



Commonwealth Connect

Andover, Ayer, Barnstable, Bedford, Boston, Braintree, Brookfield, Chelsea, Chicopee, Chilmark, Clarksburg, Eastham, Easton, Everett, Fall River, Fitchburg, Framingham, Franklin, Halifax, Haverhill, Holliston, Hopkinton, Lexington, Lowell, Malden, Medway, Melrose, Middleborough, Nantucket, Needham, New Bedford, Newton, North Adams, North Andover, Northampton, Orange, Quincy, Randolph, Revere, Royalston, Saugus, Seekonk, Somerville, Sudbury, Swampscott, Taunton, Wakefield, Ware, Watertown, West Boylston, Westborough, Whitman, Woburn, Worcester

7/18/2013

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July 18, 2013

Fellow State and Local Innovators,

For local governments, few things are more important than the basics of neighborhood life: ensuring smooth streets, well-lit blocks and graffiti-free neighborhoods. In 2009, the City of Boston launched Citizens Connect, a mobile app to help residents report these types of issues directly to the right person in City government. This app, which now is the source of 20% of all the requests the City receives from its residents, not only improved our efficiency but also deepened our ability to engage with our residents.

With the financial support of the State and in collaboration with staff from two of their departments, the City of Boston is extending this type of platform to 53 additional municipalities across the Commonwealth. Called Commonwealth Connect, this has been a first-of-its-kind collaboration to empower residents in municipalities across the state by providing them – and the municipal staff who work for them – with new technology to improve their neighborhoods directly.

In this report we document the process we are taking to delivering these tools. Through this process – which is still on-going, we believe we not only have built stronger connections between the public and the public sector but also between participating municipalities and the Commonwealth. We are deeply grateful for the immense support for this project from the Commonwealth and the leadership of municipalities across the state. We look forward to making it a continued success for all involved.

Sincerely

Chris Osgood
Mayor's Office of New Urban Mechanics

EXECUTIVE SUMMARY

Whether through mobile apps for residents or new platforms for municipal operations, civic technology is revolutionizing how people interact with government and how government is delivering services. Commonwealth Connect, a project of Massachusetts' Innovation Challenge (CIC) Grant Program, is an example of this.

There are three technical elements to Commonwealth Connect: (1) a mobile and web app that residents and municipal staff can use to report neighborhood issues; (2) a work order management system that municipalities can use to respond to those issues and the people who reported them; and (3) a router to ensure that the web and mobile app could work seamlessly across municipalities.

To deliver this technology, we issued a Request for a Proposal in the summer of 2012. From the eight responses we received, we ultimately selected SeeClickFix as the partner in the fall of 2012.

After the vendor selection, we ramped up our outreach to municipalities, explaining to them the possibilities of this technology and the commitment they would need to leverage it fully. Fifty-nine communities applied; ultimately, we were able to select forty-seven partners. By the end of 2012, the first half-dozen municipalities went live with the mobile app, having gone through business process training as well as technical training on the new system.

By the mid-July 2013, all forty-seven partners launched. In addition, Commonwealth Connect was integrated with the mobile apps of seven additional municipalities, bringing the total connected communities to fifty-four. To date, nearly 1,500 people have downloaded the app, reporting over 3,500 issues which have already netted 3,000 specific improvements to cities and towns across the Commonwealth.

As the roll out continues, we expect these numbers to continue to grow. In addition, this local data can increasingly be leveraged to drive performance improvements internally and share best practices externally with fellow Commonwealth Connect municipalities.

PARTNER COMMUNITIES

Boston: The City of Boston applied for the Commonwealth Innovation Challenge Grant for this project. Boston is also the project manager and administers all aspects of the project, including community outreach, participant application review, technology procurement, implementation support and vendor management.

SeeClickFix: SeeClickFix is the technology provider for this project. They have leveraged their existing technology platform to deploy the Commonwealth Connect mobile app quickly, and provide application support to each of the community participants.

Commonwealth of Massachusetts – Department of Administration & Finance & Information Technology Department: The Department of A&F & ITD provided support during project outreach to build interest among Massachusetts communities for this project, as well as guidance during the participant application review process.

The following Massachusetts communities were selected to receive the Commonwealth Connect technology after a rigorous application process. Each community was required to provide an internal project lead that would be responsible for the successful implementation of the technology in their own community. Additionally, each community is responsible for defining the service requests that are made available using the Commonwealth Connect mobile/web app.

Phase 1 Participants*

Barnstable	Newton	Wakefield
Chicopee	North Adams	
Clarksburg	Northampton	
Malden	Taunton	

Phase 2 Participants*

Ayer	Haverhill	Orange
Braintree	Holliston	Revere
Brookfield	Lexington	Somerville
Easton	Medway	Watertown
Everett	Melrose	West Boylston

Phase 2 Participants*

Fall River	Middleborough	Westborough
Fitchburg	Nantucket	Whitman
Framingham	Needham	Woburn
Halifax	New Bedford	

Phase 3 Participants*

Bedford	Hopkinton	Sudbury
Chilmark	Randolph	Ware
Eastham	Royalston	Worcester
Franklin	Seekonk	

Participants With Existing Mobile Apps Integrated Into The Program

Andover	Chelsea	Lowell
Quincy	Saugus	Swampscott

These 54 communities are home to 2.5 million residents, approximately 38% of the population of the Commonwealth of Massachusetts.

** The Phase indicates which cohort the communities were in during implementation. Phase 1 began in December, Phase 2 in January, and Phase 3 in March.*

GOALS

Primary goals (motivation for creating this project):

- For municipalities:
 - **Encourage greater engagement among citizens:** In its implementation of Citizens Connect, the City of Boston discovered that there are residents who might never use their smart phone to call City Hall to report an issue, but would use an app on their phone to report a problem they see in their neighborhood. By delivering this app, the City has been able to engage a segment of its residents who might otherwise not engage with government.
 - **Create stronger neighborhoods:** By having a more engaged population, you have more eyes and ears in the neighborhoods. This means that problems – such as graffiti – are identified more quickly and can be resolved faster. As broken windows theory has suggested, by paying attention to the small details of neighborhood life, you can strengthen neighborhoods significantly.
- For residents:
 - **Empowerment:** Constituents will have a new tool that they can use to call for action in their neighborhoods.
 - **Better, more reliable services:** By providing tools that enable real-time management of constituent services, this project will enable stronger internal management of constituent complaints. As a growing number of municipalities utilize the same or similar work order management system, there would also be opportunities for developing a series of common performance reporting tools enabling better cross-municipality benchmarking.

Secondary goals (applying technology to support the primary goals):

- For municipalities:
 - **Reduced development and maintenance costs:** By pooling this request for software, services and apps, municipalities will have access to tools at dramatically reduced costs.
 - **Opportunities for collective enhancements:** If municipalities would be interested in enhancements to the app, the Open311 API or the work order management system, they would be able to share that new cost and exert more collective purchasing power.
 - **Increased ability to partner:** By implementing the Open311 API, municipalities would dramatically lower or eliminate the cost to partner with other vendors in the mobile reporting space.

- **Improved case management and operational efficiency:** Receiving requests from constituents requires a lot of tracking (to know if the case is actually resolved) and management (to ensure that departments are continuously improving the quality and speed of service delivery.) By providing this data and tools to enable real-time management of basic city service issues, the work order management system – for those municipalities who don't have one – will improve accountability and efficiency in service delivery, reducing the costs of managing cases for a city.
- For residents
 - **Choice:** Because Open311 APIs would be provided for each municipality, it would be likely that other smart phone app developers would provide additional free or low cost products to residents, increasing the number of apps they could use to report issues in their neighborhood.
 - **Opportunity:** By implementing Open311 APIs for each municipality, you are creating a larger and more attractive market for local software developers to create new apps for.
 - **Ease:** While government is often very aware of municipal borders, our residents are usually not. Through this grant, we have an opportunity to provide an app for residents that works seamlessly Commonwealth-wide, regardless of what they see and where they see it.

