

COUNTY OF ROCKLAND
Department of General Services
Purchasing Division

Contract Award Notification

Title: **Government Chatbot and Communication Platform**

Contract Period: June 16, 2025 through June 15, 2028

Original Date of Issue: 06/16/25

Date of Revision:

RCO No: **RCO-RC-2025-005**

Catalog: **Computers**

Authorized Users: United States Agencies, Other States & Political Subdivisions Therein,
Local Governments, School Districts & Non-Profit Agencies

Address Inquiries To:

Name: Sabrina Samuels
Title: Assistant Director of Purchasing
Phone: 845-364-3807
Fax: 845-364-3809
E-mail: samuelss@co.rockland.ny.us

Description

This is for Government Chatbot and Communication Platform

| Contract # | Vendor Number | Contractor & Address | Telephone No. |
|------------|---------------|--|---|
| RCO 25-005 | 0000007662 | SHI International Corp 290 Davidson Ave Somerset, NJ 0883 Contact: Daniel Rouette Dan_rouette@shi.com | 888-744-4084 FAX: 888-764-8889 |

| RCO-RC-2025-005 | | | COUNTY OF ROCKLAND DGS – PURCHASING DEPARTMENT BLDG. A, 6TH FLOOR, 50 SANATORIUM ROAD POMONA, NY 10970 TELEPHONE NO.: 845-364-3820 | | | Proposal Page 1 VENDOR: _SHI CORP_ |
|-----------------|--|-------------|--|-------|-------------|---|
| LINE NO. | DESCRIPTION | Item # | EST QTY | Unit | Unit Price | MANUFACTURER |
| Year One | | | | | | |
| 1 | Year One- One-time implementation of new or existing CRM for County. Citibot-INT-Mthly-1195 or approved equal. Hourly rate for implementation based on estimated hours | 20811000001 | 46 | Hours | \$243.20 | Citibot |
| 2 | Year One- Web Chat for County: 150K-400K Citibot-WC-County-400k or approved equal | 20811000002 | 1 | Year | \$11,576.06 | Citibot |
| 3 | Year One- Text Chat for County 150K-400K to include annual subscription for multilingual- Citibot-TC-County400K or approved equal | 20811000003 | 1 | Year | \$10,700.56 | Citibot |
| Year Two | | | | | | |
| 4 | Year Two- Web Chat for County: 150K-400K Citibot-WC-County-400k or approved equal | 20811000004 | 1 | Year | \$12,354.28 | Citibot |
| 5 | Year Two- Text Chat for County 150K-400K to include annual subscription for multilingual- Citibot-TC-County400K or approved equal | 20811000005 | 1 | Year | \$11,576.06 | Citibot |
| Year Three | | | | | | |
| 6 | Year Three- Web Chat for County: 150K-400K Citibot-WC-County-400k or approved equal | 20811000006 | 1 | Year | \$13,035.22 | Citibot |

| LINE NO. | DESCRIPTION | Item # | EST QTY | Unit | Unit Price | MANUFACTURER |
|----------|--|-------------|---------|------|-------------|--------------|
| 7 | Year Three- Text Chat for County 150K-400K to include annual subscription for multilingual-Citibot-TC-County400K or approved equal | 20811000007 | 1 | Year | \$12,403.42 | Citibot |

COUNTY OF ROCKLAND - DGS-PURCHASING
 BLDG. A., 6TH FLOOR, 50 SANATORIUM RD, POMONA, NY 10970
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PURCHASES BY OTHER

LOCAL GOVERNMENTS, SCHOOL DISTRICTS, AND NON PROFIT AGENCIES

As per the New York State General Municipal Law, all political subdivisions of New York State are allowed to make purchases through the resulting contract(s). As per Rockland County Procurement Policy, Non Profit Agencies approved to participate in New York State's Contract Extension Program are authorized to make purchases through the resulting contract(s).

