

**Request For Proposals
RFP #22-36
Town of Arlington
Information Technology
Permit Application Digitization Pilot**

Responses Due: Wednesday, August 3, 2022
Late responses will be rejected

Deliver Complete Responses To: Town Manager
Town Manager's/Purchasing Dept.
Town Hall Annex 2nd floor 730
Massachusetts Avenue Arlington,
MA 02476

For Further Information Please Contact: Domenic Lanzillotti, 781-316-3003
DLanzillotti@town.arlington.ma.us

Proposals are invited and will be received by the Town Manager, Town of Arlington, Massachusetts on or before **Wednesday, August 3, 2022, 1:00 PM**, the Town Manager's Office/Purchasing Department, Town Hall Annex, 730 Massachusetts Avenue, Arlington MA 02476-4908.

One hard copy of technical proposal and one electronic copy shall be submitted in a sealed envelope marked "Bid #22-36 Permit Application Digitization Pilot -- Technical Proposal" and one (1) copy of the price proposal in a sealed envelope marked "Bid # 22-36 Permit Application Digitization Pilot- Price Proposal"

Overview

The Town of Arlington (hereinafter referred to as "the Town") strives to provide the services it offers to all residents effectively and efficiently, while maintaining a commitment to disseminate public information transparently, accessibly, and accurately.

To this end, the Town is interested in implementing a cloud-based digital permit application platform. This platform will provide a widely accessible means for constituents to apply for and complete permit review processes in a more secure and efficient manner.

The Town of Arlington, MA is soliciting quotes from qualified, independent firms, consultants, organizations with expertise in web-based permitting and licensing programs for municipalities. Per Chapter 30B of the Massachusetts General Laws, we are requesting written quotations from a minimum of three applicants who customarily provide the service that we are requesting.

The Town of Arlington reserves the right to reject any or all proposals, waive any minor informality in the proposal process, and accept the proposal deemed to be in the best interest of the Town of Arlington.

Background

The 2020 COVID-19 pandemic has caused not only a public health crisis; it has also triggered a worldwide economic crisis. Challenges posed by the COVID-19 outbreak along with a higher level of scrutiny surrounding the transparency and efficiency of their day-to-day operations have placed new burdens on local governments.

In Arlington, applications, permits, licenses, and inspections are areas where innovative solutions are needed to help evolve how our local government operates while improving the quality, efficiency, and reliability of services to our constituents. Through digital automation, we can relieve the bottlenecks created by paper and PDF applications, in-person payments, handwritten signatures, and ambiguity with inter-department workflows, all of which have become increasingly challenging during COVID-19. Automating these tasks and the underlying business practices will lessen health and safety risks and increase processing efficiency and transparency.

This unprecedented time creates a massive opportunity for Arlington to embrace automation that would drive operational evolution. In response to this call, the Information Technology Department is launching a Permit Application Modernization Project that would achieve the following goals:

- Opting into Massachusetts Chapter 43D program for expedited local permitting
- Making our Town competitive in attracting and retaining new businesses
- Enacting high standards of customer service to all constituents and across all departments, boards, and committees
- Improving and unifying our application submission, payment, review, and approval processing by:
 - Reviewing, documenting, and streamlining application related business workflows across all departments
 - Selecting and implementing a shared digital application management system
 - Developing application forms and their business workflows within the application management system
 - Integrating application forms with online payments
 - Training staff, offering education to constituents, and marketing the system and its benefits publicly to increase adoption of the new system and processes

Scope of Work

The Town of Arlington is seeking proposals from qualified consultant(s)/organizations that have previous experience conducting implementation and support of cloud-based permit application platforms. Previous work with municipalities is preferred, but applicants with ample experience in the field will be considered. The project is intended to provide a proof of concept and a

foundational basis for expanded deployment of a unified digital application system for the entire town.

Project is estimated to have a four-to-six-month duration and should not exceed a budget of \$130,000. Bidders are welcome and encouraged to submit alternative strategies that they feel are more productive to the Project Goals.

Project Objectives:

In reviewing the overall environment of application submittal, application processing and approval, payment collection, and permit and license delivery, a working group determined that there are many improvements that could be made to improve applicant experience, improve processing and approval timeline and level of effort, improve record organization and archiving, improve payment collection and processing, and improve approval work flows between departments when multiple departments are involved.

