

Request for Proposals



City of Lynnwood Procurement Division
19100 44th Ave W Lynnwood, WA 98036

ADVERTISED DATE: JANUARY 29, 2020 HERALD AND DJC

Request for Proposals (RFP) Title: **Permit Tracking and Plans Review Software Solution**

RFP Number: **3178**

Due Date: **February 26, 2020 - 2:00 PM, Pacific Local Time.**

Buyer: **Cathy Robinson | crobinson@lynnwoodwa.gov | 425-670-5166**

Alternate Buyer: **Ginny Meads | gmeads@lynnwoodwa.gov | 425-670-5149**

Pre-proposal Conference:

**Zoom phone conference
Wednesday, February 12, 2020
10:00 AM, Pacific Local Time**

Refer to Section 1.4 in RFP document for phone conference details.

Sealed Proposals are hereby solicited and will **only** be received by:
City of Lynnwood
Procurement Division
19100 44th Ave West
Lynnwood, WA 98036

1. The Proposer certifies that he or she has read and understands all terms and conditions of this solicitation.
2. By signing this document, the Proposer certifies that they have not, either directly or indirectly, entered into any agreement, participated in any collusion, or otherwise taken any action in restraint of free competitive bidding. If the City determines that collusion has occurred among the Proposers, none of the submittals from the participants of such collusion will be considered. The City's determination will be final.
3. The Proposer acknowledges that the person who signs below is fully authorized to sign on behalf of the firm listed and to fully bind the firm to all conditions and provisions thereof.
4. Proposer acknowledges that all Addenda issued for this RFP have been examined as part of the proposal documents.

Company Name

Address

City/State /Postal Code

Signature

Authorized Representative / Title

Email

Phone

Fax

Contact Name:

Phone

Email

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DEFINITION OF WORDS AND TERMS APPLICABLE ONLY TO INSTRUCTION OF THE RFP

Words and terms shall be given their ordinary and usual meanings. Where used in the Contract documents, the following words and terms shall have the meanings indicated. The meanings shall be applicable to the singular, plural, masculine, feminine and neuter of the words and terms.

Addendum/Addenda: Written additions, deletions, clarification, interpretations, modifications or corrections to the solicitation documents issued by the City during the Proposal period and prior to contract award.

Best and Final Offer: Best and Final Offer shall consist of the Proposer's revised proposal and any supplemental information requested during the evaluation of Proposals. In the event of any conflict or inconsistency in the items submitted by the Proposer, the items submitted last govern.

Competitive Range: The Competitive Range consists of the Proposers that have a reasonable chance of selection for contract award. The Proposal Evaluators (PE) shall conduct the initial evaluation of the proposals considering price and Evaluation Factors established in the RFP. The Buyer and Project Manager/PE together shall compare the evaluations and determine the Competitive Range. The Competitive Range may be reduced after the evaluation of additional information, Best and Final Offers and negotiations.

Criteria, Evaluation Criteria or Evaluation Factors: The elements cited in the RFP that the City shall examine to determine the Proposers understanding of the requirements; technical, business and management approach; key personnel; qualification and experience of the Proposer; potential for successfully accomplishing the Contract; risk allocation and the probable cost to the City.

Days: Calendar days.

Proposal Evaluators (PE): Team of people appointed by the City to evaluate the proposals, conduct discussions, call for Best and Final Offers, score the proposals and make recommendations.

Proposer: Individual, association, partnership, firm, company, corporation or a combination thereof, including joint ventures, submitting a proposal to perform the Work.

RFP: Request for Proposals, also known as the solicitation document.

Reference Documents: Reports, Specifications, and drawings which are available to Proposers for information and reference in preparing proposals but not as part of this Contract.

SECTION I PROJECT OVERVIEW AND GENERAL TERMS AND CONDITIONS

1.1 Intent

The purpose of this Request for Proposal is to solicit responses from interested firms for a permit tracking software solution.

1.2 Background

- A. The City of Lynnwood, Washington (City) is the fourth largest city in Snohomish County, sixteen (16) miles north of Seattle, near the junction of Interstate 5 and Interstate 405. The city limits include 7.7 square miles and is considered a Regional Growth Center by the Puget Sound Regional Council (PSRC). Lynnwood has an estimated population of 39,600 and an expected population growth of 18,000 more residents and 18,000 more jobs by the year 2035, per PSRC's growth projections. With an estimated number of 2,500 businesses, the City has one of the largest concentrations of retailers in the region, in addition to a community college, convention center and a major transit center. The City incorporated in 1959, has a strong Mayor/Council form of government, operating as a non-charter code city under the Revised Code of Washington Title 35A
- B. The City is composed of twelve departments, with a biennial budget of \$386 million, of which roughly, \$119 million is General Fund. The City provides community members with general government, police, public works, planning and community development, as well as parks, recreational and senior programs. The City operates a municipal court and jail facility, water, storm water and waste water utilities.
- C. The City has a staff of approximately 572 full/part-time employees with an additional seasonal flux of employees. More than 75% of the employees report to Public Works, Police as well as the Parks Department
- D. The City of Lynnwood's Development and Business Services team consists of 40 individuals working as building plan reviewers and inspectors, code enforcement officers, land use planners, public works engineers, permit techs, and fire prevention/fire inspectors. External agencies (such as Alderwood Water and Wastewater District) are also included in permit review processes.
- E. The City of Lynnwood is rapidly transforming from a low-density Seattle suburb to a vibrant, walkable community projected to have a population of 55,000 by 2035. The City is seeking a permit tracking software, with mobile device access, capable of accepting, reviewing, issuing, and inspecting a variety of permits, documents and applications, including, but not limited to: building, land use, economic development, engineering, business license, fire, public works, special events, code enforcement, and police.
- F. The ideal permit tracking software will provide core tracking and workflow functionalities through the life of a permit, as well as integrated capabilities, such as electronic document management, electronic plan review, electronic billing and payment, geographic information systems (GIS), time tracking, inspection management, wireless field inspections, and reporting capabilities.

