

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

Gregory S. Shaffer
County Manager

September 28, 2022

SANTA FE COUNTY
RFP No. 2023-0023-AO/APS
Online Live and Chatbot 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.

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

- Question No. 1: Do you also require the chat software to schedule appointments?
Answer No. 1: No, however, if it is an option or “add-on” feature your software has available, please include information/cost within the RFP.
- Question No. 2: Do you only use SMS or do you use other services like WhatsApp and Facebook Messenger?
Answer No. 2: We use SMS text messaging within our CRM portal and Facebook Messenger in the event that we receive other appraisal/assessment questions from the public.
- Question No. 3: How many phone calls and walk ins do you have currently on a day to day basis?
Answer No. 3: During peak times the average per day can range from 80 to 120 per day. On regular business its range from 35-50. Walk-ins are about 10-20 per day however during peak times can range from 20-30
- Question No. 4: What is your current CRM that you are using today?
Answer No. 4: Our Current CRM is integrated through our website hosted by the County’s website vendor Desert Elements.

- Question No. 5: In Appendix E, are all integrations mentioned needed or are there specific ones you are currently using that would be a must?
- Answer No. 5: Please respond to those integrations that your specific software is able to do.**
- Question No. 6: Who are you currently using for telephony? Would you like the system to integrate with your telephony system?
- Answer No. 6: We currently use Cisco. If your software has the capability to integrate, please provide that information within your RFP submittal.**
- Question No. 7: What type of Knowledge Management (KM) are you currently using today, that the chatbot/agents would be pulling information from? Are you looking for a new KM as well?
- Answer No. 7: We currently review live responses and share with our live chat/chatbot software vendor so that the chatbot can answer according to typical inquiries.**
- Question No. 8: Where do you envision the chatbot residing? On the main Santa Fe County's website and/or the Assessor's sub site?
- Answer No. 8: On the Assessor's sub site.**
- Question No. 9: Can you provide a current or estimated number of chat or chatbot request.
- Answer No. 9: The last audit we conducted was 68 in a month but can range between 38 and 73 per month.**
- Question No. 10: How many agents or personnel do you have (or will have) responding to chat requests?
- Answer No. 10: For the Assessor's Office, up to 10 agents at any given time.**
- Question No. 11: Do you have a current knowledge management or database platform where the answers for chat both questions can be answered?
- Answer No. 11: There is a form embedded into the current live chat/chatbot software system we use, that is used to evaluate and assign answers to questions.**
- Question No. 12: Do you currently have any AI or Bot solutions in place or do you have a preferred AI or Bot solution?
- Answer No. 12: We currently have a Bot for afterhours and weekend support**
- Question No. 13: The RFP mentioned being able to transfer chat to other internal offices, are those other offices using their own chat solution or would they be part of this solution? If they have their own, can you provide the solution they are using?
- Answer No. 13: Santa Fe County would like to have other departments who are interested in using chat services to utilize the same chat services requesting within this RFP. The Santa Fe County Treasurer's Office currently has a chat service and utilizes the same live chat/chatbot software that our Office uses.**

- Question No. 14: What CRM and/or Portal are you currently using?
Answer No. 14: Our Current CRM is integrated through our website hosted by the County's website vendor Desert Elements.
- Question No. 15: We assume the IP/Source code remain with the bidder.
Answer No. 15: This information will be discussed with the awarded vendor.
- Question No. 16: How many total active users on Mobile app, if any? Average Daily, monthly, peak active users?
Answer No. 16: We do not utilize mobile app. Application is in office with a user group of 8-10 agents at any given time.
- Question No. 17: How much is the current call volume, if any? Average Daily, monthly, peak?
Answer No. 17: During peak times the average per day can range from 80 to 120 per day. On regular business its range from 35-50. Walk-ins are about 10-20 per day however during peak times can range from 20-30
- Question No. 18: How much is the current email volume, if any? Average Daily, monthly, peak?
Answer No. 18: IT maintains email system and metrics but email volume peaks during protest season and Notice of Value Mail-out timeframes.
- Question No. 19: Please share the expected chatbot chat messages. Average Daily, monthly, peak.
Answer No. 19: The last audit conducted showed 68 in a month but can range between 38 and 73 for the Assessor's Office.
- Question No. 20: The solution will be provided on cloud or on Santa Fe County premises? If it is on cloud who be paying the bills and if on premises, who will arrange hardware and network/internet?
Answer No. 20: The solution will be provided on a cloud. The cost for the Assessor's Office will be paid for using the Assessor Office Budget. Payments can be made monthly or annually (following our fiscal year: July 1-June 30th).
- Question No. 21: In section C part 2 there is mention of automobile insurance requirement. Is this a general requirement that is to say auto insurance is required for rental cars and etc.? Or is this a requirement the company must carry.
Answer No. 21: Yes, this is a general requirement.

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.



**PRE PROPOSAL CONFERENCE
RFP No. 2023-0023-AO/APS ONLINE LIVE AND CHATBOT SERVICES
SEPTEMBER 20, 2022 AT 11:00AM**

Contracting Agency: Santa Fe County

- Amanda Patterson-Sanchez Procurement Specialist Senior Purchasing Division
- 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 chatbot 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 chatbot 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

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

- Please submit all questions via email to Amanda Patterson-Sanchez at apatterson-sanchez@santafecountynm.gov. The last day for questions will be **Friday, September 23, 2022. (Please do not contact any other County staff.)**
- Addendum will be issued on **Wednesday, September 28, 2022. (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: Thursday, October 13, 2022
Time: 2:00 PM**

Location: 102 Grant Avenue 1st Floor, Santa Fe, NM
Electronic submission also available via Dropbox utilizing
Dropbox link:
<https://www.dropbox.com/request/H08JXyBhWxOTH90JFyZZ>.



SANTA FE COUNTY

**PRE-PROPOSAL CONFERENCE
RFP No. 2023-0023-CMO/APS
ONLINE LIVE AND CHATBOT SERVICES
SEPTEMBER 20, 2022 AT 11:00AM**

NAME	COMPANY	TELEPHONE	E-MAIL ADDRESS
Amanda Patterson-Sanchez	SFC Purchasing	(505) 992-6753	apatterson-sanchez@santafecountynm.gov
Jennifer C. Romero	SFC Assessor's Office		
Mitch Pursell	e-Gain		
Abhishek Sharma	CoRover Private Limited		
Jason Wu	Comm100		
Niel Bisson	Ivy.ai		