

**Henry Roybal**  
Commissioner, District 1

**Anna Hansen**  
Commissioner, District 2

**Rudy N. Garcia**  
Commissioner, District 3



**Anna T. Hamilton**  
Commissioner, District 4

**Hank Hughes**  
Commissioner, District 5

**Katherine Miller**  
County Manager

July 14, 2021

**SANTA FE COUNTY**  
**RFP No. 2021-0146-AO/APS**  
**Online Live and Automated Chat Services**

**ADDENDUM NO. 1**

Dear Proponents,

This addendum is issued to reflect the following immediately. It shall be the responsibility of interested Offerors to adhere to any changes or revisions to the RFP as identified in this Addendum No. 1. This documentation shall become permanent and made part of the departmental files.

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***Attachment A: Pre-Proposal Agenda & Sign-In Sheet***

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- Question No. 1: What is the funding amount that is allocated for this requirement?  
**Answer No. 1:** **The budget is unknown as this will be a price agreement for all County Departments.**
- Question No. 2: Would a company be given the same additional “Preference” points if they do not have one of the 3 certificates, but can show extensive work with New Mexico Veterans and/or the County? Or is the Certificate the only acceptable/submittal form to receive the “Preference” points?  
**Answer No. 2:** **NO! Only the certificate is acceptable to receive preference points. In order to qualify for a resident preference a firm must meet the requirements as stated in the New Mexico Statutes Act (NMSA) 13-4-2 & NMSA 13-1-22 “Resident Preference” requirements as well Santa Fe County Ordinance 2012-4 requirements as listed in the County’s Business Preference Requirements.**
- Question No. 3: Please provide the number of Internal and External Users expected.  
**Answer No. 3:** **internal: 10-15; external: per month low/peak: 200/500**
- Question No. 4: What is the average traffic of users for the website?  
**Answer No. 4:** **Website Visits:**

- 2020: 231,362
- (peak month) April 2021: 23,074
- (peak day) April 12: 1,095

Question No. 5: How many users typically contact per day to seek help through phone/email/contact forms?

**Answer No. 5:** **Phone: avg. low/peak: 800/1,000 calls per month; avg. low/peak: 40/90 calls per day**  
**Email: 15-20 per day**  
**Contact Forms: we have customized forms on our website for property owners to complete electronically via email, mail or hand deliver. These forms can be placed as link on the live chat.**

Question No. 6: Is there any particular time of day/month/event the number of users who contact are high/low?

**Answer No. 6:** **Yes, peak months for our Office are from: November 1<sup>st</sup>-May 1<sup>st</sup>; Peak times for us occur when we send out our Notice of Value (NOV) to property owners and during protest season, in addition, when the Treasurer's Office sends out the tax bill and delinquent tax notices, it impacts enduser traffic to our Office.**

Question No. 7: Do you have any rough estimation about the number of chat support executives required?

**Answer No. 7:** **10-15**

Question No. 8: As you have mentioned "Options for off hours' bot messaging" how many hours of service is required for a day and what time the support begins and ends?

**Answer No. 8:** **Weekdays: 5:01pm to 7:59am (MST)**  
**Weekends/Holidays: 24-hour period**

Question No. 9: Are there any days that are off for the service? Like national holidays or weekends, if yes could you please share them?

**Answer No. 9:** **No.**

Question No. 10: Do you want a Spanish chat support executive or just live translation of the content to Spanish and vice versa?

**Answer No. 10:** **Just live translation of content to Spanish & vice versa.**

Question No. 11: What does "Surveys" in the SOP mean?

**Answer No. 11:** **Having a 1-5-star rating survey or polling after a live chat ends or when a chatbot ends a chat with an end-user.**

Question No. 12: What do you mean by Customized Chat windows? Please elaborate?

**Answer No. 12:** Having the ability to customize the chat window to include a logo or image of our Office in the background or as a watermark. Having a chatbot icon image set to our logo or an image we select/create.

Question No. 13: Team Collaboration – What functionality are you looking for here pertaining to Chatbot?

**Answer No. 13:** We would like to have a collaborative partnership with the vendor and share input/ideas as the design/look of the Chatbot as well as, information that is shared by the bot, quantitative/qualitative data that is tracked, etc.

Question No. 14: Ability to transfer the chat to other internal offices – Do you use a Live Agent Hub system today in the County? Please share details of the system. If not, do you have any preference for implementing Live Agent Hub? Do you use Teams – Can Teams be used for Live Agent transfer?

**Answer No. 14:** No.

Question No. 15: Does the Chatbot need to be deployed to County Public website <https://www.santafecountynm.gov/>? If yes,  
a. Please share the details of the website – what technology/platform it is built on?  
b. Can staff authenticate to the same public website?  
c. Does the Chatbot need to be available for both Unauthenticated & Authenticated users?  
d. Which authentication Identity Provider is implemented? E.g. Azure AD, On-premise AD or any other.