1.3 Software Experience

- A. The City is seeking a firm whose team has experience in:
 - 1. Long-term viability as a company and commitment to customers through regular product enhancements and on-going support.
 - 2. Permit tracking software solution incorporating current technology functions, formats and user-friendly accessibility for both internal staff and external customers.

3. Providing business process design, identifying gaps and recommendations of software configuration.
4. Providing successful training and software implementation.

1.4 RFP Solicitation Schedule

Tentative Schedule	
Task	Date
RFP Issued	January 29, 2020
Deadline for Pre-Proposal Conference Questions <u>The City strongly encourages potential proposers to submit questions prior to the Pre-Proposal Conference</u>	February 7, 2020, 2:00 PM Pacific Local Time
RFP Pre-Proposal Conference All prospective Proposers are strongly encouraged to attend. The intent of the pre-proposal conference is to assist the Proposers to more fully understand the requirements of this RFP. Proposers are encouraged to submit questions in advance to enable the City to prepare responses (email questions to the Buyer). Questions will be encouraged during the pre-proposal conference also.	Time: Feb 12, 2020 10:00 AM Pacific Time (US and Canada) Join Zoom Meeting (Audio Only) https://lynnwoodwa.zoom.us/j/558054644 Meeting ID: 558 054 644 One tap mobile +16699009128,,558054644# US (San Jose) +16465588656,,558054644# US (New York) Dial by your location +1 669 900 9128 US (San Jose) +1 646 558 8656 US (New York) Meeting ID: 558 054 644 Find your local number: https://lynnwoodwa.zoom.us/j/558054644
Addendum Issued from Pre-proposal Conference (if applicable)	February 14, 2020
Last Date to Submit Questions	February 20, 2020, 2:00 PM Pacific Local Time
RFP Due Date	March 4, 2020, 2:00 PM Pacific Local Time
*Evaluation and Selection	Mid to Late March 2020
*Interviews / Presentations, if required	Late March early April 2020
*Estimated Date of Intent to Award	Late April early May 2020
*Estimated Date of Council Award	May or early June 2020
*Estimated Date of Notice to Proceed	June, 2020

NOTE: *Dates preceded by an asterisk (*) are estimated dates. Estimated dates are for information only.*

1.5 Communication, Questions and Interpretation of the RFP

Communications concerning this RFP with other than the listed Buyer or Procurement staff may cause the Proposer to be disqualified. Any information modifying a solicitation will be furnished to all Proposers by addendum. **Communications concerning this proposal, with other than the**

listed Buyer, or other Procurement staff, may cause the Proposer to be disqualified.

All questions and any explanations must be requested in writing and directed to the Buyer no later than the date and time established in the solicitation.

No oral interpretations of the RFP will be made to any Proposer. Oral explanations or instructions are not binding.

1.6 Addenda

If at any time, the City changes, revises, deletes, clarifies, increases, or otherwise modifies the RFP, the City will issue a written Addendum to the RFP.

1.7 Cancellation of RFP or Postponement of Proposal Opening

The City reserves the right to cancel this RFP at any time. The City may change the date and time for submitting proposals prior to the date and time established for submittal.

1.8 Cost of Proposal and Samples

The City is not liable for any costs incurred by Proposer in the preparation and evaluation of proposals submitted.

If applicable to this solicitation, samples of items required must be submitted to location and at time specified. Unless otherwise specified, samples shall be submitted with no expense to the City. If not destroyed by testing, samples may be returned at the Proposer's request and expense unless otherwise specified.

1.9 Proposal Price and Effective Date

- A. The proposal price shall include everything necessary for the prosecution and completion of work and services performed under the contract including, but not limited to, furnishing all materials, equipment, supplies, tools, plant and other facilities and all management, supervision, labor and service, except as may be provided otherwise in this RFP.
- B. Proposed prices shall include all freight charges, FOB to the designated delivery point.
- C. Washington State sales/use taxes and Federal excise taxes shall not be included in the proposal price. The City shall pay any Washington State sales/use taxes applicable to the contract price or tender an appropriate amount to the Contractor for payment to Washington State. The City is exempt from Federal excise taxes. All other government taxes, duties, fees, royalties, assessments and charges shall be included in the Proposal price.
- D. If applicable to this solicitation, in the event of a discrepancy between the unit price and the extended amount for a proposal item, the City reserves the right to clarify the proposal.
- E. The proposal shall remain in effect for 90 days after the proposal due date, unless extended by agreement.

