



REQUEST FOR PROPOSAL

NWRFP-20-17

eGovernment Customer Relationship Management (CRM)

Closing Time:

Thursday, July 23, 2020
3:00 PM, Local Time, Vancouver BC

Closing Location:

Send to FTP link at <https://fileshare.newwestcity.ca/filedrop/~sS3M7G>

Further requests for information :

Purchasing: Patrick Shannon, SCMP
Purchasing Manager

Email: nwpurchasing@newwestcity.ca

PROPONENT NAME		
Street Address:		
City Province Postal Code		
Contact Name:		
Telephone number:		Fax:
Email		Date:
Signature: by authorized signatory		

By my signature above, it shall be understood that I have read, understood and accept the requirements outlined in the Request for Proposal; we hereby propose to supply the Services in accordance with the Request for Proposal and as outlined in this Form of Proposal.

CORPORATION OF THE CITY OF NEW WESTMINSTER

PART 1

RFP PROCESS & GENERAL REQUIREMENTS

1.0 GENERAL INFORMATION

- 1.1** The City of New Westminster is seeking a supplier to provide an enhanced online service to the City's residents, visitors, and businesses. Refer to Part 2 – BUSINESS REQUIREMENTS for an in-depth scope of work.
- 1.2** The City of New Westminster is the first city in Western Canada and is located at the centre of Metro Vancouver. Just 20 km from downtown Vancouver, the City has both major transportation routes and railways running through its boundaries.
- 1.3** This is a request for proposals, and not a call for tenders or request for offers and no contractual obligations shall arise between the City and a Proponent upon the Proponent's submission of a Proposal to the City.
- 1.4** The city, at its discretion, reserves the right to;
- a) select a Proposal that deviates from the requirements of this RFP;
 - b) modify this RFP at any time.
- 1.5** Proponents will be solely responsible for their own expenses incurred in connection with this RFP, including in preparing and submitting a Proposal and in any subsequent negotiations with the City.
- 1.6** This RFP shall be governed by and construed in accordance with the laws of the Province of British Columbia.
- 1.7** The City reserves the right to negotiate with the lead Proponent deemed to provide the best overall value and such negotiations may include, but are not limited to:
- a) Changes to the requirements or Scope of Work proposed by the Proponent;
 - b) Price; and
 - c) Specific contract details as deemed reasonable for negotiations by the City.

2.0 PROPOSAL INSTRUCTIONS

- 2.1** Proposals should be submitted electronically in one (1) Adobe (PDF) file with "NWRFP-20-17 Submission" in the Subject <https://fileshare.newwestcity.ca/filedrop/~sS3M7G>
- 2.2** The City shall receive by email Proposals **prior to** the stated Closing Time. The City may not accept nor consider late submissions. It is the Proponent's responsibility to ensure that the City receives its Proposal prior to the stated closing time.
- 2.3** Requests for clarification or further information must be made in writing only to the individual identified on the first page of this RFP. The City intends to respond to enquiries that it, in its sole discretion, considers relevant to this RFP. The City intends to respond only to those relevant written enquiries received at least ninety-six (96) hours prior to the closing time. The City will record enquiries and post written responses on its website at <https://www.newwestcity.ca/business-and-economy/doing-business-with-the-city/request-for-bids-and-proposals-open>

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3.0 CONTRACT REQUIREMENTS

- 3.1 The City expects that the term of any Agreement negotiated between the City and a Proponent will be for an initial term of three (3) years with an additional two (2) one (1) year renewal terms at the sole discretion of the City.

4.0 OWNERSHIP OF PROPOSALS AND FREEDOM OF INFORMATION

- 4.1 All documents submitted with your Proposal will become the property of the City, and as such shall be subject to the disclosure provisions of the *BC Freedom of Information and Protection of Privacy Act (FOIPPA)* and *Community Charter*. A Proponent may stipulate in their Proposal that a portion(s) of their Proposal that contains confidential information and is supplied to the City in confidence. However, under FOIPPA, the City may nevertheless be obligated to disclose all or part of a Proposal in response to a request made under the Act, even if the Proponent has stipulated that part of their Proposal is supplied in confidence. The Proponent should review Section 21 and other provisions of FOIPPA in order to gain a better understanding of the City's disclosure responsibilities under the Act.