1. The County of Rockland shall make all contract award information available to other political subdivisions and non profit agencies through our website: www.rcpurchasing.com
2. Any other political subdivision or Rockland County non profit agency will issue purchase orders directly to vendors within the specified contract period referencing the County's contract and shall be liable for any payments due on such purchase orders; and shall accept sole responsibility for any payment due.
3. All purchases shall be subject to audit and inspection by the other political subdivisions and Rockland County non profit agencies for which the purchase was made.
4. No officer, board or agency of a county, town, village, or school district shall make any purchase through the County when bids have been received for such purchase by such officer, board or agency, unless such purchase may be made upon the same terms, conditions and specifications at a lower price through the County.
5. All Bidders shall be on notice that as a condition of the award of a County contract, the successful bidder shall accept the award of a similar contract with any other political subdivision in New York State and Rockland County non profit agencies authorized to use New York State's contracts, if called upon to do so. A listing of approved Rockland County non profit agencies is available on the Purchasing Division's website at www.rcpurchasing.com. The County, however, will not be responsible for any debts incurred by the participants pursuant to this or any other agreement.
6. Necessary deviations from the County's specifications in the award of a participant contract, whether such deviations relate to quantities, or delivery points shall be resolved between the successful bidder and the other political subdivisions and Rockland County non profit agencies.

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SPECIFICATIONS

1. SCOPE

- 1.1.** The County of Rockland ITS Department is seeking to procure Citibot AI-based chat solution for citizens and governments or an approved equal Government chatbot and communication platform for a three-year term with two (2) one (1) year renewal terms. This chatbot will use text messaging (SMS) and web chat technology to automate customer service and increase citizen engagement.

2. GENERAL REQUIREMENTS

- 2.1. Chatbot uses SMS and web chat technology to allow residents to get answers to questions, report issues, send messages directly to staff and receive real time alerts.
- 2.2. Interactive Web Chat: an integrated web assistant on the Rockland County website that offers conversational customer service, to allow residents to submit questions, request, and access information 24/7.
- 2.3. Interactive Text Chat: interact through a dedicated phone number without using an app, enabling residents to submit requests, questions and send direct messages 24/7.
- 2.4. Text Alerts: Interactive text alerts in English and Spanish.
- 2.5. Multilingual: capability of translating a minimum of seventy-one (71) languages
- 2.6. Facebook/WhatsApp/Twitter/Threads: Interact through County designated social media channels 24/7

3. IMPLEMENTATION

- 3.1. Implementation must include:
- 3.1.1. Providing and activating a dedicated phone number
 - 3.1.2. Installing product via cloud, setting up storage
 - 3.1.3. Build Q/A models
- 3.2. Training for Rockland County staff is required for successful implementation and must be included in price.
- 3.2.1. Complete configuration, mapping, testing and training
- 3.3. Analytics Dashboard to be set up for Rockland County to use as a real-time decision-making tool. Analytics must store information and report information of questions and issues reported on a monthly basis.
- 3.4. Post installation maintenance hosting, support, integration management and software as a service (SaaS) management.

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4. TECHNICAL SUPPORT

- 4.1. The bidder is responsible for any implementation, assistance, or technical support that is required.
 - 4.1.1. The bidder must install and configure Chatbot and Communication Platform for the County's environment.
 - 4.1.2. The bidder must provide any necessary training or services to the County's ITS Department on the use of the Communication platform.
 - 4.1.3. The bidder must maintain and support the communication platform solution during and after the implementation.
- 4.2. Installation and implementation must be done with minimal interference to daily operations.

5. PRICING

- 5.1. Pricing is to be provided for software for a one (1) year, two (2) year, and three (3) year terms from the start date. The County intends to award the contract for a three (3) year contract term; however, the County would like to receive pricing for each year.
- 5.2. Pricing is to include all costs associated with the product, implementation, technical support, and assistance.
- 5.3. Pricing is to reflect an annual rate for Web Chat and Text Chat for approximately 150k-400k.
- 5.4. Pricing for text chat is to include multilingual subscriptions.
- 5.5. Pricing will be held firm for the first three years with price adjustments available upon renewal in the fourth and fifth renewal option.

6. PRICE ADJUSTMENT

- 6.1. A Price Adjustment request must be made in writing and include the reason for the request, documentation supporting the request (i.e., commodity increases), the current pricing, and the requested revised pricing.

The County will review the Price Adjustment request. If the Price Adjustment is deemed reasonable the Price Adjustment request will be accepted by written acknowledgement. If the request is not accepted the County may entirely reject the request or may counter with revised pricing. In either case the County will provide a written explanation in support of the decision.

