

Date: May 20, 2016

City of Beaverton

Request for Information: Electronic System for Tracking Interactions and Communications

Solicitation #3093-16

DATE & TIME PROPOSALS ARE DUE:

June 13th, 2016

Submit Response To: Travis Dutton, tdutton@BeavertonOregon.gov
City of Beaverton Solid Waste and Recycling,
12725 SW Millikan Way, Beaverton, OR 97005

This document is available in alternate formats, such as large print, audiotape, oral presentation and electronic format.
To request an alternate format, call the City of Beaverton at 503-526-2228 or TDD 503-526-2506.



LEGAL ADVERTISEMENT

City of Beaverton Request for Information Electronic System for Tracking Interactions and Communications Solicitation #3093-16

The City of Beaverton is seeking information from qualified vendors to provide an information packet on electronic systems for tracking interactions and details with residents and businesses.

City prefers responses be submitted electronically (e.g., by e-mail or dvd in Adobe PDF/A Format). Responses are due no later than 2:00 PM on June 13th, 2016.

Responses delivered via email should be sent to Travis Dutton, tdutton@BeavertonOregon.gov. State the RFI title and number and the RFI due date and time within the subject line of the email. The name and address of the responder should appear within the first few lines of the email.

Responses delivered via United States Postal Service (USPS) should be mailed to City of Beaverton, c/o Travis Dutton, Solid Waste and Recycling, PO Box 4755, Beaverton, OR 97076-4755. The name and address of the responder should appear on the outside of a sealed envelope. The outside lower left-hand corner should state the RFI title and number and the RFI due date and time.

Responses hand-delivered, or not sent through the USPS, should be delivered to Beaverton City Hall, c/o Travis Dutton, Solid Waste and Recycling, 1st Floor, 12725 SW Millikan Way, Beaverton OR 97005. The name and address of the responder should appear on the outside of a sealed envelope. The outside lower left-hand corner should state the RFI title and number and the RFI due date and time.

Request for Information packets may be downloaded from <http://apps.BeavertonOregon.gov/Bids/> or may be obtained at the address listed above or by calling the Bid Line at 503-526-2228.

Published in Daily Journal of Commerce
Date: May 20, 2016

1. INTRODUCTION

The City of Beaverton is issuing this RFI to learn about the types of electronic systems available for tracking interactions and communication with businesses and residents to support several departments and programs. The city wants to know vendor interests and capabilities in replacing the city's existing systems and implementing a new solution. The city would also appreciate information related to the potential costs involved with the system(s) a vendor can provide.

This RFI will be used for informational purposes to see what possible alternatives may be available to the city. As a result of this RFI the city may decide to obtain funding and issue a Request for Proposal (RFP) or solicit quotes, which would be used to purchase a system that will meet the needs of the city.

2. BACKGROUND AND OVERVIEW

Several Beaverton programs track details regarding communication and actions with residents and businesses, details about the outcomes of the communication, and assign identifying characteristics to contacts. This is done to a) evaluate and track our work, b) ensure we are providing effective and efficient services to appropriate targets, and c) generate reports for internal program use and for submittal to other local and state agencies. We also use the information to generate communication campaigns to all or targeted contacts.

Beaverton currently uses a variety of tools to accomplish this, however three programs have an immediate need to seek out new solutions for accomplishing the above. In each case, there is no system or the existing systems are inadequate or expiring. These programs and their current situation are:

The City of Beaverton's **Economic Development Division (ED)** works with over 5,000 businesses and, potentially, hundreds of partners on a wide range of activities that can be characterized as business development. Economic Development desires a system to track and share contact and project information within the Division. The ability to create and track opportunities or projects is an essential function of the Economic Development Division.

ED is not currently using a system for tracking interactions with businesses or partners.

Public Involvement and Communications Division (PIC) currently uses a variety of contact management options. The division includes the following programs and their data current information collection:

- Public Information, currently using ACT! Premium Version (16.2.14.0) for media relations and outreach
- Cultural Inclusion, currently using Excel and Outlook to keep account of all of the city's cultural and social advocates and partner organization.