5.0 INSURANCE, PERMITS AND LICENSES

- 5.1 The successful Proponent will, without limiting its obligations or liabilities and at its own expense, provide and maintain throughout the Contract term, the following insurance with insurers licensed in British Columbia in forms acceptable to the City:
- a) Commercial General Liability Insurance protecting the City, for an amount of five million dollars (\$5,000,000) naming the City as additional insured;
- 5.2 The successful Proponent may be required to obtain a City of New Westminster or MetroWest Inter-Municipal Business license prior to commencement of work.

6.0 LIVING WAGE EMPLOYER

- 6.1 Effective January 1, 2011, the City of New Westminster became a "Living Wage Employer". As such, the City has established a [Living Wage Policy](#) that requires all firms that are contracted by the City to provide services on City premises, to pay their employees, who perform said service on City property, a Living Wage as calculated by the Living Wage for Families Campaign. The current living wage rate for Metro Vancouver is \$19.50 per hour, assuming the employer provides no benefits.
- 6.2 In order to determine an employee's hourly rate with benefits the Living Wage for Families has created a Living Wage Calculator to assist with this determination. Please access the following website to determine your compatibility.
http://www.livingwageforfamilies.ca/living_wage_calculator
- 6.3 The City includes in all its competitive bid documents a Declaration referencing the City's expectations with regards to compliance of the Policy (attached as Appendix A). **Completion and submission of the Declaration is required prior to Contract award.**
- 6.4 In evaluating submissions, the City intends to rely on the Declaration provided by a Respondent and shall have no obligation or duty to investigate the truthfulness of the Declaration. Please review the City's [Living Wage Page](#) for further information.

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7.0 EVALUATION AND SELECTION PROCESS

- 7.1 The City will evaluate all submitted valid Proposals. The City will not necessarily accept any or all Proposals. The object of the evaluation and selection process is to identify the Proposal that, in the City's opinion offers the best value for the services requested.
- 7.2 The City will evaluate the requirements and only those deemed by the City to have the right experience/capabilities/methodology etc. will have their price evaluated.
- 7.3 Proposals will be evaluated based on the following criteria:

Evaluation Criteria	Weighting
Project Team/Experience	10
Experience in Microsoft Dynamics	15
Experience in creating web portal	15
Working with local government	10
Working in a cloud environment	20
Level of Effort	10
Innovative Considerations	5
Cost	15
Total	100

- 7.4 The City, at its discretion, may request any or all of the Proponents to present their proposals and/or interview with the Selection Committee. Note that any information provided by Proponents in their proposals or discussed in presentations/interviews may be incorporated into any Contract with the Proponent.
- 7.5 The City advises all Proponents that the process for evaluation/interview and finalizing the lead/winning proponent may take 2 months.
- ### 8.0 NEGOTIATIONS
- 8.1 The award of a contract may be subject to negotiations with the lead Proponent that is deemed to provide the best value to the City. Such negotiations include, but not limited to, the following:
- a) Changes to the requirements or Scope of Work proposed by the Proponent
 - b) Price; and
 - c) Specific contract details as deemed reasonable for negotiations by the City
- 8.2 If a written contract cannot be negotiated within fourteen (14) days of notification with the lead Proponent, the City may, at its discretion at any time thereafter, terminate negotiations with the lead Proponent and either enter into negotiations with the next qualified Proponent or cancel the RFP or negotiate with another supplier.



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PART 2

BUSINESS REQUIREMENTS AND SCOPE OF WORK

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1.0 BACKGROUND

- 1.1** As the City evolves to offer enhanced services to the City residents, visitors, and businesses, a new online service is needed that provides:
- a) Single and secure sign on access to city's web portal 24/7;
 - b) Improved customer engagement with enhanced work flow processes using a Customer Relationship Management (CRM) system;
 - c) Enhanced and optimized internal workflow to provide timely responses to customers; and
 - d) Opportunity for service innovation by utilizing relevant web technology solutions.
- 1.2** The current online services offered through www.newwestcity.ca web site, including online forms and utility portals, will be part of the new portal. All new initiatives, where there is an opportunity for customer self-serve, will be under this new service.
- 1.3** By placing our online services under one portal, we expect to offer customers a consistent experience, improve staff workflow, and gain efficiencies in the services the City offers.
- 1.4** This project is corporate wide with representatives from each city department contributing requirements and direction. Information Technology (IT) will coordinate with the departments and be the main point of contact.
- 1.5** We are seeking an experienced Information Technology and Business Process company to guide, assist, and develop our electronic government services, as noted above.
- 1.6** The estimated timelines for phase one is to have a working eGovernment (eGov) portal with single sign on and CRM capabilities by 4Q2020. The overall project is envisioned as a 'work in progress', spanning up to five years.

