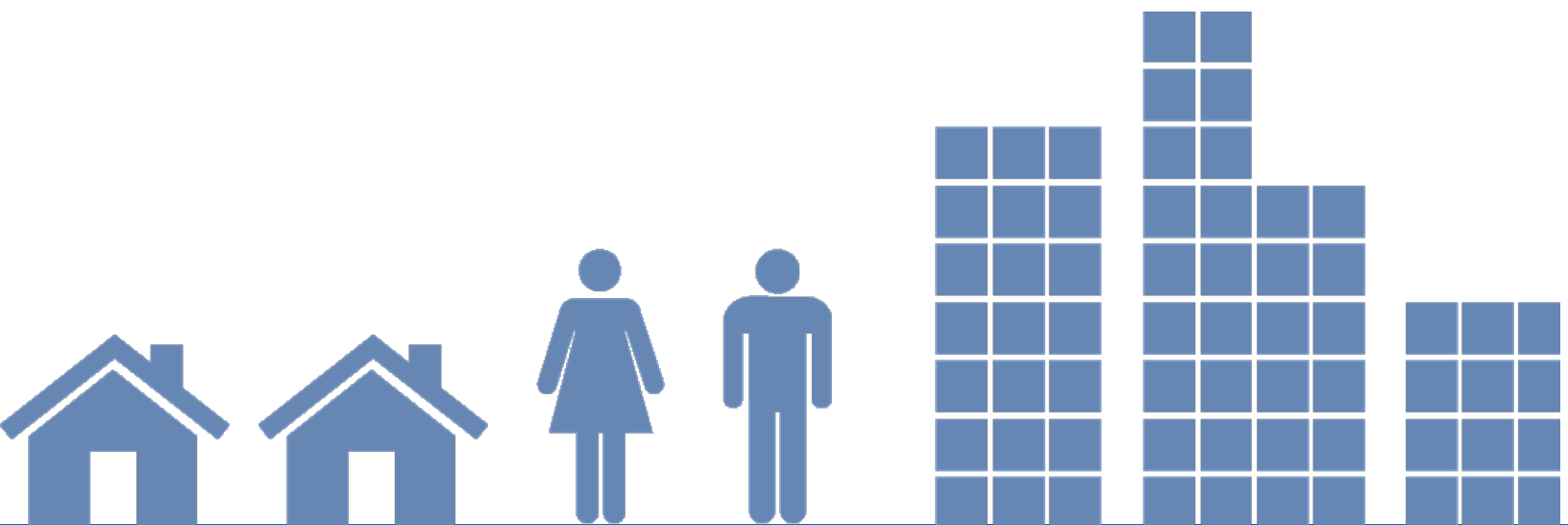


# REQUEST FOR PROPOSALS (RFP)

*City of West Hollywood*

*e-Permitting and Land Use Management System*



Date Issued: November 26, 2012  
Proposal Due: January 18, 2013 @ 12:00 PM (PST)

Submit to: City Clerk  
City of West Hollywood  
8300 Santa Monica Boulevard  
West Hollywood, CA 90069  
Attn: Francisco J. Contreras, AICP

Refer questions to: Francisco J. Contreras, AICP  
Community Development Department  
fcontreras@weho.org



City of West Hollywood  
California 1984



## REQUEST FOR PROPOSALS (RFP)

*City of West Hollywood – e-Permitting and Land Use Management System*

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# REQUEST FOR PROPOSALS (RFP)

City of West Hollywood – e-Permitting and Land Use Management System

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### Exhibits

- Exhibit A. CDD Organizational Chart
- Exhibit B. Technical Environment & Infrastructure  
*An overview of the key components of the City's technology environment.*
- Exhibit C. Sample Basic Contract  
*The contract is the City's standard contract for these goods and services and will be used as a result of this selection process. Any deviations from this contract should be clearly identified in the Proposal. Please note the City's mandatory Living Wage and Equal Benefits clauses.*
- Exhibit D. Technical and Functional Requirements  
*The technical and functional requirements are detailed in the attached Excel spreadsheet (XLS file) and are organized under the following sections (Tabs):*
- A. *Table of Contents*
  - B. *Instructions for Proposers*
  - C. *System Administration*
  - D. *General Technical*
  - E. *General Features*
  - F. *General Financial*
  - G. *Customer Service Portal*
  - H. *Building and Safety*
  - I. *Planning and Land Use*
  - J. *Inspections*
- Exhibit E. Pricing Sheet  
*The pricing sheet has been provided to ensure that all Proposers communicate their Project pricing to the City in a uniform way. The instructions for completing the pricing sheet can be found in Section 5 of the RFP. The pricing sheet is organized into the following sections (Tabs):*
- A. *System Pricing*
  - B. *Additional Licensing*
  - C. *Project Management Details*
  - D. *Additional Training Details*
  - E. *Travel Expense Details*
  - F. *City Owned Infrastructure*
  - G. *Managed Infrastructure Services*
  - H. *Additional Services & Costs*
- Exhibit F. Inventory of Reports  
*A collection of existing activity reports generated with various frequencies (monthly, quarterly, annually, etc.) which need to be reproduced/generated by the new permitting system:*
- *Housing – Current Residential Projects*
  - *Housing – Housing Unit Change Report*
  - *CHPP – Project Status Report*
  - *B&S – Monthly Permit Activity and Revenue Report*
  - *LRMP – Related Projects List*
  - *LRMP – Congestion Management Report*
- Exhibit G. City Address List



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- Exhibit H. CHPP Application Process Flowchart
- Exhibit I. CHPP HdL Screenshots
- Exhibit J. CHPP Permit Activity for 2011
- Exhibit K. CHPP Permit Types & Review Authority  
A table indicating the planning permit/application types and the responsible review authority.
- Exhibit L. Application Forms for CHPP Permits  
*A collection of all the existing planning permit applications forms.*
- *Acceptance Affidavit*
  - *Administrative Permit*
  - *Amendment to GP, Zone Map, Zone Text Application*
  - *Appeal Application*
  - *Billboard (Creative) Application*
  - *Billboard (Standard) Application*
  - *Certificate of Appropriateness*
  - *Conditional Use Permit*
  - *Cultural Resource Designation Application*
  - *Development Permit*
  - *Environmental Questionnaire final*
  - *Extension Request*
  - *Lot Line Adjustment Lot Merger Certificate of Compliance Application*
  - *Mills Act Application*
  - *Parking Use Permit Application*
  - *Planning Division Permit Application*
  - *Project Conformity Review Application*
  - *Rehabilitation Incentives Application*
  - *Sign (Comprehensive Program) Application*
  - *Sign (Creative) Application*
  - *Sign (Standard and Temporary) Application*
  - *Smoking Operation Plan - Application and Information*
  - *Subdivision Application*
  - *Tall Wall Image Change Application*
  - *Temporary Use Permit Application*
  - *Variance*
  - *Zone Clearance (Tenant Change)*
  - *Zone Clearance Application*
- Exhibit M. Other CHPP Forms
- *Affidavit of Posting*
  - *Letter of Agency*
  - *Owners Affidavit*
  - *Performance Bond*
  - *Rehabilitation (Standards)*
  - *Rent Stabilization Notice*
  - *Site Plan Instructions Final*
- Exhibit N. CHPP Manual Database Information (Logs)



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City of West Hollywood – e-Permitting and Land Use Management System

- Directors Hearing Resolution Log
- Historic Preservation Commission Resolution Log
- Mills Act Contract Inspections
- Mills Act Contract Owners Information
- Parking Use Permit Log
- Planning Commission Resolution Log
- West Hollywood Historic Resources Log

Exhibit O. CHPP Schedules

- Directors Hearing Agenda Prep Schedule
- Historic Preservation Commission Agenda Prep Schedule
- Planning Commission Agenda Prep Schedule
- Planning Counter Schedule

Exhibit P. CHPP Fee Sheet 2012-2013 (Beginning Sept.1, 2012)  
*Fee sheet for all applications and services provided by the CHPP Division.*

Exhibit Q. CHPP Web Site Screenshot

Exhibit R. Building and Safety Application Process Flowchart

Exhibit S. B&S HdL Screenshots

Exhibit T. B&S Building Permit Activity for 2011

Exhibit U. Building Permit Types & Review Authority  
*A table that indicates the Building and Safety permit/application types and the responsible review authority.*