1.10 Examination of Proposal and Contract Documents

The submission of a proposal shall constitute an acknowledgement upon which the City may rely that the Proposer has thoroughly examined and is familiar with all requirements and documents pursuant with the RFP, including any addenda and has reviewed and inspected all applicable statutes, regulations, ordinances and resolutions addressing or relating to the goods or services to be provided hereunder.

The failure of a Proposer to comply with the above requirement shall in no way relieve the Proposer from any obligations with respect to its proposal or to any contract awarded pursuant to this RFP. No claim for additional compensation shall be allowed which is based upon a lack of knowledge or misunderstanding of this RFP.

1.11 Modifications of Proposal or Withdrawal of Proposal Prior to Proposal Due Date

At any time before the time and date set for submittal of proposals, a Proposer may submit a modification of a proposal previously submitted to the City. All proposal modifications shall be made in writing, executed and submitted in the same form and manner as the original proposal.

Proposals may be withdrawn by written notice received prior to the exact hour and date specified for receipt of proposals. A proposal also may be withdrawn in person by a Proposer or authorized representative provided their identity is made known and they sign a receipt for the proposal, but only if the withdrawal is made prior to the exact hour and date set for receipt of proposals. All requests for modification or withdrawal of proposals, whether in person or written, shall not reveal the amount of the original proposal.

1.12 Error and Administrative Corrections

The City shall not be responsible for any errors in proposals. Proposers shall only be allowed to alter proposals after the submittal deadline in response to requests for clarifications or Best and Final Offers by the City.

The City reserves the rights to allow corrections or amendments to be made that are due to minor administrative errors or irregularities, such as errors in typing, transposition or similar administrative errors.

1.13 Late Proposals

Proposals, modifications of proposals, received at the designated location in the solicitation after the exact hour and date specified for receipt will not be considered

1.14 Proposal Withdrawal After Public Opening

Except for claims of error granted by the City, no Proposer may withdraw a proposal after the date and time established for submitting proposals, or before the award and execution of a Contract pursuant to this RFP, unless the award is delayed for a period exceeding the period for proposal effectiveness.

Requests to withdraw a proposal due to error must be submitted in writing along with supporting evidence for such claim for review by the City. Evidence must be delivered to the City within two (2) Days after request to withdraw. The City reserves the right to require additional records or information to evaluate the request. Any review by the City of a proposal and/or any review of such a claim of error, including supporting evidence, creates no duty or liability on the City to discover any other proposal error or mistake, and the sole liability for any proposal error or mistake rests with the Proposer.

1.15 Procedure When Only One Proposal is Received

If the City receives a single responsive, responsible proposal, the City may request an extension of the proposal acceptance period and/or conduct a price or cost analysis on such proposal. The Proposer shall promptly provide all cost or pricing data, documentation and explanation requested by the City to assist in such analysis. By conducting such analysis, the City shall not be obligated to accept the single proposal; the City reserves the right to reject such proposal or any portion thereof.

1.16 Compliance with RFP Terms, Attachments and Addenda

- A. The City intends to award a Contract based on the terms, conditions, attachments and addenda contained in this RFP. Proposers shall submit proposals, which respond to the requirements of the RFP.
- B. Proposers are strongly advised to not take exceptions to the terms, conditions, attachments and addenda; exceptions may result in rejection of the proposal. An exception is not a response to a proposal requirement. If an exception is taken, a 'Notice of Exception' must be submitted with the proposal. The 'Notice of Exception' must identify the specific point or points of exception and provide an alternative.
- C. The City reserves the right to reject any proposal for any reason including, but not limited to, the following –
 - Any proposal, which is incomplete, obscure, irregular or lacking necessary detail and specificity;
 - Any proposal that has any qualification, limitation, exception or provision attached to the proposal;
 - Any proposal from Proposers who (in the sole judgment of the City) lack the qualifications or responsibility necessary to perform the Work;
 - Any proposal submitted by a Proposer which is not registered or licensed as may be required by the laws of the state of Washington or local government agencies;
 - Any proposal, from Proposers who are not approved as being compliant with the requirements for equal employment opportunity; and
 - Any proposal for which a Proposer fails or neglects to complete and submit any qualifications information within the time specified by the City.
- D. The City may, at its sole discretion, determine that a proposal with a 'Notice of Exception' merits evaluation. A proposal with a 'Notice of Exception' not immediately rejected may be evaluated, but its competitive scoring shall be reduced to reflect the importance of the exception. Evaluation and negotiation shall only continue with the Proposer if the City determines that the proposal continues to be advantageous to the City.
- E. In consideration for the City's review and evaluation of its proposal, the Proposer waives and releases any claims against the City arising from any rejection of any or all proposals, including any claim for costs incurred by Proposers in the preparation and presentation of proposals submitted in response to this RFP.
- F. Proposals shall address all requirements identified in this RFP. In addition, the City may consider proposal alternatives submitted by Proposers that provide cost savings or enhancements beyond the RFP requirements. Proposal alternatives may be considered if deemed to be in the City's best interests. Proposal alternatives shall be clearly identified.