2.0 BUSINESS REQUIREMENTS & SCOPE OF WORK

- 2.1** The City's approach to online services and offerings were typically narrow in scope and dealt with the immediate need (such as a request form). Our online sign on portal via MyCity is built for Tempest applications (dog license, utility bills, property tax) and does not work well for new online services, such as electrical billing's Customer Connect.
- 2.2** We are looking to create a framework where all city online services are accessed from one city portal. We will convert all existing online services and forms to reside within this one portal. All new services are developed under this one portal.
- 2.3** This project is corporate wide and potentially impacts all departments.
- 2.4** Project Goals
- a) Offer City customers (residents, visitors, businesses) a new, single sign on web portal to conduct their business with the City, available 24/7.
 - b) Implement a Customer Relationship Management (CRM) system to track and update on a timely basis all customer interactions with the City.
 - c) Improve existing business processes to take advantage of customer self-service and direct access.

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- 2.5 Business Drivers**
- a) City service requests will continue to increase as the population increases.
 - b) City customers, including residents and businesses, are asking for more and convenient online interaction with the city.
 - c) Online self-serve will free up staff time from transcribing current online forms and verbal requests (phone and counter) into other systems.
 - d) A CRM system will greatly improve the efficiencies of dealing with requests and issues by automating the workflow and providing instant status notifications to the requester.
- 2.6 Benefits**
- a) Improved customer service by offering unrestricted online access.
 - b) Less staff effort in re-entering details from the customer including address and email details.
 - c) Consistent approach when dealing with customers' requests.
- 2.7 Overview of Requirements**
- a) See Appendix B for overview of requirements
- 2.8 Out of scope**
- a) Internal coordination will be managed by IT staff
 - b) Mapping of internal processes and workflow will be created by City staff
- 3.0 WHAT DOES A GOOD SUPPLIER LOOK LIKE?**
- 3.1** The City is seeking a supplier with the following expertise and experience:
- a) Expert knowledge of Microsoft Dynamics, preferably in a Municipal or Government setting.
 - b) eGov Services Portal and CRM expertise to be used strategically during setup and implementation.
 - c) To fill in knowledge gaps.
 - d) To train and mentor the business and IT staff on the use of Microsoft Dynamics.
 - e) To offer suggestions to work processes to take advantage of a customer self-serve system
- 4.0 SCHEDULE**
- 4.1** The following milestones are envisioned:
- a) Release RFP on portal/single sign on and CRM system - July 2020.
 - b) Assess and confirm contract with Vendor - September 2020.
 - c) Software system configured and test environment implemented - November 2020.
 - d) User testing - November 2020 to February 2021 (includes vendor creating and executing test scripts).
 - e) Functional testing - November 2020 to February 2021.
 - f) User training completed - March 2021.
 - g) Complete user adoption - April 2021.
 - h) Signoff and Go-Live with Web portal and CRM - April 2021

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5.0 SUBMISSION REQUIREMENTS

5.1 Proposals should not exceed ten (10) pages in length excluding attached appendices. Proposals should be provided double-sided on 8 ½” white paper, in a font colour of black and not less than 11 point. All proposals must include and clearly identify:

- a) **Cover Page:** Front page of this RFP with the required Proponent information filled out and signed.
- b) **Project Team/Experience:** The proposed project team complete with **brief** resumes, describing each person’s role in this project and their qualifications and experience to take on successfully the role. No more than one page per team member.
- c) **Experience in Microsoft Dynamics:** (2 pages) Indicate your experience where you implemented an MS Dynamics system in a municipal or other government agency; include one (1) example and your role and responsibility.
- d) **Experience in creating web portal and CRM implementations:** (2 pages) Indicate your experience where you created a web portal and CRM implementations include one (1) example and your role and responsibility.
- e) **Working with local government:** (2 page) Provide an overview of your experience working with local government for similar projects as noted in this RFP. What were some of the lessons learned you would use for this project?
- f) **Working in a cloud environment:** (2 pages) Provide an overview of your experience working in a cloud environment.
- g) **Level of Effort:** (2 pages) Provide an overview of level of effort required on your end to develop and implement the requirements of this RFP.
- h) **Innovative Considerations:** (1 page) Provide a description of your organization’s unique expertise and successes; what sets your firm and proposed team apart from other organizations with respect to this project. What is innovative in your proposal or your organization?
- i) **Cost:** Provide a breakdown of all costs associated with your proposal. Include where applicable any ongoing annual costs.
- j) **Living Wage Declaration:** As per Part 1, Section 6.
- k) **References:** Complete the attached table of references below

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REFERENCES

Please provide three (3) references for companies in British Columbia for whom your organization has completed work of a similar magnitude and nature in the past five (5) years. The City of New Westminster may be used as a reference, if work of a similar nature has been provided to the City.

