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ALERTING & CALLOUT SYSTEM PROPOSAL SCOPE OF WORK & REQUIREMENTS

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This is a draft RFP work in progress and as such, the requirements are expected to change. Vendors are encouraged to register at <http://cityofportland.ebidsystems.com> to be notified automatically when the final RFP is published.

INTRODUCTION

The City of Portland provides critical services for its citizens through various bureaus that require employee, citizen and regional partner emergency notification. This includes employee and public notification of bureau incidents and/or support services, emergency situations/services and catastrophic events.

The City's goal is to implement a multi-use call-out and emergency notification solution that can be leveraged across multiple City bureaus as well as support other regional government agencies.

This includes, but is not be limited to, engineering, development, deployment, management of and ongoing improvements to a notification system that will meet the needs of the city in the areas of water, and sewer utilities, emergency management, emergency communications (9-1-1), transportation, fire & rescue and law enforcement.

A Request for Proposals (RFP) is being prepared to invite Offerors to deliver a notification solution that will support rapid alerting of employees and Portland citizens during emergency situations/services and catastrophic events.

Seven (7) key bureaus have been identified as major stakeholders for this project:

Water Bureau supports all aspects of water delivery and management. This includes the repair, operation, and maintenance of the distribution system; working with engineering project managers and contractors on construction activities that impact local neighborhoods and surrounding communities; providing after-hours and emergency support such as main breaks; providing water support for multiple alarm fires, and customer call-outs for water related emergency services.

Portland Office of Emergency Management (POEM) provides planning, training, exercises and community outreach programs related to natural and man-made disasters to assist and prepare citizens, government agencies, and private/nonprofit organizations prior to, during, and after any emergency. POEM manages the City's Emergency Coordination Center (ECC) and works as an interagency coordinator in partnership with local, state, federal, and private entities to provide comprehensive mitigation, planning, response, and recovery capabilities for all hazards facing the City of Portland.

Bureau of Environmental Services (BES) provides Portland residents with water quality protection, watershed planning, wastewater collection and treatment, sewer installation and storm water management. The Bureau owns, operates, and maintains all public sanitary and storm water collection, conveyance, and treatment systems within the City's corporate limits. Programs include storm water management; wastewater collection and treatment; and the protection, enhancement and restoration of natural waterways. BES also designs and installs sewers, and monitors residential and industrial wastewater discharges to sewers, streams and rivers. The Bureau investigates citizen complaints of spills and pollution in rivers and streams; oversees water quality testing and analysis; manages maintenance, repair and expansion of wastewater collection systems; issues permits for connections to the City sewer system; and provides public information, community outreach, environmental education, and environmental intergovernmental support

Bureau of Emergency Communications (BOEC) provides assistance to citizens who need emergency and non-emergency help for Police, Fire and Medical services. This service is available 24 hours a day to the citizens of Multnomah County, the Cities of Portland, Gresham, Troutdale, Fairview and Maywood Park. The Bureau sends notifications via paging to all of our partner agencies to notify them of the citizens need for assistance. Along with day to day operations, the Bureau also makes notifications to adjoining agencies on major incidents occurring locally or regionally.

Portland Bureau of Transportation (PBOT) PBOT is responsible for the planning, building, managing and maintenance of the City of Portland transportation system including street maintenance, parking management, street use and right of way permits; street signage and lights. The bureau also provides reporting of transportation options, street closures, traffic safety concerns; and traffic advisories.

Portland Fire and Rescue provides emergency response, fire and life safety, and mitigation services. The mission of Portland Fire & Rescue is to aggressively and safely protect life, property and the environment by providing excellence in emergency services, training and prevention.

Portland Police Bureau serves the community to preserve life, maintain human rights, protect property, and promote individual responsibility and community commitment. In addition, the Bureau concentrates on thorough investigations of serious crimes that require the ability to page out investigators around the clock.

SCOPE OF WORK

The City of Portland, in conjunction with the Bureau of Purchases will be seeking proposals from qualified firms or manufacturers with demonstrated experience in the implementation and support of emergency call-out and notification that will identify and optimize current and future notification needs for the City of Portland and it's regional partners. The successful Offeror will be engaged for the following:

- Provide a notification solution meeting the City's requirements.
- Install and configure the solution for successful implementation within the City's business practices and technical environment.

- Provide any required support services to load initial notification information and maintain the system
- Train designated City staff to use and administer the system.
- The successful Offeror will be expected to enter into a not-to-exceed Technology System Agreement with the City which an example will be posted as an addendum to the final RFP.