- Neighborhoods, currently using Excel to capture interested volunteers for our Neighborhood Associations
- Events, currently using Word, Excel, and Outlook – for managing the consultants, vendors, entertainment, and artists that perform at each of our events.
- Boards and Commissions, currently using Access database and Excel Spreadsheets to manage contacts for all of the people who serve on the city's 17 boards and commissions. Each board can have 15 – 20 contacts.
- Community Services currently using Excel and Outlook – for social service funding, tracking applications, and follow up with community service organizations
- Community Visioning uses Access to keep account of the various partner organizations that are involved in the community vision plan

Beaverton **Solid Waste and Recycling (SWR)** program works with all residents and businesses to reduce the landfilling of resources. We accomplish this through outreach, education, and technical support to accomplish waste reduction strategies and the increased diversion of materials to recycling or composting.

Currently, the SWR business-focused program uses a web-based CRM tool contracted through a partnering agency for tracking communication, outcomes and other information. This solution will not be available to us in the near future. SWR also uses two applications written in Microsoft Access which interfaces with a Microsoft SQL Server 2012. Two of these systems exist - one for tracking single family communication history and the other for multifamily property management communication and outcomes.

Beaverton is seeking to replace current information-tracking systems with a single vendor who can provide solutions for all above-mentioned programs, service, or product (tool) that will track communication and outcomes with single family, multifamily, and businesses contacts. The following requirements may evolve as we learn the abilities and best practices for a given tool. We are anticipating using vendor expertise and knowledge of best practices in order to accomplish our desired goals.

3. REQUIREMENTS AND PRODUCT DETAILS

The following sections detail the requirements and information needs.

A. Technical requirements

A1. Storage and internal resources

Proposed tool and associated data should be stored remotely to minimize storage on Beaverton servers. Please also describe what level of IT resources will be needed to maintain solution?

A2. Licensing

Each program or department has differing number of staff who will interact with this tool:

SWR – 5 with an immediate need and the potential to expanding that to no more than 10 in the coming years.

ED – 4 users with an immediate need and the potential for another 10 users in partnering departments.

PIC – 15 users with an immediate need.

A3. Software and browser

Beaverton currently runs Windows 7 or newer for desktop computers and some staff access the current databases remotely via Apple products running iOS 9 or newer. Additionally, Beaverton operates Internet Explorer 11 or newer, and apple mobile devices have app access or run Safari. Proposed solutions must be accessible via these browsers and operating system.

A4. Maintenance

Beaverton intends to purchase support for setting up tool and maintenance for a period of at least 2 years. Please describe your client support.

A5. Software updates

Beaverton is interested in the following information regarding updates:

- a. How frequently do you publish a new version of your software?
- b. Do you impose mandatory upgrade requirements when a new version is published?
- c. Is there an additional cost for upgrades?
- d. What are the time requirements for administering any new updates?
- e. Are we allowed to test the updates prior to applying them to the production system?

A6. Administrative management

Beaverton would require administrative abilities in order to make modifications to fields, reports, etc. Appropriate training and ongoing technical support may apply. Please include time and cost needed to achieve administrative expertise.

B. Detailed functional requirements

B1. Data fields

Each program will have unique data field needs. Data field requirements are located in Appendix A.

B2. Attachments

Desired ability to attach visual documents to contact accounts. This could include, but is not limited to, photographs, logos, documents, and web links.

B3. Reporting

Tool should allow us to run unique reports based on combinations of all fields and date ranges. Some “canned” reports will be created during the creation of the tool. Beaverton also requires user(s) to be able to create and implement unique reports. Also, please describe in what formats reports can be exported (only within tool? Export to other program?).

B4. Migration, uploading, and downloading of data

Provide solutions for storing or migrating historical information into new tool. Also, provide details on the ability to upload and download large amounts of data for updating, cleaning up, and other editing of multiple accounts.

B5. Broadcast e-mail

Programs have need to communicate with large amounts of targeted residents or businesses. Is broadcast e-mail functionality built into your system?

B6. User interface

Navigating the tool should be clear and intuitive. Primary user interface should allow for quick, easy and efficient entering, reviewing, and editing data. Please share your philosophy and commitments to user experience.

