



REQUEST FOR PROPOSALS (RFP) FOR DIGITAL SERVICES

Permitting and Inspection Software System

Date of Issue: February 26, 2024

Proposal Deadline: March 29, 2024

Submissions emailed to:

Steven Locke, Deputy City Manager
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Project Description and Background

The City of South Burlington is seeking a vendor for the purpose of digitizing the City's permitting, inspection, and related workflow system. South Burlington is a growing City of 20,000 residents, with a substantial employment base, and approximately 8,600 parcels.

The selected vendor package will allow a variety of permit applications to be submitted electronically, reviewed for completeness with varying degrees of automation, internally assigned and tracked to streamline review, allow for electronic payment, communication, permit issuance, and mobile inspections across a range of permit types and complexities. Applicants should be able to track progress, communicate with City staff, and receive notifications as appropriate. The system should also provide for robust public reporting capabilities and GIS integration.

The City presently largely tracks permits by individual spreadsheet, manages workflow and document control through the Office 365 environment; and uses Laserfiche as the document repository in most instances. The City maintains its parcels through ESRI ArcGIS. Separate software systems provide property assessment and other related services.

We anticipate approximately 15-18 regular users of the software and another 10-15 occasional users.

The City may invite one or more vendors for an interview and to update their proposals prior to final selection and refinement of the deliverables.

The City's objectives are to:

- Enhance customer service for residents and applicants interfacing with the City
- Support seamless interdepartmental and applicant/reviewer interface
- Implement software to reduce or eliminate manual workflow and tracking processes
- Improve integration between applications and other systems

Software Requirements:

1. General Permit, Land Development Application Management, Inspection, and Enforcement components.

2. Cloud-based system that includes modern security and user administration
3. Public / applicant portal to submit and revise application materials, view status, and communicate with staff.
4. Ability for applicant to manage all permits within the City through a single dashboard.
5. Mobile Inspection platform including automated remote inspection requests, ability to integrate with Outlook calendars.
6. Electronic Plan Review Integration to enhance the plan review, plat review, and development review processes including automated version control.
7. Automate workflow to support key business processes.
8. Automate notification of process updates throughout workflow and with applicant.
9. Integration with City's point-of-sale system (xpresspay and square)
10. Allocation/assignment of fees across multiple accounts with manual adjustments
11. Structure that provides flexible permit types, create and maintain workflow rules
12. Mobile device-friendly coding; robust and flexible search and display capabilities
13. Ability for City users to do custom reporting and data extraction
14. Ability to automate generation of customized forms, letters, permit/licenses, and reports.
15. Ability to integrate with ArcGIS geodatabases, including the City's parcels.
16. Robust Property/Parcel attributing, including native Georeferencing
17. Straightforward structure and process for adding/modifying forms and processes
18. Ability to link related permits, such as parent-child parcels, multiple stages of review, and permits for same parcel or entity

Project Timeline

- March 1: Issuance of RFP
- March 15: Questions due to City
- March 22: Responses provided
- March 29: Proposals Due
- April 12 Notification to vendors selected for interviews
- April 19: Interviews of select vendors
- May 3: Final vendor selection,
- May – August: Finalize contract, and begin initial deployment
- August – fall 2024: Complete deployment and training

Submission Requirements

Prospective vendors are required to provide the following as part of their response to the RFP:

- Vendor/product description, including digital services offered. If the vendor has additional related modules, such as budgeting and finance, asset management, or others, please indicate so.

- Demonstration of how the project criteria included in this RFP are met or of alternate structure/approach if applicable
- Listing of built-in software integrations with GIS (such as ESRI), electronic plan review (such as Adobe or Bluebeam), financial services, and similar
- Description of how existing records would/could be managed/addressed/linked to. The City presently stores most applicable records in Laserfiche.
- Cost proposal and fee structure, including estimated set-up fee, annual maintenance fee for the first three years, and typical future increases based on prior work.
- Data conversions: Include an estimated range of costs for data conversion based on your past experience, and a description of data that would be typically converted and description of data that would not be converted.
- Education and training options, including format(s) and cost for all users.
- List of References: Provide a minimum of three client references with which the applicant has provide similar services within the last five years. Include the name and telephone number of the contact person and a description of the role and services provided to that contact.
- Responses must be submitted in digital (PDF) formats. A technical appendix can be submitted if necessary.

Selection Process & Criteria

Vendor selection will be overseen by a cross-departmental project team established by the City Manager. The Deputy City Manager will provide a final recommendation to the City Manager for award of contract.

All vendors will have an opportunity to pose questions on the RFP and to be on a list receiving responses to questions; the City will provide a written response to be shared with all those who posed questions and/or requested to receive responses.

Vendors will be notified by email of selection, interviews, and final decisions.