IMPLEMENTATION PLAN

- Hire project manager
 - Upon being awarded the grant in mid-March, Boston began looking for a project manager to execute the project. Due to availability of the PM and internal Boston HR procedures, the PM wasn't able to begin formally working on the project until mid-June.
- Technology procurement
 - Technology procurement was an especially complicated process for this project. Please refer to Section 5 of this document for a longer explanation. In this section, we will focus on the final solution we arrived at for the procurement.
 - An RFP was released on September 5th, 2012 that described the system we were trying to build with this project:
 - Component 1: the Mobile App
 - Component 2: the Open311 Router
 - Component 3: the Work Order Management (WOM) system / Open311 Adapter
 - The RFP was written with some special provisions built in:
 - Potential vendor respondents were encouraged to respond to as many or as few components as they were interested in.
 - We reserved the right to award each component to a different vendor, but vendors were also able to specify if certain components were a "bundle".
 - There was one pre-bid conference and one opportunity for vendors to pose written questions. Responses to the questions were released two weeks before the responses were due.
 - We received eight responses to the RFP on September 26th, 2012. The technical review committee scheduled vendor interviews for the following Monday and Tuesday. The technical committee and pricing committee made separate recommendations on proposals on Wednesday (Oct. 3rd, 2012). The technical and pricing committee's worked together to make a final recommendation on Component 1 (the Mobile App) and Component 3 (the WOM / Open311 Adapter) on Friday (Oct. 5th, 2012).

successfully implement this project in their community. We received 59 applications by the deadline (November 16, 2012).

- We decided that a phased approach would be best, and selected small group of 10 communities to begin implementation in December. The Phase 1 communities were chosen because of their higher tolerance for risk and readiness to begin the technology implementation immediately. Another group of 26 communities were selected to join Phase 2, which would begin in January. In late February 2013, it became clear that the deployment to our 36 partners was going very well, and we decided to include a further 11 communities in Phase 3.
- In order to legally gain access to SeeClickFix's service through the Boston RFP, each partner was required to sign separate contracts with Boston and SeeClickFix. This Municipal Grant Agreement was required by state law so that the partners could share in Boston's procurement, and ensured that they were not going to be billed by SeeClickFix for the duration of the 3 years that the grant paid for. Separately, each partner was also required to sign a contract directly with SeeClickFix that obligated SeeClickFix to provide support directly to the partner, without Boston having to be a middleman.
- Business deployment / change management
 - One of the key factors to implementing a project that alters someone's daily work routine (such as this project would), is adequately preparing that person for the change. As such, we felt that it was critical to provide support to all of our partners on creating a change management plan for Commonwealth Connect.
 - There were two parts to creating this plan:
 - Document existing processes: we provided a training course to provide our partners with the tools necessary to document the existing processes. This course included guidelines on selecting service requests that fit well with this type of technology project, gathering details on an unknown process and templates for creating cross-functional flowcharts and business process documentation.
 - Modify the processes and communicate the changes: once a process was documented, we also provided guidance on modifying that process to include the Commonwealth Connect mobile app. Partners were also encouraged to communicate the upcoming changes to the impacted staff, so they would be prepared when the app went live.
 - These training sessions were optional, but almost every one of our partners sent a representative to one of the sessions.
- Technology deployment
 - The technology deployment consisted of the following steps:

BUDGET

When determining the original budget request in the CIC grant application, the City of Boston considered the following variable and fixed costs:

- Variable
 - Number of communities that choose to participate (estimated 50)
 - Cost of services from 3rd party technology providers (estimated \$5,000 - \$10,000 per community)
- Fixed
 - Project manager (\$100,000)

This led to the original funding request of \$500,000 in the Commonwealth Innovation Challenge Grant application.

The grant application was approved, but at a lower amount than requested (\$400,000). The following table explains how the funds were subsequently allocated:

Item	Amount	Notes
Project manager	\$ 100,000	Provided project management, project administration, conducted training sessions and marketing outreach
Graphic designer	\$ 1,000	Provided professional-quality icons and background artwork for the mobile app
Mobile app / Work Order Management (WOM)	\$ 275,000	Provides access to the Commonwealth Connect mobile app and SeeClickFix's WOM system for 47 communities. Provides an automated integration into an existing WOM for 5 of those communities.
Open311 Router	\$ 20,000	Open-source server that provides a directory-style service to look up available Open311 endpoints.
Total	\$ 396,000	

CHALLENGES AND SOLUTIONS

Procurement

- **Challenge:** Commonwealth Connect is a first of its kind project in the nation; we are not familiar with any other State-funded, municipal-led, cross-jurisdiction implementation of a mobile app and supporting technology. Boston's standard technology Request for Proposal template appeared too restrictive to get the quality of vendors response we sought at the price we could afford.
 - **Background:** One of the biggest unknowns when we began this project was how much the technology would cost, so one of the highest priorities was to find a vendor to provide the technology. We decided to split the required technology components among two RFP's (one for the backend infrastructure and one for the mobile app) so that we could preserve the most flexibility during implementation. We felt that time was of the essence, so we looked for a suitable RFP template that would allow us to release the first RFP as soon as possible.

Unfortunately, the existing templates we found were written for large, multi-million dollar procurements and included numerous provisions that eliminated all but the largest vendors as possible respondents. These RFP's also included dense legal language that was difficult to understand. However, we were under the impression that these templates represented the standard way of releasing an RFP for Boston, so we chose one and modified the sections that we were told we could touch.

This first RFP was released on July 16, 2012 and we received only four responses by August 13, 2012. Two of the responses were disqualified for violating some of the submission guidelines, and the two remaining responses weren't graded highly in several of the technical categories, and were ultimately deemed to be too expensive anyway. We determined that the RFP template we had been given was too restrictive to adequately describe what we hoped to achieve, and decided that we wouldn't get better responses unless we could massively change the RFP.

- **Solution:** We formed an advisory group that included, among others, the IT Admin & Finance Manager and a representative from Boston's legal department. Together, we wrote an RFP from scratch that accurately and comprehensively described the technology we wanted, the constraints on funding and resources we faced and also eliminated every unnecessary legal clause and bureaucratic requirement. We also included very detailed scoring criteria on the technical details as well as the pricing section to emphasize the elements of the project that were of particular importance. We released the new RFP on September 5, 2012, and received eight qualified responses less than a month later.

Motivation

- **Challenge:** This project could not be successful without the whole-hearted and enthusiastic support from our municipal partners. However, we have no authority over any of our municipal partners, and limited leverage to apply to encourage them to complete the implementation.
- **Solution:** We feel very strongly that there is no such thing as a one-size-fits-all implementation, especially considering the wide variation in municipal organizations that are represented among our partners. Each partner has their own unique culture that approaches technology, innovation, operational change and customer service in a different manner. Accordingly, given the time frame of this project and the number of partners, we felt that it would be impossible to be successful unless the partner themselves took on the responsibility of managing their own implementation schedule.