1.17 Protest Procedures

The City has a process in place for receiving protests based upon the RFP or contract awards. The protest procedure is available under Procurement Documents at <https://www.lynnwoodwa.gov/Government/City-Clerk/Procurement-Contracts-Division>.

1.18 Public Disclosure of Proposals

This procurement is subject to the Washington Public Records Act, RCW (Revised Code of Washington) 42.56 et seq. Proposals submitted under this RFP shall be considered public documents unless the documents are exempt under the public disclosure laws. After a decision to award the contract has been made, the proposals shall be available for inspection and copying by the public.

If a Proposer considers any portion of its proposal to be protected under the law, the Proposer shall clearly identify each such portion with words such as "CONFIDENTIAL," "PROPRIETARY" or "BUSINESS SECRET." If the City determines that the material is not exempt from public disclosure law, the City will notify the Proposer of the request and allow the Proposer ten (10) Days to take whatever action it deems necessary to protect its interests. If the Proposer does not take such action within said period, the City will release the portions of the proposal deemed subject to disclosure. By submitting a proposal, the Proposer assents to the procedure outlined in this subsection and shall have no claim against the City on account taken under such procedure.

1.19 Cooperative Purchasing – Other Public Agency Orders

The Washington State Interlocal Cooperative Act RCW 39.34 provides that other governmental agencies may purchase goods or services on this solicitation or contract in accordance with the terms and prices indicated therein if all parties agree. The City does not accept any responsibility or involvement in the purchase orders or contracts issued by other public agencies.

END OF SECTION

SECTION 2 SCOPE OF WORK

2.1 Project Description

- A. The City of Lynnwood is seeking proposals from qualified companies to provide an electronic permit tracking software solution, capable of accepting, reviewing, issuing, and inspecting a variety of permits, documents and applications including, but not limited to: building, land use, economic development, engineering, business license, fire, public works, special events, code enforcement, and police. The software solution system should allow mobile friendly access by external (public and customers) and internal staff.
- B. The ideal permit tracking software will provide core tracking and workflow functionalities through the life of a permit, as well as integrated capabilities, such as electronic document management, electronic plan review, electronic billing and payment, geographic information systems (GIS), time tracking, inspection management, wireless field inspections, and reporting capabilities. The proposed solution shall be web-based. The City is not interested in an in-house hosted solution.
- C. The City's objective from a new permit software solution is to:
- Facilitate self-service information and process, through an online portal, which should reduce walk-in customers, phone calls and emails;
 - Improve customer service by facilitating self-service functionality through an online portal with mobile friendly access.
 - Allow customers to apply for permits, track status, make payments, and schedule inspections all from an online portal with mobile friendly access to required information;
 - Address and/or mitigate many of the City's challenges in current environment, providing efficiencies to the City, such as:
 - Reduce City staff time spent on administrative tasks through efficient use of automated reports, emails, and communication with customers;
 - Reduce plan review time;
 - Reduce permit issuance time;
 - Increase inspections per inspector;
 - Enable concurrent reviews and permit issuance from multiple disciplines;
 - Streamline project management;
 - Allow City staff to track and extract data from the proposed system using simple ad-hoc reporting tools;
 - Allow applications and plans to be uploaded through the portal, at the counter, or any other methods that promotes paperless process and increases overall productivity. way as needed, this will allow us to eliminate paper and increase our productivity.

2.2 Current Software System and Process Information

- A. The City of Lynnwood's Development and Business Services team consists of 40 individuals working as building plans reviewers and inspectors, code enforcement officers, land use planners, public works engineers, permit techs, and fire prevention/fire inspectors. External agencies (such as Alderwood Water and Wastewater District) are also included in permit review processes.

The City of Lynnwood is currently using EnerGov by Tyler Software. The City has been using this product for eleven years and has a desire to test the market and review the latest in technology as it relates to permitting software.

The City's current process is, 20% electronic and 80% paper. The city wishes to move toward a 100% paperless process.

Our current program is a server-based product with limited capabilities, we are looking for a SAAS (Software as a Service) solution. Our new program will be able to meet the requirements as stated in the scope of work, but also be user friendly enough and easy to use and modify by department staff to fit our change workflows.

The City's current turnaround process ranges from 2 – 16 weeks, depending on the complexity and levels of reviews required. The City seeks to greatly improve this turnaround time. A proposed software solution should integrate with or be able to migrate information as it relates to permitting revenues with Tyler Munis financials, Washington State Business License System (BLS) <http://bls.dor.wa.gov/file.aspx> Built-in GIS system capable of hosting multiple layers and accepting a variety of hosted sites, Arc GIS, ESRI, City of Lynnwood GIS, Google Maps and World, and others, etc.

- B. The table below represents the recent permit volumes for the City. The City does not currently track or is unable to obtain historical data for the number of property inquiries, fee transactions, or inspections.

