

Utah Telecommunication
Open Infrastructure Agency



Request for Proposal for
Software Field Services Management
RFP # Field-Services-Management-2024DEVOPS-001

March 27, 2024

The Utah Telecommunication Open Infrastructure Agency (UTOPIA) or UTOPIA Fiber, invites qualified respondents to submit a request for proposal (RFP) for software field service management.

This RFP outlines the requirements for your proposal that UTOPIA Fiber is interested in.

All quotes must be received by **5:00 P.M. Mountain Time on April 10th, 2024** via email to Aaron Leach (aleach@utopiafiber.com). **QUOTES SUBMITTED AFTER THE DEADLINE WILL NOT BE CONSIDERED.**

Please use email to direct all questions to Aaron Leach (aleach@utopiafiber.com). Any questions received will be answered and provided to other respondents.

We look forward to receiving your response.

Sincerely,



Roger Timmerman
Executive Director
UTOPIA Fiber

UTOPIA FIBER

Request for Proposals

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1.1 Introduction

UTOPIA Fiber is accepting proposals from suitable qualified and experienced candidates for software solution centered around field services management.

This software solution will be used for managing the UTOPIA Fiber field technicians and installation crews as they related to current/potential customers.

1.2 Software Requirements and Objectives

Utopia has identified several key objectives that the organization would like to achieve to alleviate challenges with scalability and management of the field workforce and provide visibility and transparency to current and potential customers.

The high-level goals are listed below:

Operations:

- Installations: Solution will manage processes related to drop installations. This will provide a reduction in time between drops to installs, provide means to verify all procedural steps are followed, and capture all pertinent data (i.e. installation pictures, speed test data, etc.) is being gathered and stored in the system.
- Repair: Solution will manage process related to repair of customer infrastructure. This will track time to repair, provide means to verify all procedural steps are followed, and capture all pertinent data (i.e. Pictures, speed test data, etc.)
- Regional Management: Solution will provide means to manage multiple geographic areas.
- Contractor Visibility: Solution will provide means to ensure visibility and quality control of all contracted work.

Customer:

- Maintain High Customer NPS: Solution will provide means of maintaining a high customer experience with an integrated digital field experience.
- Uberized Customer Experience: Solution will provide a more Uberized customer experience by providing real-time notifications to customers that opt in for service.

Technology:

- Scalable Platform: Solution must scale as the UTOPIA Fiber network grows.
 - Provide performance reports.
- Schedule Optimization: Solution must provide ways to manage schedule including manual schedule assignment as well as automated schedule assignment via API.
- API Ability: Solution has a robust API that will allow UTOPIA Fiber to facilitate and integrate with all various support systems.
- Security Considerations: Solution uses appropriate means to prevent unauthorized or bad actors from accessing said system.
 - API security best practices

- Single Sign-On Capabilities
- Cloud Based or Local Instance
 - If Cloud Based, provide test and development environment.

1.2.1 Additional Requirements

UTOPIA Fiber also has identified requirements that are more granular. These are listed by Section/Role, Requirement, and User Story associated with Requirement.

Section/Role	Requirement	User Story
Customer Portal	The solution will allow technicians/customers to create, cancel and modify truck rolls to customer appointments. Appointment types are, installs, maintenance, repairs, etc.	Customers need to be able to receive email/SMS with a link to the customer portal where they can choose a date and timeslot for a given appointment. They can also cancel or reschedule those appointments.
Customer Portal	Customer may opt in for Email and SMS notifications.	<p>Customers, if opting in, can receive Email and SMS notifications (Text and Messaging charges are not included) for an installation, maintenance, or repair task.</p> <p>Notification examples:</p> <ul style="list-style-type: none"> - Appointment booking notification - Booking confirmation - Morning of reminder - Technician on the way reminder <p>Option should be configurable in customer portal or have ability from API perspective to update the provided solution with information about the appointment.</p>
Customer Portal	Scheduling: Appointment windows and rule templates.	<p>Appointment windows can be configured as timeslots e.g. 8-10a, 10a-12p, 12-2p, 2-4p</p> <p>Rule templates are set for different</p>

