



Request for Proposal

Digitisation Roadmap:
Improving Customer and Employee Experiences

Date of Issue: 4th May 2023

Closing date: 15th June 2023

Contact Details

Name: Sharon James	Position: Coordinator Customer Services
Department: Corporate Services	Organisation: West Coast Council
Phone: 03 6471 4700	Email: cccs@westcoast.tas.gov.au

1 Background

Through the *Digitisation Roadmap Program*, the West Coast Council is creating a modern framework for decision-making and service delivery with a focus on improving the service experience of individual customers and communities across Tasmania's West Coast.

Following an evaluation of the comparative efficiency, effectiveness, and reliability of current operational processes and information systems, the Council has recognised a need to improve the processes and systems that underpin the organisation's customer and employee experience functions.

The Council is now inviting vendors to submit formal proposals for meeting those requirements to enable officers to effectively evaluate the scope of work and timelines.

2 Submission Requirements

A response must be fully completed and submitted by 3pm on the closing date. A late response may be excluded from evaluation and void the RFP process. West Coast Council may, in its discretion, extend the closing date and time.

A response can be provided in any format that the proponent wishes but must include responses to all requirements outlined in **Section 4 Scope of Work**.

Any clarifications regarding this RFP shall be submitted via email to the officer identified in **Contact Details**.

The response will be treated as commercial-in-confidence.

3 Timeline

RFP Release Date	4 th May 2023
RFP Submission Deadline	3pm, 15 th June 2023
Review and Evaluation Period	19 th June – 4 th July 2023
Final Selection and Contract Award	7 th July
Estimated Project Commencement	1 st August 2023

4 Scope of work

4.1 Project details

What is the Digitisation Roadmap Program

The *Digitisation Roadmap Program* (DRP) is estimated to be undertaken over 5-years. This program will look at improving customer experience and engagement (CX), employee experience (EX), and internal ways of working from a productivity, efficiency, and culture perspective, enabled by uplifted technology systems.

The program will also include remediation work across the current financial and regulatory management functions and systems (RX) to enable more intelligent operations. The DRP will move Council towards a target operating model that is shaped by changes to service delivery and technology governance, and ultimately provide a baseline for enhanced delivery capabilities for the next 20-years.

Going Digital

The West Coast community values self-sufficiency and resilience. Accordingly, the Council is seeking to emulate these characteristics by optimising digital self-service capabilities for its employees and the community. For Council, this means enabling digital interactions not digital transactions. It means improving our ability to respond and engage.

To achieve this, the Council will pursue a cloud-first strategy for system improvements, promoting upskilling and shared responsibility for systems support and delivery throughout the organisation. As a remote organisation, minimising system downtime will be crucial.

The overarching objectives of the digital program include:

- Boosting the efficiency and effectiveness of Council operations.
- Improving communication and collaboration within the Council.
- Elevating customer satisfaction with the services provided by the Council.
- Enhancing decision-making processes through data-driven insights.
- Cultivating an engaging customer-centric culture within the Council.
- Fostering an atmosphere of collaboration between the Council and the community.

Current Environment

Function	Status
Regulatory Management	Council is at pre-implementation stage of a CouncilWise upgrade (from PropertyWise) and currently in the process of evaluating its implementation alongside other projects.
Financial Management	Council is at pre-implementation stage of a Microsoft Dynamics Business Central upgrade and currently in the process of evaluating its implementation alongside other projects.
Employee Productivity	Council currently utilises a mix of Microsoft Office versions, including 35 instances of Office 365 Business, 3 instances of Office 365 Pro Plus, 14 instances of Office 2010, 1 instance of Office Pro 2010, and 2 instances of Office 2016. In total, Council operates 52 Microsoft credentialed workstations. The version of Microsoft Office 365 Business employed by West Coast Council is 16.0.12527.20278 from the Microsoft Office 2016 suite. Council is at pre-implementation stage of Microsoft SharePoint Online, and currently in the process of evaluating its implementation alongside other projects.
Records Management	The council currently utilises an aging Dataworks system and is exploring future options through the DRP.

Locations and Digital Connectivity

Council's primary sites are located in Queenstown, Zeehan, Strahan, and Rosebery.

Enhancing the reliability of connectivity for all staff and optimising communication with Council stakeholders is a fundamental component of our *Digitisation Roadmap Program*.