Permit Type	2016	2017	2018	2019 (thru Dec 10)	Average
Commercial Building Permits	57	79	68	48	63
Building Tenant Improvement	255	220	233	171	220
Demo Permits	2	5	3	6	4
Electrical, Mechanical, and Plumbing	338	313	301	249	300
Fire	79	86	82	69	79
Single Family Residential	70	133	131	119	113
Pool	2	0	2	1	1
Mobile Home	4	3	3	2	3
Sign	98	91	74	83	87
Wireless Communication Facilities	18	23	18	16	19
Accessory Dwelling Unit	4	12	5	8	7
Planned Unit Development	0	1	0	0	0
Project Design Review	13	11	9	16	12
Rezone	9	3	2	0	4
Subdivision	2	0	1	0	1
Short Subdivision	4	10	7	4	6
Boundary Line Adjustment	3	12	2	5	6
Conditional Use Permit	4	2	2	1	2
Environmental Review	29	22	14	10	19
Binding Site Plan	0	0	2	1	1
Miscellaneous (Variance, Appeals, Essential Public Facilities, Tent Encampments, Parking)	1	1	7	3	3
TOTAL PERMITS	992	1027	966	812	949

- C. In addition to permit reviews, the City utilizes the existing permit tracking system to track the following work.

Other Work (Not Permit)	2016	2017	2018	2019 (thru Dec 10)	Average
Code Enforcement Cases	691	645	589	299	556
Pre-Development Meetings	Not Previously Tracked	Not Previously Tracked	7	24	16
Zoning Certification Letters	Not Previously Tracked	Not Previously Tracked	Not Previously Tracked	17	17
Public Works	Not Previously Tracked	Not Previously Tracked	Not Previously Tracked	5	5
Annexation	0	1	0	2	1
Code Amendments	7	12	5	4	7
Comprehensive Plan Changes	10	3	1	0	4

2.3 New Permit Tracking Software

- A. The City is seeking a permit tracking system solution that:
1. Is cloud/web-based. The City is not interested in an in-house hosted solution.
 2. Is commercially available out of the box and/or with little or no major customizations
 3. Currently being used by other similar government entities with similar functionality
 4. Demonstrates a history of stability and reliability with provable results of efficiency improvements
- B. The City intends to use the permit tracking software for a variety of development and permitting activities. While the City will evaluate and consider all software proposals, the City's preference is an all-inclusive, cloud-based system solution. The proposed solution should integrate all functions of permit processing ranging from:
1. Documentation of property inquiries,
 2. Permit submittals,
 3. Fees and billing,
 4. Review processes,
 5. Permit issuance,
 6. Appeals,
 7. Inspections, and
 8. Integration with other systems.
- C. The proposed solution should provide an intuitive and user-friendly experience for internal staff and external customers and the public. The proposed solution should facilitate coordinated, efficient and

timely reviews. Processes should be automated to the greatest extent possible (such as completeness determination notifications, correction letters, public noticing requirements, etc.).

2.4 City Provided Services / Resources

For this project, the City will provide the following:

- A. Staff available for train the trainer
- B. One or two dedicated staff to learn and implement the administration of the program
- C. All necessary hardware needs to implement
- D. Dedication for ongoing training and education for staff and the public

2.5 Suggested Improvements (Optional)

When preparing the submittal, proposers are encouraged to suggest improvements to the scope of work that would provide the City with a successful outcome of the project.

2.6 Funding and Cost

The City's 2020 budget includes funds dedicated to this project. The City estimates the cost for this project will not exceed \$100,000.

END OF SECTION

SECTION 3 EVALUATION, SELECTION AND CONTRACT AWARD

3.1 Evaluation Criteria

Each proposal has a total possible score as shown below. Proposals will be evaluated using the following criteria:

Evaluation Criteria	
Category	Maximum Points
Organization and Completeness of Proposal Response	25
Approach and Understanding of Requirements <ul style="list-style-type: none"> • Project Approach and Software Solution • Implementation Methodology and Project Schedule • Data Conversation Plan • System Interface Plan • Testing and Quality Assurance Plan • Training Plan • System Documentation Plan • Pre and Post-Implementation Level Support Plan • System Security Plan • Business Continuity and Disaster Recovery Plan 	375
Requirements Met with Limited Customization <ul style="list-style-type: none"> • Functional and Technical Requirements / Capabilities • Software Customization Plan, if applicable 	492
Qualifications and Experience <ul style="list-style-type: none"> • Experience of the Firm • Experience and Knowledge of the Assigned Project Team • Sub-Contracting 	300
References <ul style="list-style-type: none"> • Current References • Site Visit References 	300
Cost	200
Contract Terms and Conditions	100
Maximum Written Points	1,792
Interview / Presentation / Demonstration	1,500
Total Maximum Points	3,292

3.2 Determining Selection

A. The City will evaluate proposals using the criteria set forth in this RFP. If deemed necessary, written and/or oral discussions, site visits or any other type of clarification of proposal information may be conducted with those Proposers whose proposals are found to be potentially acceptable. Identified deficiencies, technical requirements, terms and conditions of the RFP, costs or prices, and clarifications may be included among the items for discussion. The discussions are intended to give Proposers a reasonable opportunity to resolve deficiencies, uncertainties and clarifications as requested by the City and to make the cost, pricing or technical revisions required by the resulting changes. In addition, the City may request additional business and administrative information.