Exhibit V. Application Forms for Building and Safety Permits  
*A collection of all existing building permit application forms.*

- Building Permit Application
- Electrical Permit Application
- Grading Permit Application
- Mechanical Permit Application
- Plumbing Permit Application
- Pool or Spa Permit Application
- Sewer or Septic Permit Application

Exhibit W. Other Building and Safety Forms

- Certificate of Occupancy (Sample)
- Commercial Awnings & Canopies
- Construction Hours Calendar
- Documentation of Unreasonable Hardship
- Inspection Record
- Inspection Request Form
- PME Plan Check Checklist
- Residential Window Replacements
- Required Agency Approvals Contact List
- Structural Observation Report Form
- Submittal Requirements for Multi-Family Additions and Remodels
- Submittal Requirements for SFR Additions and Remodels



## REQUEST FOR PROPOSALS (RFP)

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- Submittal Requirements for Tenant Improvements
- Wall Sign Submittals

Exhibit X. B&S Permit and Plan Check Fees

Exhibit Y. B&S Building Valuation Data Sheet

Exhibit Z. B&S Web Site Screenshot

Exhibit AA. B&S Web Site FAQ's

Exhibit BB. LRMP Forms

- Neighborhood Traffic Management Program Request Form

Exhibit CC. LRMP Web Site Screenshot



## REQUEST FOR PROPOSALS (RFP)

*City of West Hollywood – e-Permitting and Land Use Management System*

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## REQUEST FOR PROPOSALS (RFP)

*City of West Hollywood – e-Permitting and Land Use Management System*

### 1. INTRODUCTION AND SCHEDULE

#### 1.1. Purpose of RFP

The Community Development Department (CDD) of the City of West Hollywood (City) is requesting proposals for a permitting and land use management system (commercial off-the-shelf or customized) that has the capability of processing and tracking all Planning and Building & Safety permit review and inspection transactions seamlessly across department divisions. Both off-site (hosted) and in-house solutions will be considered. The submitted proposals will be reviewed to evaluate Proposers who can address the City's functional and technical requirements. The system is expected to greatly expand public access to the permitting and land use processes by using web-enabled technologies including a public information portal and electronic plan review capabilities. The system will replace a permitting system (HdL) that was implemented approximately 10 years ago.

#### 1.2. City Objectives

The City envisions a new system that will simplify and streamline the City's permitting review and management process. The system will be expected to meet the increasing demands of customers to make the permitting process simpler to understand, more convenient to use, more efficient and more predictable. The system is also expected to greatly expand public access to the permitting process by using web-enabled technologies including a public information portal and electronic plan review capabilities. This system may also incorporate the acquisition and use of interoperable hardware and software, which may include mobile devices and large-format touch screens. The system will also interface with the City's GIS solution (a separate RFP will be issued for an enterprise GIS solution in early 2013).

The City desires to obtain a system to add efficiencies and limit the manual research required to support current processing activities. The City also wants to streamline processes by establishing and improving performance metrics while providing accurate data on all permit and entitlement transactions, track revenue recovery, reduce operating costs, improve data quality, ensure performance accountability, and reduce processing times.

The contract resulting from this RFP will include system software licensing, installation/configuration/customization, deliverables, and system infrastructure and maintenance. The City prefers to independently purchase the hardware and database software required for the system.

#### 1.3. Selection Process

The RFP and subsequent evaluation of proposals will allow the City to identify a short-list of Proposers. The short-list Proposers will then be invited to complete an on-site interview and demonstration. Upon completion of the interviews and demonstrations, the City intends to identify a finalist. Even



## REQUEST FOR PROPOSALS (RFP)

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though the City intends to select only a single finalist, the City reserves the right to select more than one finalist in the event that the evaluation committee is not able to agree on a single Proposer.

The finalist(s) will then be required to perform a scripted proof-of-capabilities (POC) demonstration. The POC is not intended to be a generic demonstration of the application, but rather a demonstration of specific product functionality deemed most critical to the City using data provided by the City. Proposers must be prepared to invest the time and resources in the POC to be successful with this procurement. The City will provide the scripts, data, and other relevant documentation at least 10 business days prior to the scheduled POC.

It is the City's intention to negotiate a final agreement upon successful completion of the POC demonstration. If the finalist's solution fails to satisfy the needs of the City, the City will proceed with an invitation to the next highest scoring Proposer to participate in a POC demonstration.

### 1.4. RFP Schedule

The following dates represent the City's best estimate of the RFP schedule that will be followed.

<b>RFP Schedule and Deadlines</b>	<b>Date</b>
RFP issued by the City	November 26, 2012
Deadline for Letter of Intent to Propose	December 10, 2012
Deadline for submission of written questions or clarification requests	December 17, 2012
City responses posted to written questions or clarification requests	January 4, 2013
<b>Proposal due date</b>	<b>January 18, 2013 (noon)</b>
City completes technical and pricing evaluations	February 1, 2013
City notifies short-listed Proposer(s)	February 4, 2013
Short-list Proposer(s) on-site interview and demonstrations	Week of February 18, 2013
Finalist Proposer(s) notified and provided POC packet	February 25, 2013
POC demonstration to Selection Committee	Week of March 18, 2013
Conclusion of Contract Negotiations (assumes successful POC)	April 1, 2013
City Council Meeting – awarding of proposal and contract signing	April 15, 2013
<b>Contract start date</b>	<b>April 15, 2013</b>

The City reserves the right, at its sole discretion, to adjust this schedule, as it deems necessary. Notification of any adjustment to the RFP Schedule will be provided to all Proposers that submitted a Letter of Intent to Propose.

### 1.5. Implementation Timeline

The City anticipates having the Proposer begin work in April 2013, with submittal of final deliverables from the scope of work to the City occurring by April 2014. Proposals containing earlier completion of



## REQUEST FOR PROPOSALS (RFP)

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the Proposer's work are acceptable and encouraged. Contract will continue with annual maintenance renewals for a total of no more than 10 years. The City reserves the right to accept proposals that fall outside of this estimated length of implementation.

### 1.6. Letter of Intent to Propose

Each Proposer who plans to submit a proposal should register by submitting a letter indicating a Proposer's intent to respond to this RFP. The Letter of Intent to Propose should be emailed to the Project Manager no later than December 10, 2012. Proposers may withdraw their Letter of Intent to Propose at any time before the deadline for submitting a proposal.

The following information should be included in the Letter of Intent to Propose:

- Proposer's name
- Name and title of main contact
- Address, telephone number, and email address of main contact
- Signed Statement of Intent to Propose

Submittal of a Letter of Intent to Propose is necessary to ensure a Proposer's receipt of RFP amendments and other communications regarding the RFP. The Letter of Intent to Propose is not intended to bind Proposers to submitting a proposal.

### 1.7. Project Manager

All communications concerning this RFP must be submitted in email to the Project Manager identified below. The Project Manager will be the sole point of contact for this RFP.

Francisco J. Contreras, AICP  
CDD Innovations Liaison  
City of West Hollywood  
8300 Santa Monica Blvd  
West Hollywood, CA 90069  
[fcontreras@weho.org](mailto:fcontreras@weho.org)

Contact with anyone else in the City is expressly forbidden and may result in disqualification of the Proposer's bid. The City has assigned the following identification that must be referenced in all communications: "RFP: e-Permitting and Land Use Management System"

### 1.8. Questions or Clarifications Pertaining to the RFP

It shall be the Proposer's responsibility to ask questions, request changes or clarifications, or otherwise advise the Project Manager if any language, specifications or requirements of an RFP appear to be ambiguous or contradictory.

Every attempt shall be made to ensure that the Proposer receives an adequate and prompt response. However, in order to maintain a fair and equitable RFP process, all Proposers will be advised, via the issuance of an addendum to the RFP, of any relevant or pertinent information related to the



## REQUEST FOR PROPOSALS (RFP)

*City of West Hollywood – e-Permitting and Land Use Management System*

procurement. Questions and requests for clarification regarding this Request for Proposal must be directed in writing, via email, to the Project Manager at least ten (10) calendar days prior to the Proposal due date. Therefore, Proposers are advised that any questions received less than ten (10) calendar days prior to the RFP opening date may not be answered. Proposers should not assume that electronic communications have been received unless confirmation of receipt has been sent.