As part of ongoing efforts, Council is in the process of installing Business Ethernet (100/100 Mbps) at the Council chambers in Queenstown to ensure high-speed, reliable internet access.

Additionally, Council is actively working on consolidating service providers for other locations. This consolidation aims to streamline network management and enhance overall service quality.

These improvements will contribute significantly to the efficiency and effectiveness of Council operations, as well as improve the experience for both staff and stakeholders.

At present, all key locations are equipped with standard NBN FTTN, while the main council offices utilise Launtel Business Ethernet services. Respondents should note that there are mobile coverage blackspots throughout the West Coast of Tasmania.

Improving Customer and Employee Experiences

Council office staff are responsible for providing direct customer services as well as supporting and coordinating field staff in providing services to the West Coast community. However, excessively manual administration tasks are restricting the time available for them to efficiently provide those services and support.

4.2 Project Scope

CRM and HR

The goal of this request for proposal (RFP) is to seek proposals from CRM and HR solution providers to enhance the customer and employee experiences within the organisation. The objective is to improve business processes, customer relationship management, and human resources management by implementing fit-for-purpose CRM and HR solutions.

The RFP encourages vendors capable of providing both CRM and HR systems to submit proposals, which will allow for seamless integration and a unified approach to managing customer and employee interactions. This will enable Council to more effectively manage and enhance customer relationships while creating a positive and productive work environment for employees. The proposed CRM platform will also help Council to better manage and track information, streamline processes, and improve response times for handling customer and community issues.

This RFP is specifically seeking responses from suitably qualified organisations to supply and install CRM and HR business systems in support of Council's *Digitisation Roadmap Program*.

CRM	HR
Key Functions	Key Functions
Case Management	Recruitment - Induction
Complaints Management	Employee Lifecycle Management
Contact Management	Performance Management
Customer Community Support	Time and Attendance
Customer Service Requests	Leave Management
Event Management	Employee Self Service
General Information	Policy Management
Incident Reporting	
Non-Functional Capabilities	
Analytics and Reporting Tools	
Customisable Intelligent Workflow and Routing	
Customisable Modules and Templates (e.g., Witness Statements and Timesheets)	
Pre-configured Functional Processes	
Web Form Builder (incl. embed code generation)	
Development and Training Environments	
Cloud-Based	
Integration Capabilities	
3 rd Party Digital Signature Solutions (DocuSign, Adobe Sign, Nintex Sign)	
CouncilWise	
Microsoft Dynamics 365 Business Central	
Microsoft Office 365	
Microsoft SharePoint Online	
Open APIs	
Single Sign On - Authentication	

The implementation partner will be responsible for the following tasks:

- a) Migrate data from the existing on-premises system to the proposed cloud-based system.
- b) Configure and customise solutions to meet Council's requirements.
- c) Council's objective is to digitise and automate all paper-based forms that are currently being used for processes within the Customer Service and Human Resources functions, as outlined in *Section 7: Form Digitisation*. If the vendor does not have the direct capability to provide this service, the vendor should still provide a detailed explanation of how the proposed technology platform can support this outcome and identify an implementation services partner that can support the implementation.
- d) Train users and provide support during the transition period.

4.3 Project Requirements

The proposed offer must include formal responses to following requirements:

Solution Overview

1. Company description.
2. Experience in implementing the proposed solutions.
3. Detailed list of functional and non-functional inclusions (what we get).
4. Limitations and assumptions made in defining the proposed solutions (what we could get).
5. References from current clients that have undergone similar implementation projects.

Non-Functional Services

6. Minimum system requirements to optimise use and experience of the proposed solution:
 - i. Software infrastructure including M365 environment and security services.
 - ii. User devices including desktop, laptop, and mobile devices.
 - iii. On-premises hardware.
7. Security requirements to ensure backups, access controls, and disaster recovery planning are concurrent.
8. Backup services covered by the proposed solution.
9. Integration capabilities to enable an open and flexible platform environment.
10. Reporting options available in the environment.
11. Reporting capabilities included in the proposed solution.

Implementation Services

12. Proposed implementation approach for cloud-based software.
13. Detailed project plan outlining the proposed governance, approach, timeline, and milestones.
14. Extent of data preparation and migration requirements included in the proposed solution scope.
15. RACI model outlining clear Responsibility and Accountability for specific, proposed, and/or excluded tasks identified in the project plan.
16. Preferred **continuous** implementation windows to allow for a series of 6-week agile project implementation sprints, and which avoid conflicts with Councils year-end and other resource-intensive periods.
17. Training, including the type and extent of training, who it will be provided to, and the amount of training hours included in the proposed solution.