Reference 1	
Company Name and Address	
Contact Name	
Telephone Number	
Email address	
Brief Description of services provided	

Reference 2	
Company Name and Address	
Contact Name	
Telephone Number	
Email address	
Brief Description of services provided	

Reference 3	
Company Name and Address	
Contact Name	
Telephone Number	
Email address	
Brief Description of services provided	

- 1.1** The City reserves the right to contact the references to confirm the nature and performance of the work provided by the Proponent.
- 1.2** The City reserves the right to seek a reference from sources other than those provided by the Proponent.



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APPENDIX A

DECLARATION – LIVING WAGE EMPLOYER

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DECLARATION – LIVING WAGE EMPLOYER

I, _____ as a duly authorized signing officer of

Company: _____

Address: _____

_____, confirm that all employees and sub-contractors under our contract with the City as outlined below, are paid not less than the “Living Wage” as calculated by the Living Wage for Families Campaign.

I understand that this requirement extends only to those employees and sub-contractors’ employees that perform work while on City premises and property for durations in excess of one continuous hour per occasion.

I understand that the City will conduct audits if and when notification of breach of this compliance is received by the City. I understand that in the event any breach of this declaration is found to be true, the City reserves the right to cancel its contract without penalty at any time once said authentication of the breach is made.

Contract Name: _____

Authorized Signatory:

Dated:



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APPENDIX B

OVERVIEW OF REQUIREMENTS

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Using Microsoft Dynamics, the following components of eGov Services are required:

eGov Services Portal

- Is the overall web site for online city services
- Has single sign on which gives convenience for the customer (one sign on for all services), better request tracking and allows for better city understanding of customer trends and wants
- Allows Guest sign on for customers who do not wish to register
- Part of the first phase of the overall project implementation. Will phase in services under the single sign on process as determined by the working group (based on priority and other factors)

eGov Customer Relation Management (CRM)

- Part of the new eGov Services portal and part of the first phase of the overall project implementation.
- Will be the city system to track customer requests and issues, give timely updates and keep a history of interactions
- Requests and issues will be automatically sent to the appropriate department for resolution
- In some cases, customer's initial data will be automatically entered into the appropriate system for staff action
- As customer request is acted on, status updates will automatically be given to the customer

eGov Bill Payment and Account Query

- Part of the eGov Services portal
- Has seamless integration into existing bill payments and utility accounts

eGov Licensing and Permit Applications

- Part of the eGov Services portal
- Has seamless integration into existing licensing and permit applications
- New online services added as they are developed

eGov Citizen Engagement

- Part of the eGov Services portal.
- Allows registration to councillor committee.
- Register to attend council meeting.

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Other

- Open Data
- Citizen Dashboard
- Job Applicant System
- Other online tools

Detailed requirements for Single Sign on and the CRM system are in Appendix C. The other components of eGov will be phased in after the initial Portal (with Single Sign On) and CRM system are implemented.

A Personal Information Assessment (PIA) is part of this project. Potentially sensitive personal information will be stored including name, address, bill and billing information; permits applied for, miscellaneous correspondence with the city, ad hoc requests to the city and selected interests.

Confidentiality of this data is critical.

City Resources

This project impacts a number of business streams and departments and will require department participation to implement changes identified. The following staff will be involved:

- IT staff (for coordination, installation, configuration and troubleshooting)
- eGov Services Working Group (for discussion and decision making) made up of staff from city departments:
 - Development Services
 - Engineering
 - Finance
 - HR
 - Electrical
 - Public Library
 - Parks & Recreation
 - Communications
 - Legislative Services
 - Fire Services
 - Police
- Appropriate alternate staff (for back-filling if needed)



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APPENDIX C

**CUSTOMER RELATIONSHIP SYSTEM (CRM)
AND
SINGLE SIGN ON REQUIREMENTS**

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CRM Requirements:	
Feature requirement	Priority
Activities	
General	
Secure API access (to and from CRM system)	High
Contact management - add/delete/merge contact info	High
Role-based views and access	High
Workflow and approvals	High
Customizable fields	High
Email templates - including closed cases	High
Email tracking	High
Files sync and share	High
Email scheduling	Med
Transactions/Billing/Sales	
Collaboration tools	High
Mobile functionality	High
Performance management	Med
Fees (including FOI fees)	Med
Business invoices - received and sent to AP	Med
Forecasting	Low
Automation	
Email reminders	High
Outgoing calls - via telephony, as a reminder	Low
Follow-up campaigns	Low