If, in the opinion of the Project Manager, additional information or interpretation is needed by the Proposers, an addendum will be issued. Any addendum or addenda issued by the Project Manager, that may include changes, corrections, additions, interpretations, clarifications, or information, and issued seventy-two (72) hours or more before the scheduled closing time for submitting the Proposal (Saturday, Sunday, and legal holidays not included) shall be binding upon the Proposer. City shall supply notice of such addenda via email to all Proposers who have submitted a Letter of Intent to Propose, but failure of the Proposer to receive or obtain such addenda shall not excuse the Proposer from compliance therewith if awarded the contract.

In addition, all addenda and updates shall be posted on <http://www.weho.org/index.aspx?page=1188>. Please check this site often.



## 2. WEST HOLLYWOOD OVERVIEW AND CURRENT ENVIRONMENT

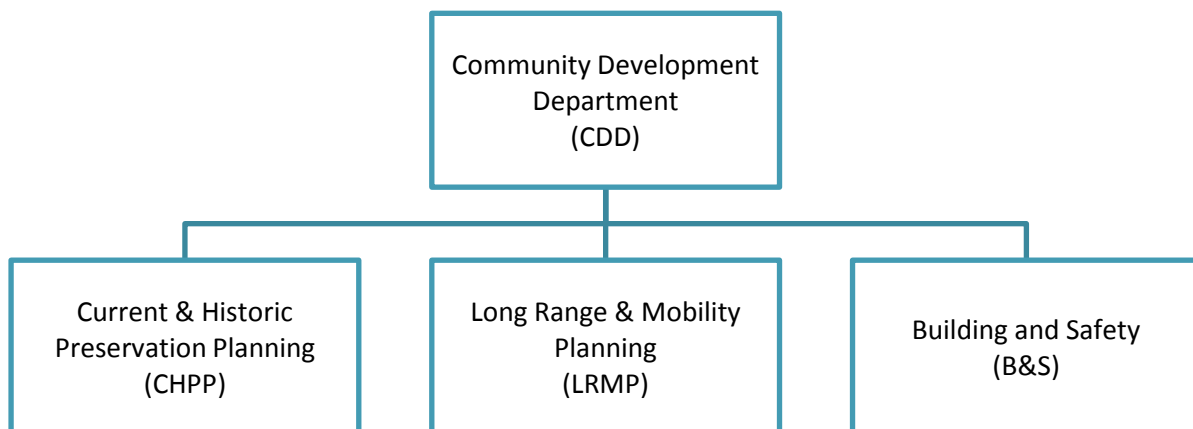
This section of the RFP provides an overview of the City’s current operations, organization, and technical environment. This information is provided to assist the Proposers in responding to this RFP.

### 2.1. City Overview

West Hollywood is a city of 34,000 people located in a 1.9 square mile area that is completely surrounded by the cities of Los Angeles and Beverly Hills. It has an annual operating budget of eighty million dollars. West Hollywood has just over 230 full-time employees and a significant number of partnerships with Proposers who provide services ranging from police and fire services, to environment and landscaping services. West Hollywood has a City Manager form of government in which the City Manager functions like a corporate CEO. The City has a five member City Council, all of which are elected at large.

### 2.2. Community Development Department Overview

The Community Development Department (CDD) consists of three divisions: the Current and Historic Preservation Planning Division (CHPP); Long Range and Mobility Planning Division (LRMP); and the Building and Safety Division (B&S). The Department has approximately 30 staff. A simplified overview of CDD’s organization chart is presented below with a brief description of each division’s responsibilities. Please refer to Exhibit A for the full CDD Organization Chart.



#### **Current & Historic Preservation Planning (CHPP) Division**

The CHPP Division includes 13 employees: a Manager, two Senior Planners, four Associate Planners, one Assistant Planner, one Urban Designer, two Administrative Assistants, and two interns. CHPP focuses on entitlement processing and environmental review. CHPP processes approximately 800 - 1,000 permits annually. CHPP is responsible for:



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- Zoning administration
- Land use regulation
- Permit review and processing
- Environmental review
- Plan checking
- Planning assistance
- Special studies
- Subdivisions
- Historic Preservation

### Long Range and Mobility Planning (LRMP) Division

The LRMP Division includes seven employees: a Manager, two Senior Planners, one Associate Planners, one Assistant Planner, one Administrative Assistant, and one intern. In addition to maintaining the General Plan, LRMP focuses on long range planning efforts which often result in Planning Code and General Plan changes. In addition, LRMP is responsible for:

- Long-range planning
- General Plan updates and maintenance
- Neighborhood traffic management
- Transportation planning
- Bicycle planning
- Pedestrian planning

### Building and Safety (B&S) Division

The B&S Division includes eight employees: a Manager, three Senior Plan Checkers, two Senior Building Inspectors, and two Permit Technicians. B&S focus processes approximately 2,000 construction-related permits per year. B&S is responsible for:

- Building permits
- Building inspections
- Building plan review
- Capital project review
- Disability access review
- Building permit fee administration

### 2.3. Existing Permitting Review Process

The following provides an overview of the City's existing permitting and plan review process. This overview is not intended to serve as the Technical and Functional Requirements, but to give Proposers an understanding of the City's existing permitting and plan review processes. Please refer to Exhibit H for a flow chart of the Planning Permit Process and Exhibit R for a flow chart of the Building Permit



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Process. (Because LRMP does not issue permits, the CHPP process flow chart incorporates the LRMP work flow General Plan and the Zoning Code amendments.)

### Planning Permit Process (See Exhibit H)

1. Pre-Application Meeting
  - a. Pre-application meetings are available to applicants that request in-depth review or discussion of proposed projects with various department heads before submittal of a permit application. These meetings are not required but may be recommended to applicants proposing large or complex projects. These meetings are arranged by the CHPP Manager at the applicant's request. A fee is charged for this service.
2. Application Processing
  - a. Customer Information – Customers that arrive in-person are routed within City Hall via a manual (non-automated) queuing system. Before a customer has applied for a permit, assistance is available via "over the counter" discussions at the CDD Counter, or via phone.
  - b. Application Submittal
    - i. Physical applications are screened at the counter by the Planner On Duty (POD).
    - ii. The POD preliminarily reviews application for accuracy and completeness.
    - iii. Property data is verified and cross-checked against comprehensive property profiles containing historical and current property information.
    - iv. Property data is reviewed for any issues that may affect permit issuance (i.e. code enforcement, historic designation, etc).
    - v. If the application lacks required information or documentation, the application may not be accepted and the applicant is advised that the application needs to be revised and resubmitted.
  - c. If application is accepted
    - i. Application data is entered by the POD and retained in the existing HdL permit tracking system
    - ii. HdL generates a permit number for each required permit for the project
    - iii. Planning application fees are calculated and an invoice is generated using an automated PDF document.
    - iv. The applicant takes the invoice and pays the Cashier at the Finance Counter and receives two receipts: one receipt is for the applicant's records; the other receipt is returned to the POD as proof of payment and is attached to the application. Fee payment verification is entered into HdL.
  - d. Applications are then reviewed via two non-exclusive paths:
    - i. Over-the-Counter Review Process: involves projects that can be reviewed within a short examination period by the POD
      1. Application is reviewed and approved at the counter by the POD



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2. The POD stamps the plans approved and sends the applicant to Building and Safety to start the Building Permit process
- ii. Review by a Project Planner: Project Planner review is required when the zoning code "triggers" a review for a specific permit type. Regulations directing review for specific permit types can be found in the zoning code, as well as within conditions of approval from past land use approvals for a project.
  1. Application is placed in a "to-be-assigned" bin
  2. Applications are assigned to a Project Planner on a weekly basis at CHPP Division staff meeting. (From this point forward, the application status is tracked manually by the Project Planner and he/she provides customers permit review status and application disposition.)
  3. Applications are reviewed by the Project Planner for accuracy and completeness.
  4. Other departments' comments are received by the Project Planner at a Development Review Committee meeting, and incorporated into the planner's review of the application.
  5. Application and plan review is conducted within established "turnaround times."
  6. If an application is missing any required information "incomplete letters" are mailed to the applicant within 30 days of application submittal outlining any required information that must be submitted before the review can continue and to deem the application complete.
  7. If an application requires a Neighborhood Meeting, a Neighborhood Meeting is scheduled within 60 days of application submittal.
  8. The applicant must submit missing application information within 180 days of issuance of an incomplete letter or application is withdrawn by staff. If an application resubmission is missing any required information "incomplete letters" are mailed again within 30 days of application resubmittal outlining any required information that must be submitted before the review can continue and to deem the application complete. This process continues until the application is deemed complete.
  9. When an application is deemed complete a letter is mailed to the project applicant.
  10. Once an application is deemed complete, the Project Planner will determine what type of environmental review is required to process the project.
  11. The Project Planner will process the environmental review along with the application or a consultant is hired to process the environmental review in lieu of the Project Planner.