Since the building permit application workflow has already gone through a discovery process, is sufficiently complex, and involves multiple departments, we determined that this example be used in a pilot deployment. The pilot could be used to test and better understand the effort and costs associated with an enterprise-wide digital application and permitting management system and in the least may provide the Town and applicants with a viable product that could be put into production. To that end, we outline the following objectives for this project:

- Select a cloud-based application management platform.
- Implement the building permit application process in the chosen platform considering the following factors among others
 - Highly visible benefit to customer and process owner
 - Electronic Document management functionality
 - Electronic sign off capability
 - Online payment processing integration
- Based on pilot results, develop a plan for adding other application processes to the platform.

See Attachment A for Building Permit Application Process Map and Requirements Roster.

Deliverables

- The selected vendor will consult with Town stakeholders to get a clear understanding of the key requirements that are critical to the success of a Town-wide roll out of a digital permit application platform.
- The selected vendor will implement the building permit application process in a cloud-based digital platform as a working proof of concept that will provide immediate benefit to stakeholders.
- The selected vendor will be required to provide adequate training and informational support to allow the Town to proceed with adding other application processes to the permit application platform in an ongoing basis.
- Progress reports/check ins will be requested

Project Timeline

The Town of Arlington will solicit bids from consultants/organizations beginning in July 2022.

The Director of IT, and other project stakeholders will review the proposals and potentially interview selected vendors. The winning bid will be referred to the Town Manager's Office/Purchasing Department to finalize the contract. The work of the Permit Application Pilot is scheduled to begin September 2022.

Proposal Submission Requirements

Project Cost

- Please identify the cost for each task in the Scope of Work
 - Includes number of staff needed to complete each task, and the total cost
- Identify any one time and ongoing costs for licensed use of selected digital application platform
- Additional costs/charges (i.e., travel expenses), must be defined in the proposal
- Final summary of costs, broken down by task, by staff person, components, optional work, taxes, etc.
- Acknowledge meeting insurance requirements set forth in accompanying professional services agreement

Approach and Timeline

- A work plan describing strategies, roles, responsibilities and methodologies of how the Scope of Work items will be completed
- Presentation of a live demonstration of the candidate software platform, illustrating key functionality (Attachment A, Building Permit Process Workflow and Requirements Roster) that aligns as much as possible with the Town's requirements.
- Description of the plan for meeting with all project stakeholders
- Detailed description of the deliverables and outcomes
- Timeline for all plans
 - Detailed timeframe for completion of the project
 - Timeframe will be part of the contractual agreement

Experience

- Provide documentation of experience providing requested services. Examples include implementation of similar platforms and processes for other municipalities
- Showcase experience in the municipal sector, if applicable. Preference will be given to respondents who have developed plans for other municipalities
- Brief biographies, professional training summaries of the team members that will be used to resource the project and role that they will perform
- Sample list of past and current municipal clients
- At least three (3) business references, including contact information: names, addresses, and phone numbers plus a description of the type of work you performed for them.

Communication

- Please provide as detailed as possible, a written summary identifying the types of information, data, and assistance expected from the Town of Arlington in order to complete this project
- Collaboratively work with the Chief Information Officer, Town Project Manager and other members of the Town project team, throughout the process and keep them informed about what is occurring at each stage of the implementation.
- Complete a written summary of project lessons learned, make recommendations and suggestions, and include a strategic plan for future deployment to other application processes

Project Schedule

- The project is expected to start in September 2022, and a reasonable timeline to complete the project should be prepared.
- The project shall have a desired completion date of no later than 5 months from the written Notice to Proceed, given by the Town of Arlington. It is preferable that the pilot implementation is complete by December 2022.

Qualifications

The proposing consultant/organization must meet the following requirements:

- The team must have at least four (4) years of experience in application support and implementation in the chosen software platform
- Team members working on this project must be available for meetings, during daytime business hours, with the Town, as required
- Team must have previous experience with similar projects, including work in the public sector, non-profit sector or with a school district
- The volume of the proposer's current projects and projected workload must not adversely affect its ability to immediately initiate work and to follow through with the project in a timely and professional manner. The consultant and all team members must be capable of devoting a significant amount of time to this project in order to complete the work within the schedule outlined in this RFP.

Comparative Evaluation Criteria

The Town will award the contract to the consultant/organization offering the most advantageous response to this RFP, taking into consideration all evaluation criteria. The selection process will include an evaluation procedure based on the criteria identified below. Finalists will be required to appear for an interview/software demonstration.

1. Proposer's depth of experience with similar projects, and prior experience working with cloud-based software platforms and process digitization for municipalities.

