ADDENDUM No. 1

RFP No. 23-51

Enterprise Chatbot

Due: October 5, 2023 at 11:00 A.M. (local time)

The information contained herein shall take precedence over the original documents and all previous addenda (if any) and is appended thereto. This Addendum includes twelve (12) pages.

The Proposer is to acknowledge receipt of this Addendum No. 1, including all attachments in its Proposal by so indicating in the proposal that the addendum has been received. Proposals submitted without acknowledgement of receipt of this addendum may be considered non-conforming.

The following forms provided within the RFP Document should be included in submitted proposal:

- Attachment B – City of Ann Arbor Non-Discrimination Declaration of Compliance
- Attachment C - City of Ann Arbor Living Wage Declaration of Compliance
- Attachment D - Vendor Conflict of Interest Disclosure Form of the RFP Document

Proposals that fail to provide these completed forms listed above upon proposal opening may be rejected as non-responsive and may not be considered for award.

I. QUESTIONS AND ANSWERS

The following Questions have been received by the City. Responses are being provided in accordance with the terms of the RFP. Respondents are directed to take note in its review of the documents of the following questions and City responses as they affect work or details in other areas not specifically referenced here.

Question 1: How many concurrent live agents?
Answer 1: We don’t have a specific count, but we have staff in most departments responsible for this role.

Question 2: What current phone system and CRM are they using?
Answer 2: We have a Mitel VOIP phone system. We do not use a CRM.

Question 3: Any compliance requirements?
Answer 3: Not that we are aware of.

Question 4: Is The City of Ann Arbor (a2gov.org) the only website and where they see expected volumes?
Answer 4: Yes. However, we are curious if we can use the chatbot solution internally on our intranet site, file shares or other data sources.

Question 5: Does the City of Ann Arbor track, compile a list, and breakdown entry points of constituent questions across its self-service options? i.e., programs, departments, services? Is the list prioritized? As a means to “Improve access to information on a2gov.org?”
Answer 5: We do not have a centralized system for compiling and prioritizing inquiries. Inquiries are directed to the appropriate department.

Question 6: What CRM? ERP are used by the city?
Answer 6: We do not use a CRM or ERP.

Question 7: What has been the impact of e-subscriber service on staff resources? Do you keep data on enrollments in e-subscriber service (constituent satisfaction, inquiries made, phone calls received)? How many calls/inquiries are received to reset passwords?
Answer 7: Self service functions are decentralized. Enrollment and utilization information is managed in the appropriate system responsible for responding to the inquiry. We do not compile password reset information.

Question 8: What are the #1 and #2 questions asked by constituents of the Subscriber Pages?
Answer 8: Top questions asked by constituents are dependent on the time of year. For example, in the weeks leading up to an election the top questions are election related.

Question 9: What has been the impact of e-subscriber service on staff resources? Do you keep data on enrollments in e-subscriber service (constituent satisfaction, inquiries made, phone calls received)? How many calls/inquiries are received to reset passwords?
Answer 9: The effort required to respond to questions is variable and is dependent on the time of year.

Question 10: What resources, if any, will be available overseeing this project/implementation?
Answer 10: The City has an internal project team that will be involved with the project and implementation.

Question 11: Does Ann Arbor use, and prefer, a particular project/implementation approach?
Answer 11: No preference.

Question 12: Third party applications; do the 3rd parties share data with the city?
Answer 12: Yes.

Question 13: What technology powers “A2Fix It? Does it interface with other backend systems? What are these systems?
Answer 13: SeeClickFix powers A2Fix It and it interfaces with Cityworks.

Question 14: How often are questions posted, inquiries made to “Report a Problem”?
Answer 14: Daily.

Question 15: Are the resources expected to be based out of the US or can we leverage a combination of US & offshore based resources?
Answer 15: It is preferred that the resources are located in the US but not required.

Question 16: Please describe the current process to respond to a query/customer?
Answer 16: A customer calls or sends an email. City staff fielding the call or email responds if they can. If they don’t know how to respond they follow up internally to find the appropriate answer to the customers question and then follows up with the customer.