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12. Certain applications may be approved or denied by the Project Planner without a hearing, acting on behalf of the Community Development Director, subject to findings and conditions of approval.
  - a. A Microsoft Word document is generated that contains the project description, the findings of determination, and conditions of approval if the project is approved. Conditions of approval from other departments are incorporated into this document.
  - b. The project approval or denial can be appealed to the Planning Commission within 10 days of approval.
  - c. If an appeal is filed with the City Clerk within 10 days of approval, the project is scheduled for a hearing with the Planning Commission.
  - d. If an appeal is not filed, the applicant is given an Acceptance Affidavit that they must sign and get recorded with the County Recorder's Office. The Affidavit is filed along with the approval documentation.
  - e. The planner stamps the plans approved and sends the applicant to Building and Safety to start the Building Permit process.
13. Certain applications require a hearing with a reviewing body (Planning Commission, City Council, etc.).
  - a. In these cases, a public hearing is scheduled based on calendar availability
  - b. A public hearing notice is posted on site, newspaper notices are published (if required), and a notice is mailed to property owners and tenants within a 500-foot radius. (The radius mailings maps and labels are generated by a third party but the notices are mailed out from City Hall.)
  - c. Staff prepares a staff report with a staff recommendation and conditions of approval
  - d. Staff report packets are assembled by the administrative staff. The packets contain all of the staff reports for a particular meeting.
  - e. A hearing is held which is open to the public for testimony, and the review body issues a decision.
  - f. Decisions at a public hearing may be appealed to the relevant review body. All appeals require a public notice, a public hearing, and a decision issued by the review body. The City Council is the final review body for any appeal. City Council actions are not appealable.





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- vii. Proof of payment is delivered to Permit Technician
          - viii. Permit is issued (see below)
        - d. Concurrent Plan Check: involves more complex projects that require longer review times in order to coordinate review with other City departments.
          - i. Plan check application is processed by the Permit Technician and data is entered into HdL
          - ii. Plan check fees are calculated and an invoice is issued to the applicant
          - iii. Applicant pays fee at the Cashier's desk and returns to permit counter with proof of payment
          - iv. Plans and construction documents are received and bundled together for distribution to yet-to-be assigned Plan Check Engineer and various departments that require review of project
          - v. Permit Technician sends an email notice to various departments' point of contact to come and pick up their set of plans for review
          - vi. Project is assigned to a Plan Check Engineer at weekly staff meeting
          - vii. Assigned Plan Check Engineer updates information in HdL to reflect his project assignment
          - viii. Concurrent Plan Check review is conducted within established "turnaround times" that are recorded in an Excel spreadsheet that tracks submittal dates and review deadlines
          - ix. If approved at first round, the applicant is notified by the Permit Technician and the permit is processed (see below)
          - x. If not approved at first round, corrections and comments are compiled from all departments and compiled in a Microsoft Word document
          - xi. Applicant is contacted via telephone that comments and redlined plans are ready to be picked up at B&S counter.
          - xii. Permit Technician updates Excel spreadsheet with information as to when plan check corrections were picked up by applicant.
          - xiii. Revised and corrected construction documents are resubmitted to Permit Technician for redistribution to Plan Check Engineer and various departments
          - xiv. If approved, the applicant is notified by the Permit Technician and the permit is processed (see below), or process continues until all outstanding items have been corrected or addressed by the applicant
3. Building Permit Issuance
  - a. Permit information is processed by the Permit Technician
  - b. Building permit fees are generated by HdL; other development fees are collected by various other departments prior to building permit issuance
  - c. All outstanding fees are paid by the applicant at the cashier before a permit can be issued
  - d. Once proof of payment is received, permit is issued to applicant





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- C. Plan Review and Approval – Project plan review, from pre-application to the permit finalization, must be fully coordinated and tracked between divisions. The entire plan review process should be subject to standard plan review and approval processes and agreed upon performance standards.
- D. Permit Fees – The collection of all permit, entitlement, impact fees and payments should be coordinated with the objective of developing common accounting practices and collection points.



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### 3. SCOPE OF WORK

The City of West Hollywood is seeking Proposals from qualified Proposers with demonstrated experience in developing, implementing, and maintaining permit issuance, review, and inspection management systems. The successful Proposer will be expected to enter into a not-to-exceed Contract with the City (reference Appendix XX – Sample Basic Contract).

The City proposes to engage the Proposers for the following:

#### **Phase 1. Project Initiation, Analysis, & Planning**

Project initiation will include staff training and setting up the sandbox/training environments such as the development environment, test environment, and production environment. Analysis will include Project scoping and prototyping in order to plan the System architecture, and to develop an understanding of how the proposed System will fit into the existing City IT infrastructure. Prototyping will be conducted for several business practices in order to demonstrate the proposed System functionality. A project plan and detailed statement of work will be developed to establish the project schedule and details of the phased approach.

#### **Phase 2. System Analysis and Specification**

The Analysis and Specification phase is comprised of the activities required to define the baseline configuration of the System. The key output of the process is a blueprint for all design, configuration, customization, and data conversion efforts throughout the Project and establishes the benchmarks for testing and Acceptance at the conclusion of the Project. Blueprints will be created for the work processes as well as for the creation or configuration of interfaces. Change management will also be outlined in this phase. A strategic and tactical plan shall be laid out addressing training, outreach, demonstration, and interaction with work groups and a time table for those efforts which supports the implementation schedule. The aforementioned will become a detailed statement of work.

#### **Phase 3. Initial System Configuration, Customization, and Testing**

This phase includes data conversions, customization or configuration of interfaces and development of scripts to automate business processes and custom report development. The first round of quality assurance (QA) testing will be conducted during this phase.

#### **Phase 4. Further System Implementation and Refinement**

Two additional rounds of testing and analysis will result in further refinement of the System.



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### **Phase 5. Beta Testing / Deployment Rehearsal**

This will include validating completion of the Configuration, Customization, Modification, data conversion, report writing, interface, and data migration efforts to meet the agreed upon requirements and to assure the System is ready to move into the Production environment. Administrative and technical training will be provided to the City on System administration, maintenance, and User configuration. City staff will be trained into order to provide training to Users. Proposer support will be provided for the purpose of assisting the City with development of a Pre-Production checklist, final data conversions, System validation, staff preparation assistance and training, and coordination of deployment.

### **Phase 6. Deployment / Go Live**

Post deployment support will be provided by the Proposer to address issues and provide consultative advice immediately following the move to the production environment for daily use. Final Acceptance Testing shall be performed and issues will be identified and addressed by the Proposer during this period.

### **Phase 7. Warranty / Final Commission / Declaration of Project Completion**

Post go-live warranty support will be provided by the Proposer to address issues and provide consultative advice for a period of 12 months following implementation. Any remaining implementation issues will be identified and addressed during this period.



## 4. WORK REQUIREMENTS

### 4.1. Required Services

The Proposer will implement a new electronic permitting system along with any required ancillary systems and interfaces to City and other identified information systems. The Proposer shall be expected to work closely with designated City personnel at CDD and other departments (e.g., Information Technology) to accomplish the goals, to perform the tasks, and to best meet the functional and technical requirements as listed below:

#### Goals

##### A. Updating the Permitting and Land Use Management System

- Setting up new technical infrastructure, both at the City and/or a hosting site (3rd party hosting site) to support a state of the art electronic permitting system. For 3rd Party hosted option, a separate Agreement for Services will be required.
- Setting up new business processes and permit/case types and workflow.
- Migrating the City's historical data and documents to be accessible in the new system and to follow the new business process and permit/case types and workflow.
- Integrating with City systems, such as:
  - Electronic Digital Imaging System (Laserfiche);
  - ERP - Tyler Eden Inforum Gold v5.7.1.1
  - Permitting - HdL
    - HdL Building Permits v1.10.52
    - HdL Rent Stabilization System v1.2.2
    - HdL Business License System v4.5.136
    - HdL Business License Regulatory v4.5.136
  - Work Order
    - Cartegraph v8.2b
      - Administrator module
      - Navigator module
      - VERSAview module
      - WORKdirector module
  - Report Writer
    - Crystal Reports v9 and v10
    - Crystal Reports Server v11
  - GIS
    - ESRI ArcGIS v9.3 (10 concurrent licenses)
    - Digital Map Products – CityGIS 7.0 (web based GIS <http://maps.digitalmapcentral.com>)





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- Document Imaging/Records Management
  - LibertyNet v9.0.00552(migration pending)
- Customer Relations Management (CRM)
  - GovPartner Connect 2012 – CRM Module;

and external systems such as the Proposers State License Board database of registered Proposers. (See Exhibit B for an overview of the key components of the City's technology environment.) Interagency Service Level Agreements with each of the Systems interfaced will determine the service level expectation and role of the selected Proposer in maintaining service levels.