We accomplished this using several methods:

- **Partner selection:** The application that each potential partner was asked to complete was designed to help us understand not only the technical readiness of the potential partner, but also the business readiness. In our estimation, we could work with almost any existing technology platform that a potential partner might have, but if the potential partner's executives couldn't demonstrate enthusiasm about the project, we felt there was a lot more risk involved.
- **Almost everything is optional:** The only hard requirement we enforced on our partners was signing the contracts. Other than that, we resolved to provide extensive guidance, advice and support, but never "thou shall." For example, each partner was able to customize and/or design for themselves:
 - The pace that they achieve the implementation milestones, including their go-live date (we encouraged them to capitalize on existing momentum, but this project was often being shoehorned in around other internal projects)
 - The number and type of service requests made available (we encouraged them to keep it simple and manageable in size to start)
 - Business process mapping training was offered as a support aid, if needed
 - Media/art that represents the partner in the Commonwealth Connect app (most chose a version of their city/town seal, but some chose other designs)
- **Relationships:** We worked to create and build greater relationships with the project team as well as among the partners. We organized several "all hands" meetings keep the partners focused on the "suggested" milestone dates, and distributed a semi-regular newsletter to share the success each partner was having with the rest of the group.

OUTCOMES

The following measures were included in the grant application:

Measure	Data	Notes
Number of participating municipalities	54	= 47 municipal partners + 1 Open311 integration (Boston) + 6 existing Massachusetts SCF customers (Chelsea, Quincy, Lowell, Saugus, Andover, Swampscott)
Aggregate population of participating municipalities	2.5 million	
Number of companies using the Open311 API	0	All will have an Open311 endpoint available, but this aspect of the project hasn't been widely publicized yet; consequently none are using it yet.
Number of downloads of the app	1,466	= 1,150 iOS + 316 Android
Ratio of downloads of the app to population of participating municipalities	0.00058413	= 1,466 / 2,509,717
Number of requests made through the app	3,502	Includes all requests made to SCF through all channels (mobile app and web)
Ratio of Commonwealth Citizens Connect service requests to total service requests made by the public	n/a	We don't have enough data from other municipal systems to determine this yet.
Ratio of Open311 API service requests to total service requests made by the public	0.16419189	= 575 / 3,502

Measure	Data	Notes
Median number of municipalities that a person reports an issue in via Citizens Connect	97% of users have reported an issue in 1 community 2.5% of users have reported an issue in 2 communities 0.5% of users have reported an issue in 3+ communities	
Number of potholes filled, graffiti removed, streetlights fixed, etc.	3,072	This represents 87% of all requests made to date (3,072 / 3,502).
Ratio of change in property values in participating municipalities to the Commonwealth	n/a	We don't have enough data to determine this yet.
Reduction in the average time to resolve each service type (potholes filled, graffiti removed, streetlights fixed, etc)	n/a	We don't have enough data to determine this yet.

These results represent very early outcomes, since most of the municipal partners have only been online for 1 – 2 months, and as of May 1, 2013, there are 15 partners that are still working through the implementation phase. However, we have already seen some great indications of user adoption, including almost 1,500 downloads, and 87% of the 3,500 service requests having already been resolved.

CONTACT INFORMATION

City of Boston

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Project website:

Vendor Contact Info:

Ben Berkowitz
Founder and CEO
SeeClickFix
ben@seeclickfix.com

REFERENCES

Appendix A Commonwealth Connect RFP
Appendix B Municipal partner application
Appendix C Business Process Mapping Training Presentation
Appendix D Municipal Grant Participation Agreement

City of Boston

Commonwealth Citizens Connect RFP

RFP #DOIT090412

www.cityofboston.gov PHONE 617.635.4783 FAX 617.263.3035

Boston City Hall, Room 703, One City Hall Plaza
Boston, Massachusetts 02201



1. Overview

1.1. Summary

The City of Boston, through a Commonwealth of Massachusetts Community Innovation Challenge (CIC) Grant, is supporting the development of a suite of applications that work across municipalities that allows individuals to report basic problems, such as potholes, directly to the appropriate local government.

This suite is composed of three components: (1) the mobile app; (2) the router that allows that app to report cases across municipalities; (3) the work order management system / Open311 adapter that allows local governments to respond to requests made through the mobile app. These components are described in detail below, and the relationship between them is described in Section 2 of the RFP.

Based on the quality and cost represented in the responsive submissions, the City of Boston may elect to select separate vendors for any of the three components or more than one vendor for any or all components. Vendors who believe they have a quality solution for any one of the components are strongly encouraged to submit.

Through this grant, we intend to support up to thirty (30) Massachusetts' cities & towns use of this system for up to the next three (3) years. This includes five (5) municipalities by the end of calendar year 2012 and twenty (20) to twenty-five (25) additional municipalities by the end of the first quarter of calendar year 2013. To the extent of available grant funds, participating Massachusetts cities and towns will be able to use these products at no cost to them, under the terms of this RFP. Cities and towns must comply with Massachusetts procurement law as well as their own local rules, and may add local contractual requirements. The City of Boston shall not be a party to any agreement between a contractor and a city or town and each city or town will be required to sign a participation agreement with the City of Boston acknowledging same.

For more background information on the organizations involved in this effort, visit the [City of Boston's website](#).

The budget for this project is \$300,000 of the grant available for the scope of work described in this RFP. This amount will cover costs for all three components described in this RFP for up to three years. The final number of Massachusetts municipalities included in this project will be determined by the fixed cost of each component, and the per municipality costs of the mobile app and WOM / Open311 adapter. Lower costs per component and per municipality will allow this project to include more Massachusetts municipalities, and extend the positive impact of this project.

1.2. The Mobile App

We are looking for an app that meets four main criteria.

1. *App Functionality*

The app should allow a resident to submit a description, photograph and location of a service request (SR) to a local government. The app should show the tracking number for that SR and contact details from that relevant municipality. The app should show the status of that SR (e.g., the case is open or closed.)

2. *App Integration*

The app should be able to integrate with two types of services: a Massachusetts-wide router and an Open311 GeoReport v2-compliant (Open311) endpoint. When a user reports a SR through the app, the router directs the app to the geographically appropriate Open311 GeoReport v2-compliant (Open311) endpoint. The Open311 endpoint connects to a work order management (WOM) system, and brokers all communications between them.

3. *App Look & Feel*

We want municipalities to have the opportunity to customize the app so that, when you are reporting an SR to a particular municipality, the user knows that she or he is connecting with that municipality. Consequently, the look & feel of this app should support dynamic branding (i.e. the branding of the app should change on the fly to represent the branding of the municipality receiving the SR)

The intent of this effort is to draw a closer connection between the public and the public sector. Any response that features an app that is heavily branded as a 3rd party intermediary will not be seen as advantageous.

4. *App Platforms*

This app should work on smartphones that leverage iOS and the Android operating system. Preference will be given to those that also operate well on other platforms.

The criteria each response will be evaluated by for the app component is outlined in detail in [Section 3](#).

1.3. The Router

The router is the component that tells the mobile app which Open311 endpoint to contact. This router will be similar to previous efforts such as [GeoWebDNS](#) or [LoST](#).

Additionally, we view this router as a potential platform to allow for discovery of and connection to municipal services beyond both the current scope (participating municipalities in Massachusetts) and duration (3 years) of this grant. The following criteria are intended to ensure that this component is an open platform that is of enduring value to developers.

1. *Location-based Routing*

The router should be able to respond quickly to calls from any app and connect that app to the appropriate Open311 endpoint. The router must contain a geo-coded list of Open311 endpoints. The app will report a location, and the router will respond with the appropriate Open311 endpoint(s) that match that location.

2. *Open Sourced & Separate*

To ensure that this router is available for developers, the code and all components of the router should be open source software.