		types of appointments and regional rules.
Reporting	KPI dashboards	<p>Standard Reports & Dashboards:</p> <ul style="list-style-type: none"> - Technician Utilization: During the last 30 days, how much time (using tasks) was allocated for each technician every day compared to the available time for the shift. - SLA Compliance Rate: From the completed work orders in the last 30 days, show the percentage of Work Orders completed within SLA compliance. - Task Completion Rate: Total percentage of completed tasks as a portion of all tasks scheduled for the day. - Work Order Statuses: Number of work orders per OOB Status by created date. - Tasks By Status: Number of tasks per status by created date. - Mean Time to Resolution (MTTR): The time difference between Work Order Requested Date & Time and Work Order completed Date & Time, per WO Type. - First Time Fixed Rate (FTFR): Percentage of the tasks that have been reopened at least once vs the ones that were submitted by the technician only once (completed) and were scheduled for the same day. - Technician Efficiency: Shows how efficient a technician is in completing tasks compared to the allocated time in hours. Displays historical data by technician-date. -Ability to create new reports and/or create additional dashboards

Dispatch	Calendar view with the ability to filter based on appointment type/s.	Full page calendar view where dispatchers can see a visual representation of the schedule while also being able to schedule, assign, and dispatch tasks. Tasks can be dragged from the Open Task List on the calendar grid to assign to a technician. Tasks can also be dragged within the calendar grid to easily adjust the schedule.
Dispatch	Map view of routes	A map view to see a visual representation of task locations, technicians, and technician routes.
Dispatch	Escalation management	<p>If appointments are at risk of not being completed or missed, solution must provide escalation tools to alert and notify Dispatch.</p> <p>Types of rules to adjust for</p> <ul style="list-style-type: none"> - SLA in risk - Long running task - Technician on leave - Other configurable rules
Dispatch Center	Status of jobs (Work Order level)	<p>Work Orders can have one of the following statuses:</p> <p>Open - Work Order is saved and tasks can be added. In Open status, the Work Order can be edited and/or canceled.</p> <p>Scheduled - At least one task in the Work Order has been published and is in one of these statuses: Scheduled, In Progress, Pending Review, Reopened. In this state, the work order can be edited or canceled.</p> <p>Completed - When all tasks within the Work Order are completed, the Work Order automatically</p>

		<p>transitions to Completed status. Completed Work Orders may contain one or more tasks that have been canceled, but at least one was completed.</p> <p>Canceled - This status indicates the Work Order was canceled by a web user. All tasks which were not previously completed are also canceled by default when the parent work order is canceled. Canceled Work Orders and Tasks cannot be reopened.</p>
Dispatch Center	Status of jobs (Task Level)	<p>Dispatchers get real-time visibility of task statuses and changes with the ability to group by:</p> <ul style="list-style-type: none"> - Open tasks - Tasks that have not yet been scheduled or assigned. - Scheduled - Tasks have been assigned and scheduled but not yet dispatched, and not visible to a tech. - Dispatched - Tasks have been sent to the assigned tech and are viewable on the tech's mobile device. But the tech has yet to start/check-in to the site. - In Transit - Tasks where the tech has clicked the start travel at the start of the mobile workflow. - In Progress - Tasks are those where the tech has checked in to the site. The check-in by default is enforced by geofence with a radius of 500 meters from the site coordinates. - Delayed - A task delay is reported by the tech. Details of the delay can be viewed in the side panel. - Incident - An incident is reported by the tech. Details of the incident can be viewed in the side panel.