- B. Migrating to full digital documents and file management throughout CDD's business process and workflow including implementing online electronic plan review and online customer service through online customer service portal.
- C. Implementing wireless computing devices for the staff and inspectors allowing them to operate remotely when receiving their work assignments, entering inspection results and making updates, annotating and uploading pictures, accessing permit and case information, printing inspection results, violation notices, etc.

### Tasks

- A. Sandbox and technical/admin training of project team, prototyping and proof of concept of example set of business processes/workflows, etc.
- B. Project planning, detailed work task development and assignment of responsibility, project management and coordination.
- C. Development of detailed requirements and specifications for each of the business processes/workflows within each section and program, including the system data architectures (permit/case types and sub-types, property model, people records, fees and billing) as well as the interfaces needed and a data migration plan.
- D. Configuration of the new system to these specifications and development of the programming specifications where necessary. Initial System architecture setup and data migration.
- E. Minimum of three (3) rounds of configuration/programming, user testing, and gap analysis.
- F. Additional data migration testing, correction and clean-up.
- G. Concurrent staff user training and preparation for migration to new System, as well as customer orientations and training on the online customer service portal.
- H. Beta testing/Soft Go Live of new system involving final user acceptance testing.
- I. Final data migration plan and testing.



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- J. Develop Service Level Agreement (SLA) for the final system implementation as part of the Maintenance Contract.

### **Functional and Technical Requirements**

The functional and technical requirements are provided in detail in Exhibit D. Proposers are required to respond to each functional or technical requirement per the instructions in the exhibit. The functional and technical requirements are organized under the following tabs:

- A. Table of Contents
- B. Instructions for Proposers
- C. System Administration
- D. General Technical
- E. General Features
- F. General Financial
- G. Customer Service Portal
- H. Building and Safety
- I. Planning and Land Use
- J. Inspections

An electronic copy of the document can be downloaded at the e-Permitting and Land Use Management System RFP web page at <http://www.weho.org/index.aspx?page=1188>.

#### 4.2. Work Performed by the City

The City has assigned a Project Manager who will oversee the work and provide support as needed; this Project Manager shall be the primary and first point of contact for the Proposer, from initial conversations through all phases of the Project. The Project Manager will provide project support including, but not limited to, organization of meetings with departmental and technical staff, performing requirements gathering, and development of specifications and documentation. With proper and evaluated training, the Project Manager will also assist in configuration and programming of the new system, as well as analysis, specification and development of the system interfaces with other City information systems.

Specific duties the City will perform include:

- A. Provisioning of technology services through the City's Information Technology (IT) Division.
- B. The Selection Committee (CHPP Manager, B&S Manager, IT Manager, IT Systems Engineer, and Project Manager) will be available during regular business hours to meet with, and provide information requested by, the Proposer.



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- C. Providing on-site work space, Internet access, and other standard office equipment at the City when required.
- D. Procuring and installing any hardware and operating system software necessary for the City to use the system, which is identified in the Proposal.
- E. Providing communication to various departments and individuals on the status of this Project.

### 4.3. Deliverables

Deliverables shall be considered those tangibles and resulting work products which are to be delivered to the City, such as draft documents, data, interim findings, drawings, schematics, training, meeting presentations, final drawings and reports. Deliverables shall be in an editable format such as MS Word, Excel, PowerPoint, or Visio. Documents within documents shall also be in an editable format as mentioned in the previous statement.

Proposer shall construct the Deliverables in the best and easiest way, based on their Product. However, the City will review Deliverables separately and in total, to affirm the total Deliverables meet the minimum components as described in the mandatory requirements. All deliverables and resulting work Products from this contract will become the property of the City of West Hollywood.

Deliverables and schedule for this Project shall include:

#### **Phase 1. Project Initiation, Analysis & Planning**

- A. Deliverable: Detailed project plan and statement of work

Proposer and the City will conduct a project scoping in order to create a detailed project plan and statement of work. This will include the project schedule, a phased approach, the system architecture, an assessment of the City's requirements and a determination of how to fit the system into existing City of West Hollywood IT infrastructure.

The project schedule shall assume an April 2013 start date and an April 2014 go-live date. The project schedule should include the following:

- An estimated timeline for implementation;
- Identification of significant tasks and subtasks;
- Project milestones and meetings; and
- A training schedule with the various Departments responsible to use the permit tracking system.

The project plan shall also address the following:

- Analysis and planning
- Data migration scoping and plan
- Gap analysis (Scripting and Programming)
- System Interfaces analysis and scoping
- Detailed Statement of Work



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- Detailed Implementation Plan

### B. Deliverable: Setup of sandbox/training environment

Setup an environment on a local or Proposer hosted sandbox/training site for the City with the full feature set and program model template (Sandbox Setup).

### C. Deliverable: Project team training

Provide on-site training in the sandbox environment consisting of technical training (configuration and scripting), and user training (including post-test verification of staff competencies).

### D. Deliverable: Prototype for proof of concept

- Setup of demonstrative business workflows and configurations for up to twelve example permits / applications
- Provide proof of concept demonstrations that current permits / application types can be processed in the Sandbox environment
- Development of system requirements matrix and Gap Analysis between expected requirements and prototype

## Phase 2. System Analysis and Specification

### A. Deliverable: Planning permits process specification document

Create a specifications document for design and configuration for planning and land use permit processes.

### B. Deliverable: Building permits process specification document

Create a specifications document for design and configuration for building permit processes.

### C. Deliverable: Inspections process specification document

Create a specifications document for design and configuration for building permit inspection work processes.

### D. Deliverable: Billings /cashiering specification document

A specifications document will be created detailing billings/cashiering process.

### E. Deliverable: GIS interface specification document

A specifications document will be created detailing the interface with GIS.



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F. Deliverable: IVR interface specification document

A specifications document will be created detailing a possible IVR Interface for inspection scheduling and management.

G. Deliverable: Historical data conversion specification document

A specifications document will be created detailing how historical data will be converted to the new system. (See Section 4.4 below)

H. Deliverable: Licensed Professional interface specifications document

A specifications document will be created detailing the interface to Licensed Professional (Proposers, architects, etc.) data sources.

I. Deliverable: Data warehouse interface specification document

A specifications document will be created for an interface to a data warehouse.

J. Deliverable: Customer/citizen public web portal specification document

A specifications document will be created for a customer/citizen web portal.

K. Deliverable: Inspections mobile access portal specification document

A specifications document will be created for inspections mobile access portal for wireless access for inspectors and field staff.

L. Deliverable: Staff web portal specification document

A specifications document will be created for the staff web portal (back office).

M. Deliverable: Comprehensive change management plan document

A strategic and tactical plan will be provided addressing training, outreach, demonstration, and interaction with work groups and a time table for those efforts which support the implementation schedule.

### **Phase 3. Initial System Implementation, Configuration, Customization, and Testing**

A. Deliverable: Implement all permit/application types, work processes, System interfaces and data conversions in accordance with Deliverables established and agreed upon in Phase 2.

B. Deliverable: First round of QA testing, analysis of permit/application types, work processes, system interfaces and data conversions, and implementation improvements.