3. *API Key Management*

To make this router a convenient discovery tool for municipal APIs, there should be an API Key management platform as part of the router. Developers should be able to register for a key, and that key should automatically be available to any municipality using this system.

The criteria for each response will be evaluated for the router component as outlined in detail in [Section 4](#).

1.4. The WOM System / Open311 Adapter

This component serves three purposes that are dependent upon the needs of the participating municipality: it provides a light WOM tool for municipalities that do not already use a WOM system; it provides an Open311 endpoint to the public, and it can serve as a general integration point for municipalities that operate an existing WOM system.

1. *Service Request Management*

For municipalities that do not have WOM systems, we want to provide a lightweight tool that allows them to manage the cases. At a minimum, the system should allow the municipality to see SR's on a map, filter/group them by type, and allow them to set the status of the SR (open, closed, pending, etc.).

2. *Open311 Endpoint*

This system will serve as the public Open311 endpoint for the municipality. This endpoint must be 100% compliant with the Open311 GeoReport v2 specification. This system must also allow the municipality to configure the Open311 endpoint, specifying SR types (and other details) and blacklisting API keys.

3. *Integration Point*

For municipalities that have an existing WOM system (with a published API), we want to provide an adapter that can be configured to talk to that system. We would like to see a skeleton framework that can be configured by a moderately technical person, but we will also look favorably on pre-existing custom integrations.

Some of the existing WOM systems in use in Massachusetts include, but are not limited to, Cartograph, EnerGov, IntelliGov, GovQA, Lagan and Munis.

The criteria each response will be evaluated by for the WOM System / Open311 Adapter component is outlined in detail in [Section 5](#).

1.5. Submission Requirements

Section 7 outlines the list of documents you must submit as well as the form in which you must submit them. **Please pay careful attention to this section, if you fail to meet any of the requirements outlined in that section, your submission will not be considered.**

1.6. Important Things to Know

Section 8 lists other key factors you should know about this RFP process and the contracting that would follow. Please read it.

1.7. Timeline

Request for Proposals Available	Wednesday, September 5, 2012
Pre-Bid Conference	Wednesday, September 12, 2012 at 1pm EST
Questions Due to the City	Friday, September 14, 2012
City Responses to Questions Posted	Tuesday, September 18, 2012
Requests for Proposal Due	Monday, September 24, 2012 at 12pm EST
RFP Award Decision	Friday, September 28, 2012

1.8. Submission Address

City of Boston DoIT Department
Attn: Paul Kresser

One City Hall Plaza, Room 703
Boston, MA 02201

1.9. Contact Information

Paul Kresser, Department of Innovation & Technology, paul.kresser@cityofboston.gov

2. Architecture

A description of the three-part solution that the City of Boston is pursuing is below. As noted above, these three parts may or may not be awarded separately. While the router component should be open sourced, the other components may be commercially available and licensed software.

2.1. Mobile App communication with the Router

The mobile app will request a list of endpoints from the router. This communication should generally follow this pattern:

1. The mobile app sends a location to the router
2. The router performs a geo-lookup to identify Open311 endpoints that overlay the location
3. The router responds to the mobile app with either the list of endpoints, or a message indicating that there are no endpoints available.

2.2. Mobile app communication with the WOM / Open311 Endpoint

Once the mobile app has a list of endpoints, it will contact them to identify the services available.

1. The mobile app sends an Open311 service query to the endpoint
2. The endpoint responds with the list of services, detail questions and a link to the municipality's branding assets. In the instance where there are multiple endpoints, the app should present all the services, grouped by endpoint.
3. If the mobile app needs the branding assets, it should download them, cache them locally and apply the assets to the apps appearance. In the instance where there are multiple endpoints, the app should fall back to default branding until a service type (and endpoint) are chosen by the user.

When the user has completed creating a new SR, the mobile app will submit the payload to the appropriate endpoint.

1. The mobile app sends an Open311 SR payload to the endpoint
2. The endpoint processes the payload, and forwards the SR either to the built-in light WOM component, or to an external WOM system.
3. The endpoint sends a case ID (or other unique identifier) to the mobile app.

The mobile app will periodically poll the endpoint(s) for status updates.

1. The mobile app sends an Open311 status query to the endpoint
2. The endpoint processes the payload, and queries the WOM system for a status update.
3. The endpoint sends the status to the mobile app.

2.3. Router communication with the WOM / Open311 Endpoint

When an app communicates with the WOM / Open311 endpoint, it will include an API key. The API key authorizes the app to communicate with the endpoint, and the endpoint will reject all payloads

including an invalid API key. Management of API keys happens in the router. Once granted, an API key is available to all endpoints, but each endpoint can choose to reject a key.

1. The Open311 endpoint receives an API key from the mobile app, and checks the key against its internally cached list. If the key is blacklisted then the payload is rejected. If the key is not on the list, the endpoint sends the key to the router for validation.
2. The router receives the key, and validates it against the master record.
3. The router notifies the endpoint of the key’s status: “valid” or “not valid” (e.g. not present in the master record or globally blacklisted).

3. Mobile App Technical Evaluation Criteria

All responsive mobile app proposals will be evaluated by the following technical criteria. Please note that any proposal that fails to meet the requirements of [Section 7](#) will be considered non-responsive.

Submissions will be evaluated on technical merit and experience of the vendor.

3.1. Technical Merit

The mobile app technical proposals will be evaluated in five categories: *functionality, integration, look & feel, platforms, timeline*. Described below are the characteristics that would make up a not advantageous, advantageous, and highly advantageous response in each of those categories

3.1.1. Functionality

Rating Criteria

<i>Not Advantageous</i>	The app cannot support the submission of photos, text and case types to municipalities or provide a tracking number so a user can follow-up on a case.
<i>Advantageous</i>	The app can support the functionality listed in “not advantageous.”
<i>Highly Advantageous</i>	In addition to supporting the functionality listed in “not advantageous,” the app allows for updates to case status, social sharing of cases, and other features that strengthen the communication between the public and the public sector.

3.1.2. Integration

Rating Criteria

<i>Not Advantageous</i>	The app does not use the Open 311 standard for case submission.
<i>Advantageous</i>	The app uses the Open 311 standard for case submission.
<i>Highly Advantageous</i>	The app uses the Open 311 standard for case submission and has integrated already with more than one municipality with different work order management systems.

3.1.3. Look & Feel

Rating Criteria

<i>Not Advantageous</i>	The app is clearly and primarily branded as a 3 rd party app.
<i>Advantageous</i>	The app can be branded as an app of the Commonwealth of Massachusetts.

<i>Highly Advantageous</i>	The app can dynamically change to reflect the municipality that it is being used in.
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3.1.4. Platforms

Rating	Criteria
<i>Not Advantageous</i>	Does not work on smartphones using iOS and/or the Android operating system.
<i>Advantageous</i>	The app works on smartphones using iOS and/or the Android operating system.

Highly Advantageous The app also works on other platforms such as Windows Phone, Blackberry and websites and / or uses SMS.

3.1.5. Timeline

Rating	Criteria
<i>Not Advantageous</i>	Could not reasonably deploy to five (5) municipalities by the end of 2012 and 15-25 additional municipalities by the end of the first quarter of 2013
<i>Advantageous</i>	Could reasonably deploy to five (5) municipalities by the end of 2012 and 15-25 additional municipalities by the end of the first quarter of 2013
<i>Highly Advantageous</i>	Could reasonably deploy to more than five (5) municipalities by the end of 2012 and more than 15-25 additional municipalities by the end of the first quarter of 2013

3.2. Experience

The mobile app technical proposals will be evaluated for the experience of the vendor.