B7. Mobile access

Much of the information tracked is captured in the field and remote access via a variety of mobile devices and/or web browsers to all or key elements of the tool would increase efficiency. Alternatively, a remote template that could be uploaded later or other solutions are welcome.

B8. Connectivity

Tool must allow for controlled sharing of information across all programs using it. For example: SWR should be able to view which businesses ED has interacted with in recent history, but not see all data entered by ED.

B9. Records Retention

The proposed solution must include records management capabilities to allow authorized users to extract information from any user of the solution in order to fulfill public records requests and provide legally mandated records retention on generated information.

C. Additional functional desires (would benefit, but not required)

C1. Interaction with other software

Tool's ability to connect to Microsoft Outlook (currently operating 2013) and/or SharePoint would help eliminate duplications of entering information.

C2. Customer access

Programs would benefit from the ability for customers to access a personal dashboard that can provide them with information about their own activities and accounts.

C3. Sharing to external group

Ability to share targeted information (contact info, names, etc.) with external groups who do not have access to tool.

4. RESPONSE CONTENT

Interested responders should provide the following information:

4.1 Cover Letter

- A. A cover letter on the Respondent's letterhead. The cover letter should designate the individual who will be the Respondent's primary contact for all communications regarding its response. Provide the individual's Name, Title, Company, Mailing Address, E-mail Address, and Telephone Number.
- B. Demonstrated specific experience in the interaction and communication tracking fields.
- C. List products/systems available to meet the City's requirements.

4.2 Business Information

- A. Include the length of time your company has been in operation.
- B. Please describe what challenges your product was originally created to solve.
- C. Indicate the number of installations you have completed on the product you are proposing.
- D. Indicate how long the specific products/systems you are proposing have been on the market or how long a similar solution you have developed has been in use by a similar customer.
- E. Provide three references that are current customers using the proposed system or are using solutions you have developed using the technologies described, including the name and phone number of contact person. If you have customers on the west coast, please provide these as reference.
- F. Provide a sample of implementation, acceptance, and support plans created for previous implementation of the specific products/systems.
- G. Indicate any experience with Public Sector clients.
- H. Please indicate the size and location of your program support staff. Also include information about support service options and processes.
- I. Please share your company values and philosophy.

4.3 Cost Estimate

Provide your best estimate on what your proposed system(s) would cost the city. If possible break out the cost of setup, maintenance, support, data storage, and/or any other costs associated with proposed solutions.

4.4 Schedule Estimate

Access to existing databases can be utilized through at least 2016. Provide a high-level schedule with Vendor and city resources needed for implementation. Only outline major milestones.

4.5 Technical Requirements

Provide clear technical requirements that the city may need to meet in order to use the solution.

4.6 Functionality

Indicate how the proposed system would meet the needs of the city. Include:

- A. Describe and identify any provided proprietary components or plans to include proprietary components in the proposed solution.
- B. Security features. Indicate how security and user administration is carried out. Indicate how group and individual user levels access control functions.
- C. Provide any additional information that summarizes the capabilities, features, and desirability of your system(s) such as brochures or general literature, which you believe will help the evaluation committee better understand your product.

4.7 Demonstration

A system operation and functionality demonstration may be requested of vendors based upon the information received from this RFI.

If a demonstration is requested, the demonstration will be conducted at a site where the proposed equipment is installed at a time and date to be mutually agreeable between the city project manager and the responder.

5. SUBMITTAL INSTRUCTIONS

Responses are due at or before 2:00 pm on June 13th, 2016. Late responses will not be accepted.

City prefers responses be submitted electronically (e.g., by e-mail or dvd in Adobe PDF/A Format).

Responses delivered via email should be sent to Travis Dutton, tdutton@BeavertonOregon.gov. State the RFI title and number and the RFI due date and time within the subject line of the email. The name and address of the responder should appear within the first few lines of the email.

Request for Information - Electronic System for Tracking Interactions and Communications #3093-16
Closes: June 13, 2016 @ 2:00 PM

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Responses hand-delivered, or not sent through the USPS, should be delivered to Beaverton City Hall, c/o Travis Dutton, Solid Waste and Recycling, 1st Floor, 12725 SW Millikan Way, Beaverton OR 97005. The name and address of the responder should appear on the outside of a sealed envelope. The outside lower left-hand corner should state the RFI title and number and the RFI due date and time.