Highly Advantageous: The Proposer has four (4) or more years of experience in conducting successful implementations of a permit application platform, within the public sector, educational institutions, or other non-profit organizations, and during the past four (4) years has concluded at least three (3) successful implementations in the public sector, educational institutions or other non-profit organizations, one (1) of which must have been for a client/community of similar size and demographics as Arlington.

Advantageous: The Proposer has at least three (3) years of experience in successful implementations and has concluded at least two (2) successful implementations with clients in the public sector.

Not Advantageous: The Proposer has fewer than three (3) years of experience, but more than one (1) year consulting on projects of similar size and scope. The proposer can demonstrate the completion of one (1) successful implementation with a similar sized client.

Unacceptable: The Proposer has fewer than two (2) years of experience in permit application platform implementations, and consulting on projects of similar size and scope to this project. The Proposer has not concluded any successful implementation and cannot demonstrate successful completion of similar projects.

2. Evaluation of the proposed plan, approach to the project is desirable, and demonstrates understanding of all project components and stakeholder needs.

Highly Advantageous: The proposal contains a clear, creative and comprehensive plan that addresses all the components in the Scope of Work, including Project Goals and Specific Objectives, as stated in the RFP.

Advantageous: The proposal contains a clear plan that addresses most of the components in the Scope of Work, including Project Goals and Specific Objectives, as stated in the RFP.

Not Advantageous: The proposal does not contain a clear plan to address many of the components stated in the Scope of work and RFP.

Unacceptable: The proposal does not contain any plan to address the components in the Scope of Work, including Project Goals and Specific Objectives, as stated in the RFP.

3. Evaluation of the software demonstration, live demonstration of software product clearly shows that the tool will meet or exceed the requirements outlined in Attachment A Requirements Roster

Highly Advantageous: The demonstration clearly and directly validates that the application will meet or exceed most of the requirements specified in Attachment A, including all requirements identified as “High Value”.

Advantageous: The demonstration clearly and directly validates that the application will meet or exceed most of the requirements specified in Attachment A, but not all the requirements identified as “High Value”.

Not Advantageous: The demonstration clearly and directly validates that the application will meet or exceed less than half of the requirements specified in Attachment A, and not all the requirements identified as “High Value”.

Unacceptable: The demonstration does not clearly nor directly validate that the application will meet any of the requirements specified in Attachment A.

4. Credibility and strength of client references. The Proposer shall demonstrate prior client satisfaction with working relationship, project management capabilities, and technical expertise in developing similar projects.

Highly Advantageous: More than three clients who consider your services satisfactory or better.

Advantageous: Three clients who consider your services satisfactory or better.

Not Advantageous: Three or more clients not all of whom consider your services satisfactory or better.

Unacceptable: Fewer than three clients who consider your services satisfactory or better, or three or more clients who consider your services unsatisfactory.

5. Proposer demonstrates ability to meet project budget and schedule.

Highly Advantageous: All the Proposer’s references indicate that the projects were completed within the proposed budget and on schedule, or with minimal to insignificant delays.

Advantageous: One of the Proposer's references indicates that the project was not completed within the proposed budget attributable to the Proposer or with substantial delays attributable to the Proposer, and no current project or project completed in the last three years experienced substantial delays.

Not Advantageous: Two of the Proposer's references indicate that the project was not completed within budget attributable to the Proposer or was completed with substantial

delays attributable to the Proposer, and no current project or project completed in the last year experienced substantial delays attributable to the Proposer.

Unacceptable: More than two of the Proposer's references indicate that the project was not completed within budget attributable to the Proposer or was completed with substantial delays attributable to the Proposer.