3.2.1. Mobile 311 Apps

Rating	Criteria
<i>Not Advantageous</i>	The vendor has never built and deployed to a municipality a mobile 311 reporting app.
<i>Advantageous</i>	The vendor has built and deployed to a municipality a mobile 311 reporting app.
<i>Highly Advantageous</i>	The vendor has built and deployed to at least five municipalities a mobile 311 reporting app

3.2.2. Open 311 Experience

Rating	Criteria
<i>Not Advantageous</i>	No demonstrable experience developing apps that meet the Open 311 standards
<i>Advantageous</i>	Demonstrable experience developing apps that meet the Open 311 standards
<i>Highly Advantageous</i>	Demonstrable experience developing apps that meet the Open 311 standards and contributing to the development of the Open 311 standard

3.2.3. References

Rating	Criteria
<i>Not Advantageous</i>	References provide poor or no recommendations or the contact information is inaccurate
<i>Advantageous</i>	References provide good recommendations

<i>Highly Advantageous</i>	References provide excellent recommendations
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4. Router Technical Evaluation Criteria

All responsive router proposals will be evaluated by the following technical criteria. Please note that any proposal that fails to meet the requirements of [Section 7](#) will be considered non-responsive.

Submissions will be evaluated on technical merit and experience of the vendor.

4.1. Technical Merit

The router technical proposals will be evaluated in four categories: *functionality, open source, resilient architecture, timeline*. Described below are the characteristics that would make up a not advantageous, advantageous, and highly advantageous response in each of those categories

4.1.1. Functionality

Rating	Criteria
---------------	-----------------

<i>Not Advantageous</i>	The router cannot maintain a list of Open311 endpoints, it cannot allow endpoints to be assigned to a geographic area, it cannot manage API keys or it doesn't respond in a timely manner to requests for endpoints or validating API keys.
<i>Advantageous</i>	The router performs all of the functions described in "not advantageous."
<i>Highly Advantageous</i>	In addition to the functionality required for "advantageous", the router supports other features advantageous for developer support, such as managing geo-coded endpoints for other standards besides Open311.

4.1.2. Open Source

Rating	Criteria
---------------	-----------------

<i>Not Advantageous</i>	Some or none of the router's codebase will be released with an open source license.
<i>Advantageous</i>	The entire codebase of the router will be released with an open source license.
<i>Highly Advantageous</i>	The router is based on existing open source and/or Open311 community efforts, and already enjoys community support.

4.1.3. Resilient Architecture

Rating	Criteria
---------------	-----------------

<i>Not Advantageous</i>	Router is not deployed in a scalable and robust environment capable of withstanding typical IT failure scenarios.
<i>Advantageous</i>	Router is deployed in a scalable and robust environment capable of withstanding typical IT failure scenarios.
<i>Highly Advantageous</i>	Router is deployed in a scalable, robust and redundant environment capable of withstanding unusual and extreme IT failure scenarios.

4.1.4. Timeline

Rating	Criteria
---------------	-----------------

Not Advantageous Could not reasonably have a test environment ready for use by November 30,

	2012, and the production deployment complete by March 15, 2012.
<i>Advantageous</i>	Could reasonably have a test environment ready for use by November 30, 2012, and the production deployment complete by March 15, 2012.
<i>Highly Advantageous</i>	Could reasonably be ready for production use earlier than November 30, 2012

4.2. Experience

The router technical proposals will be evaluated for the experience of the vendor.

4.2.1. Open 311 Experience

Rating Criteria

<i>Not Advantageous</i>	No demonstrable experience developing apps that meet the Open 311 standards
<i>Advantageous</i>	Demonstrable experience developing apps that meet the Open 311 standards
<i>Highly Advantageous</i>	Demonstrable experience developing apps that meet the Open 311 standards and contributing to the development of the Open 311 standard

4.2.2. References

Rating Criteria

<i>Not Advantageous</i>	References provide poor or no recommendations or the contact information is inaccurate
<i>Advantageous</i>	References provide good recommendations
<i>Highly Advantageous</i>	References provide excellent recommendations

5. Work Order Management System / Open311 Adapter Technical

Evaluation Criteria

All WOM / Open 311 Adapter responsive proposals will be evaluated by the following technical criteria. Please note that any proposal that fails to meet the requirements of Section 7 will be considered non- responsive.

Submissions will be evaluated on technical merit and experience of the vendor.

5.1. Technical

Merit

The WOM / Open 311 Adapter technical proposals will be evaluated in four categories: *functionality, usability, reporting, timeline*. Described below are the characteristics that would make up a not advantageous, advantageous, and highly advantageous response in each of those categories

5.1.1.

Functionality

Rating Criteria

<i>Not Advantageous</i>	<p>The Open311 adapter:</p> <ul style="list-style-type: none"> • is not 100% compliant with the Open311 GeoReport v2 specification • doesn't support cloud hosting as well as local installation • does not include a toolkit to facilitate 3rd party WOM integrations <p>The WOM system:</p> <ul style="list-style-type: none"> • does not provide a map interface that displays all SR's, with options to filter what is displayed • does not provide the capability to append notes to a SR or change the status of a SR (open, closed, etc.)
<i>Advantageous</i>	The app can support the functionality listed in "not advantageous."
<i>Highly Advantageous</i>	In addition to supporting the functionality listed in "not advantageous," the WOM system provides other features that enable greater degrees of work order management by a municipal user (for example, assigning SR's to specific users), as well as options for mobile municipal workers to manage the case load.

5.1.2. Usability

Rating	Criteria
<i>Not Advantageous</i>	The user interface for the Open311 adapter and the WOM system are poorly designed, cluttered, or difficult for new users to comprehend.
<i>Advantageous</i>	The user interface for the Open311 adapter and the WOM system are well designed, clear and logical, and easy for new users to navigate and accomplish necessary tasks.
<i>Highly Advantageous</i>	The users interfaces are clearly superior, with respect to the criteria described in "advantageous", and have an existing and satisfied user community

5.1.3. Reporting

Rating	Criteria
<i>Not Advantageous</i>	Provides no, or few, auditing and management reports
<i>Advantageous</i>	Provides at least 10 auditing and management reports that support performance management principals
<i>Highly Advantageous</i>	Provide greater than 10 auditing and management reports, or capability for ad hoc reporting

5.1.4. Timeline

Rating	Criteria
<i>Not Advantageous</i>	Could not reasonably deploy to five (5) municipalities by the end of 2012 and 15-25 additional municipalities by the end of the first quarter of 2013
<i>Advantageous</i>	Could reasonably deploy to five (5) municipalities by the end of 2012 and 15-25 additional municipalities by the end of the first quarter of 2013
<i>Highly Advantageous</i>	Could reasonably deploy to more than five (5) municipalities by the end of 2012 and more than 15-25 additional municipalities by the end of the first quarter of 2013

5.2. Experience

The WOM / Open 311 Adapter technical proposals will be evaluated for the experience of the vendor.

5.2.1. Work Order Management system Experience

Rating Criteria

<i>Not Advantageous</i>	The vendor has never built and deployed to a municipality a WOM system.
<i>Advantageous</i>	The vendor has built and deployed to a municipality a WOM system.
<i>Highly Advantageous</i>	The vendor has built and deployed to at least five municipalities a WOM system.