- B. The City may find that a Proposer appears fully qualified to perform the Contract or it may require additional information or actions from a Proposer. In the event the City determines that the proposal is not within the Competitive Range the City shall eliminate the proposal from further consideration.
- C. The evaluation of Proposers' proposals and additional information may result in successive reductions of the number of proposals that remain in the Competitive Range. If applicable to the procurement, the firms remaining in the Competitive Range may be invited to continue in the proposal evaluation process, and negotiations.
- D. Upon completion of discussions, the City may issue to all remaining potentially acceptable Proposers within the competitive range a request for Best and Final Offers. The request shall include notice that discussions are concluded, an invitation to submit a revised proposal with a Best and Final Offer, and a new submittal date and time.
- E. The City may enter negotiations with one or more Proposers to finalize Contract terms and conditions. Negotiation of a Contract shall be in conformance with applicable federal, state and local laws, regulations and procedures. The objective of the negotiations shall be to reach agreement on all provisions of the proposed Contract. In the event negotiations are not successful, the City may reject proposals.
- F. The City reserves the right to make a Contract award without written and/or oral discussions with the Proposers and without an opportunity to submit Best and Final Offers when deemed to be in the City's best interests. Contract award, if any, shall be made by the City to the responsible Proposer whose proposal best meets the requirements of the RFP, and is most advantageous to the City, taking into consideration price and the other established evaluation factors. The City is not required to award a Contract to the Proposer offering the lowest price. The City shall have no obligations until a Contract is signed between the Proposer and the City. The City reserves the right to award one or more contracts as it determines to be in its best interest.

3.3 Responsive and Responsible Criteria

A. Responsive

The City will consider all the material submitted by the Proposer, and other evidence it may obtain otherwise, to determine whether the Proposer is in compliance with the terms and conditions set forth in this RFP.

B. Responsible

In determining the responsibility of the Proposer, the City may consider:

- the ability, capacity and skill to perform the Contract and provide the service required;
- the character, integrity, reputation, judgment and efficiency;
- financial resources to perform the Contract properly and within the times proposed;
- the quality and timeliness of performance on previous contracts with the City and other agencies, including, but not limited to, the effort necessarily expended by the City and other agencies in securing satisfactory performance and resolving claims;
- compliance with federal, state and local laws and ordinances relating to public contracts;
- other information having a bearing on the decision to award the Contract.

Failure of a Proposer to be deemed responsible or responsive may result in the rejection of a proposal.

3.4 Agreement / Contract

- A. The City intends to use and issue an agreement for the services requested herein. Typically, the Scope of Services outlined in this RFP solicitation, the successful proposer's submittal to same and the result of negotiations will become Exhibit "A", Scope of Services in the agreement.
- B. A sample copy of the City's software agreement is attached to this RFP as Exhibit B – Software as a Service and Exhibit C – Commercial off the Shelf.
- C. Depending on the software solution proposed, Proposers are instructed to accept or provide redlined exceptions to the City's corresponding software agreement. Any exceptions taken by Proposers will be evaluated and scored.

SECTION 4 PROPOSAL RESPONSE, FORMAT AND SUBMITTAL

4.1 Proposal Submittal Overview

- A. This section provides information to assist proposers in preparing their responses and facilitates the subsequent evaluation and comparison process.
- B. Proposals shall include responses to the information presented in Section 4.2, Organization and Assembly of Proposal. Proposals submitted without answers provided will not be considered complete and will be scored accordingly. Question responses need to be specific, detailed and straightforward using clear, concise, easily understood language.
- C. Proposers are encouraged to use recycled paper in the preparation of additional documents submitted with this solicitation and shall use both sides of paper sheets where practicable.
- D. Sealed proposals shall contain all required attachments and information and be submitted to the City no later than the date, time and place stated on the front of this RFP or as amended. The proposals shall show the title and number, the due date specified, and the name and address of the Proposer on the face of the envelope. Proposers are cautioned that failure to comply may result in non-acceptance of the proposal. The Proposer accepts all risks of late delivery of mailed proposals or of misdelivery regardless of fault. Proposals properly and timely submitted will be publicly opened.
- E. Proposals will only be accepted from Proposers able to complete the delivery of goods or services described in the solicitation document. Joint ventures shall submit one proposal for the team, with accompanying proof of the joint venture agreement.
- F. If a company chooses not to submit a proposal, the City requests the company advise the Buyer by email if they desire to remain listed for the subject of this RFP and state the reason they did not submit a proposal.

4.2 Organization and Assembly of Proposal

- A. Format as a PDF, unless otherwise instructed, to fit onto a letter size, 8.5" x 11" page when printed. Pages shall be limited to single space, minimum 12-point font. Pages are defined as one side of an 8.5" x 11" sheet of paper.
- B. Submit one, unbound, original, marked ORIGINAL. The unbound original may be secured using binder clips, rubber bands or other such items. No combing or three ring binders.
- C. Submit one electronic copy on a compact disk or flash drive in Adobe Acrobat™ format. City provided Attachments or Exhibits in an excel spreadsheet shall be submitted in native format. The electronic copy must match the original document submitted.
- D. Proposers are expected to include the following information in the proposal response. Unless identified as a Mandatory requirement, failure to provide clear responses or omitting information may not result in immediate disqualification. Vague and/or omitted information may move forward with evaluation; however, the incompleteness will be reflected in the evaluation scoring of the proposal.
- E. Proposal is to be organized into the following Sections as shown in the table below.