The Director of Purchasing may use available indexes (e.g. CPI or PPI) to determine if the requested Price Adjustment is reasonable. Typically, a Price Adjustment that exceeds 5% will not be approved unless very unusual and significant changes have occurred in the industry.

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In the event industry costs decline, the County shall have the right to receive, from the Contractor, a reasonable reduction in prices/pricing that reflect such cost changes in the industry. The County will make a written request to the Contractor for a Price Adjustment in writing with supporting documentation.

7. APPROVED EQUAL

- 7.1. In submitting an approved equal, bidder must submit a copy of brochures with detailed specifications. This information should be attached directly behind the detailed specifications.
- 7.2. In the event, that an alternate is bid, the County of Rockland reserves the right to request a demonstration of the specific model bid. Failure to furnish the demonstration would render the bid for this item non-responsive.
- 7.3. If the bidders submit a bid for specific equipment, equivalent or approved equal products, they must submit Manufacturer's product description and specifications along with a list of three references showing locations using the exact make and model intended to be supplied. These specifications must include all items listed in the bid specifications.
- 7.4. If bidders submit or bid for equivalent or approved equal products, they must submit manufacturer's product description and specifications. These specifications must include all functions listed in the bid specifications.
- 7.5. Bidder must be able to demonstrate within one week after notice and guarantee in writing that the item bid is compatible with existing software.

DEPARTMENT OF GENERAL SERVICES, PURCHASING DIVISION

Dr. Robert L. Yeager Health Center
50 Sanatorium Rd, Building A
Pomona, New York 10970
Phone: (845) 364-3820 Fax: (845) 364-3809
Email: purchasing@co.rockland.ny.us

Paul Brennan, FNIGP, NIGP-CPP, CPPO
Director of Purchasing

ADDENDUM # 1

RCO-RC-2025-005

Government Chatbot and Communication Platform

The information in this addendum supersedes any contradictory information set forth in the contract documents. Acknowledge receipt of this addendum in the space provided on the signature page of the bid proposal. Failure to do so, may subject the bidder to disqualification. This addendum forms a part of the contract documents.

Question #1: Will the chatbot be expected to support multiple audiences, including residents, County staff, and external stakeholders?

Response #1: Yes

Question #2: Are there specific departments or services the County wishes to prioritize for chatbot deployment in the initial phase?

Response #2: No there are no specific departments.

Question #3: Will Rockland County provide a pre-existing FAQ or knowledge base, or should vendors develop this from scratch?

Response #3: This will be developed in collaboration with the vendor. This should be automatically generated based upon information provided on the Rockland County website.

Question #4: Should the chatbot support multimodal interaction (e.g., voice, text, AI-generated summaries)?

Response #4: Yes

Question #5: Is there a requirement for live agent handoff? If so, what helpdesk or CRM platforms are currently in use or preferred?

Response #5: No this is not a requirement.

Question #6: What are the County's expectations regarding response time or SLAs for escalation to human agents?

Response #6: This is not a requirement therefore not applicable.

Question #7: Will the chatbot be expected to support internal workflows or case management in addition to public-facing self-service?

Response #7: No this is not required.

Question #8: What specific citizen service categories or transactions (e.g., permits, social services) are intended for chatbot automation?

Response #8: This is undetermined at this time.

Question #9: Are vendors allowed to propose optional or future expansion modules (e.g., document upload, proactive alerts)?

Response #9: Yes, this can be included in the narrative response and will be reviewed for future consideration.

Question #10: Does the County currently have a CRM system in place? If so, can you specify the vendor or platform?

Response #10: No there is no CRM in place.

Question #11: Is the expectation to replace, extend, or integrate with the existing CRM?

Response #11: No this is not an expectation.

Question #12: Can the County clarify what functionality is included in "Citibot-INT-Mthly-1195"? Is this a CRM interface, API integration service, or monthly maintenance fee?

Response #12: This is annual maintenance.

Question #13: Are there specific APIs or middleware the County prefers or requires for integration with existing systems?

Response #13: No

Question #14: Is integration with third-party platforms (e.g., Open311, GIS, Salesforce, Accela) required or expected?