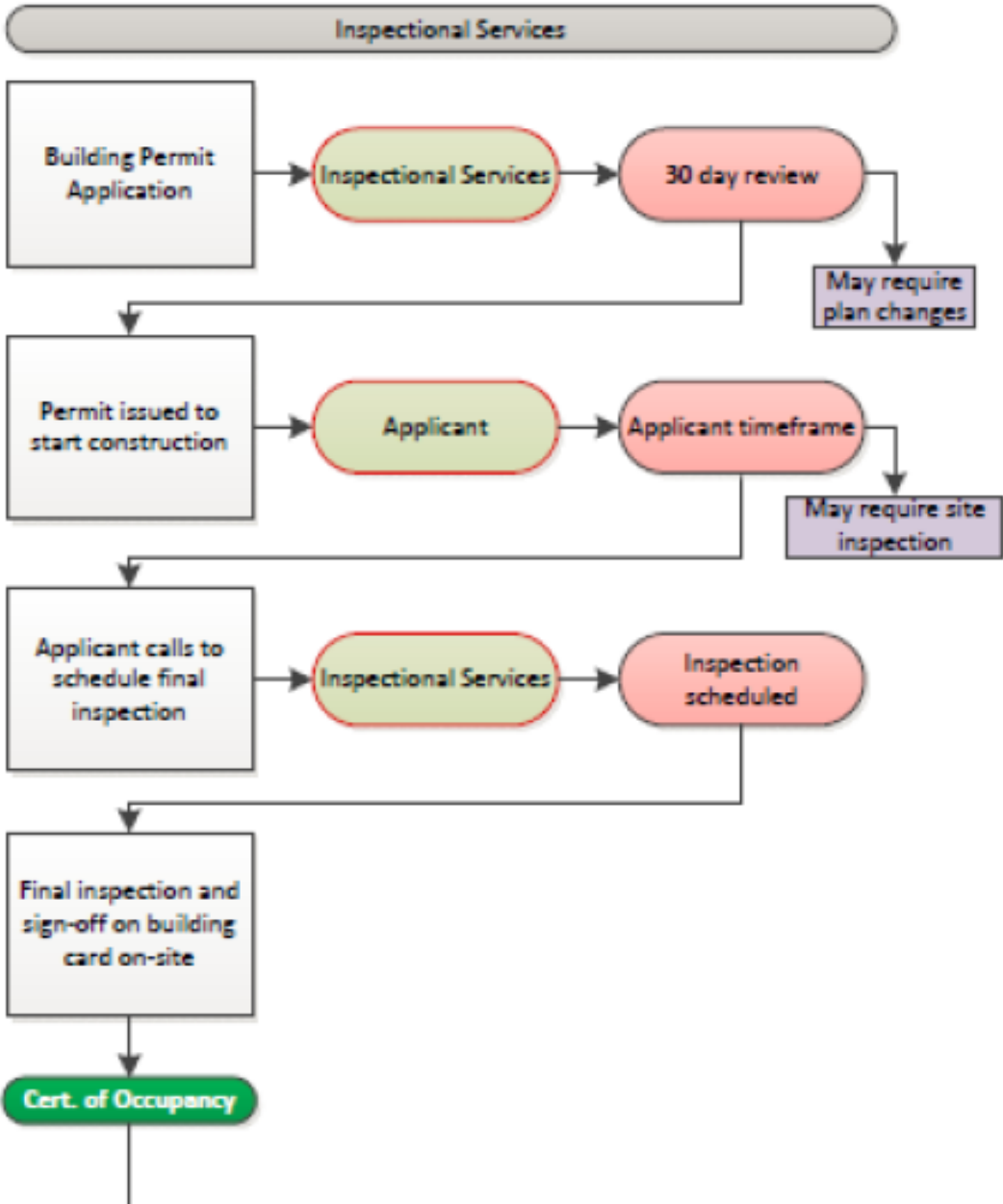
Submittal Requirements

Interested qualified consultants/organizations must submit responses addressing the objectives, scope and schedule described in this RFP. Responses must include, at a minimum, the following:

1. General description of the consultant's/team's experience.
2. Description, with examples, of the consultant's/team's experience in working with clients in the public sector, educational institutions and/or other non-profit organizations, to implement a cloud-based process digitization platform.
3. A detailed scope of services for the proposed work, including the consultant's/team's general approach to such work, evidence of understanding of the goals and objectives of the project, and methodology for accomplishing the tasks as listed in this RFP.
4. An outline of the schedule for completion of tasks (timeline) as presented in the consultant's/team's approach to the scope of services.
5. Description of or resumes for the assigned staffs' experience, educational background, availability, and chain of responsibility, including the name and title of the principal and project manager assigned to the project, names of all subcontractors, and resumes of all personnel to be associated with the project.
6. At least three (3) references, including name, title, agency, address, description of project, project cost, and telephone number and the email address for clients with similar projects completed by the Consultant within the last four years (including dates).

