf of staff reporting to them.			
23	Customized sets of questions can be created in the CRM system and asked prior to request creation.			
24	CRM system allows different sets of questions to be attached to different requests			
25	CRM system allows answers to questions be in various forms (e.g. text box, radio button, dropdown, etc.).			
26	Requests can be determined and assigned based on answers to submission questions.			
27	Tasks (activities) in a request can be designated as mandatory or optional.			
28	Requests can be reassigned to a different case type if request was accidentally submitted incorrectly.			
29	Requests can be reassigned to a different department/staff at any point along the way.			
30	Location maps must be printed on the trouble ticket from the CRM system of complaint location.			
31	Requests can be automatically closed after tasks (activities) have been completed.			
32	Requests and tasks (activities) can be postponed and automatically reactivated.			
33	CRM system allows closed requests to be re-opened.			
34	CRM system has the ability for users to know how many service requests are currently in the queue waiting to be served.			

ITEM	REQUIREMENT	Y	N	COMMENTS
35	CRM system has the ability for users to know the average time spent with each request.			
36	CRM system has the ability for users to know how many requests have been entered.			
37	CRM system is able to create anonymous requests.			
38	CRM system has correspondence management that allows emails to be created and mailed within the CRM system through Microsoft Outlook.			
39	CRM system allows call takers to use an interactive map to identify and select a problem location.			
40	CRM system has the ability to add user defined fields for citizens, locations, and cases to capture, search, and record on these fields.			
41	Ability to merge duplicate caller information			

### ***E. Knowledge Base (KB)***

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

## ***F. Integration***

<b>ITEM</b>	<b>REQUIREMENT</b>	<b>Y</b>	<b>N</b>	<b>COMMENTS</b>
1	CRM system must be tightly integrated with a GIS system. The town currently uses People GIS . If an ESRI solution is required, proposal must include cost of implementing an ESRI server solution.			
2	CRM System has ability for a standard web service interface to other systems, including but not limited to work order, timekeeping and asset management systems.			
3	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.			

## G. *Internet*

ITEM	REQUIREMENT	Y	N	COMMENTS
1	Citizens have the ability to login and enter requests over the internet.			
2	Citizens are able to add attachments to their requests.			
3	CRM system allows citizens to login and track their requests over the internet.			
4	CRM system has a public bulletin board component that allows common requests to be displayed.			
5	Citizens do not need to login in order to view the public bulletin board.			
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.			
7	Internet CRM system uses cascading style sheets.			
8	CRM system is scalable to accommodate multiple Internet customers performing transactions simultaneously.			
9	Internet CRM system is scalable across multiple servers.			

## H. Reporting

ITEM	REQUIREMENT	Y	N	COMMENTS
1	CRM system has standard reports which are customizable.			
2	Reports will be available based on user permissions (i.e. different users will have reports available to them)			
3	Management users can view detailed reports to analyse performance.			
4	Reports can be previewed and printed from a web browser.			
5	Reports can be exported from CRM system (e.g. MS Excel, PDF, etc.)			
6	Reports can integrate to GIS to provide map based reports.			
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).			
8	CRM system has an interactive management Dashboard report			
9	Reports can be scheduled to auto run and sent by email.			

**Exhibit "B"**

**Qualifications Questionnaire**

ITEM	QUALIFICATIONS	Y	N	COMMENTS
1	Does the company have significant local government market presence as shown by multiple customer installations in North America?			
2	Is the Company's core business providing solutions to local government?			
3	The company has staff members dedicated to the local government market.			
4	The company has its corporate headquarters in the United States.			

## Exhibit "C"

### QUALIFICATIONS WORKSHEET

General Statement of Qualifications:

Qualified Licenses (Personnel and Company):

Qualified Certifications (Personnel and Company):

Describe your Customer Care Department: Please see attaché Service Level Agreement.

## Exhibit "D"

### CLIENT WORK HISTORY

Proposer is to list applicable awarded contracts within the same scope of work during the past 5 years.

1. Client Name: \_\_\_\_\_  
Contact Name: \_\_\_\_\_  
Phone Number: \_\_\_\_\_  
Dates of Service: \_\_\_\_\_  
Brief description of service provided \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
  
2. Client Name: \_\_\_\_\_  
Contact Name: \_\_\_\_\_  
Phone Number: \_\_\_\_\_  
Dates of Service: \_\_\_\_\_  
Brief description of service provided \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
  
3. Client Name: \_\_\_\_\_  
Contact Name: \_\_\_\_\_  
Phone Number: \_\_\_\_\_  
Dates of Service: \_\_\_\_\_  
Brief description of service provided \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
  
4. Client Name: \_\_\_\_\_  
Contact Name: \_\_\_\_\_  
Phone Number: \_\_\_\_\_  
Dates of Service: \_\_\_\_\_  
Brief description of service provided \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

In the last three years, have you been released or removed from a job prior to the job being completed?

YES \_\_\_\_\_ NO \_\_\_\_\_ If yes, give reason(s) \_\_\_\_\_.

**TOWN OF EAST HARTFORD**  
**CITIZEN RELATIONSHIP MANAGEMENT/311 SOFTWARE**  
**THIS FORM MUST BE THE LAST PAGE OF YOUR BID PROPOSAL.**

**Vendor Acknowledgment Form**

The undersigned hereby certifies that he/she understands the specifications, has read the document in its entirety and that the prices submitted in this offering have been carefully reviewed and are submitted as correct and final. Vendor further certifies and agrees to furnish any or all products/services upon which prices are extended at the price offered, and upon conditions contained in the specifications of the Invitation for Offer.

**The following information must be filled out in its entirety for your quote to be considered:**

Company Name: \_\_\_\_\_

Address of Principal Place of Business: \_\_\_\_\_

\_\_\_\_\_

Phone/Fax of Principal Place of Business: \_\_\_\_\_

E-mail Address of Representative: \_\_\_\_\_

Authorized Representative: \_\_\_\_\_

Print Name

Signature of Authorized Representative \_\_\_\_\_

Date \_\_\_\_\_