There is no page limit on submittals, but the City strongly encourages submittals consist of no more than twenty pages.

On the cover of the response and/or on the first page of the response, the City requests the following information be included:

- A. The RFI Title;
- B. The name, title, address, telephone number, fax number, e-mail address of the primary contact person of the individual or firm submitting the Response; and
- C. The date of submission.

5.1 Questions

All questions or requests for clarification regarding this RFI should be submitted in writing to Travis Dutton tdutton@BeavertonOregon.gov by **4:30 PM on June 3, 2016**. Answers to all questions and any additional information the City may wish to communicate will be posted to the city's website at <http://apps.BeavertonOregon.gov/Bids/> and you will be notified via email of the posting of additional information to the website.

In an effort to promote greater use of recycled and environmentally preferable products and to minimize waste, the city encourages all Responses submitted in hard copy be prepared simply and economically. The use of special bindings, unnecessary colored displays and irrelevant promotional materials is neither required nor desired. Double-sided printing on recycled paper and/or the use of reusable products is preferred.

5.2 Cost of Preparing Proposal

The city is not responsible for any costs associated with the preparation of a Response to this RFI. All submissions and accompanying documentation become the property of the city and will not be returned. No entitlement to payment of direct or indirect costs or charges by the city will arise as a result of submission or responses to this RFI and the City's use of such information.

5.3 Public Record

If responses contain trade secrets or other confidential information, Responders must label the information to protect it from disclosure to third parties as a trade secret under ORS 192.501(2) with the following: **"This material constitutes a trade secret under ORS**

192.501(2) and is not to be disclosed except as required by law." Each page containing the trade secret or other confidential information must be so marked. The City shall take reasonable measures to hold in confidence all such labeled information, but shall not be liable for release of any information when required by law or court order to do so, whether pursuant to the Oregon Public Records Law or otherwise and shall also be immune from liability for disclosure or release of information under the circumstances set out in ORS 646.473(3).

In submitting a response, each respondent agrees that the City may; (a) reveal any trade secret or other confidential materials contained in the Response to City staff and to any outside consultant or third party who is hired by the City and (b) post the response on the City's intranet for purposes related to its evaluation. Furthermore, each proposer agrees to indemnify and hold harmless the City and each of its officers, employees, and agents from all costs, damages, and expenses incurred in connection with refusing to disclose any material that the respondent has designated as a trade secret and/or as confidential information. Any respondent that designates its entire response as a trade secret may be disqualified.

6. ANTICIPATED USES OF THIS RFI

This RFI is issued solely for information and planning purposes; it does not constitute a solicitation. There will not be an evaluation or scoring of the material submitted. No information received in response to this RFI will be returned. Responses to this notice are not an offer and cannot be accepted by the City to form a binding contract. All costs submitted with the RFI are for City budget planning purposes only and are not considered to be a bid. Proposers will not necessarily be notified the result of this RFI, interviews, or future solicitation opportunities.

The City anticipates conducting a three phase process for identifying potential solutions and developing a budget decision package.

- Phase 1: the city will review written responses received in response to this RFI
- Phase 2: The city may invite selected vendors to present their product(s)
- Phase 3: the City may issue a RFP to find a solution

The City may choose to take no further action.

Responding to this RFI is not a condition for eligibility to respond to any subsequent RFP issued by the City. Further, submitting a response to this RFI does not create any rights or privileges with respect to any subsequently issued RFP.

7. SCHEDULE

The City reserves the right to modify this schedule at the City's discretion. Proper notification of changes will be made to all interested parties.

1. RFI Release Date – May 20, 2016
2. Deadline for Questions from Potential Respondents - 4:30 PM on June 3, 2016
3. Written Responses Due - 2:00 PM on June 13, 2016

Appendix A – Data Tracking Requirements

This section outlines the specific information or data fields each department or programs needs to track.

1. ECONOMIC DEVELOPMENT - tracks relevant information regarding all businesses in the city, as well a history of communication, outreach, materials, outcomes, and issues. The below list covers the minimum data we would be collecting for the businesses sector.