**Answer No. 15:** No. The website used is separate from the County website, as an elected office, the Office of the County Assessor website is: <https://www.santafecountynm.gov/assessor>. We currently have a live chat offering and would like to integrate a chatbot feature.

Question No. 16: Does the Chatbot need to be deployed to County Internal Intranet/Website?  
a. If yes, please share the details of the Intranet/Website – what technology/platform it is built on?  
b. Which authentication Identity Provider is implemented? E.g. Azure AD, On-premise AD or any other.

**Answer No. 16:** No.

Question No. 17: Do you have Azure subscription?

**Answer No. 17:** No.

Question No. 18: Do you have PowerBI license for Chatbot Reporting & Analytics?

**Answer No. 18:** No.

Question No. 19: What would be the tentative number of unique authenticated and non-authenticated monthly users who will access the Chatbot.

**Answer No. 19:** This is unknown until the Chatbot is added and used during the timeframes outlined.

- Question No. 20: Any integrations that are needed to be done with the Chatbot e.g. Ticketing System, CRM, etc.? Please share details from the integrations.  
**Answer No. 20: There may be a possibility of a CRM portal.**
- Question No. 21: For the multilingual support, is the County fine with AI translation services for translating bot responses from primary language or they need a separate knowledge base of each supported language.  
**Answer No. 21: Yes, we are fine with the AI translation service.**
- Question No. 22: Is the County looking for a subscription-based Chatbot product?  
**Answer No. 22: Yes.**
- Question No. 23: Is the County fine with the custom-developed solution as per their requirement?  
**Answer No. 23: Yes.**
- Question No. 24: In Native mobile app integration/development is needed, are the use cases of the Chatbot from the Mobile app the same as the Website use case?  
**Answer No. 24: Yes.**
- Question No. 25: Do you have FAQs and other content ready for ingestion to the Chatbot database or you want the vendor to develop it for you?  
**Answer No. 25: We would want the selected vendor to develop for us.**
- Question No. 26: You have mentioned “the online live and automated chat services for various department within Santa Fe County”, kindly help us understand how you envision the Departments using the live chat, via Intranet? Kindly provide more details on the exact requirement and expectation here.  
**Answer No. 26: Since 2015, the County has implemented a live chat feature on our website, we would like to continue the chat service and incorporate a chatbot during the timeframe outlined.**
- Question No. 27: Kindly help us understand how you plan to roll out interactive surveys through the chatbot. Does this refer to polling or full-fledged surveys?  
**Answer No. 27: When a live chat or chatbot conversation ends with an end-user, we would like for a polling or 1-5 star rating option to pop up and allow the end-user to answer up to 1-5 questions, for example: “How did we do today? Did we answer your question? How can we improve?”, etc.**
- Question No. 28: Can we take exceptions (if any) of T&C for the County’s review and discussion before contract signing?  
**Answer No. 28: Pursuant to the instructions provided in the RFP, section IV.C.2.g any exceptions to the terms and conditions must be stated and included in the transmittal letter in the Offeror’s proposal.**
- Question No. 29: Will agents be fully omni-channel, or just doing live chat or digital channels?  
**Answer No. 29: Just live chat.**

Question No. 30: Will the chatbot be just facing the end constituents, or is there an interest in an agent-facing chatbot as well?

**Answer No. 30: Just facing the end constituents.**

Question No. 31: How many agents will need access to live chat?

**Answer No. 31: 10-15**

Question No. 32: What are the main use cases and top questions you envision a chatbot helping with?

**Answer No. 32: Questions that may be asked included: Property, valuation, exemption and benefits**

Question No. 33: What are the most important pieces of functionality you are looking for in a chatbot?

**Answer No. 33: To be able to answer questions regarding the department and services that are being provided and office related questions when office staff is not available/during the timeframe outlined.**

Question No. 34: What percentage of your project interest is live chat versus chatbot?

**Answer No. 34: Live Chat: weekdays from 8am to 5pm  
Chatbot: weekdays from 5:01pm to 7:59am; weekends & holidays – 24 hours  
Mountain Standard Time (MST)**

Question No. 35: Will Santa Fe County please elaborate on what is meant by automated chat? Is this simple automated such as answering FAQs or more complex automation such authentication and pulling information specific to an individual?

**Answer No. 35: Yes, answering FAQ and/or scripted questions provided from daily live chats and using with the chatbot.**

Question No. 36: If the chat automation is more complex, what is an estimate of how many ‘tasks’ a user could complete utilizing a chatbot? For example, getting account information would be considered one task.

**Answer No. 36: Pull information and questions from what live chat agents are already sharing with end-users and apply to the chatbot feature.**

Question No. 37: Will Santa Fe County please elaborate on what kind of analytics are required?

**Answer No. 37: Number of chats per day/month/year; what types of questions are being asked, for example, NOV, appraisal, account number, exemptions, benefits, protest, property sales, mapping/lot splits, other departmental or non-related questions, etc.**

Question No. 38: Will Santa Fe County please elaborate on what is meant by customized forms?