Question 17: "Follow up on questions that couldn’t be answered by the Chatbot”. How does the City envisions follow ups here? Do we need to create a ticket and assign it to an agent who can connect with the customer as per the availability? Also please confirm if the solution includes set of a contact center to support live agent transfers?
Answer 17: If a customer’s question cannot be answered by the chatbot then an email address,
phone number, and/or contact form should be provided as an option for escalation and will be directed to our customer service department. We do not need to integrate with a ticketing system or phone system. In the future we may consider live chat.

Question 18: Translation services - Please list down the languages that need to be supported as part of the solution?
Answer 18: The languages are listed in the top right corner on a2gov.org. The languages currently supported are Spanish, Arabic, Chinese (both traditional and simple), Japanese, Korean, and English.

Question 19: Omnichannel support - Please list down all the channels that need to be supported (For ex - Web, Chat, SMS, Messenger etc.).
Answer 19: Web is the primary channel however we are interested in solutions that can support other channels such as SMS, voice, etc. We do not have a definitive list of channels.

Question 20: Is user authentication required in order to access the chatbot? If yes, please help us with the authentication process details.
Answer 20: No.

Question 21: Please list down the self service capabilities the chatbot should have other than FAQ handling.
Answer 21: No self-service capabilities are required currently.

Question 22: How many users would be interacting with the chatbot on a monthly/yearly basis? How many of them would be concurrent users?
Answer 22: The City's website gets approximately 110,000 to 210,000 web sessions per month depending on the time of year. We do not know how this translates to future chatbot utilization.

Question 23: Should the solution have reporting & dashboarding capabilities? If yes, please share more details around the requirement.
Answer 23: Yes, we would like to understand how the system is being utilized and how it can be improved.

Question 24: How many agents are currently present in the City's system? What is the interface used by the agents for live chat currently?
Answer 24: We don't have a specific count, but we have staff in most departments responsible for this role. We do not use live chat and do not currently have plans to use it. However, we may consider live chat in the future and want to ensure the chatbot could interface with a live chat system.

Question 25: Please list down the CRM tools currently being leveraged. Additionally, please list down the further integrations required in the solution.
Answer 25: We do not use a CRM. No further integrations are required but we are curious if we can use the chatbot on other data sources.

Question 26: Do you have any presence on AWS for any Data or Analytics workloads?
Answer 26: No.

Question 27: What are the primary use cases or scenarios where the chatbot will be used? For example: Who will be the users and why do they contact you? What are the demographics and socioeconomics of the customers?
Can we assume the chatbot will cover the main topics addressed on the Ann Arbor website: www.a2gov.org?

Answer 27: City website users who opt to interact with the chatbot when visiting the City’s website. An example would be a constituent inquiring about voter registration prior to an election. Please see Ann Arbor census data for demographic and socioeconomic information. Yes, the information on the City’s website should be the primary source of information for the chatbot.

Question 28: To achieve improved access to information on a2gov.org, are you expecting the chatbot to:
   a. Provide direct responses by extracting information from preset data?
   b. Offer hyperlinks to specific pages on the website in response to user queries?
   c. Implement a combination of both options mentioned above?
   d. Have a different approach not mentioned here?

Answer 28: Option C, but we are open to recommendations and best practices.

Question 29: What are the most common service needs? Is there an 80/20 rule? i.e. 80% of the customers have the same 20% of the possible questions/needs...

Answer 29: Most common service needs are dependent on the time of year. Please see the “I want to” and “Featured pages” sections on the City’s homepage for common service needs.

Question 30: How does the City of Ann Arbor currently handle customer inquiries, and how much staff time is currently dedicated to these services? How many people field telephone inquiries?

Answer 30: Customer inquiries are directed to the customer service department or other departments depending on the nature of the inquiry. We don’t have a specific count of staff time or people, but we have staff in most departments responsible for responding to inquiries.

Question 31: Is there a particular technology stack or platform preference for the chatbot solution?

Regarding the Conversation/dialog management for the Bot development are there any preferences or limitations of managed and unmanaged services we should take into account when proposing solutions?
   i.e. Are certain services off-limits for an all-digital self-service solution?