Attachment A

Building Permit Process Workflow



Link to Current Building Permit Applications, Town of Arlington

<https://www.arlingtonma.gov/departments/inspectional-services/applications-fees-forms>

Permit Application Digitization Platform Requirements Roster

Requirement	ID	Priority	Notes
Secure document repository accessible by applicant and applicable departments	5	High Value	must be able to attach plans
Integrated or support online payment function	16	High Value	Must accept credit cards
Permits can be issued and stored directly through platform	26	High Value	Stored in perpetuity for historical records
Permit acknowledgement to pertinent stakeholders upon issuance of permit	37	High Value	
follow up inspection report and review capabilities for certain issued permits, completion of work.	38	High Value	i.e. sewer/water division is required to inspect utility installations, Engineering etc. Division performs a trench repair inspection program beginning in the spring of the year following the
pertaining to requirement ID 4. Input to plan review for permit applications to Town Boards, ie ZBA, ARB, etc.	39	High Value	Address via workflow in future implementation?
Online Platform	1	High Value	
Internet accessible	2	High Value	Remote access from home that is secure
Ability to transfer misrouted applications to correct department owner	13	High Value	
Application workflow provide instructions/guide that assure applicant provides correct information to begin the correct process, can support mandatory field entries, can enforce data entry formats	3	High Value	System must require certain fields be completed and in some fields verified before allowing continuation i.e. verified address of work and applicant, scope of work, large project details such as total sq ft, # of baths, units etc
Application workflow provide ability for front end communication to identify prerequisite actions or opportunities based on permit type	4	High Value	
Application status is tracked in real time	6	High Value	
Platform can track deadlines and can alert applicant or department to take action	12	High Value	I.e. remind user/department when certifications expire and updated certification needs to be uploaded. Automatically send out re-permitting information for annual permit holders

Reports can be run based on applicant status	7	High Value	
Integration with DocuSign	18	High Value	Or any accepted electronic signature
Ease of use for applicants and departments	22	High Value	
Applicant workflows can be created/edited by department staff	11	High Value	Self-service workflow creation, no developer talent required
Applicant and applicable departments can communicate within platform	10	High Value	
Applicant record has department eyes only area for notes that are not visible publicly	14	High Value	
Platform supports or integrates a calendar feature for scheduling inspections	15	High Value	
PCI compliant	21	High Value	Platform must be PCI compliant
Multifactor authentication?	28	High Value	
Roles and permissions - is application granular in terms of setting individual access for separation of duties?	31	High Value	Role based access
Support SLA - is the support contract robust? 24x7?	34	High Value	
Permit holder/client profile is maintained in system for as long as administratively required	40	High Value	
Client OS agnostic, Mobile compatible	24	High Value	Bonus if there is an app/ can be accessed easily on a tablet, Mobile app can operate in cached mode/live connection not needed
Access to and updates made to applications are logged and can be reported on	8		Change log for permit applications in progress
Department facing database of users & application history	25		I.e., Each restaurant creates a profile. History of document uploads, permit application and payments are accessible
Ability to issue or track violation notices sent to parcels	35		
for the multi permit application, ability to follow a flow chart for order of permits	36		
Ability to report performance metrics	20		SLA tracking for internal use

User customizable dashboard provides real time application status	17		User customizable dashboard provides real time application status with color coded status indicating adherence to scheduled, e.g. yellow if due within 2 weeks, green if on time, orange if 2 weeks late, red if > 30 days. - etc.
Integration with inspectional software or ability to build inspection forms into the platform	27		If built in inspectional component, online & offline capability. I.e., ability to inspect in the field without internet and upload report once reconnected
Historical documents - does vendor offer document migration to bring in past permit history (searchable, printable)?	29		What can vendor provide?
Release cycle - how often are updates made by vendor? Quarterly? Monthly?	30		Information gathering - what is update cycle for app?
Does vendor offer and support API integrations?	32		
Does vendor offer integration with town websites?	33		What are the options?
Integration/data export ability to third party apps?	41		Data export of parcel appraisal system - CAMA

CERTIFICATE OF NON-COLLUSION

The undersigned certifies under penalties of perjury that this bid or proposal has been made and submitted in good faith and without collusion or fraud with any other person. As used in this certification, the word "person" shall mean any natural person, business, partnership, corporation, union, committee, club or other organization, entity, or group of individuals.

(Signature of individual submitting bid or proposal)

(Name of individual submitting bid or proposal)

Name of Business

Date

Pursuant to M.G.L. Chapter 62C, Section 49A, I certify under the penalties of perjury that I have complied with all laws of the commonwealth relating to taxes, reporting of employees and contractors, and withholding and remitting child support.

Social Security Number or
Federal Identification Number

Signature of Individual or Responsible
Corporate Officer and Title

**NON-COLLUSION FORMS
MUST BE SIGNED AND
SUBMITTED WITH BID**