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### **Phase 4. Further System Implementation**

- A. Deliverable: Second round of QA testing, analysis of permit/application types, work processes, system interfaces and data conversions, and implementation improvements.
- B. Deliverable: Initial user training, including verification of competencies
- C. Deliverable: Implement necessary custom coding / programming
- D. Deliverable: Further refinement of historical data conversion
- E. Deliverable: Third round of QA testing, analysis of permit/application types, work processes, system interfaces and data conversions, and implementation improvements.
- F. Deliverable: Final system build for soft/hard go-live

### **Phase 5. Beta Testing / Deployment Rehearsal (Soft Go-Live)**

- A. Deliverable: Proposed staffing model and process for ongoing maintenance and support of new system
- B. Deliverable: Administrative and technical training
- C. Deliverable: Report development training including ad hoc reporting and reports found in Exhibit F of this RFP.
- D. Deliverable: Train-the-trainer and creation of user training materials and manuals for the different user groups
- E. Deliverable: Acceptance testing

### **Phase 6. Deployment (Hard Go-Live)**

- A. Deliverable: System go-live and final system acceptance
- B. Deliverable: GoLive support coverage and transfer of system support

### **Phase 7. 12 Month Warranty through Final Commission**

- A. Deliverable: Transition to support team/program document.  
  
A specifications document that will explain how hand off to support team or program will be implemented.
- B. Deliverable: Warranty support for issues relating to implementation (12 months after implementation/system acceptance)



### 4.4. Historical Data Conversion Specification Document

As of the issue date of this RFP, the existing HdL database has approximately 50,000 records that will be migrated to the new system. This includes approximately 10,000 records from CHPP and 40,000 records from B&S. The Historical Data Conversion Specification Document must include specific information and milestones that will help identify the risks and required activities for a successful migration of this data into the new system. At a minimum, the document shall address the following:

#### 1. Pre-Migration Planning and Assessment

Assess the viability of data migration with a pre-migration impact assessment that will consider whether the migration is viable, how long it will take and what challenges may lie ahead. Map out the sequence of tasks, deliverables and dependencies to be required and assign roles to each activity. Create a structured task workflow so each member will understand what tasks are expected and in which sequence.

#### 2. Project Initiation

Create a stakeholder communication plan and determine level, format, and frequency of reporting that will be delivered. Create accurate timelines for migration plan once data has been analysed.

#### 3. Data Landscape Analysis

Create a detailed data dictionary (a catalogue of all the information retrieved on the data under assessment). Identify the high-level objects and relationships that will be linked during the migration. Fully assess the scope and volume of data to be migrated. Focus on pruning data that is historical or surplus to requirements. Create a final scoping report detailing what will be in scope for the migration. Refine project timeline.

#### 4. Solution Design

Create a detailed mapping design specification of how the source and target objects will be mapped, down to attribute level. Create an interface design specification for any interface designs that are required to extract the data from the legacy systems or to load the data into the target systems. Create a data quality management specification that will define how to manage the various data quality issues discovered during the landscape analysis phase. These may fall into certain categories such as: Ignore; Cleanse in Source; Cleanse in Staging Process; or Cleanse on Target. Refine project timeline.

#### 5. Build & Test

Document the migration logic illustrating the transformations and rules that were used to map the legacy and target environments. (This will allow the execution team to analyse the root-cause of any subsequent issues discovered.) Test the migration with a mirror of the live environment, with entire data from the production environment, not a smaller sample set. (By limiting the test data sample one will almost certainly run into conditions within the live data that cause a defect in the migration at runtime.) Define an ongoing data quality monitoring



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solution for the target platform. Create a very detailed plan for how the migration execution will take place. (This will include sections such as what data will be moved, who will sign-off each phase, what tests will be carried out, what data quality levels are anticipated, when will the City be able to use the data, what transition measures need to be taken.)

### 6. Execute & Validate

Demonstrate that the migration has been compliant.

### 7. Decommission & Monitor

Complete system retirement validation. Hand over ownership of the data quality monitoring environment. Close down project by passing over the process and technology adopted to measure data quality during the project.





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### 5. PROPOSAL SUBMISSION

#### 5.1. Proposals Due January 18, 2013

By submitting a Proposal, the Proposer agrees to provide all services specified within the RFP pursuant to all requirements and specifications as contained therein.

Sealed Proposals must be received no later than January 18, 2013 at 12:00 P.M. (PST). The package should be clearly labelled:

RFP: e-Permitting and Land Use Management System  
Name of Proposer  
Proposer's Address  
Proposer's Contact Person  
Proposer's Telephone Number

Proposals received after the scheduled closing time for filing will be returned to the Proposer unopened. Postmarks will not be accepted as proof of receipt. No faxed or emailed proposals will be accepted.

The RFP must be submitted to:

City Clerk  
City of West Hollywood  
8300 Santa Monica Boulevard  
West Hollywood, CA 90069  
Attn: CDD Innovations Liaison

#### 5.2. Proposal Page Limit

Proposals must be clear, succinct and not exceed fifty (50) pages, optional communications material. (See Section 5.6 below.) Proposers who submit more than the pages indicated may not have the additional pages of the Proposal read or considered.

For purposes of review and in the interest of the City's sustainable business practices, the City encourages the use of submittal materials (i.e. paper, dividers, binders, brochures, etc.) that contain post-consumer recycled content and are readily recyclable. Firms are encouraged to print/copy on both sides of a single sheet of paper wherever applicable (if sheets are printed on both sides, it is considered to be two pages). Color is acceptable, but content should not be lost by black-and-white printing or copying.

All submittals will be evaluated on the completeness and quality of the content. Only those firms providing complete information as required will be considered for evaluation. The ability to follow these instructions demonstrates attention to detail.



### 5.3. Proposal Submission

For purposes of this Proposal submission, the Proposer shall submit:

- One (1) complete original printed and signed copy
- One (1) electronic copy in Adobe PDF file format, submitted on a CD or USB flash drive
- One (1) electronic copy in MS Office file formats (signature pages are acceptable in PDF format however all other pages shall be in MS Word, MS Excel, or other editable MS Office format) submitted on CD or USB flash drive, and
- One (1) electronic Redacted for Public Disclosure Copy. If Proposer has no redactions, provide a written statement to that effect.

### 5.4. Redaction for Public Records

Any portion of a Proposal that the Proposer claims as exempt from disclosure must meet the requirements of California Public Records Act Government Code Section 6250 et. seq. When preparing its Proposal submission, the Proposer shall provide one (1) Redacted for Public Disclosure Copy of their Proposal in MS Word or similar editable format with their submission. The Redacted for Public Disclosure Copy shall be a complete copy of the submitted Proposal, in which all information that the Proposer deems to be exempt from public disclosure has been redacted. For the purpose of the Redacted for Public Disclosure Copy, "redaction" means "the careful editing of a document to highlight confidential references; a revised or educated document thereby highlighting the exempt information but otherwise leaving the formatted document fully intact." Proposers shall include a summary page(s) at the beginning of their Redacted for Public Disclosure Copy detailing the location of all redacted information. When exempt information is mixed with nonexempt information on the same page, the exempt information must be redacted in such a way as to allow the disclosure of the non-exempt information. Should the Proposer determine that no redaction is required, that statement may be included within the text of the cover memo.

If a Proposer fails to submit a Redacted for Public Disclosure Copy of their Proposal as required, the City may release the Proposer's original Proposal without redaction.

### 5.5. Conflict of Interest

A Proposer submitting a Proposal thereby certifies that no officer, agent or employee of the City who has a pecuniary interest in this RFP, has participated in the contract negotiations on the part of the City, that the Proposal is made in good faith without fraud, collusion, or connection of any kind with any other Proposer of the same request for Proposal, and that the Proposer is competing solely in its own behalf without connection with, or obligation to, any undisclosed person or firm.

### 5.6. Proposal Organization

The Proposer must provide all information as requested in this RFP. Responses must follow the format outlined in this RFP. Additional materials in other formats, or pages beyond the stated page limit(s) may not be considered. The City may reject as non-responsive at its sole discretion any Proposal or any part thereof, which is incomplete, inadequate in its response, or departs in any



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substantive way from the required format. By submitting a response, the Proposer is accepting the General Terms and Conditions of this RFP. Proposal responses shall be organized in the following manner:

## 1. COVER LETTER

An overall introduction to the proposal is required, including a statement of the Proposer’s understanding of the needs of the City in an executive summary format. The Cover Letter must state the name of the person(s) authorized to represent the Proposer in any negotiations, the name(s) of the person(s) authorized to sign any contract that may result, the contact person’s name, mailing or street addresses, phone and fax numbers and email addresses. A legal representative of the successful firm, authorized to bind the firm in contractual matters must sign the Cover Letter and the Proposal response. The letter may also briefly set forth any particular information the Proposer wishes to bring to the City’s attention and if any information contained in the response should be considered proprietary.