5.2.2. Open 311 Experience

Rating Criteria

<i>Not Advantageous</i>	No demonstrable experience developing apps that meet the Open 311 standards
<i>Advantageous</i>	Demonstrable experience developing apps that meet the Open 311 standards
<i>Highly Advantageous</i>	Demonstrable experience developing apps that meet the Open 311 standards and contributing to the development of the Open 311 standard

5.2.3. References

Rating Criteria

<i>Not Advantageous</i>	References provide poor or no recommendations or the contact information is inaccurate
<i>Advantageous</i>	References provide good recommendations
<i>Highly Advantageous</i>	References provide excellent recommendations

6. Pricing

All responsive proposals will be evaluated by the following pricing criteria. Please note that any proposal that fails to meet the requirements of [Section 7](#) will be considered non-responsive.

6.1. Instructions for completing the Pricing Spreadsheet

Completely fill in the spreadsheet for each component your proposal covers. If your proposal does not include a component, fill in that section with “N/A.”

6.2. Definitions

- *Per Municipality*: the cost per municipality for each application’s one-time costs component at each designated range of municipality participation (# of Municipalities column)
- *Per Municipality Per Year*: the cost per municipality per year for Maintenance and Support at each designated range of municipality participation
- *One-Time Costs*: Any costs that occur only once, typically for development, deployment, customization or training. Provide annotations to your pricing spreadsheet explaining which specific activities contribute to the figures in this column.
- *Maintenance & Support (M&S)*: The cost to ensure up time of the app, fix any bugs that may occur and upgrade the app due to necessary changes (such as alterations in the Open311 standard)
- *1 Year / 2 Years / 3 Years M&S*: Maintenance & Support costs for the 1st, 2nd, and 3rd year of deployment of each application, except that the router application requires a cost entry for the 1st year only
- *4th year and beyond*: Assuming a 3 year period of M&S has just concluded, M&S costs per year after the 3rd year, for the 4th, 5th, and 6th years, except that no cost entry is required for the router application

- *Local / Hosted:* We expect that most of the municipalities participating in this project will prefer a hosted solution, but there may also be some that wish to have the system installed locally. Please provide pricing for maintenance and support of each type of deployment, keeping in mind that the final deployment may be a combination of locally installed and hosted instances.

6.3. Pricing Spreadsheet

Per Municipality

Per Municipality Per Year

Mobile App

Router

of Municipalities

1 - 9

10 - 19

20 - 49

50+

One-Time Costs 1 Year M&S 2 Years M&S 3 Years M&S 4th, 5th and 6th Year M&S

1 - 9

Local

Hosted

WOM / Open 311

10 - 19 Local
 Hosted

20 - 49 Local
 Hosted

Local

50+

Hosted

6.4. Pricing Samples

An Excel fill is included as an appendix to this RFP with samples of completed spreadsheets.

6.5. Bundling

You may bundle multiple components into a “package,” and provide different pricing models depending on the number of components selected from your proposal.

6.6. Total Price

The lowest price for each application will be determined by 1) calculating the lowest total price to deploy each application to the maximum number of municipalities for three years, taking into account the \$300,000 total budget for all applications, then 2) adding the cost of

maintenance and support for the 4th, 5th, and 6th years . For purposes of the RFP price calculation only, the calculation assumes that 90% of the municipalities will select a hosted solution.

The lowest bundled price for all applications will be determined by 1) calculating the lowest total price to deploy all application to the maximum number of municipalities for three years, taking into account the \$300,000 total budget for all applications, then 2) adding the cost of maintenance and support for the 4th, 5th, and 6th years . For purposes of the RFP price calculation only, the calculation assumes that 90% of the municipalities will select a hosted solution.

The price billed will be based on the level of annual municipality participation estimated by the City at the beginning of the contract period. One year after the contract is executed, the actual municipal participation will be determined and the parties will true-up the amount billed to reflect the pricing for the actual level of municipality participation. In no event will the City be obligated to pay in excess of the \$300,000 grant funds available. The selected contractor is responsible for monitoring the level of orders to ensure that the project stays within this budget, even after true-up .

7. Submission Requirements

In this section are described are the specific requirements that are the minimum standards for any responsive RFP.

Any proposal not completed in the manner specified below and submitted by the due date will not be evaluated. Please carefully read what is listed below.

To help you, we've provided a check list for you to fill out. To ensure we get as many responsive bids as possible, you must fill out, sign and submit this checklist with your technical proposal.

7.1. The Minimum Requirement Check List

Technical Proposal:

A summary letter

- A summary letter
- Organization Description
- Legal & Financial Information
- A description of your proposed solution. You only need to provide a description for the component(s) you are bidding on, as described in Sections 3, 4 & 5.
- Contact Information for 3 references
- Completed attachments including:
 - Appendix A - Standard Contract City of Boston/County of Suffolk (Form CM 10 and 11)
 - Appendix B – Bid Response Form (Form CM 07)
 - Appendix C – No Proposal Response Form (if applicable)
 - Appendix D – Certificate of Authority (Form CM 06)
 - Appendix E – Title and Intellectual Property Rights
- A signed version of the minimum requirement check list

Price Proposal:

- ___ A price proposal using the tables provided in Section 6. You only need to provide a proposal for the component(s) you are bidding on, as described in Sections 3, 4 & 5.
- ___ A written description of what is included in each of the price proposal categories. Again, you only need to provide a description for the component(s) you are bidding on, as described in Sections 3, 4 & 5.

Separate Submission Requirement & Signature

- ___ Submit a separate, sealed price proposal to the Submission Address in Section 1
- ___ Submit a separate, sealed technical proposal to the Submission Address in Section 1
- ___ Signature; the Offeror's authorized representative shall sign on the line provided here, certifying that the responses provided by the Offeror to these Minimum Evaluation Criteria are provided without modification, qualification or limit.

The Offeror certifies under penalties of perjury that their Proposal has been made and submitted in good faith and without collusion, fraud or unfair trade practice with any other person. As used in this paragraph, the word "person" shall mean any natural person, business, partnership, corporation, union, committee, club, or other organization, entity or group of individuals. Any actions to avoid or frustrate fair and open competition are prohibited by law, and shall be grounds for rejection or disqualification of a Proposal or termination of the Contract.

SIGNED UNDER THE PAINS AND PENALTIES OF PERJURY

Signature

Date

Name

Title & Company

7.2. Summary Letter

Submission of the letter will constitute a representation by your firm that your firm is willing and able to perform the commitments contained in the proposal. The letter must be signed by a person authorized by your firm to obligate your firm to perform the commitments contained in the proposal. The letter must also include a statement that your firm is able to comply with the City's contract requirements.

7.3. Organization Identification

Provide, as applicable, the following information about the Offeror's organization, company, partnership, coalition or unincorporated association:

- Offeror's Name
- Federal Identification Number
- Office Address and Telephone Number
- Name and Telephone Number of Offeror's contact person. This person must be capable of committing the Offeror to an agreement with the City.
- Number of years Offeror operated under this name.
- Brief description of the nature of Offeror's business
- Number of years Offeror has been in continuous operation
- Type of business organization and where registered or incorporated
 - The names and addresses of all parent corporations, officers, general and/or limited partners:

- If the Offeror has conducted business under any name other than the current name of the organization/company, state the time when, and place where, the certificate required by M.G.L.c. 110, §5, was filed.

7.4. Legal & Financial Information

List any legal actions taken against or by the Offeror within the last five (5) years relating to a claim of contract default, including without limitation its provision of a constituent relationship management/work order management. For each legal action, provide the parties involved, the date of the action, any judgments and a brief description.

Attach Dunn & Bradstreet Reports for past two years.