REQUIREMENTS

Directions: This form shall be filled out and placed after the Transmittal Letter in your response submission. Provide information in the Transmittal Letter that provides information supporting your responses to the items below.

For each requirement listed below, please respond by placing an F, CO, M, U in the vendor response box, based on the following directions:

Response Code Key:

- F** – Fully provided “Out-of-the-box”
- CO** – Requires Configuration (no changes to underlying source code)
- M** – Requires Modification/Customization (change to source code)
- U** – Unable to meet requirement

Additionally, identify whether the cost for this functionality is included within this proposal. If the functionality is available but requires additional cost, please identify the estimated cost. Where helpful, please provide additional information in the comment field.

Req. No.	Requirement Description	Required/Optional	Response Code	Cost Included in Proposal?	If cost not included, what is the additional cost?	Vendor Response
1	Information/Data Management					
1.1	Ability to integrate with existing enterprise systems of records, such as Microsoft Exchange, SAP, Cayenta Utilities and continuity planning software. Specific examples include: <ul style="list-style-type: none"> ▪ Department employee databases, ▪ Employee information from SAP, and the ▪ City of Portland Geographic Information System (GIS) allowing selection of geographical area for notification options. 					
1.2	Supports the ability to import data from multiple data sources. Specific examples include department employee databases, employee information from SAP, and the City of Portland GIS (Geographic Information System) to allow selection of geographical area for notification options (i.e.					

	importing established COP mapping layers such as designated neighborhoods, water districts).					
1.3	Supports interface with other regional agencies/organization systems.					
1.4	Allows the specific Bureau/Agency's authorized administrator(s) to restrict fields users are able to update and which fields can only be modified via import.					
1.5	Allows view/edit privileges to be set for individual fields or groups of fields.					
1.6	Allows users to self-maintain their data for non-restricted fields and should retain that data even if additional imports of data occur.					
1.7	Allows scheduled updates from designated applications to all designated information in the solution (such as employee information stored in SAP).					
1.8	Allows scheduled updates from designated applications to all designated information.					
1.9	Allows public users to select privacy options according to user preference.					
1.10	Allows public users to opt-in/opt-out of certain types of notification.					
1.11	Allows for single member addition or removal based on each Bureau/Agency's established security and administrative rights.					
1.12	Provides for the tracking of user work hours, work days, and time zone.					
1.13	Provides overtime alerts (to be used for notification purposes).					
1.14	Search Functionality					
1.14.1	Provides the ability to search on name, address, group, sub-group, and job classification.					

1.14.2	Allows for additional information to be entered for each user to be used for custom searches. For example, for COP employees this information could include skill sets, job group, job classification, individual role, building location, or department.					
1.15	Provides customizable fields for data collection, filtering and reporting					
1.16	Information/Data Mgmt - Application Interface Protocol Options					
1.16.1	Has an available Application Programming Interface (API) for automated, real-time updates directly from a system of record as designated by each group owner (i.e. COP department employee databases; public information databases).					
1.16.2	Supports open standards Web service APIs					
1.16.3	Supports building of APIs between mass notification system and COP internal systems					
2	Information/Data Management - Notification Specific					
2.1	Allows for different methods for contacting users based on the users' schedules and the time and day of the notification.					
2.2	Allows set up of a default order of devices for all users for notification purposes, but also allow users to change the default order if granted permission by the Bureau/Agency's authorized administrator(s)					
2.3	Must support the following types of notification devices:					
2.3.1	Land-lines and cell phones					
2.3.2	SMS messages					
2.3.3	E-mail					
2.3.4	Numeric pagers					
2.3.5	1 way alphanumeric pagers					
2.3.6	2 way alphanumeric pagers					

2.4	Supports multiple devices per user (please include in response number of devices per user supported).					
2.5	Allows for a default set of devices for each user, but allow users to add custom devices (such as satellite phones) if granted permission by each Bureau/Agency's authorized administrator(s)					
2.6	Provides reporting based on user device configurations, such as: <ul style="list-style-type: none"> ▪ List of users and their devices ▪ List of users who do not have any devices configured ▪ List of users who have or have not configured a specified device type. 					
2.7	Allows set up of a default order of notifications for individuals in a team/group or sub-group by each Bureau/Agency's authorized administrator(s).					
2.8	Provides the ability to auto page individuals within a team/group according to number of hours worked (thus reducing overtime costs).					
2.9	Supports partner notification to other regional agencies/organizations (e.g. Counties, State).					
3	Access Control					
3.1	Access Control - Global System Administration & Security Requirements					
3.1.1	Allows for the setup of a System Administrator by Bureau/Agency who has complete access to all system functions <u>and user data for that specific Bureau/Agency.</u>					
3.1.2	Allows for specific global privileges to be assigned to individual users [or groups of users] without elevating those users to the system administrator(s) level. As an example, permissions should include: sending, viewing, and canceling notifications, modifying user data, and resetting user passwords.					
3.1.3	Users who have been granted permission to send notifications to other users should not be able to view or edit private contact data for those users.					