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Communications	
Email list management	High
Web to lead form builder	High
Stakeholder (3rd Party) management	High
Email list segmentation	Med
Social media management	Low
Event marketing	Low
Website event tracking (analytics)	Low
Communications automation	
Follow-up alerts	Med
Customer service features	
Case management - end to end	High
Online support environments	High
Customer support automation	High
Team inbox	High
Canned responses (e.g. electrical outage)	High
Linked tickets	High
Parent-child ticketing	High
Portal customization	High
Customer Self Service	High
Anonymous ticket creation	High
Customer Feedback	High
Automatic assignments by ticket category	High
Knowledge Base (faq)	High
Scenario automation	Med
Job Applicant management	Med
Volunteer management	Med

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Business invoices - received and sent to AP	Med
SLA management	Low
Custom ticket status	Low
Forum moderation - link to existing	Low
Reporting and analytics	
Real-time data	High
Customer satisfaction	High
Leads by source (where did they hear?)	High
Custom reporting	High
Role based analytics	High
Report of all customer calls (audit tracking)	Med
Initial Response Time	Med
System requirements	
Integrations	
Integrates with Outlook	High
Telephony (record calls, initiate a call)	High
Integrates with Single Sign On/Identity Management	High
Integrates with NorthStar Electrical Billing - Customer Connect	High
Integrates with Tempest – MyCity	High
Integrates with CityWorks	High
Integrates with Perfect Mind	High
Integrates with ESRI	High
Integrates with AD users and groups for staff, including Azure	High
Integrates with existing Smallbox forms & pdf's	High
Integrates with Opentext eDocs	Med
Integrates with Track-It!	Med
Integrates with See, Click, Fix	Med
Integrates with 3rd party and custom SQL databases	Med
Integrates with Benevity (online grant system)	Med

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Integrates with Camino (online permit application guide)	Med
Social media monitoring	Low
Web analytics (e.g. Google Analytics, ahrefs)	Low
ERP (e.g. JDE address book)	Low
Integrates with Horizon	Low
Mobile platform	
Native iOS app	High
Native Android app	High
Mobile web app	High
Smartwatch iOS app	High
Smartwatch Android app	High
Delivery platform	
Cloud	High
Specific Technical Requirements	
Secure tunnel/gateway for accessing on premise data	High
All data kept in Canada	High
Ability to use the city's email server for outgoing emails	High
Ability to import/export data to/from the CRM	High
Ability to detects and notifies staff of intrusion attempts	High
Audit of all system activity viewable by admin staff	High
Daily backups of all CRM data	High
Ability to purge/clean-up (e.g. resume's)	High
Include staff notes on cases (internal view only)	High
Ability to attach photographs to tickets	Med
Ability to read and consume photograph meta data (GPS, etc.)	Med
Ability to use maps to indicate areas of interest	Med
Mobile push notifications (emergencies, opt in reminders, prov)	Med

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Include self-serve terminals	Med
Property tax information availability	Med
Single Sign on Requirements:	
Feature requirement	Priority
Activities	
General	
The Corporation of New Westminster retains full ownership of all customer data (personal, consent, usage) held in the CIAM and has the right to access it at any time	High
Extensive ability to customize the design (graphics, interactions, layout, style) of the customer-facing interfaces including the customer registration, sign-on, sign-off, notifications, etc. to match the look and feel of the My New West Portal	High
Support for various authentication protocols, including Oauth 2.0, Open ID Connect, SAM, JWT	High
Support for multi-factor authentication opt-in including for account creation and modifications	High
Risk-based (IP, Behavioural) and fraudulent usage (geographic and/or frequency impossibility) prevention	High
The solution should facilitate access control to each application with the MyNewWest portal	High
Robust developer-focused documentation and technical support, including code samples	High
Hosted in a Canadian data centre (if SaaS)	High
Full compliance with the Province of B.C. FOIPPA legislation (if SaaS)	High
Highly available components, so that any single service can go down for maintenance or fail without affecting the solution (either on-premises or SaaS). The highly available solution must maintain FOIPPA compliance (failover systems cannot be located outside of Canada, for example).	High
Ability to scale up and scale out easily as customer demand increases & decreases while maintaining FOIPPA compliance.	High
API access to all actions, data, and logs stored in the identity management solution, and support for full data extraction capabilities for backups, migration, etc.	High
Ability to capture and store customer consent within account profiles for audit purposes (the City will be providing access to customers under a "prescribed informed consent" model)	High
Ability to delete all customer's personal data when prescribed consent is removed	High