Proposal Submittal Item	Description	RFP Reference Document/Page Limit
1	Proposers Signature and Submittal Page	RFP Cover Page (1 st Page)
2	Internal Revenue Service Form W-9 (Oct 2018) or Firms outside the US: Internal Revenue Service Form W-8 (2017)	Proposer to Provide

3	Conflict of Interest / Non-Disclosure Agreement	Exhibit A
4	City of Lynnwood Contract – Accepted and/or redlined	Exhibit B – SaaS Exhibit C - COTS
5	Exceptions to Contract Terms and Conditions	Exceptions may be included as comments in redlined document (see above) or as a separate document
6	Executive Summary Response should include: <ul style="list-style-type: none"> • An Executive Overview/Summary of the proposed software solution, describing the overall approach, methodology, City's responsibilities and overall schedule, excluding cost. Cost shall only be listed in Exhibit D – Price Proposal and Resources Worksheets • Refer to Section 1.19 Cooperative Purchasing. Indicate if you are willing to offer these same services to other governmental entities. 	Limit 5 pages
7	Company Background and History Describe in detail the firm's experience of providing Permit Tracking Software solutions and working with government entities. Provide the following information: <ul style="list-style-type: none"> • Total number of employees • Type and number of company employees committed to the product and support of proposed solution • Office locations • Total number of active clients • Total number of active government clients • Total number of active Washington State clients • Total number of Washington State City clients • Total number of completed implementations of the proposed product solution and version • Total number of active government clients using the proposed product version • Total years offering government Permit Tracking Software Systems • Largest active government installation including population • Smallest active government installation including population • Other products offered by company • Disclose recent, within the past three years, quantitative and qualitative information about current and pending litigation to enable the City to understand the nature of the litigation, potential magnitude of the litigation, and potential time of litigation. Proposer may aggregate disclosures about similar litigation by class or type so that the disclosures are understandable. Include the timeline of the litigation history, subject of the litigation and current status of litigation. Proposals must also include any pending litigation of any third-party partners in the proposals. 	Limit 10 pages

<p>8</p>	<p>References</p> <p><u>For each reference provided</u> include the following:</p> <ul style="list-style-type: none"> • Name of Client, address, number of employees • Project Manager/Contact, title, email, phone number • Summary of the project and current status • Modules implemented • Original budget, # of change orders and revised budget • Original start date, actual start date • Original end date, actual end date <p><u>Current References</u></p> <ol style="list-style-type: none"> 1. Provide at least five (5) city/municipal government clients with whom the Proposers has worked with during the past three (3) years that are of similar size and complexity to the City. 2. Three (3) of the references should be from City/municipal governments that have been live with the current software version for a minimum of two (2) years 3. Two (2) of the references should have been live with the current software version for less than one (1) year. <p>Proposer may substitute other organizations to ensure five (5) total references are provided. Proposers are to indicate how these substitute references deviate from the requested characteristics.</p> <p>City prefers to receive comparable references from the State of Washington or nearby states. If possible, the City prefers references that utilize the same Project Manager as will be recommended for this Project, and the same scope of functional areas.</p> <p><u>Site Visit Reference</u></p> <p>Provide at least three (3) similarly-size City/Municipal governments with which the City may conduct site visits, preferably in Washington State or nearby states.</p>	<p>Limit 10 pages</p>
<p>9</p>	<p>Proposed Key Personnel Team Organization / Project Roles and Responsibilities</p> <p>Provide an organization chart showing all proposed team member roles and responsibilities, including any subcontractors/subconsultants.</p> <p>Proposers are to provide the following information for each member of the Project Team. Resumes should be specific to the actual personnel to be assigned to this Project for all primary roles. The resumes should be provided for the implementation team as well as the personnel involved in live operation and ongoing support and maintenance.</p> <p>The City is interested in personnel that hold Project Management certifications. Resumes should include any Project Management Professional or Certified Associate in Project Management certifications held.</p> <p>The City reserves the right to require background checks be conducted on any individual conducting work as either an employee of the Consultant or Proposer, or on the Consultant's or Proposer's behalf.</p>	<p>Limit 10 pages, excluding resumes</p>

	<ul style="list-style-type: none"> • Name and Title • Home Office Location • Length of Time Within Company • Roles Within Company • Educational Background • Professional Registrations and Memberships • Professional References • Role(s) on this Project / Description of this Project roles and responsibilities • Percent of time assigned to this project / Percent of time assigned to other projects at the same time • List of Modules implemented relevant to modules proposed for the City's project, dates and versions. • Additional relevant information 	
10	<p>Sub-Contracting Describe and identify if any of the required services will be sub-contracted. For each of these services provide the following:</p> <ol style="list-style-type: none"> 1. Summary of the service 2. Reasons for sub-contracting 3. Proposed sub-contractor, name, location 4. Detailed sub-contractor responsibilities 5. Sub-contractor experience 6. Previous use of sub-contractor 7. Any additional relevant information 	2-3 pages of narrative per Sub-Contractor
11	<p>Project Approach / Software Solution / Implementation Methodology / Project Schedule The City anticipates the consultant taking the lead role with assistance from the City.</p> <ul style="list-style-type: none"> • Describe the project approach and proposed software solution. • Describe the overall project objectives, including a list of deliverables and milestones of the Project, including associated dates. For the purpose of comparing timelines, assume a June 1, 2020 project start date. • Each deliverable or milestone should describe exactly how and what will be provided to meet the needs of the City and describe what role or functions will be required by the City. 	Limit 30 pages
12	Functional and Technical Requirements / Capabilities	Exhibit E
13	<p>Software Customization Plan The City anticipates the consultant taking the lead role. If any customization is proposed to meet the City's needs, describe in detail, what the customization entails, the purpose, the end results, what additional resources (staff, hardware, software, etc.) may be required.</p>	Limit 10 pages