1. Basic information

- a. Business Name
- b. Location information
- c. Contact information
 - i. Specific person
 - ii. E-mail/phone/cell
- d. Demographic information

2. Characteristics

- a. Business sector (restaurants, manufacturing, software, etc. Identified via NAICS codes if available presently)
- b. Number of employees
- c. Property management company (if applicable)

3. Interaction information

- a. Description
 - i. Type (e-mail, call, in-person, etc.)
 - ii. Key word descriptions
- b. Beaverton representative
- c. Date(s) of interaction
- d. Materials distributed
 - i. Type
 - ii. Date
 - iii. Quantity
- e. Contact initiation (who made first contact, city or business)
- f. Results of interaction

4. Other

- a. Notes
- b. Photographs
- c. Required follow-up actions

2. PUBLIC INVOLVEMENT AND COMMUNICATIONS DIVISION - The below list covers the minimum data we would be collecting for the businesses sector.

1. Basic information
 - a. Name
 - b. Location information
 - c. Contact information
 - i. Specific person
 - ii. E-mail/phone/cell
 - d. Demographic information
2. Characteristics
 - a. Neighborhood
 - b. Affiliated organization
 - c. Role
 - d. Property management company (if applicable)
3. Interaction information
 - a. Description
 - i. Type (e-mail, call, in-person, etc.)
 - ii. Key word descriptions
 - b. Beaverton representative
 - c. Date(s) of interaction
 - d. Materials distributed
 - i. Type
 - ii. Date
 - iii. Quantity
 - e. Contact initiation (who made first contact, city or business)
 - f. Results of interaction
4. Other
 - a. Notes
 - b. Photographs
 - c. Required follow-up actions

3. SOLID WASTE AND RECYCLING

- a. **Residential Data** – Beaverton tracks all incoming communication from residents, as well as activities conducted and materials distributed at outreach at events. The below screen shots illustrate desired fields as they are currently tracked in our access database for residential contacts. Beaverton is expecting to continue tracking formation from all shown fields.

***Note – images below are from our residential interaction tracking database. They are simply for purposes of showing the fields we need to track, not for desired layout or design purposes.**

Contact Log Detail Form

Log No. 7398 **Closed Question** Refresh

LOG INFO (1) FOLLOW-UP ACTIVITIES (1) MATERIALS DISTRIBUTION (0)

Log No. 7398 **RECYCLING & SOLID WASTE CONTACT LOG RECORD**

Status: **Closed** Opened: Jan 20, 2016 Closed: Jan 20, 2016

Issue Type: Question Caller Type: Hauler: Initial Contact: Phone Call Assigned To: ecole How did you hear about us?:

Citizen Contact Information

First Name: Cindy Mgr Hold Last Name: Company: Address: City & State: Zip: Phone 1: (503) 270-1164 Phone 2: E-Mail:

Notes: phone book

From Web: Locked By: tdulton Created: Jan 20, 2016 2:15 PM By: ecole Updated: Jan 20, 2016 2:34 PM By: ecole

Set Status: "Received" "Pending" "Closed"

Print Close

Records: 1 of 3369 No Filter Search

1a. Summary of communication with a resident in Beaverton regarding garbage, recycling, composting, or other related topic.

Contact Log Detail Form

Log No. 7392 **Closed Question** Refresh

LOG INFO (1) FOLLOW-UP ACTIVITIES (2) MATERIALS DISTRIBUTION (0)

FOLLOW-UP ACTIVITIES (By Ascending Date)

Rec No	Msg? Done	Activity Date	Activity Type	Staff	Comments
3574	✓	Jan 13, 2016	Phone Call	ecole	Left a VM to call if still looking for resources
3578	✓	Jan 13, 2016	Phone Call	ecole	Cust called back. Ladder is broken. Advised her to break down the ladder to small

New Delete Descending Print Close

Records: 7 of 3369 No Filter Search

1b. Summary of history of actions and communications with resident.