3.1.4	Provides secure site with 128 bit SSL encryption					
3.1.5	Supports audit logging for login attempts and other security concerns					
3.2	Access Control - Organizational Administration Group Management					
3.2.1	Allows for the creation of team/group leaders with full control to perform actions on members of the team/group, such as adding members, modifying user data, and sending notifications.					
3.2.2	Allows for the Bureau/Agency's authorized administrator, team/group lead to grant specific rights to team/group members, such as sending a notification to the team/group.					
3.2.3	Allows for the creation of different teams/groups to support functionality such as partitioning of different divisions or departments or different user groups.					
3.2.4	Allows for the creation of hierarchical structures, allowing teams/groups to have multiple sub-teams below them so as to accurately reflect the structure of the organization/user group.					
3.2.5	Allows users to be members of multiple teams/groups.					
3.2.6	Allows for the creation of teams/groups where members of the team/group would receive notifications simultaneously.					
3.2.7	Limits view capabilities so that teams/groups created can only view those in their team/group or to each Bureau/Agency's authorized administrator(s).					
3.2.8	Limits permission granted to group leader or team/group member to only that team/group and its members.					
3.2.9	The solution should track which permissions have been granted on which team or group, so that members of multiple teams/groups can have different levels of permissions from group to group.					

3.2.10	Allows for the propagation of permissions to sub-teams/groups so the leader of a team/group will also have the same permissions on any sub-teams/group.					
3.2.11	Allows for the creation of teams/groups where users will be contacted in a specified order, with a specified delay between calls.					
3.3	Access Control - User					
3.3.1	Allows for authentication of users via the web for self-maintenance, access to administrative functions, and over-the-phone user authentication for receipt of notifications.					
3.3.2	Allows the initial configuration of passwords and PINs to be done via the data import process, by each Bureau/Agency's authorized administrator(s), or randomly.					
3.3.3	Provides an option where COP/Agency employees can log in with their Windows network password or their established web password.					
4	Notification Initiation					
4.1	Allows for the initiation of notifications via a web-based console.					
4.2	Allows for initiation of notifications via an Interactive Voice Response system.					
4.3	When initiating a notification via the Interactive Voice Response (IVR) phone line, the user should be given the option to select a team or group from a presented list, or by entering a pre-configured code that is associated with a particular team/group.					
4.4	Allows the Bureau/Agency's authorized administrator to call a customer support representative and dictate the details of a notification.					
4.5	Allows for the automated initiation of notifications via an Application Programming Interface.					
4.6	Support of Pre-recorded notification messages					

4.6.1	Allows for pre-recording of stored messages that can be selected upon incident occurrence.					
4.6.2	Provides the option to easily adjust pre-recorded messages "on the fly" at the time of activation.					
4.7	Provides ESRI-compatible capability to select and send geographically targeted broadcasts (GIS system) to handle emergency notifications such as flood events, chemical release or other emergency evacuations or other emergency events.					
5	Notification Types					
5.1	Allows for easy selection among several notification types which pre-configures options to simplify the notification process, for example: <ul style="list-style-type: none"> • Supports delineation of time sensitive vs non-time sensitive Notifications • Supports classification of type of notification information 					
5.2	Notification Types - Conference Call Options					
5.2.1	Allows the sending of a conference call notification for COP/Agency employees and Emergency Responders with a facility to allow recipients to join the call.					
5.2.2	Recipients of a conference call notification should not be required to hang up from the notification and dial back to the conference bridge.					
5.2.3	Supports any conference bridge provider.					
5.3	Notification Types - Poll/Survey Options					
5.3.1	Allows the creation of notifications that are used to poll/survey the recipients with a question and a number of possible response options.					
5.3.2	Allows recipients of SMS notifications to respond to poll questions by returning the SMS message without recourse to use a web client or send email.					
5.3.3	Allows for a "limit" field to be specified for each poll response option, preventing further selection once the limit has been reached.					