7.5. A Description of Your Proposed Solutions

The technical proposal should describe your proposed solution for the components outlined in Sections 3-5. For ease of review, please separate these proposals into three distinct sections.

7.6. Contact Information for 3 References

Each references should include contact name, contact address, contact telephone number, contact E-mail address. Please check the email and phone numbers before providing them.

7.7. Completed Attachments

The Offeror must complete the attached legal documents and submit an original set of legal forms.

- Appendix A - Standard Contract City of Boston/County of Suffolk (Form CM 10 and 11)
- Appendix B – Bid Response Form (Form CM 07)
- Appendix C – No Proposal Response Form (If applicable)
- Appendix D – Certificate of Authority (Form CM 06)
- Appendix E – Title and Intellectual Property Rights

7.8. A Price Proposal

Your price proposal for each component should use the table and follow the instructions described in Section 6.

7.9. Separate Submission Requirement

The following is a really important requirement. It's easy to get it wrong; please don't.

Each proposal must be submitted in two (2) separate sealed envelopes, one containing only technical information and marked 'TECHNICAL PROPOSAL', and the other containing only price information and marked "PRICE PROPOSAL." Under no circumstances shall any price information be included with a technical proposal. **Failure to submit a separate sealed Price Proposal will result in disqualification of the entire Proposal.**

The Technical Proposal: The Offeror should submit one original (clearly marked) paper copy, one electronic copy (thumb drive), and five (5) copies of the Technical Proposal. The technical proposal must conform to the order, content and format set forth in this RFP. **The technical proposal shall contain absolutely no reference to price.**

The Technical Proposal shall be submitted in a sealed envelope marked:

City of Boston
RFP# DOIT090412 Citizens Connect for Commonwealth Municipalities
TECHNICAL PROPOSAL

Submitted by: (Name of Offeror)
(Date Submitted)

This sealed envelope shall be submitted or mailed to:

City of Boston Department of Innovation & Technology
Attn: Paul Kresser
One City Hall Plaza, Room 703
Boston, MA 02201

The Price Proposal: The Offeror should submit one (1) original (clearly marked) paper copy, one electronic copy (thumb drive), and five (5) copies of the Price Proposal. The Price Proposal must conform to the order, content and format set forth in Section 6Section 6.

The Price Proposal shall be submitted in a separate sealed

envelope marked: City of Boston
RFP# DOIT090412 Citizens Connect for Commonwealth Municipalities
PRICE PROPOSAL
Submitted by: (Name of Offeror)
(Date Submitted)

This sealed envelope shall be submitted or mailed to:

City of Boston Department of Innovation & Technology
Attn: Paul Kresser
One City Hall Plaza, Room 703
Boston, MA 02201

These two envelopes must be submitted or mailed separately. They must reach City of Boston by the RFP due date and time listed in Section 1.

8. Important Things to Know

This section describes important things you should know about how this RFP process and the resulting contracts will be handled. Please read it thoroughly.

8.1. Questions About The RFP

There are two ways you can ask questions about the RFP. The City of Boston will conduct a pre-bid conference on Wednesday, September 12, 2012 at 1:00 PM Eastern in a conference room located in Boston City Hall. The City of Boston will also answer a round of vendor questions regarding this RFP. Vendor questions are due to the City by Noon (Eastern), Tuesday, September 18, 2012. The City will post and distribute both a summary of the questions and answers from both opportunities as an addendum to this RFP on the [City's website](#) and via email to any and all respondents who have requested the RFP by Monday, September 24, 2012.

Any other communications between an Offeror and an employee or contractor/consultant of the City of Boston may cause the Offeror's bid to be rejected.

8.2. Changes or Additions to the RFP

Any supplemental instructions, amendments or changes to the RFP, or attached documents, shall be in the form of written addenda to this RFP. If issued, such addenda shall be emailed to all parties on record as having received and/or requested an RFP from Mr. Paul Kresser at the email address listed therein. Such addenda, if any, will be sent no later than five (5) business days prior to the deadline for submission of proposals and will be posted on the City's website.

Failure of any Offeror to acknowledge receipt of any such addenda shall not relieve such Offeror from any obligation under the proposal as submitted. At the time of the opening of proposals, each Offeror shall be conclusively presumed to have received and understood all RFP documents, including all addenda, and the failure of any Offeror to examine any form, instrument, or other document which is part of the RFP shall in no way relieve such Offeror from any obligation arising under law from the submission of a proposal. Failure of any Offeror's proposal to address any addendum or addenda may also result in the rejection of the entire proposal. Any costs incurred by the Offeror's as a result of responding to this RFP are to be borne by the Offeror and are not to be reimbursable by the City.

8.3. Disclosing Who Bid

A register of proposals with the name of each Offeror and the number of options for which a proposal was submitted will be open for public inspection following the opening of the technical proposals. Proposals will be confidential until the completion of the evaluations, or until the time for acceptance specified in the RFP, whichever is earlier. All submissions will be public records. Do not submit confidential materials.

8.4. Offeror Interviews

If necessary, the City of Boston will ask offerors to present their solutions.

8.5. Offeror Selection Process

The City of Boston reserves the right to award a contract(s) to other than the Offeror(s) offering the lowest overall cost. The contract(s) resulting from this solicitation shall be awarded to the responsive and responsible Offeror(s) whose proposal(s) the City has determined to be the most advantageous, based on the evaluation criteria set forth in the Request for Proposals. Evaluation of all of the non-price proposals will be completed prior to the opening of any price proposal.

Price proposals will be evaluated to determine the lowest total cost, within budget, for the largest number of municipalities, as further described in section 6.6 included.

The City of Boston may determine that it is most advantageous to award to a separate offeror for each of the three components of this RFP. Each offeror, consequently, may be awarded a contract for 0, 1, 2 or all 3 of the components outlined in this RFP.

8.6. Contracting Timeline

All contracts resulting from this RFP shall be signed by the Offeror(s) within a reasonable time upon receipt, which period shall not exceed 90 days. Thereafter the Offeror(s) proposal may be rejected.

8.7. Contracting Language

The Standard Contract for the City of Boston/County of Suffolk documents are contained in Appendix A, Appendix B, Appendix C, Appendix D and Appendix E to this RFP. They will be part of the Contract of the successful Offeror. The Contract will also include, without limitation, the following standard City of Boston forms: (1) a CORI Compliance Certification; (2) Living Wage forms, and (3) Contractor

Certification. Copies of these documents are available for review upon request. To the extent applicable, a license agreement and statement of work, under terms acceptable to the City, will be included as part of the Contract.

8.8. Contract Term

Successful Offeror(s) will be awarded a contract for a period until completion of contract or until June 30, 2015, whichever is earlier.

8.9. No Obligation to Proceed

The City is under no obligation to proceed with this project and may cancel this RFP at any time without the substitution of another, if such cancellation is deemed in the best interest of the City. Further, the Contract shall be subject to the availability of an appropriation. The City reserves the right to reject any or all Proposals, as well as the right to waive informalities and minor irregularities in offers received. Furthermore, the City may issue a new or modified RFP, if doing so is found to be in the best interest of the City.

Commonwealth Citizens Connect Municipal Survey

Thank you for your interest in the Commonwealth Citizens Connect project. The following questions are designed to give us a better understanding of the level of effort required to implement this project in your municipal environment. Because this is a pilot project, we are limiting involvement to 25-35 communities. The first 5 will be completed by 12/31/2012, and the remaining communities will be completed by 3/15/2013.

Please complete this survey by Friday, November 16th, and return it to Alan Heatherley (alanp.heatherley@cityofboston.gov). Thank you!