A managed service will allow an IT team to offload many routine and cumbersome tasks to a third-party provider, as well as critical tasks requiring special expertise. With an unmanaged network, the IT team is responsible for everything.

In the context of the paid and open-source Frameworks for Bot development, are there specific preferences or constraints that we need to consider while evaluating and recommending framework options?

Answer 31: No preference on platform or stack. We are open to recommendations for conversation/dialog management and do not have any preferences or limitations.

Question 32: Please specify the expected scale in terms of concurrent users or interactions the chatbot should support.

What is the approximate count of the daily website users?
What is the approximate number of daily inquiries needing customer support?
What is the expected volume of customer interactions that the chatbot should handle?

Answer 32: The City’s website gets approximately 110,000 to 210,000 web sessions per month depending on the time of year. We do not have a count of daily inquires as this function is decentralized. We do not know how the web traffic translates to future
chatbot utilization.

Question 33: What communication channels should the chatbot support other than on the website (e.g., mobile app, SMS, social media)?
Answer 33: Web is the primary channel however we are interested in solutions that can support other channels such as SMS, voice, etc. We do not have a definitive list of channels.

Question 34: Is there a preference for a cloud provider to ensure scalability?
Answer 34: We currently use Azure but we do not have a strong preference.

Question 35: What platform is the City's website built on, and are there any technical constraints for embedding the chatbot? i.e., AWS-Azure vs. self-managed servers, frontend and backend technologies, and so on.
Answer 35: We currently use SharePoint as our content management system and we host the website. However, in the coming year we will be replacing SharePoint with a new content management system. We are not aware of any technical constraints.

Question 36: Are there any specific preferences or constraints regarding the choice of data engineering technologies? For example, are you inclined to use particular tools such as Google Analytics for Event Management or Tableau/Power BI for Data Visualization?
Answer 36: No.

Question 37: What key metrics and data points are you interested in tracking regarding chatbot utilization?
Answer 37: Some examples are utilization, customer satisfaction, and how many chat sessions result in escalation to a customer service representative.

Question 38: Please provide examples of preset questions/service needs.
Answer 38: Where do I vote? How do I register to vote? What day is my trash collection?

Question 39: Assumption: The Chatbot will have a preset Q&A, whenever there's a question the chatbot can't answer from the preset data, an AI model (built using ChatGPT) will be used to answer the asked question with its best data (knowledge) available.
Please suggest any other preferred way to address the above incident.
Answer 39: We have no additional suggestions.

Question 40: Are there any specific preferences/limitations of integrations or APIs the chatbot should use for generating AI responses (e.g, ChatGPT)?
Answer 40: The chatbot should be able to consume the information from a2gov.org and ideally third party hosted websites such as our legislative management system.

Question 41: Assumption: Users can engage with the chatbot as usual, asking questions and receiving preset and/or AI-generated responses. When the chatbot can't provide a satisfactory answer, it acknowledges this limitation. The chatbot presents users with an option to escalate the conversation to a human agent. This option can be made available through a button or a specific command, such as "Talk to a Human." The chatbot seamlessly shares context with the human agent. When a user escalates the conversation, the chatbot triggers an alert to the available human agents, ensuring a timely response.
Please suggest any other preferred way of achieving this.
Answer 41: We do not have live chat and do not intend to use live chat currently. We would
like to escalate to a customer service representative by providing the customer with an email, phone, and/or contact form.

**Question 42:** Shall we consider all 7-language support available on the city website - English, Spanish, Arabic, Simplified Chinese, Traditional Chinese, Korean, and Japanese? Please provide your preferred language or languages for translation services.

And should they be fully automatic or human-assisted translations?
If we opt for human-assisted translations, can we assume that they would be provided by you (client-side’s scope of work)?

**Answer 42:** Yes, we would like to support the languages available on the City’s website. The languages currently supported are Spanish, Arabic, Chinese (both traditional and simple), Japanese, Korean, and English. We are open to your recommendations as far as the chatbot translation services.