**Answer No. 38: We have exemption forms that are located on our website and can be shared with the end-user. These forms are customized and specific to what the end-user is asking for, a link of the form can be shared during the live chat or chatbot conversation and include items like: “change of address”, “GIS data request”, “business personal property”, etc.**

Question No. 39: Is there any chat need that requires an integration to an existing system Santa Fe County is using? If so, how many systems need to be integrated?

**Answer No. 39: No.**

Question No. 40: Is Santa Fe County currently using a knowledge base?

**Answer No. 40: Yes.**

Question No. 41: Will the chat automation require alphanumeric inputs?

**Answer No. 41: There may be a possibility to require alphanumeric inputs.**

Please add this Addendum No. 1 to the original proposal documents and refer to proposal documents, hereto as such. This and all subsequent addenda will become part of any resulting contract documents and have effects as if original issued. All other unaffected sections will have their original interpretation and remain in full force and effect. Responders are reminded that any questions or need for clarification must be addressed to Amanda Patterson-Sanchez, Procurement Specialist Senior at [apatterson-sanchez@santafecountynm.gov](mailto:apatterson-sanchez@santafecountynm.gov).



**PRE PROPOSAL CONFERENCE**  
**RFP No. 2021-0146-AO/APS ONLINE LIVE AND AUTOMATED CHAT SERVICES**  
**JULY 7, 2021 AT 10:00AM**

**Contracting Agency: Santa Fe County**

- |                            |                               |                     |
|----------------------------|-------------------------------|---------------------|
| • Amanda Patterson-Sanchez | Procurement Specialist Senior | Purchasing Division |
| • Maricela Martinez        | Procurement Planner Analyst   | Purchasing Division |
| • Gus Martinez             | County Assessor               | Assessor's Office   |
| • Jennifer C. Romero       | Operations Manager            | Assessor's Office   |

**Project Information**

Santa Fe County is seeking a vendors or firms to provide an online live and automated chat services for the Santa Fe County Assessor's Office and other departments within Santa Fe County.

In order to provide a more accessible and transparent government service to the public the Santa Fe County wishes to provide online live and automated chat services. Santa Fe County would like to enhance the customer service experience and engaging with customers wherever they are. The County intends to select and award a contract based upon the highest ranked proposal based on the qualifications provided within the request for proposals.

**Proposal Information**

- Carefully read the Request for Proposal for requirements, terms & conditions including the sample contract.
- Sequence of Events are listed on page 9.
- Proposal Organization - Proposal should be organized as outlined in the RFP on page 19-20.
- Selection of finalist(s) – the most qualified proposal received based on the evaluation factors outlined in the RFP (pages 21-24) will be scored by a three to four-member evaluation committee.
- Preferences -

1) N.M. In-State Business Preference Certificate 50 points total of all evaluation factors added to score.

**OR**

2) N.M. Resident Veterans Preference Certificate, 100 points total of all evaluation factors added to score. For more information on State Preference visit [www.tax.newmexico.gov](http://www.tax.newmexico.gov)

**AND**

3) Santa Fe County Preference, 50 points total of all evaluation factors added to score. For more information on County Preference visit [https://www.santafecountynm.gov/asd/purchasing\\_division](https://www.santafecountynm.gov/asd/purchasing_division)

- Please submit all questions via email to Amanda Patterson-Sanchez at [apatterson-sanchez@santafecountynm.gov](mailto:apatterson-sanchez@santafecountynm.gov). The last day for questions will be **Friday, July 9, 2021**. **(Please do not contact any other County staff.)**
- Addendum will be issued on **Tuesday, July 13, 2021**. *(Only questions answered by formal written addenda will be binding. Oral and other interpretations or clarifications will be without legal effect.)*

- Proposal Submittal –

**Due Date: Wednesday, July 28, 2021**

**Time: 2:00 PM**

**Location: 102 Grant Avenue 1<sup>st</sup> Floor, Santa Fe, NM**

**Electronic submission also available via Dropbox utilizing**

**Dropbox link:**

<https://www.dropbox.com/request/54memU2pABzyXeLltrsY>





**PRE-PROPOSAL CONFERENCE**  
**RFP No. 2021-0146-AO/APS ONLINE LIVE AND AUTOMATE CHAT SERVICES**  
**JULY 7, 2021 AT 10:00 AM**

NAME	COMPANY	TELEPHONE	E-MAIL ADDRESS
Amanda Patterson-Sanchez	SFC Purchasing	505-992-6753	<a href="mailto:apatterson-sanchez@santafecountynm.gov">apatterson-sanchez@santafecountynm.gov</a>
Maricela Martinez	SFC Purchasing	_____	_____
Gus Martinez	SFC Assessor's Office	_____	_____
Jennifer Romero	SFC Assessor's Office	_____	_____
Michelle Breeswine	TekSystems	Via Webex	
Christopher Cybuch	TTEC	Via Webex	
Margo Edris	Sales Force	Via Webex	
Rahul Madhan	Agreeya Solutions	Via Webex	