Contact Log Detail Form

Log No. 7403 Closed Question Refresh

LOG INFO (1) FOLLOW-UP ACTIVITIES (1) MATERIALS DISTRIBUTION (2)

MATERIALS DISTRIBUTION (By Ascending Date)

Rec No	Msg? Done	Activity Date	Type of Materials	Count	Comments	Update By	Update Date
1474	<input checked="" type="checkbox"/>	Jan 25, 2016	Every Day is Recycling D...	1		ecole	01/25/16
1473	<input checked="" type="checkbox"/>	Jan 25, 2016	MF Bag	1		ecole	01/25/16

Record: 10 of 3385 No Filter Search

1c. Summary of educational materials or tools distributed as a result of the communication.

Enter New Contact Log Entry

Log Information	Contact Information
Status: Received Open Date: Jan 21, 2016 Close Date: Jan 21, 2016 Issue Type: Question Assign To: Idutton Initial Contact: Phone Call Caller Type: Hauler: How did you hear about us?:	First Name: Last Name: Company: Address: City & State: Beaverton OR Zip: Phone 1: Phone 2: E-Mail: <input type="checkbox"/> Mgr Hold
Notes:	
Topic Category Filter: < All Categories >	
Available Topics - < All Categories > <ul style="list-style-type: none"> Apparel - Clothing & Shoes Appliances - Coolant containing Appliances - Large Appliances - Small Bikes Bulky Waste - Furniture Bulky Waste - Mattress Bulky Waste - Other Bulky Waste - Tires Bulky Waste - Toilet Cardboard Carpet Child Car Seat Christmas Tree Commingled Recycling - General Compost - Backyard Compost - Other 	0 Selected Topics <input type="button" value="Select At Least One Topic"/> <input type="button" value="HiLite All"/> <input type="button" value="Un-HiLite All"/>
<input type="button" value="OK"/> <input type="button" value="Cancel"/>	

1d. Initial page for tracking information when new communication or action with resident takes place.

b. **Multifamily Complex Data** – Beaverton tracks relevant information regarding all multifamily complexes (apartments, townhouses, condominiums, mobile home parks, retirement, assisted living) in the city, as well a history of communication, outreach, materials and issues. The below screen shots illustrate desired fields as they are currently tracked in our access database for multifamily complexes. Beaverton is expecting to continue tracking information from all shown fields. A list of additional tracking fields is provided at the end of each section.

*Note – images below are from our residential interaction tracking database. They are simply for purposes of showing the fields we need to track, not for desired layout or design purposes.

Multifamily Complex Detail Form

45 Degree Central Refresh

COMPLEX INFO (1) CONTACTS (0) MATERIALS (0) SERVICES (1) COLLECTIONS (3) EVALUATIONS (0)

Site ID#: 350

**CITY OF BEAVERTON
MULTIFAMILY COMPLEX SITE**

Complex Type: Condominium Primary R#: 1S109BB90000

Property Name: 45 Degree Central

Property Address: 13885-13925 SW Meridian St

Mail Address: 13885 SW Meridian St

City & State: Beaverton OR Zip: 97005

Phone 1: (503) 951-8047 Phone 2:

E-Mail: info@45central.com

NAC: Five Oaks/Triple Creek

Hauler: Waste Management

Office: (Office Hours Example: M-F 9-5; Sat 8-4)

Office Hours: Daily noon - 5 p.m.

Units: 140 Secure R/SW Area Oil Collection Allowed

Recycle Stns: 3 No Glass Recycling Insufficient Recycling

Garbage Stns: 3 No Comingled Recycling Other Issues

Notes: New construction - 2014
Dec 2015 - # of stations may not be accurate, site visit required.

TAX LOT R#s FOR COMPLEX

Record: 1 of 1 No Filter Search

Created Dec 1, 2015 12:12 PM By: ecole

Updated Dec 1, 2015 2:48 PM By: ecole

COLLECTION SCHEDULE

	Rec.	Garb.	Glass	Yard
Mon.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tue.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Wed.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Thu.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fri.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sat.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sun.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Record: 1 of 349 No Filter Search

2.a Apartment database summary/main page. Contains most information about the property at a glance.

*Year built is a desired new field.