14	<p>Data Conversion Plan</p> <p>The City anticipates the consultant taking the lead role with assistance from the City.</p> <p>The City has limited legacy information to be converted, such as, permit number, address, type of permit, completed or not, site and parcel information, owner information, and maybe fees.</p> <p>Describe typical data conversion activities from a legacy Permit system to the proposed system. Explain how it is planned out, what data clean-up is expected prior to conversion and how converted data is validated. Explain limitations on record/record counts converted and any pricing differences based off record count.</p>	Limit 10 pages
15	<p>System Interface Plan</p> <p>The City anticipates the consultant taking the lead role with assistance from the City.</p> <p>Provide a list of all Proposer system interfaces currently in use with the proposed software solution. Include the date created, version of software supported for the other software and proposer's software.</p> <p>Describe the typical approach to interfacing with other software systems.</p> <p>Identify any special approach for interfacing with the City's identified interface systems.</p>	Limit 10 pages
16	<p>Training Plan</p> <p>Describe how the primary training for the proposed system will be conducted. Training should cover the typical systems for end-users and administrator requirements.</p> <p>Include training on all system functionality, including screen and report use, ad hoc report creation and use.</p> <p>Address how the Proposer will address training on the responsibilities related to system operation and management, security, problem identification and problem resolution.</p> <p>Will training be in-person or web-based? Are video tutorials available? Provide details related to the training offerings.</p> <p>What data (live, sample, etc.) will be used for training City staff on the use of the system?</p> <p>What provision will the Proposer make for having a system environment available for training exercises, and when?</p> <p>Are training materials available online or as part of the software?</p>	Limit 20 pages
17	<p>Testing and Quality Assurance Plan</p> <p>The City anticipates shared roles for both the consultant and City.</p> <p>Describe the Testing and Quality Assurance Plan that describes all phases of testing: unity, system, interface, integration, regression, parallel, and user acceptance testing.</p> <p>Identify and include both Consultant and City roles and responsibility for testing.</p>	Limit 20 pages

18	<p>System Documentation</p> <p>The City anticipates the consultant will have 100% responsibility for system documentation.</p> <p>Describe the process to document and provide system documentation to the City.</p> <p>If customization is proposed, include how customized documentation will be incorporated into the overall documentation.</p> <p>Describe the plan to update documentation, including any customized documentation, when new software revisions are released.</p>	Limit 5 pages
19	<p>Pre and Post-Implementation Level Support</p> <p>The City anticipates shared roles for both the consultant and the City.</p> <p>At a minimum, describe the ability to adhere to the following standards for issue resolution:</p> <ul style="list-style-type: none"> • Severity Level 1: System is down. Attention required immediately, maximum 30-minute response time. • Severity Level 2: Major functionality of the system is impacted, or parts of the system are down. Maximum of 1-hour response time. • Severity Level 3: Non-mission critical processes are impacted. Maximum of 8-hour response time. • Provide support during standard City business Monday – Friday 7:00 am to 5:00 pm Pacific Time. <p>What access by Proposer is required to the application and/or network prior to troubleshooting?</p> <p>Third party software such as: JAVA virtual machine, Internet Explorer, Mozilla, Safari, etc., is often used in conjunction with a software system. Describe how the Proposer’s support center will notify the City when third party releases are known to create problems with the City current version of the Proposer’s software.</p>	Limit 5 pages
20	<p>System Security</p> <p>Identify and provide certifications the Proposer has received from Cyber / Internet security companies (such as truste.com or Better Business Bureau), if any, as to the security of the Web and the privacy of the information gathered.</p> <p>Include Data Privacy and Security Standards and plans.</p>	Limit 5 pages
21	<p>Business Continuity and Disaster Recovery Plan</p> <p>Describe Proposer’s current disaster recovery measures and contingency plans for business continuity.</p>	Limit 5 pages
22	<p>Price Proposal and Resources Worksheets</p>	Exhibit D

PROPOSAL LABEL

Complete the form below (or a close facsimile) and affix to the exterior lower left-hand corner of the submission envelope(s), box(es), etc. .

URGENT – SEALED PROPOSAL ENCLOSED Do Not Delay – Deliver Immediately	
U R G E N T	 City of Lynnwood Procurement and Central Services Division 19100 44th Ave W Lynnwood, WA 98036
	Proposal Number. 3178 / Robinson
	Proposal Title Permit Tracking and Plans Review Software Solution
	Opening Date
	Firm Name
U R G E N T	