		<ul style="list-style-type: none"> - Pending Review - Tasks that have been completed in the field and submitted for review. - Site Change Request - Tasks that are submitted when a tech has discovered that the site address needs to be updated. - Completed - tasks that have been completed, reviewed, and approved. - Canceled - tasks are those that have been canceled. <p>Customers who opt in receive notifications as task status changes.</p>
Field Execution	Offline Execution of Tasks	Technicians will be able to execute tasks on their mobile device even when they are offline due to poor or no cellular connectivity.
Field Execution	Checklists/Evidence Capture	<p>Technicians will have checklists for each task type.</p> <p>Technicians will have the ability to submit pictures.</p> <p>User Defined fields can record information and tests that were completed at customer location.</p>
Field Execution	Parts Barcode Capture	Technicians will be able to capture serial number of equipment being installed/serviced. The serial numbers will be communicated back to UTOPIA Fiber support systems.
Field Execution	Check-in/Check-out time capture	Technicians will use geofence based check-in at the beginning of the task and then check-out on completion of task.
Field Execution	Signature capture	Technician will be able to capture customer signatures digitally on

		completion of a task.
Field Execution	Travel Time Capture	Technician will mark travel start and stop events. Customer will receive notifications when technicians start traveling to a customer location.
Field Execution	Failure/Completion Codes	<p>If a technician could not complete the job due for any reason, the tech will select from a pre-defined list of failure codes which will be sent back to UTOPIA Fiber support systems.</p> <p>The client will initiate a new task for subsequent visit by the tech.</p> <p>On successful completion, status will be communicated back to the UTOPIA Fiber support system along with any equipment information and/or data collected for task.</p>
Integration	Customer and Customer Site Creation and Updates	<p>During integration phase, Solution provider will create and implement the necessary pieces and map those pieces to UTOPIA Fiber existing processes.</p> <p>Solution provider will verify that</p>
Integration	Work Order Creation	<p>All pertinent work orders will be created and mapped to UTOPIA Fiber existing processes.</p> <p>Solution provider will verify that all work orders are functioning as desired.</p>
Integration	Status Update	<p>All status updates will be created and mapped to UTOPIA Fiber existing processes.</p> <p>Solution provider will verify that all work orders are functioning as desired.</p>
Schedule Optimization	Automated Scheduling Optimization Methods	Scheduling Settings can be configured to allow certain criteria to be met before appointment can

		<p>be scheduled.</p> <p>-Does the tech have the required skills? (Yes / No):</p> <p>-Is the tech within in range of the appointment? (Range in km):</p> <p>-Is the tech schedule appropriately for a given week? For newer tasks, will the system consider and balance workloads or number of tasks for all techs?</p> <p>-Will the system estimate the travel time between tasks?</p> <p>-Can the system evaluate the experience, completion time of tasks, skills, first time fix rate, etc., when setting and maximizing the schedule?</p> <p>-Will the system take into consideration any overtime aspects when scheduling? Will there be an override?</p>
Configuration	No Code Task Builder	Schedule, task templates, rule templates, etc., will use no code.
Work Management	Minimum Task Types	<p>Solution must be able to support the following task types with associated workflows:</p> <ul style="list-style-type: none"> - Installation - Repair - Fiber Drop - Disconnects
Work Management	Task Dependencies	Configure the order in which tasks need to be performed if there are two or more tasks in a work order. Task dependencies are created based on task status changes and any number of dependencies can be configured.
Workforce	Technician Information	Technician information like home

Management		base, skills, shifts, etc.
Workforce Management	Workgroup Regional Management	Field workforce can be organized across regions and tasks. For example: Region based work groups could be RegionA and RegionB. Task Type based workgroups could be configured as Drop or Install. Sample workgroups could be RegionA-Drop, RegionA-Install, RegionB-Drop, RegionB-Install.

1.3 License Considerations

The following license considerations should be used for quoting.

Internal/External	Group	Number of Licenses
Internal	Field Service Technicians	15
External	Field Installation Personnel	10
Internal	Administration/API	5

1.4 Implementation Timeframes

It is anticipated, that once a respondent is awarded, contract negotiations, and integration/training/production release will take 16 weeks.