Multifamily Complex Detail Form

Allen Creek Apartments Refresh

COMPLEX INFO (1) CONTACTS (1) MATERIALS (10) SERVICES (7) COLLECTIONS (4) EVALUATIONS (2)

CONTACTS (By Status, Last Name, FirstName)

Record #: 1176 Title: Resident Managers Name: Ray & Jeni Johnson

First Name: Ray & Jeni Last: Johnson Status: Active

Company: Norris & Stevens Investment Real Estate Se Website: norris-stevens.com

Address: 9408 SW Allen Blvd Phone 1: (503) 246-6855

City & State: Portland OR Zip: 97223 Phone 2:

Notes:

E-Mail: allen.creek.apts@gmail.com

Updated: 01/11/12 3:00 pm

By: awythe

Record: 6 of 349 No Filter Search

2.b Contacts form, used to track current and past contacts.

Multifamily Complex Detail Form

Allen Creek Apartments Refresh

COMPLEX INFO (1) CONTACTS (1) MATERIALS (10) SERVICES (7) COLLECTIONS (4) EVALUATIONS (2)

MATERIALS (By Ascending Date)

Rec No	Msg? Done	Activity Date	Type of Materials	Count	Comments	Update By	Update Date
725	<input checked="" type="checkbox"/>	Jan 10, 2012	Commingle Decal	4		awythe	01/11/12
726	<input checked="" type="checkbox"/>	Jan 10, 2012	Glass Decal	2		awythe	01/11/12
728	<input checked="" type="checkbox"/>	Jan 10, 2012	No Plastic Bag Decal	1		awythe	01/11/12
729	<input checked="" type="checkbox"/>	Jan 10, 2012	Property Manager's Guide	1		awythe	01/11/12
727	<input checked="" type="checkbox"/>	Jan 10, 2012	Stop Sign Decal	2		awythe	01/11/12
817	<input checked="" type="checkbox"/>	Jan 30, 2012	Recycling Red Bag	46	Red bag evaluation	awythe	02/02/12
850	<input checked="" type="checkbox"/>	May 7, 2012	Move-In Guide (English)	15		awythe	05/07/12
851	<input checked="" type="checkbox"/>	May 7, 2012	Move-Out Guide (English)	15		awythe	05/07/12
852	<input checked="" type="checkbox"/>	May 7, 2012	Recycling Door Hanger	15		awythe	05/07/12
853	<input checked="" type="checkbox"/>	May 7, 2012	Recycling Red Bag	20		awythe	05/07/12

Record: 1 of 1 No Filter Search

2.c Summary of educational materials or tools distributed

communications #3093-16

Enter New Multifamily Complex Information

NOTE: Red Labels Denote Required Fields

Complex Type: **Primary R#:**
Property Name:
Property Address:
Mail Address:
City & State: **Zip:**
Phone 1: **Phone 2:**
E-Mail:
NAC:
Hauler:
Office: (Office Hours Example: M-F 9-5; Sat 8-4)
Office Hours:
Units: **Secure R/SW Area** **Oil Collection Allowed**
Recycle Stns: **No Glass Recycling** **Insufficient Recycling**
Garbage Stns: **No Comingled Recycling** **Other Issues**

Notes:

2.d Form to enter a new apartment complex (or condominium, town house etc.)

Multifamily Complex Detail Form

Beaver Creek Apartments Refresh

COMPLEX INFO (1) | CONTACTS (1) | MATERIALS (10) | SERVICES (7) | COLLECTIONS (3) | EVALUATIONS (2)

EVALUATIONS (By Evaluation Date)									
Record #	Evaluation Date	Updated	By						
170	Dec 19, 2011	Dec 20, 2011	rzarfas						
Commingle Rating:		Plastic Film	Plastic Other	Food soiled paper	Garbage				
0 - 10% Contamination		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Glass Rating:		Glass Other	Plastic Film	Commingle	Garbage				
0 - 10% Contamination		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Garbage Rating:		Cardboard	Paper	Metal	Plastic bottle/tubs	Glass	Electronics	Haz. Waste	Yard Debris
N/A		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Notes: <input style="width: 90%;" type="text"/>									
304	Jul 30, 2013	Jul 30, 2013	cmorales						
Commingle Rating:		Plastic Film	Plastic Other	Food soiled paper	Garbage				
0 - 10% Contamination		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Glass Rating:		Glass Other	Plastic Film	Commingle	Garbage				
N/A		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Garbage Rating:		Cardboard	Paper	Metal	Plastic bottle/tubs	Glass	Electronics	Haz. Waste	Yard Debris
N/A		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Notes: Great set up and low contamination levels									

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2.e Site Evaluation form. Used to track contamination found in the recycling and/or garbage, what was it and what percent. Used to inform targeted education.