Post-Implementation Services

18. Post-implementation support plan, including service levels for response times, and additional and optional support costs.
19. Additional service options Council may wish to consider.
20. Minimum level of Council officer support required for the quoted services and price.

Deliverables

21. A list of project deliverables, including digitised forms.

Licensing

22. License quantity proposed.
23. License type (e.g., perpetual, subscription-based).
24. License restrictions or limitations.
25. License terms and conditions, including renewal and upgrade options.
26. License costs.
27. Licensing annual increases over a forward 5-year period.

4.4 Assumptions

- The scope of the project will remain consistent with the information provided in the RFP.
- Any changes to the project scope or requirements will be communicated in a timely manner by the Council and may result in adjustments to timelines or costs.
- The proposed implementation approach will ensure minimal disruption to ongoing business operations.
- Council will provide timely access to required information, resources, and personnel during the project.
- Council will endeavour to ensure current system service providers cooperate fully and promptly throughout the assessment process.
- If successful, preferred suppliers will have access to the necessary expertise to ensure a successful implementation, including project management, technical, and training resources.
- Council will actively participate in decision-making, testing, and approval processes throughout the project.
- The proposed solution will comply with relevant regulations, industry standards, and best practices.
- All costs submitted in the proposal will remain valid for a specified period, allowing Council sufficient time to evaluate and decide.
- The proposed implementation windows will consider the Council's year-end and other resource-intensive periods.
- If successful, the preferred supplier will provide ongoing support and assistance in resolving any issues that may arise during and after the implementation.
- Council will be responsible for any data cleansing tasks not explicitly included in the preferred supplier's proposal.
- Any additional costs or services not specified in the proposal will be negotiated and agreed upon by both parties before commencing work.
- Council will provide a project manager or contact person to coordinate and facilitate communication between the preferred supplier and Council officers.

4.5 Project Risks/Issues

The submission should include detailed responses addressing mitigation strategies for the following potential risks:

- **Data Migration and Integrity:** How the proposal ensures that records, historical data, and related information are successfully transferred without errors.
- **Integration and Compatibility:** How the proposal ensures operational disruptions, and inefficiencies in the departments that rely on the systems are minimised.
- **Change Management and User Adoption:** How the proposal ensures resistance to change or difficulty in adapting to the new system is managed.
- **Security and Compliance:** How the proposal ensures that sensitive data is securely stored and transmitted, and that the new system meets regulatory requirements.
- **Cost Overruns and Budget Management:** How the proposal ensures costs related to licensing, consulting services, data migration, training, and ongoing support are clearly disclosed.

4.6 Project Timeline

Council is seeking to undertake this project as part of a multi-year digital transformation program.

Proposed delivery timeframes will form part of the evaluation criteria for this RFP.

4.7 Pricing Model

The proposal should offer competitive and transparent pricing, including a clear itemisation of costs for licensing, direct and sub-contracted implementation consulting support services, managed services fees, expenses, and any other relevant expenses. All prices are to be proposed in AUD.

Pricing must:

- be itemised.
- indicate where discounts have been applied for tiered pricing structures.
- where there are multiple implementation phases, be broken down by implementation phases.
- include costs for additional hourly and daily rates, by role.
- include total travel related expenses, plus estimation assumptions (e.g., # of trips, inclusions etc.).

5 Evaluation Criteria

Proposals will be evaluated based on the following criteria:

- **Proposed project scope:** The proposal should present a clear and detailed response to Section 4 – Scope of Work and include project scope, approach, project plan and highlight how the proposed solution addresses Council's requirements.
- **Clarity and comprehensiveness of the proposal:** The proposal should be well-structured, easy to understand, and thoroughly address all requirements outlined in the RFP. It should demonstrate quality and clarity of deliverables.
- **Qualifications and expertise of the organisation and proposed implementation team:** The proposal should demonstrate the skill and experience of the organisation and implementation resources, showcasing their relevant experience and implementation expertise and the ability to successfully deliver the project, including training, and supporting the proposed services.
- **Delivery timeframe:** The proposal should provide a realistic and feasible timeline for the project's completion, considering Council's preferred implementation window.
- **Pricing structure and cost-effectiveness:** The proposal should offer competitive and transparent pricing, including clearly itemised costs for licensing, implementation consulting support services, managed services fees, travel expenses, accommodation expenses, and any other relevant expenses.
- **Client references and testimonials:** From three (3) organisations operating in the local government sector. It would also be beneficial for Council to understand where other Tasmanian organisations are clients.