5.4	Notification Types - First Responder Options					
5.4.1	Must have the ability to send out a “First Responder” notification that asks recipients to fill a specific role with a designated number of slots for that role.					
5.4.2	Allows each Bureau/Agency's authorized administrator(s) to determine if the notification stops when the role has been filled, or if it continues to all recipients.					
5.4.3	Allows for the First Responder notification to be easily expanded in order to fill multiple roles.					
5.5	Notification Types - Mass Notification Option					
5.5.1	Supports mass notification generation in rapid cycles, (i.e. 1000 notifications or more within minutes)					
5.5.2	Provides call-throttling to ensure mass notification does not result in denial of service.					
5.5.3	Tracks and does not charge for out-of-service numbers and denial of service exceptions.					
5.6	Notification Types - Custom Options					
5.6.1	Allows for a notification that combines multiple notification types into one notification.					
6	Notification Options					
6.1	Allows a single notification to be delivered to all types of devices (multi-modality). Voice devices and text devices should not require separate notifications.					
6.2	Allows for the delivery of messages via a text to speech engine.					
6.3	Allows for attachments on outgoing notifications					
6.4	Allows for multiple priority queues, allowing emergency notifications to take precedence over					

	lower priority notifications.					
6.5	Allows each Bureau/Agency's authorized administrator(s) to require recipients to authenticate their identity before the notification message is delivered.					
6.6	Allows each Bureau/Agency's authorized administrator(s) to place a delay between recipients ad hoc, without creating a new escalation team or group.					
6.7	Allows each Bureau/Agency's authorized administrator(s) to override the existing escalation path of all recipients and enter a unique escalation path for any notification during the notification process.					
6.8	Allows each Bureau/Agency's authorized administrator(s) to be able to skip specific devices or all devices of a particular type for any notification during the notification process.					
6.9	Notification Options - Support of Recorded messages					
6.9.1	Allows for the delivery of a recorded message during the notification.					
6.9.2	Allows authorized personnel to call in to a number and record a notification message.					
6.9.3	Allows a recorded message to be uploaded as a file.					
6.9.4	Allows for a system initiated phone call to record the outgoing message. For example, the administrator(s) enters the phone number of an executive; the system then calls the executive and prompts him/her to record the message. The Bureau/Agency's authorized administrator(s) would then send that recorded message out as the notification.					
6.9.5	Provides for toll-free, recorded-message call-in					
6.10	Notification Options - Adding recipients					

6.10.1	Allows each Bureau/Agency's authorized administrator(s) to add recipients by any combination of individual user names, broadcast teams/groups, or escalation teams/groups.					
6.10.2	Allows the Bureau/Agency's authorized administrator(s) to add notification recipients by searching for a keyword phrase in the user record such as zip-code; job classification.					
7	Notification Delivery & Confirmation					
7.1	Provides the ability to distinguish between reaching a live recipient and reaching an answering machine or voice mail.					
7.2	Provides the ability to leave an appropriate message If reaching an answering machine or voice mail and then continue to call additional devices until a live recipient is contacted.					
7.3	Must provide the option of requiring a confirmed response from the recipient or leave a complete voice mail message for contact with a specific device to be considered successful.					
7.4	Ability to require confirmed receipt of the notification from the recipient allowing different requirements for what is considered acceptable confirmation.					
7.5	If a device is not reached or the notification message is interrupted, must retry that device while also continuing on to other devices.					
7.6	Provides for the escalation of notification if primary recipient does not respond.					
7.7	Continues automatic notification in order of a pre-set notification list until a response is received if elected by Bureau/Agency administrator.					
8	Notification Response					
8.1	Allows recipients to respond to a voice notification by using the keypad of their phone.					
8.2	Allows recipients to respond to specified notifications via a toll-free interactive voice					