**Question 43:** Are there any regulatory or compliance considerations for translation services?

**Answer 43:** Not that we are aware of.

**Question 44:** Assumption: As the user ends the chat by clicking on the "End Chat" button, the user will see an option to download the transcript of the entire session. The transcript can be in PDF file format.

Please suggest any other preferred way of achieving this.

**Answer 44:** We do not have a strong preference but perhaps the transcript could be emailed to the user.

**Question 45:** For the Live Chat - The chatbot can be integrated with a human support system, such as a live chat platform or a ticketing system, to facilitate the handover to a human agent.

Assumption: Inquiry handling (passing them to human agents) and agent (human) support system development for the live chat are part of the scope.

If so, shall we consider a single agent (human) will handle only a single session (conversation) at a time or will a single agent handle multiple sessions?

**Answer 45:** We are not currently prepared to use live chat.

**Question 46:** If the chatbot links to Live Chat, does the city foresee providing Live Chat agents? Or do you want those agents to be provided by the chatbot builder?

**Answer 46:** We are not currently prepared to use live chat.

**Question 47:** How is staff time engaged by customers to answer these questions now?

**Answer 47:** Email or phone call.

**Question 48:** Are there specific demographics or language preferences to consider? What is the minimum set of language translations desired? Are there current metrics on the preferred language for past and current questions asked and/or answered?

**Answer 48:** The languages currently supported on the City’s website are Spanish, Arabic, Chinese (both traditional and simple), Japanese, Korean, and English. We do not have metrics on the preferred language of historic questions.

**Question 49:** Are there specific subject areas or questions that consistently require a significant investment of staff time answering? Where are the answers sourced from (if not from the existing website)? Please provide a few specific examples. What portion are answers that are unique to the customer, and would the unique data be available from an online system or datafile?
Answer 49: Questions are variable and dependent on the time of year. We would like to use the City’s website as the source for customer questions and answers. Additionally, we would like to be able to preconfigure questions and answers.

Question 50: Which existing systems, databases, or platforms does the Chatbot need to integrate with to provide accurate information?
Answer 50: The City’s website and ideally third-party vendor websites such as our legislative management website.

Question 51: Is there a need for real-time data updates or access to external databases? Are there any security or privacy concerns related to data integration?
Answer 51: No real-time data updates or external databases are required.

Question 52: Where will the Chatbot source its data and information from?
Answer 52: The City’s website and ideally third-party vendor websites such as our legislative management website. We are curious if we can use the chatbot solution internally on our intranet site or file shares.

Question 53: What is the expected volume of interactions that the Chatbot will need to scale to meet?
Answer 53: The City’s website gets approximately 110,000 to 210,000 web sessions per month depending on the time of year. We do not know how this translates to future chatbot utilization.

Question 54: Are there legal or ethical considerations unique to the city’s operations that need to be addressed in the Chatbot’s behavior?
Answer 54: Please see the Privacy and Security page on the City’s website.

Question 55: Ahat metrics and data are collected in the current system to gauge consistency, accuracy, and customer satisfaction?
Answer 55: We use Google Analytics for metrics and Voice of the Citizen for customer satisfaction.

Question 56: Do customers have access to the previous questions and answers provided by the staff? How is the information updated for consumption on the website?
Answer 56: Staff updates the information on the City’s website to provide answers to common questions.

Question 57: Is there another source of user search queries besides the https://www.a2gov.org/Search/pages/results.aspx page?
Answer 57: No.

Question 58: Is there a record of previous search box queries or can log files be provided to be parsed to extract them?
Answer 58: Yes, this information is available through the website analytics.

Question 59: Please provide examples of questions and answers that consume staff time (from most time consuming to least, with estimates of time required)? Is there a breakdown of the steps used and the time required for each?
Answer 59: The effort required to respond to questions is variable and the nature of the questions is dependent on the time of year. For example, in the weeks leading up to an election the top questions are election related.

Question 60: For "the ability to define preset questions/answers in addition to AI generated questions/answers", are there existing preset questions/answers and how are they stored or retrieved on the existing website?
Answer 60: There are some frequently asked question pages, but the majority of the information is available on the various department websites. We would like the ability to predefined questions and answers to help train the chatbot.