Response #14: This is not required, however will be accepted , specifically for Granicus go access.

Question #15: What is the estimated volume of chatbot sessions per month or expected peak concurrent users?

Response #15: Must be built based on a population of 350,000 residents.

Question #16: Are there future plans to expand the chatbot to support additional languages, departments, or communication channels (e.g., SMS, voice)?

Response #16: There are no current plans of expansion, however future enhancements may be a possibility.

Question #17: Will the chatbot need to scale across other jurisdictions or agencies, as indicated by the piggyback clause?

Response #17: No functionality will not be across other jurisdictions, however it must be available for other jurisdictions to piggyback from this contract for software if necessary.

Question #18: What language support is expected at launch, and are there specific compliance requirements for multilingual services?

Response #18: Full standard language packages are expected. Specifically, English, Spanish, Haitian, Creole, Hebrew and Yiddish are required.

Question # 19: Is there a preference for the chatbot platform to be vendor-hosted, on-premise, or deployed in a County-approved cloud environment?

Response #19: Vendor Hosted.

Question #20: What data security, encryption, and compliance standards must the solution adhere to (e.g., SOC 2, HIPAA, FedRAMP, NYS guidelines)?

Response #20: NYS guidelines are required.

Question #21: Will the County conduct a security audit or penetration test prior to go-live?

Response #21: Yes

Question #22: Are there any specific data residency or audit logging requirements we should account for?

Response #22: No

Question #23: Is the County open to a fully remote implementation, or will on-site presence be required at any phase?

Response #23: Fully remote implementation is required.

Question #24: Does the County prefer a dedicated support team or a shared support model?

Response #24: A dedicated support team is required.

Question #25: What is the expected turnaround time for issue resolution, bug fixes, and feature updates?

Response #25: The turnaround time for issue resolution should be provided in the narrative response. The County does not have expectations of timing on these issues.

Question #26: How many County staff members will require training? Should this be delivered live, virtually, or self-paced?

Response #26: Minimum of three (3) County staff, this can be self-paced or virtual or a combination.

Question #27: Will County staff be responsible for managing content and analytics after go-live, or is that part of ongoing vendor support?

Response #27: This will be a collaboration between the County and the vendor.

Question #28: Is there an estimated budget or target cost ceiling for this procurement?

Response #28: No there is no estimated budget for this project.

Question #29: Should vendors propose one-time implementation pricing, a subscription-based model, or a hybrid approach?

Response #29: Pricing must be provided in the format at listed in the bid table.

Question #30: Will pricing in the Excel BidTable be evaluated based on the initial 3-year contract or the full 5-year term (including renewals)?

Response #30: Pricing is only requested for years one-three.

Question #31: Are vendors allowed to propose alternate pricing tiers, discounts for multi-year commitments, or add-on services not listed in the bid table?

Response #31: Pricing must be submitted as requested. Additional cost for add-on services must be submitted in the narrative response. These will be reviewed for consideration.

Question #32: Are there any expected third-party or County-imposed costs vendors should include (e.g., hosting, compliance, licensing)?

Question #32: No additional costs should be included.

Question #33: Will vendors be asked to provide a live demonstration or proof of concept as part of the evaluation process?

Response #33: The County reserves the right to request a live demonstration if it is deemed necessary for evaluation.

Question #34: Should vendors include case studies or client references from similar chatbot implementations in county or government settings?

Response #34: Yes

Question # 35: Is there flexibility in contract renewal options beyond the stated 3+2 year term?

Response #35: No this contract will be a max of five (5) years; three (3) years with two (2) one (1) year renewal options.

Question #36: The contract includes a three-year term with two one-year renewal options. What are the conditions or criteria (e.g., performance metrics, budget approval) for exercising these renewals?

Response #36: All renewals are based upon mutual agreement between the vendor and the County. All renewals are contingent upon performance and budget appropriations.

Question #37: Is the chatbot intended primarily for public use, county employees, or both?

Response #37: Public use.

Question #38: Are there plans for future expansions or additional features that the platform should be able to accommodate?

Response #38: See response to question # 16.