Listed below are phases as it relates to timeline.

- Phase 0 – Contract Negotiation/Finalization (4 weeks)
- Phase 1 – Integration, Training, and Production Release (12 weeks)

These phases are high-level guidelines, and each phase may require further breakdown into tasks, timelines, and responsibilities. Respondents may adjust timeframes if necessary.

1.5 RFP Questions

Respondents that have questions must provide those questions to Aaron Leach (aleach@utopiafiber.com) by email no later than 2 business days before the RFP ends. Questions and answers will be placed on the UTOPIA Fiber website as RFP-Field-Services-Management-2024DEVOPS-001.xls) the day before the RFP deadline date.

1.6 Payment Terms

UTOPIA Fiber will be issuing purchase orders (PO's) for software. UTOPIA Fiber uses the term NET30 for payment of invoices. Payment will be in US Dollars only. UTOPIA Fiber will issue payments for NET30 terms the later date of invoice/s received, or material received.

1.7 Response Material Ownership

All material submitted regarding and in response to this RFP becomes the property of UTOPIA Fiber and will only be returned to the respondent at UTOPIA Fiber's option. Any person may petition to review responses after final selection has been made. UTOPIA Fiber has the right to use any or all system ideas presented in reply to this request, subject to limitations outlined below in "Proprietary Information." Disqualification of a respondent does not eliminate this right.

1.8 Confidentiality and Non-Disclosure

Respondents agree to maintain the confidentiality of all proprietary and confidential information of UTOPIA Fiber related to the project.

Respondents shall not disclose or use any confidential information, for any purpose other than the performance of the services outlined in this RFP.

1.9 UTOPIA Business Hours

UTOPIA Fiber's operation works from 8:00AM to 5:00PM. Vendors will be responsible to coordinate with UTOPIA Fiber personnel during these times.

1.10 Financial Security and Stability

Respondents to this RFP must provide financial statements to UTOPIA Fiber upon request.

1.11 Client References

Respondents are scored on the presentation and content of references that are provided.

1.12 Selection Criteria and Scoring

Respondents will be scored on price, references, and quote presentation of how well they can meet the above requirements.

Scoring is calculated as such:

Price:	50%
References:	25%
Proposal Presentation:	25%

Awardees and Non-Awardees will be notified by email no later than seven business days after RFP end.

1.13 Proprietary Information

UTOPIA Fiber is subject to the disclosure requirements of the Government Records Access and Management Act (“GRAMA”), Title 63, Chapter 2, Utah Code Annotated. UTOPIA Fiber generally considers Agreements, Contract Documents, and all accompanying material to be public and subject to disclosure. A written claim of confidentiality and a concise written statement of reasons supporting the claim must accompany any material considered by respondents to be proprietary. Blanket claims that the entire Agreement or Contract Documents are confidential will be denied by UTOPIA Fiber. UTOPIA Fiber cannot guarantee that any information will be held confidential. Under Section 63-2-304 of the Government Records Access and Management Act, if a respondent makes a claim of confidentiality, UTOPIA Fiber, upon receipt of a request for disclosure, will determine whether the material should be classified as public or protected, and will notify the respondent of such determination. UTOPIA Fiber agrees to hold all information classified as protected in confidence and protect it from public disclosure in accordance with such statutes to the greatest extent permitted by Utah law. UTOPIA Fiber may disclose such information to the extent required by law; however, UTOPIA Fiber shall provide respondents prompt notice of a request for disclosure of such protected information and shall cooperate with respondents in seeking the issuance of a protective order.

Respondents are entitled under the Government Records Access and Management Act to appeal an adverse determination regarding the classification of information. UTOPIA Fiber is not required to notify respondents of a request for non-protected information and will not consider a claim of confidentiality unless the respondent’s claim of confidentiality is made on a timely basis and in accordance with the Government Records Access and Management Act.