Question 61: For "Live chat in addition to a chatbot" is there an existing chat tool or product in use? Is there an existing call center or case management system used? Would escalation to a voice and/or video call be desired, or just text-based chat? Would live language translation between customer and staff be desired?

Answer 61: We are not currently prepared to use live chat but may consider this in the future. We would like the chatbot to be able to interface with a live chat system if we decide to use live chat in the future. For now, it would be sufficient to provide contact information as a means to escalate to a customer service representative.

Question 62: What level of natural language understanding and processing should the Chatbot have?

Answer 62: We are looking for recommendations on the appropriate level of natural language processing.

Question 63: Do you require machine learning capabilities for continuous improvement?

Answer 63: Yes.

Question 64: Should the Chatbot be able to communicate in multiple languages?

Answer 64: We are open to recommendations on how to best support chatbot translation services. The languages currently supported are Spanish, Arabic, Chinese (both traditional and simple), Japanese, Korean, and English.

Question 65: Are there language-specific challenges or considerations?

Answer 65: Not that we are aware of.

Question 66: How will the Chatbot ensure accessibility for users with disabilities?

Answer 66: It should be Section 508 compliant.

Question 67: Are there plans for making the Chatbot inclusive for all citizens?

Answer 67: We are interested in recommendations on how we can ensure chatbot inclusivity.

Question 68: What measures will be in place to protect user data and privacy?

Answer 68: Please see the Privacy and Security page on the City’s website.

Question 69: How will the Chatbot handle sensitive or personal information?

Answer 69: We do not intend to collect sensitive or personal information using the chatbot.

Question 70: What is the desired user experience when interacting with the Chatbot?

Answer 70: A positive, courteous, professional, and helpful user experience that uses voice and tone consistent with the City’s website.

Question 71: What is the budget allocated for developing, implementing, and maintaining the Chatbot?

Answer 71: We don’t have a predefined budget allocated at this time, but appropriate funding will be made available if a suitable solution is found via this RFP process.

Question 72: How will you monitor and ensure optimal performance?

Answer 72: By using the chatbot reports, dashboards, and analytics information to continually refine the chatbot.

Question 73: What channels must be covered with the requirement that the chat tool “needs to be scalable and omnichannel” (telephone systems, website, others)?
Our initial plans are to use it on the City’s website however we are interested in a chatbot that could use different channels such as SMS. We are also curious if we can use the chatbot to consume information on the City’s intranet or file shares.

The languages are listed in the top right corner on a2gov.org. The languages currently supported are Spanish, Arabic, Chinese (both traditional and simple), Japanese, Korean, and English.

There are some frequently asked question pages, but the majority of the information is available on the various department websites. We would like the ability to predefine questions and answers to help train the chatbot.

We do not currently have a chatbot so we don’t have current user journeys. The City’s website gets approximately 110,000 to 210,000 web sessions per month depending on the time of year. We do not know how this translates to future chatbot utilization.

We do not intend to integrate the chatbot with any backend applications currently.

The City’s website gets approximately 110,000 to 210,000 web sessions per month.
depending on the time of year. We do not know how this translates to future chatbot utilization.

Question 85: Which User Role in scope (Maker/Checker/Authorizer/QC)
Answer 85: I don’t believe this applies to what we would like to use the chatbot for.

Question 86: Will the documents attachments to be in scope for chat user journeys? (Image/PDF/Word formats & max sizes of attachments to be configured)
Answer 86: The chatbot should be able to consume the content on the City’s website including web pages, PDFs, Word documents, etc.

Question 87: What will be Authentication Requirement:
   1) Authentication Through (OTP/Web Link/Application)
   Please provide Authentication Process Details:
Answer 87: We do not anticipate requiring authentication.

Question 88: What will be expected NLP Conversation among following
   - FAQ
   - Standard (Fixed)
   - Customer Information (User Specific)
   - Intent Identification
   - Entity Identification
   - Action Identification & Details
Answer 88: We are interested in your recommendations.