## 2. PROPOSER INFORMATION

Complete a copy of the Proposer information shown below for each different Proposer in this proposal (including all subProposers).

Company Name	
Proposed Role (i.e., Prime, SubProposer)	
Local Address	
Headquarter Address	
Website Address	
Number of Employees	
Length of Time in Business	
Length of time serving municipal/government organizations	
Number of years providing electronic permitting solutions or services	
Number of similar projects currently being performed by the Proposer	
Federal Taxpayer ID number	
Dun & Bradstreet number	

The Proposer should also include details of any pending litigation or liquidating damages that have occurred within the past five years for any firms on the project team.

## 3. FINANCIAL STATEMENTS

For each firm involved in the Proposer's team, please provide financial statements for the last three fiscal years. If the firm is a publicly traded firm, please include this data from the firm's annual report and related SEC filings. If a firm is privately held, please provide at a minimum the following information for the previous three fiscal years:



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- Annual revenues
- Number of new projects started within the previous 12 months
- Number of completed projects within the previous five years
- Number of employees
- Average revenue per project

The financial data presented should demonstrate that the Proposer is not at substantial risk of failing to deliver what they intend to deliver over the short, mid, and/or long-term due to their financial situation.

### 4. PROPOSER'S CAPABILITIES

#### A. Proposer Philosophy

- i. The Proposer will describe their philosophy and strategy for keeping the City highly functional and up-to-date with current technology. The City expects the Proposer to proactively analyze technology, incorporate new technology into new software releases, and partner with the City in implementing new releases as quickly as is feasible.
- ii. The Proposer shall identify customers and/or organizations where the proposed philosophies and strategies are currently in practice.
- iii. Proposer should describe how they support and interact with their user community/customer base. If this interaction takes place on an online, interactive environment for identifying issues and sharing solutions and best practices, please describe that online environment.

This portion of the response should be not more than 5 pages.

#### B. Product Roadmap

- i. Describe the annual reinvestment into the Product(s) included in the Proposer's Proposal.
- ii. Describe the Products' user "community", e.g., how many users, numbers of interactions, venue for interactions, etc.
- iii. Describe the number of versions or releases that each Product included in the Proposal have undergone, and provide the approximate release date for each.
- iv. Describe unscheduled releases, hard-fixes, patches that have been released for each Product proposed and explain what necessitated each.

#### C. Company's experience with similar projects

- i. Describe your experience with similar projects. Provide examples including the scope of each such project, the size of the client, the timeframe of project, and when the project was implemented.



## 5. PROJECT TEAM

### A. Project Management Approach

Provide a brief but detailed description of the overall project management approach and integration of all activities required by the scope of work, including the project management objectives and techniques that demonstrate how the work requirements will be met.

This section can include organizational charts and/or information regarding lines of authority and responsibility, a description of how the Proposer's firm is prepared to respond promptly to problems, Project scope changes, or other information that would be pertinent to timely, efficient, thorough and successful Project completion.

### B. Key Personnel

Please provide the following information about the Proposer's key personnel that are expected to be assigned to this Project. Be specific and address the unique qualifications and experience for the teams and Key Personnel that is directly relevant to the Project. Place general resumes and background information in an Appendix to the Proposal:

- i. The number of people to be assigned (dedicated) to the Project;
- ii. Extent of Proposer's principal member's involvement;
- iii. Team qualifications and experience on similar or related projects:
  - a. Qualifications and relevant experience of prime Proposer
  - b. Qualifications and relevant experience of sub-Proposers, if any
  - c. Project manager's experience with similar projects;
- iv. Names and titles of Key Personnel who will perform the work on this Project, and:
  - a. Their responsibilities on this Project.
  - b. Current assignments and location, and their availability to work on this Project within the timeframe proposed.
  - c. Experience on similar or related projects, e.g., specific implementations the individual Key Personnel have worked on, the specific roles they played on those projects, length of time with the company, and what positions they have held with the company.
  - d. For each specific implementation they worked on, please provide details about the module and/or functionality that was implemented, a description of the organization, a contract title and number, and names and contact information for people we can speak with at the site where the project occurred.
  - e. Unique qualifications.
  - f. Percentage of their time that will be devoted to the Project, for each phase.



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- g. Provide a one page summary that describes the specific intended role for this person, their high level responsibilities, and proposed FTE for this person for each phase of the Project.

### 6. PROJECT APPROACH AND UNDERSTANDING

Proposer should demonstrate a clear and concise understanding of the Project and clarify any major issues based upon the existing information provided.

For the overall Project, the Proposer should provide an overall system architecture diagram with an explanation of components, connectivity, and interfaces.

For each phase, the Proposer's approach should:

- A. Describe the tasks and activities, the methodology that will be used to accomplish each phase, which team members will work on each task, and clearly identify the division of responsibility between the Proposer's team and City staff;
- B. Describe the outcomes and Products of the tasks and activities that would occur for each of the deliverables;
- C. Identify points of input and review with City staff and stakeholders; and
- D. The time frame estimated to complete each task and activity.

### 7. PRICING SHEET (PROPOSED COST)

Proposer should provide clear and concise information about the proposed costs for this Project and complete the attached Pricing Sheet (Exhibit E – Electronic Permitting System Pricing Sheet).

Subsections A through D below describe the major components of the Pricing Sheet. To complete the Pricing Sheet please enter the costs, and where applicable the quantities, for the proposed system in the cells provided. Cells that are provided and formatted to accept cost and quantity information are enclosed within a dark red border.

- A. System Software Licensing - Permit / Land Use Management System

Proposer should specify licensing costs for core software and all modules needed to provide the functionality specified in the deliverables for all the City divisions listed. License structure and coverage should be sufficient to meet the City of West Hollywood's needs. Proposer should document in their Proposals their license structure/model, i.e., enterprise license, identified (named) User license, concurrent (active) User license, etc. If additional space is required for licensing costs beyond those provided, complete the Tab 1 - Additional Licensing.



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### B. Implementation Services

The Proposer should specify a cost estimate for each deliverable in the Phases 1-7 listed. The Proposal shall include the Proposer's true estimated cost to perform the work irrespective of the City's anticipated cost. Other Implementation Costs – price for each deliverable

### C. System Infrastructure and Maintenance

Proposer should complete either the City Owned Infrastructure section OR the Proposer or 3rd Party Managed Infrastructure section, based upon the proposed location of the system and back-up infrastructure that is required.

**City Owned Infrastructure** – should include a detail list of the infrastructure required to host the system at the City. Refer to Exhibit XX – Technical Environment & Infrastructure.

**Proposer or 3rd Party Managed Infrastructure** – should include the costs to maintain the System at a Proposer, or 3rd Party, hosted site.

If the Proposer wishes to provide different hosting options, separate pricing sheets should be submitted for each option. If more than one hosting option is proposed and if the proposed hosting options have significant impact on the technical Proposal or implementation plan, then separate Proposals should be submitted.

Proposer should include their standard hourly rates for additional consulting / professional services in Additional Services and Costs tab of the Pricing Sheet.

### D. Other System Costs and Services

Proposer should include in this section any costs included that are not captured elsewhere.

## 8. FUNCTIONAL AND TECHNICAL REQUIREMENTS

The Proposer must complete the Technical and Functional Requirements spreadsheet (Exhibit D) for this Project. Instructions on how to complete the spreadsheet are located in the spreadsheet on Tab B - Instructions for Proposers.

## 9. REFERENCES

Proposer should include references to:

- Three (3) of the most relevant projects completed by the Proposer, of equivalent size (or larger) and similar complexity to this Project;
- The three (3) most recent projects completed by the Proposer;
- The three (3) largest projects (by contract value) completed by the Proposer; and
- Three (3) references from clients of similar scope and complexity that each of the Key Personnel have worked with.



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A single project may fit into one or more of these reference categories. Please include the following information for each reference:

1. Contact Name
2. Contact Title
3. Address
4. Phone Number
5. Email address
6. Location/Jurisdiction
7. Project Name
8. Project Description
9. Project Dates
10. Client's Project Contract Number
11. Project Contract Value (initial and current or ending value)

### **10. [OPTIONAL] COMMUNICATIONS MATERIALS**

Proposer may include, if desired, communications materials, including newsletters, brochures, posters, and websites for review of Products, tools and services available. Supporting material may include references and case studies, and may include other information pertinent to the Proposal, such as the QA/QC summary, reports and analysis of an implementation of their proposed solution. This material will not count towards the proposal page limit.