5.1 Demonstrations and Presentations

Council will invite short-listed vendors to present their response and provide product demonstrations to council officers. Options will be provided for either onsite or remote demonstrations and held in June or July 2023.

6 Award and Formation of Contract

If the Council determines that the quality and comprehensiveness of the RFP submission is insufficient, it reserves the right to launch subsequent processes as needed to guarantee the selection of the most appropriate solution and service provider. For the avoidance of doubt, WCC is under no obligation to accept any proposals and may in its absolute discretion:

- a) Cease to proceed with the process outlined in the RFP.
- b) Not proceed with the RFP, and not to enter any contract.
- c) Call for new proposals.
- d) Accept or reject any proposal that does not comply with this RFP.

The successful vendor will be required to sign a contract supplemented by the addition of relevant information, requirements, or variations:

- a) Contained in the successful proposal.
- b) Arising during the proposal evaluation.
- c) Required by law, including insurances; and
- d) Arising out of discussions and negotiations.

No contractual relationship or other obligation arises between WCC and a vendor until WCC and the successful vendor formally exchange signed counterparts of the Contract.

7 Form Digitisation

Council acknowledges the distinction between digitising a paper form into a fillable PDF and creating an online form on the website that sends information to a specific business system.

For the initial stage of the DRP, Council's primary objective is to implement online webforms that provide a user-friendly experience for constituents and reduces reliance on paper-based processes.

Council is open to further discussions and welcome any insights or suggestions to ensure the success of this program. Accordingly, Council will appropriately consider additional (roadmap) enhancements and integrations to streamline operations and improve overall efficiency.

The following forms and associated processes should be scoped as part of the response.

Human Resources

Human Capital Management (HCM) software. Designed to manage various aspects of employee data, payroll, leave management, and personnel administration.

REF	Form
EM	Employee Management and Onboarding
EM001	Application for Employment
EM002	Access Card Return Form
EM003	Employee Details
EM004	Personal Information Protection Statement
EM005	Sample Signature Sheet
TA	Time and Attendance
TA001	Weekly Pool Timesheet
TA002	West Coast Council Daily Timesheet
LM	Leave Management
LM001	Leave Application Form
PA	Payroll
PA001	Payroll Deduction Authority
FC	Feedback and Communication
FC001	Action Item Feedback Template

Customer Service

Customer Relationship Management (CRM) software: Designed to manage and improve interactions between Council and its customers, clients, and stakeholders. Centralises customer data, customer processes, and facilitates communication and collaboration among team members to enhance customer satisfaction. Also, Content Management System (CMS) software: Designed to create, edit, manage, and publish digital content, primarily for websites or web applications. Streamlines the process of organising, controlling, and updating content, allowing multiple users to contribute to the creation and modification of digital assets without requiring extensive technical knowledge.

REF	Form
SR	Customer Service Requests
SR001	Brochure Display Advertising Agreement
SR002	Information and Declaration Operator [Book Easy Listing]
SR003	Registration for Council Updates [Contact Register]
SR004	Request for Access to Council Meeting Audio Recording
SR005	Request for Hire of Skip Bin
SR006	Request for Landfill Disposal
SR007	Request for Waste/Recycle Bin
SR008	Works Request Form [Compliments and Complaints]
GI	General Information
GI001	Air BnB Information Sheet
GI002	Fees and Charges
GI003	How-to Pay
GI004	Kerb Side Recycling Collection Queenstown
GI005	Kerb Side Garbage Collection Queenstown
GI006	Mobile Food Van Maps
IR	Incident Reporting and Complaints
IR001	Compliments / Complaints Form
IR002	Complaint Form Local Government Code of Conduct
IR003	Complaint Nuisance Created by Dog
IR004	Vandalism / Crime Reporting Form
IR005	Witness Statement Involving Animal
GR	Event and Community Support
GR001	Application for Community Christmas Event [Up to \$500]
GR002	Application for Community Christmas Event In-Kind Assistance
GR003	Application for Event Sponsorship [Up to \$2000]
GR004	Application for In-Kind Assistance
GR005	Application for Innovation [Up to \$2000]
GR006	Application for Small Grant [Up to \$250]