Question 89: Will following NLP Conversation be the requirements
   - Menu
   - Menu Details
   - Action Identification & Details
Answer 89: We are interested in your recommendations.

Question 90: Kindly provide daily Volume of estimated chat sessions. What is the peak hours / time of chat traffics during regular working days
Answer 90: The City’s website gets approximately 110,000 to 210,000 web sessions per month depending on the time of year. We do not know how this translates to future chatbot utilization.

Question 91: What will be Load & Performance Requirement:
   1) Possible No of Concurrent Users
   2) Expected Standard Response Time
Answer 91: The City’s website gets approximately 110,000 to 210,000 web sessions per month depending on the time of year. We do not know how this translates to future chatbot utilization. We are interested in your recommendations based on our traffic volume.

Question 92: How Many users to be trained on Chat platform?
Answer 92: Approximately 10, depending on the solution and the purpose of the training.

Question 93: What will be the expected duration of Post Go Live support and warranty
Answer 93: We are interested in your recommendations.

Question 94: Will this solution to be deployed Onpremise or on cloud?
Answer 94: No preference.

Question 95: Is Other (Non English) language is to be considered in conversation scope
Answer 95: The languages are listed in the top right corner on a2gov.org. The languages
currently supported are Spanish, Arabic, Chinese (both traditional and simple), Japanese, Korean, and English. We are open to your recommendations for chatbot translation services.

Question 96: What platform is City’s website built on? (Offeror is seeking information about the frameworks used.)
Answer 96: SharePoint. However, we are in the process of procuring a new content management system to replace SharePoint.

Question 97: In addition to metrics offered in the offeror’s proposal (such as # of users, user satisfaction / feedback, frequency of questions, coverage of information) what other specific metrics would City like the offeror to cover?
Answer 97: Some examples are utilization and how many chat sessions result in escalation to a customer service representative.

Question 98: Please clarify the type of follow up:
   a. Automatic escalation to a live agent
   b. Automatic escalation to a ticketing system
   c. Both, and behavior based on the hours of operation.
Answer 98: Automatic escalation by providing customer service contact information. (phone, email, and/or a contact form)

Question 99: Does the City currently have a choice of ticketing system that they intend to use in case of escalations? (e.g., Salesforce / SAP)
Answer 99: No, we do not intend to use a ticketing system currently.

Question 100: What languages does City intend to support as part of the translation service?
Answer 100: The languages are listed in the top right corner on a2gov.org. The languages currently supported are Spanish, Arabic, Chinese (both traditional and simple), Japanese, Korean, and English.

Question 101: Is the City open to offeror’s partnership with third party software vendors such that a pre-packaged live-chat solution is provided as part of the chatbot solution?
Answer 101: Yes.

Question 102: Would the City of Ann Arbor allow offeror’s offshore resources not physically located in the US to be involved in the project?
Answer 102: It is preferred that the resources are located in the US but not required.

Question 103: Being a US entity (offeror) currently based in Virginia, would the offeror need separate license to operate in the State of Michigan?
Answer 103: The City is currently unaware of State licensing requirements but would require compliance with all State laws including licensing, if applicable and the offeror is responsible for determining and complying with all state law requirements.

Question 104: What is the tentative timeline City of Ann Arbor is looking to begin this project in October or November?
Answer 104: We are flexible with the timeline.

Question 105: What is City’s current choice of cloud service provider? (MS Azure, Google Cloud Platform, Amazon Web Services)
Answer 105: We currently use Azure but we do not have a strong preference.

Question 106: What is City’s preference in hosting the said chatbot solution? (Within City’s Virtual Private Cloud where City retains the ownership or Provided to the City as Software as a Service)
Answer 106: We do not have a strong preference and we are interested in your recommendations.

Question 107: Is the winning bidder required to perform work on City of Ann Arbor premises? We will be licensed to work in Michigan, and probably based out of an affiliated office in Lansing. Are there any other requirements regarding where the development work takes place?
Answer 107: No. It is preferred that the resources are located in the US but not required.

Offerors are responsible for any conclusions that they may draw from the information contained in the Addendum.