Question #39: What specific customer service tasks (e.g., answering FAQs, scheduling appointments) should the chatbot automate? Please clarify if these tasks include only providing information or also performing actions such as scheduling appointments, processing requests, or executing other functions. How does the county define and measure "citizen engagement" (e.g., response rates, user satisfaction scores)?

Response #39: This will include answering FAQ, using AI to provide answers to questions based upon information available on our website , and providing information to get additional assistance form the Couty office if the answer is insufficient.

Question #40: The web chat must be integrated into the Rockland County website for conversational customer service. Are there specific design requirements (e.g., UI branding) or functionality expectations (e.g., seamless navigation, accessibility standards) for this integration?

Response #40: Branding is required, WCAG 2.0 Accessibility.

Question #41: The text chat operates via a dedicated phone number "without using an app." Does this mean the chatbot should handle SMS interactions natively, or is integration with a separate texting platform expected?

Response #41: The chatbot should handle with SMS Natively.

Question #42: Interactive text alerts are required in English and Spanish. What types of alerts (e.g., emergency notifications, service updates) are expected? Are there specific content, formatting, or frequency requirements?

Response #42: Emergency alerts with formatting appropriate for the purpose.

Question #43: The chatbot must support a minimum of 71 languages. Is there a specific list of these languages, or are there priority languages (e.g., commonly spoken in Rockland County) that should be emphasized?

Response #43: The required languages are referenced in the response to question # 18 and the full list is included as a link in the bid documents.

Question #44: What are the top three priority functionalities required for the chatbot? Please provide examples of key use cases or scenarios it should handle.

Response #44: This information is in the scope in the bid documents.

Question #45: For the analytics dashboard, what specific metrics or data points (e.g., query volume, resolution rates, user satisfaction) should be tracked? Additionally, is there a requirement to store chat interaction data for reporting or other purposes? If so, please specify the requirements for data storage, including retention periods, security measures, access controls, and compliance with relevant regulations.

Response #45: Basic analytics and custom reporting are required. Data retention is required by law.

Question #46: The product must be installed via the cloud with storage setup. Does the county have a preferred cloud provider (e.g., AWS, Azure) or data residency requirements (e.g., U.S.-based servers)?

Response #46: There is no preferred cloud provider, however should be U.S. based.

Question #47: What is the expected timeline for implementation, including any critical milestones or deadlines?

Response #47: Implementation should be within 3-8 months after award.

Question #48: Please list the key existing systems or databases the chatbot must integrate with, including any specific APIs or data formats required.

Response #48: No integration needed.

Question #49: Are there any restrictions or preferences regarding the use of specific Large Language Models (LLMs) for the chatbot?

Response #49: No restrictions.

Question #50: What are the performance requirements, including expected user loads, concurrent users, and uptime/availability expectations?

Response #50: The vendor is expected to perform testing to provide appropriate performance metrics. SLA 99.9 uptime expected.

Question #51: What are the security and data protection requirements for the chatbot, including any standards, certifications, and guidelines, particularly if the chatbot will process, store, or transmit Personally Identifiable Information (PII)?

Response #51: Must be in compliance with state and federal laws for local governments.

Question #52: Does the platform need to comply with specific accessibility standards, such as WCAG 2.1 Level AA?

Response #52: Yes

Question #53: Are there any additional legal or regulatory requirements the platform must meet?

Response #53: Any legal or regulatory requirements required by state and federal laws.

Question #54: Who will own the data generated by the chatbot, and are there requirements for data portability or export?

Response #54: All data will be owned by the County.

Question #55: Are there any requirements for transparency or public access to the chatbot's interactions or data?

Response #55: Yes, as required by state and federal law.

Question #56: Are there any other specific requirements or expectations that are not detailed in the solicitation documents?

Response #56: No all requirements are detailed in the solicitation and any subsequent addenda.

Question #57: Can development of the bot be done offshore? Would a hybrid offshore/onshore model be allowed?

Response #57: This is not preferred.

Question #58: If we are using a subcontractor or entering bid as a joint venture, do both parties need to complete all forms or just the prime?

Response #58: All parties must complete all required forms.

SIGNED:

Paul J. Brennan

**PAUL J. BRENNAN, FNIGP, NIGP-CPP, CPPO
DIRECTOR OF PURCHASING**

ADDENDUM

4/17/25