Description	Points
Experience of Company and References	15
Functionality/Technology	30
Implementation Approach	15
Compatibility with existing software systems	10
Cost Proposal	15
Support and Training	15

Additional information, including interviews or presentations by select vendors, may be requested prior to final selection for advancement. If selected for interview, each team will be notified by email of the interview or demo date, time, place and any other pertinent information. The City reserves the

right to request this interview in person, but may, at the City's discretion, substitute a Teams/Zoom interview. All costs and expenses incurred in preparation and submission of a proposal, including but not limited to an interview and presentation, shall be the responsibility of the consultant.

A top-ranked proposal may be selected and invited to work with City staff to develop a final scope of work, budget, timeline, and related contractual obligations.

The City will be required to follow its standard procurement procedures. No proposal will be considered accepted until all applicable City authorizations are received and an agreement is executed by both parties.

Additional Terms

This RFP is governed by the following terms and conditions.

a. Contracting

The Consultant, prior to being awarded a contract, must apply for registration with the Vermont Secretary of State's Office to do business in the State of Vermont, if not already so registered. The registration form may be obtained from the Vermont Secretary of State, 128 State Street, Montpelier, VT 05633-1101, PH: 802-828-2363, Toll-free: 800-439-8683; Vermont Relay Service – 711; web site: <https://www.sec.state.vt.us/> . The contract will not be executed until the Consultant is registered with the Secretary of State's Office.

Prior to beginning any work, the Consultant shall obtain Insurance Coverage and provide a certificate of insurance coverage documented on forms acceptable to the City.

b. Agreement Requirements

The selected consultant will be required to execute a contract with the City on the terms and conditions required by the City.

c. Limitations of Liability

The City assumes no responsibility or liability for the response to this Request for Proposals.

d. Costs Associated with Proposal

Any costs incurred by any person or entity in preparing, submitting, or presenting a proposal are the sole responsibility of that person or entity, including any requests for additional information or interviews. The City will not reimburse any person or entity for any costs incurred prior to the issuance of the contract.

e. Indemnification

Any party responding to this Request for Proposals is acting in an independent capacity and not as an officer or employee of the City. Any party responding to this Request for Proposals will be required to indemnify, defend, and hold harmless the City, its officers, and employees from all liability and any claims, suits, expenses, losses, judgments, and damages arising as a result of the responding party's acts and/or omissions in or related to the response.

f. Rejection of Proposals

The City reserves the right to reject any or all proposals, to negotiate with one or more parties, or to award the contract to the proposal the City deems will meet its best interests, even if that proposal is not the lowest bid. The City reserves the right to re-advertise for additional proposals and to extend the deadline

for submission of the proposals. This Request for Proposals in no way obligates the City to award a contract.

g. Ownership of Documents

Any materials submitted to the City in response to this Request for Proposals shall become the property of the City unless another arrangement is made by written agreement between the City and the responding party. The responding party may retain copies of the original documents.

h. Duty to Inform City of Contract Document Errors

If a bidder knows, suspects, or has reasonable cause to believe, that an error or omission exists in any contract documents, including but not limited to unit prices and rate calculations, the bidder shall immediately give the City written notice thereof. Consultant shall not cause or permit any work to be conducted that may related to the error or omission without first receiving written acknowledgment from the City that City representatives understand the possible error or omission and have approved the requested modifications to the bid or contract documents or that the consultant may proceed without any modification being made to the bid or contract documents.

i. Public Records

Any and all records submitted to the City, whether electronic, paper, or otherwise recorded, are subject to the Vermont Public Records Act. The determination of how those records must be handled is solely within the purview of City. All records the responding party considers to be trade secrets, as that term is defined by subsection 317(c)(9) of the Vermont Public Records Act, or that the responding party otherwise seeks to have the City consider as exempt must be identified clearly and specifically at the time of submission. It is not sufficient to merely state generally that a proposal is proprietary, contains a trade secret, or is otherwise exempt. Particular records, pages, and sections which are believed to be exempt must be specifically identified as such and must be separated from other records with a convincing explanation and rationale sufficient to justify each exemption from release consistent with Section 317 of Title 1 of the Vermont Statutes Annotated.

j. Public Health Emergencies

Bidders are advised that public health emergencies, as declared by the City, the State of Vermont, or the Federal Government, may introduce significant uncertainty into the project, including disruption of timelines or revised practices.

The City will have sole discretion to approve, deny, or require changes to this plan as a condition of consideration of the bid, will retain the right to inspect all work to ensure compliance with health and safety standards, and may at any time require the consultant to stop work because of the emergency.

If a public health emergency is declared, the City will not be responsible for any delays related to the sequence of operations or any expenses or losses incurred as a result of any delays. Any delays related to public emergencies will be excusable but will not be compensable.