Multifamily Complex Detail Form

Allen Creek Apartments Refresh

COMPLEX INFO (1) CONTACTS (1) MATERIALS (10) SERVICES (7) COLLECTIONS (4) EVALUATIONS (2)

COLLECTIONS (By Stream, Receptacle)

Rec No	Collection Stream	Collection Receptacle	Count	Comments	Update By	Update Date
859	Commingle	Container (1.5 yd)	1		ecole	05/06/14
660	Commingle	Container (2 yd)	1		ecole	05/06/14
661	Garbage	Container (3 yd)	4	3 of these are picked up twice weekly, one is once a week.	ecole	05/06/14
663	Glass	Roll Cart (60 gal)	2	64 gal - every other week.	ecole	05/06/14

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2.f Collections form used to track current garbage and recycling service levels – how many and of what size for garbage, recycling and glass.

Multifamily Complex Detail Form

Allen Creek Apartments Refresh

COMPLEX INFO (1) CONTACTS (1) MATERIALS (10) SERVICES (7) COLLECTIONS (4) EVALUATIONS (2)

SERVICES (By Ascending Date)

Rec No	Msg?	Done	Activity Date	Type of Services	Comments	Update By	Update Date
896		<input checked="" type="checkbox"/>	Jan 10, 2012	PM Conversation		awythe	01/11/12
397		<input checked="" type="checkbox"/>	Jan 10, 2012	Site Evaluation		awythe	01/11/12
484		<input checked="" type="checkbox"/>	Jan 23, 2012	PM Conversation	Sent manager an email about being in the Red Bag Evaluation S	rzarfas	02/08/12
475		<input checked="" type="checkbox"/>	Jan 30, 2012	Delivered Material	Distributed bags as part of MF Bag Evaluation Project.	rzarfas	02/08/12
476		<input checked="" type="checkbox"/>	May 7, 2012	Delivered Material		awythe	05/07/12
655		<input checked="" type="checkbox"/>	Jun 24, 2013	Delivered Material	Left letter and order form at office.	alindstrom	06/25/13
646		<input checked="" type="checkbox"/>	Jun 24, 2013	Site Evaluation	Recycling looked good!	alindstrom	06/25/13

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2.g Tracks services provided to the complex.

Addition data tracking field

1. frequency of service for each line is a desired new field
2. Regional housing inventory ID
3. A calculation that provides overall service level by collection stream in yards per week per unit is a desired new field. For example - in screen shot 2.F, 3.5 cubic yards of Commingle / 49 (number of units) = 0.07 cubic yards per week per unit

c. **Business Data** – Beaverton tracks relevant information regarding all businesses in the city, as well a history of communication, outreach, materials, outcomes, and issues. The below list covers the minimum data we would be collecting for the businesses sector.

1. Basic information

- d. Business Name
- e. Location information
- f. Contact information
 - i. Specific person
 - ii. E-mail/phone/cell
- g. Demographic information

2. Characteristics

- a. Business sector (restaurants, manufacturing, software, etc. Identified via NAICS codes if available presently)
- b. Number of employees
- c. Level of participation
 - i. Meeting basic requirements (Y/N)
 - ii. Additional steps in waste reduction/sustainability
 - iii. Existing or as result of interaction?
- d. Hauler account information
- e. Property management company (if applicable)

3. Interaction information

- a. Description
 - i. Type (e-mail, call, in-person, etc.)
 - ii. Key word descriptions
- b. Beaverton representative
- c. Date(s) of interaction
- d. Materials distributed
 - i. Type
 - ii. Date
 - iii. Quantity
- e. Contact initiation (who made first contact, city or business)
- f. Results of interaction

4. Other

- a. Notes
- b. Photographs
- c. Required follow-up actions