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Ability to prompt user for additional consent if/when consent requirements change.	High
Support for production and non-production (dev/test) instances	High
The solution must support a hybrid application architecture where the applications may reside on premise or hosted in the cloud, but will be seamless to the customer	High
Integration with CRM solution or other customer stores with custom data attributes	High
Ability to maintain authentication between load balanced applications on multiple servers	High
Prevent attack vectors (wildcards, SQL injection, etc.) from all user input fields	High
Provide the option for users to enable MFA such as (TOTP and SMS or voice security code) for their account	High
Ability to notify users of various account life cycle events (change to password or email, login from a new device, etc.) via email or SMS	High
Ability to add more than one email address and phone number per account as secondary / recovery address / number	High
Ability to secure access to our API endpoints	High
Support for Active Directory authentication protocols	Med
Support for password less authentication	Med
Ability to manage and extend custom data attributes for customer profiles	Med
Approval of identity verification may be required and performed via a workflow before access is granted to certain services and applications	Med
Ability to maintain separate instances of the product for segmentation of networks in production (example - an instance for authentication for internal staff applications and another for public facing applications.	Med
Ability to integrate with unified communication platforms (e.g. Phone integration)	Low
Ability to configure and ask the customer a series of questions in order to assess identity verification	Low
Customer Registration	
Ability to send email with magic link and SMS security code to confirm email address and phone number	High
Ability to restrict access to sessions initiated with an unconfirmed email address	High
Ability to create an account with minimum information and to gradually enrich the user profile with additional information as needed	Med
Uses cryptographically secure ransom key or GUID as an unique key for customers	Med
Device Registration	
Support "remember me" on this device for private authorization/registration	High
Provide a self-service facility for users to manage registered devices	High
Ability to change customers with MFA when using a new device	High
Notify the customer that the list of registered devices has changed	High

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Ability to push an encrypted cookie/token to a customer's device to act as a second factor for a defined period of time	High
Login & Authentication	
Ability to show the customer a history of their recent access (timestamp, user agent, IP address), including successful and unsuccessful login attempts	High
Provide a single interface to log-in the customer via email and password (and if enabled, MFA)	High
Ability to force customers to re-authenticate when accessing certain sensitive resources	High
Ability to detect malicious activity such as brute-force attacks	High
Ability to configure actions that will trigger upon detection of malicious activity (user notification, exponential back off cool down period, lock account, etc.)	High
Ability to notify customers that their credentials may have been involved in a published third-party security breach	High
User device ID and IP reputation, velocity, etc., to create a risk score governing when a customer is challenged with MFA during login	Med
Ability to force re-authentication for customers who behave suspiciously	Med
Ability to deal with applications that do not natively support SSO integration	Low
Change e-Mail Address	
Require customers to authenticate before changing their email address	High
Ability to send email notification to both a customer's old and new address and ask for confirmation of the new email address before completing this task	High
Ability to notify the customer via SMS after this task	High
Ability to determine a risk score governing when a customer is challenged with MFA before allowing this task	High
Change Password	
Send email notification and/or SMAS notification when this task is complete	High
Password strength policy should be configurable	High
Show password strength meter that gives real time indication to the customer while they are changing their password	Med
Use captcha to test for bots before allowing this task to complete	Med
Recover Password	
When a customer provides their email address, ensure they are not informed if the information provided is valid and associated with an existing account	High
Ability to assess a risk score before allowing this task to proceed, and challenge with MFA if appropriate	High
Send a one-time URL to the registered email address that the customer can click on to proceed	High
Send email notification and/or SMS notification when this task is complete	High
Challenge the customer with a captcha to test for humans before allowing this task to proceed	Med

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Logout/Time-out	
Ability to terminate other active sessions remotely	High
Proactively and programmatically clear high-risk objects (local cache, cookies, objects, etc.) from the browser	High
Upon logout or timeout, ensure transactions or personally identifiable information are not visible	High
Ability to support varying automatic inactivity logout times depending upon activity	Med
Additional Security Measures	
Cleanse all HTTP error messages of HTTP server product names, versions, etc.	High