	response (IVR) system.					
8.3	Allows recipients to respond to an e-mail notification via a reply-to e-mail, or via the toll-free IVR.					
9	Notification Results					
9.1	Allows each Bureau/Agency's authorized administrator(s) to view results of notifications in real-time via the web without manual page refreshes.					
9.2	Allows each Bureau/Agency's authorized administrator(s) to view specific information regarding what devices recipients were contacted on along with complete time/date stamp information about that contact.					
9.3	Allows each Bureau/Agency's authorized administrator(s) to view results aggregated by response option, time to respond, or individual user.					
9.4	Allows each Bureau/Agency's authorized administrator(s) to easily follow-up with a particular group of recipients with a subsequent notification/rebroadcast to recipients who did not confirm receipt of initial message.					
9.5	Allows each Bureau/Agency's authorized administrator(s) to view historic information on any previously delivered notification.					
9.6	Provides web-based, real-time message delivery tracking and response consolidation.					
9.7	Provides time and date stamp for all confirmed messages					
10	Emergency Incident management					
10.1	Allows each Bureau/Agency's authorized administrator(s) to create incidents that will group a related series of notifications into a single logical location.					
10.2	Allows each Bureau/Agency's authorized administrator(s) to add an electronic attachment to					

	an incident that are saved along with the notifications that were sent out for that incident.					
10.3	Allows each Bureau/Agency's authorized administrator(s) to save incidents as a template with pre-defined subject, attachments, and notifications.					
11	Emergency Incident collaboration					
11.1	Allows each Bureau/Agency's authorized administrator(s) to create online forums that can aid the recovery effort for any given incident that is also available to Regional Agencies/Organizations for the coordination of events.					
11.2	Allows each Bureau/Agency's authorized administrator(s) to create and monitor task lists for individual members of recovery teams.					
11.3	Allows team members to upload and access documents pertinent to the recovery efforts from a central location.					
11.4	Provides a log of activities, both by the notification system (including incidents opened and notifications sent) and the recovery team members including number of times notified and number of times confirmed receipt (used for government statistical purposes).					
11.5	Allows the restriction of access to the forums based on the security model of the notification system.					
11.6	Provides a non-secured "public" area where the status of the recovery effort can be posted for consumption by users without login credentials.					
11.7	Provides for the content for the forum be entered through a browser-based interface with a rich text editor without the need for HTML skills.					
12	Inbound Voice Bulletin Board					
12.1	Allows Bureau/Agency's authorized administrator(s) to create and maintain a fully customizable inbound bulletin board through a web based graphical interface.					

12.2	Allows for the creation of a general message area accessible to either all users or to only users who have logged in.					
12.3	Provides access to previously sent voice notifications for users that log in to the system.					
12.4	Allows Bureau/Agency's authorized administrator(s) to log into the web based graphical interface and initiate phone notification to selected audience.					
12.5	Provides the capability for a user to be bridged to a third party conference call center.					
12.6	Provides the capability to have multiple bulletin boards defined and easily switch between them through the browser-based interface.					
12.7	Must be capable of supporting multiple inbound Bulletin Boards.					
12.8	Must be capable of supporting multiple inbound domestic and international phone numbers.					
12.9	Inbound Voice Bulletin Board - Polling/Survey					
12.9.1	Allows the creation of a poll/survey so that users who access the voice bulletin board can answer multiple questions with numerous possible response options.					
12.9.2	Allows for a "limit" to be specified for each poll response option, preventing further selection once the limit has been reached					
12.9.3	Allows users to record a numeric response (like a telephone number) to a poll/survey question generated out of voice bulletin board.					
12.9.4	Provides detailed reports of the recorded poll/survey answers for the voice bulleting board to be automatically generated.					
13	Reporting					
13.1	Provides detailed member and registration reports.					
13.2	Provides detailed usage reports.					

13.3	Provides detail audit trail of edits/updates to all information.					
13.4	Supports Ad hoc reporting.					
13.5	Provides a log of notifications per recipient per device including number of times notified and response.					
14	Reliability/Availability					
14.1	Provides for top-tier secure facility with 24/7/365 security, access, and Type II SAS 70 certification					
14.2	Ability to set reliability and availability requirements by type of message					
14.3	Has geo-dispersed data center(s)					
14.4	Has Multi-tier, multi-server fault tolerant architecture with full redundancy					
14.5	Allows multiple phone carriers used to ensure system accessibility					
14.6	Is hosted in high-availability facilities with failover and automatic recovery					
14.7	Has maintenance of a failover site in the event of disaster at the primary location					
14.8	27/7 monitored service with automatic alerts					
14.9	Provides offsite support of system and database to meet disaster recovery requirements					
15	Advanced Features					(Please indicate if this is available as a separate option at an additional cost or if it is already included in the overall solution cost.)
15.1	Provides E911 database (supplied database of public information phone numbers & addresses).					
15.2	REVERSE 911: Provides reverse lookup functionality (have address – gets phone number; have phone number – supplies address)					