#### **5.7. Withdrawal, Modification or Alteration of Proposal**

Prior to the RFP opening, changes may be made to a submitted proposal provided that the change is initiated by the Proposer or authorized agent. Also, a Proposal may be withdrawn upon written request of the Proposer prior to the scheduled closing time for accepting Proposals. Negligence on the part of the Proposer in preparing their Proposal confers no right to withdraw their response after the scheduled closing time for filing Proposals.

As a result of any of these actions, if the intent of the Proposer is not clearly identifiable, the interpretation most advantageous to the City will prevail.

#### **5.8. Cancellation**

The City of West Hollywood reserves the right to modify, revise or cancel this RFP. Receipt and evaluation of Proposals or the completion of interviews do not obligate the City to award a contract.





## 6. PROPOSAL EVALUATION AND SELECTION

### 6.1. Evaluation Criteria

Each Proposal shall be evaluated on the following evaluation criteria, weighting, and maximum points, as follows:

Criteria	Maximum Score
Cover Letter	0
Proposer’s Capabilities	20
Project Team	20
Project Approach and Understanding	20
Proposed Cost	15
Responses to Technical and Functional Requirements	25
<b>Total</b>	<b>100</b>

### 6.2. Proposal Review

A Selection Committee will evaluate the Proposals received. For the purpose of scoring Proposals each of the Committee members will evaluate each Proposal based upon the criteria listed above. The Committee may seek outside expertise, including but not limited to technical advisors. The Committee's recommendation will be submitted to the West Hollywood City Council for approval. The City has the right to reject any or all Proposals for good cause, in the public interest.

The Proposal evaluation process consists of a series of Evaluation Levels that will lead to the identification of a finalist. This process is described below.

#### Evaluation Level #1

This step will assess whether Proposers meet the requirements outlined in this RFP. Proposers will be evaluated on a “pass” or “fail” basis on the extent to which they responded to the instructions in the RFP. A score of “fail” within Level #1 shall disqualify a Proposer from moving to Level #2.

#### Evaluation Level #2

This step consists of a detailed review of the written responses in the following areas:

1. Proposer’s capabilities;
2. Project team;
3. Project approach and understanding;
4. Proposed cost; and
5. Responses to functional and technical requirements.



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City may seek clarification from Proposers during this time. City may seek clarification from the references provided by the Proposer to ensure their responsive to the City's requirements. A short list of the highest scoring Proposals shall be determined and those Proposers invited to move on to Level #3.

### **Evaluation Level #3**

This step consists of on-site software demonstrations, reference checks, site visits, and assessment of technology architecture. Proposals will then be re-scored according to the Evaluation Criteria. The top Proposer(s) shall move on to Level #4.

### **Evaluation Level #4**

This step requires that the finalist(s) perform a scripted proof-of-capabilities (POC) demonstration. The POC is not intended to be a generic demonstration of the application, but rather a demonstration of specific product functionality deemed most critical to the City using data provided by the City. Proposers must be prepared to invest the time and resources in the POC to be successful with this procurement. The City will provide the scripts, data, and other relevant documentation at least 10 business days prior to the scheduled POC.

This step will conclude with final meetings with the Proposer(s) to answer questions regarding their responses and to re-examine specific areas of functionality on which the City may need more information.

Proposals will then be re-scored according to the Evaluation Criteria. Shortly after these meetings, Proposers in Level #4 will be asked to produce a Best-and-Final-Offer (BAFO).

### **Evaluation Level #5**

This step consists of review of the BAFOs from the Proposers and finalization of the scoring based on the Evaluation Criteria. Based on the results, the City will select a single finalist and attempt to reach agreement.

The selection of the finalist shall be based on Evaluation Criteria including final negotiated costs and conformance to the City's terms and conditions. In making its software selection decision, the City may also evaluate Value-Added Product and Service Offerings, which refers to special considerations that the Proposer may provide to the City to increase the value of its overall Proposal (e.g., no cost training units as part of the base license, no cost usage of software modules).

If an agreement with the finalist is not reached within a time period deemed reasonable to the City, the City may elevate any of the Proposers that passed Level #1.



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Level	Component	Value	Next Step	Authority
1	Review for Responsiveness	Pass/Fail	If Pass, move to Level #2	Project Manager
<b>Level 1 Score</b>				

Level	Component	Value	Next Step	Authority
2	Completeness and Quality of Written Proposal	-	Selection Committee recommends a short list of Proposers that move to Level #3	Selection Committee Project Manager
	Clarification of information from Proposer / Clarification from References provided	-		
	Initial Scoring of Evaluation Criteria	0 -100		
<b>Level 2 Score</b>				

Level	Component	Value	Next Step	Authority
3	Onsite Software Demonstrations	-	Selection Committee recommends up to 2 Proposers to move to Level #4	Selection Committee Project Manager
	Technical Architecture Assessment	-		
	Site Visits	-		
	Optional Follow-Up Interviews/Demonstrations	-		
	Reference Validation	-		
	Re-scoring of Evaluation Criteria	0 -100		
<b>Adjustment to Level 2 Score</b>				

Level	Component	Value	Next Step	Authority
4	Proof-of-Capabilities (POC) Demonstration	-	Selection Committee recommends up to 2 Proposers to move to Level #5	Selection Committee Project Manager
	Final meetings	-		
	Re-scoring of Evaluation Criteria	0 -100		
<b>Adjustment to Level 3 Score</b>				

Level	Component	Value	Next Step	Authority
5	Contract Negotiations / BAFO	-	Selection Committee recommends final Proposer for contract award	Selection Committee Project Manager City Council
	Negotiated Cost	-		
	Conformance to Terms and Conditions	-		
	Value-added Product and Service Offering	-		
	Re-scoring of Evaluation Criteria	0 -100		
<b>Adjustment to Level 4 Score</b>				

A Selection Committee (Committee) will evaluate and score all responses according to the evaluation components and assessment values defined in Levels 1 – 5 above. In addition, software demonstrations will be attended by additional City personnel. The City may develop an ‘Extended Team’ of Subject Matter Experts (SMEs) who will attend the on-site software demonstrations and assist with functional evaluation. Site visits may be made by a sub-group of the Selection Committee and SMEs.

The City of West Hollywood may exercise one of the following options:

- A. Conduct serial negotiations, beginning with the highest scoring Proposer. Such negotiations could lead to an award of a contract or the City may decide to terminate the negotiations if it determines that negotiations are unlikely to result in an acceptable contract to the City within a reasonable period of time. If negotiations are terminated, the City may cancel the solicitation or proceed to negotiate with the next highest scoring Proposer in the same manner. The City may then continue to negotiate with Proposers further down the list in the order that scores were received or cancel the solicitation; or



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- B. Conduct simultaneous competitive negotiations with the two highest scored Proposers. Such negotiations could lead to an award of a contract or the City may decide to terminate the negotiations with either or both when, in the City's sole discretion, it determines that negotiations are unlikely to reach a contract acceptable to the City within a reasonable period of time. The City may then continue to negotiate with Proposers further down the list in order that scores were received or cancel the solicitation.

The City's choice of how to proceed, its decision to begin or terminate negotiations, its determination of a reasonable time, its decision to open negotiations with a lower scoring Proposer, and any decision that a solicitation should be cancelled are all within the City's sole discretion.

It is important for Proposers to review Exhibit C (Sample Basic Contract) in this RFP. The contract is the City's standard contract for these goods and services and will be used as a result of this selection process. Any deviations from this contract should be clearly identified in the Proposal. Please note the City's mandatory Living Wage and Equal Benefits clauses.

### 6.3. Clarifying Proposal During Evaluation Period

During the evaluation process, the City has the right to require any clarification or change it needs in order to understand the Proposer's view and approach to the Project and scope of the work. Any changes to the Proposal will be made before executing the contract and will become part of the final Proposer contract.

### 6.4. Proposals are Public Records

All information submitted by Proposers shall be public record and subject to disclosure pursuant to the California Public Records Act (California Government Code Section 6250 et. seq.), except such portions of the Proposals for which Proposer requests exception from disclosure consistent with California Law. If a request to inspect the Proposal is made, the City will notify the Proposer of the request.