General Details

1. Official name of your community (e.g. "City of Boston")

1T

2. Top executive of your community (i.e. Mayor, Town Manager, etc.)

1T

3. Primary contact name, email and phone number for this project

1T

4. Stakeholders

Please list any stakeholders that would be interested and/or critical for this project to be successful in your

environment. These should be individuals that will be impacted by the implementation of this project, such as director of Public Works or similar departments.

1T

5. Current involvement of these stakeholders

Are the stakeholders listed above aware of this project? When/how do you plan to approach them, and do you expect them to be receptive? Please be clear about challenges you expect to have with any stakeholders, such as an aversion to technology, experience with previous similar projects that were not successful, etc.

1T

Service Request Intake and Service Delivery

1. Do you currently have a central call center (e.g. 311 call center) or centralized constituent relationship management (CRM) system?

If so, please specify the application and vendor.

1T

2. Please list the service delivery department(s) that you would like to have included in this project. For each department, please specify how they currently receive service requests (SR's) (e.g. phone, email) and if they utilize a work order management (WOM) system to track their SR's.

If so, please specify the application and vendor. If you have more than one used by different departments, please specify which department(s) use which WOM.

1T

3. Please provide the name and contact details of your WOM vendor(s).

1T

4. Are you currently considering adopting a new WOM (either for the first time or switching from a current WOM to a new one)? If so, what is your timeframe?

1T

5. On the short-term, will your service delivery departments be able to comfortably adapt if they begin receiving 10% – 15% more SR's per month than current?

1T

Mobile / Web Apps

1. Prior to hearing about this project, had you already deployed a mobile app, or were you considering doing so?

1T

2. Do you currently provide an online portal for constituents to report SR's?
If so, please briefly provide a description of the features of this portal. If possible, provide a link to the site

1T

Technical Details

1. How many full-time IT support staff do you have?

1T

2. Would you prefer that the back-end systems installed as part of this project be installed locally or hosted remotely?

1T

3. If you have a WOM system, do you know if it's Open311 compliant?

1T

Additional Details

Please provide any additional details that you feel will help us understand your environment.

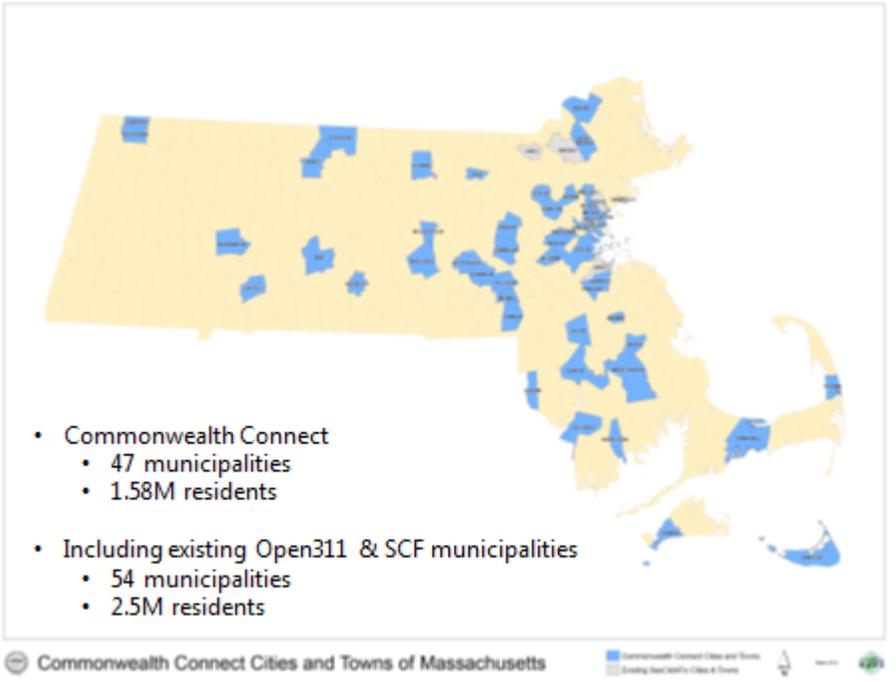
1T

BUSINESS PROCESS MAPPING

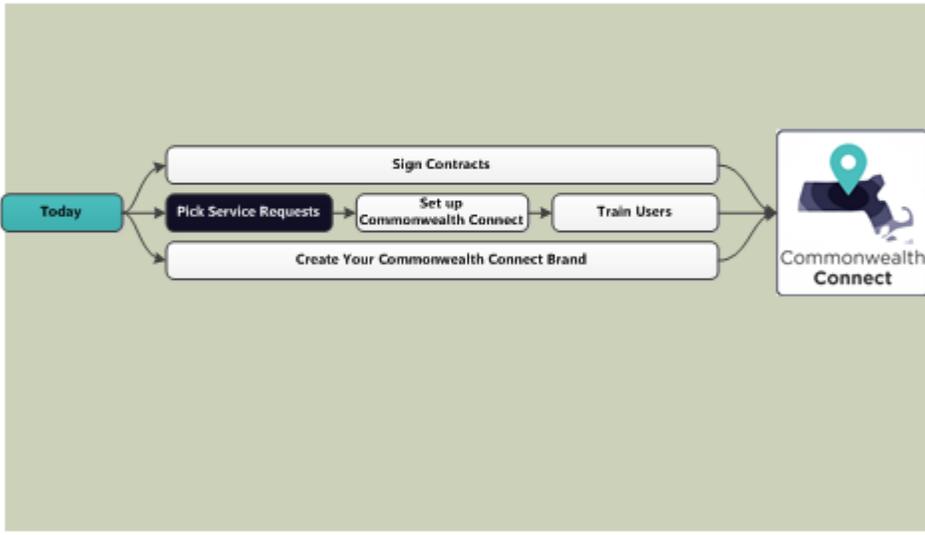
Commonwealth
Citizens
Connect
Training
Session

AGENDA

- Commonwealth Citizens Connect
- What is a business process map?
- Training scenario
- Choosing a business process to map
- Interviews
- Creating the business process map
- Questions



STEP 2: PICK SERVICE REQUESTS



WHAT IS A BUSINESS PROCESS MAP?

- What's a business process?
 - A collection of tasks required to deliver a specific service

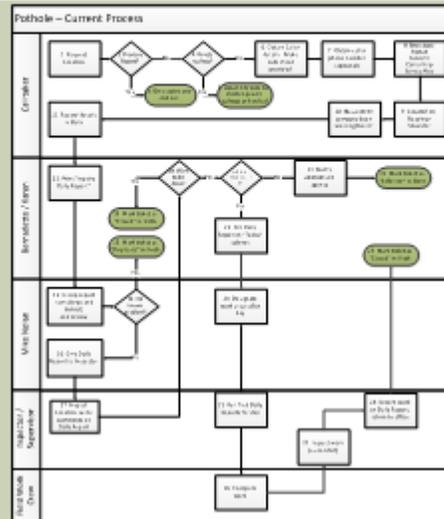
- What's a business process map?
 - Documentation that describes the tasks required to execute a business process, and the relationship between those tasks

- The business process maps we build will have two components:
 - Process Documentation – this document will describe the business process using prose
 - Cross-Functional Flowchart – this document will describe the business process using geometric shapes to represent each task

WHAT IS A BUSINESS PROCESS MAP?

Pothole - Current Process		
Core Details		
Event or Trigger in Core Process (What event or trigger starts the process for this map?)	Process or a list of tasks that is missing from a customer's current service	
Core Process	Public Works	
Stakeholders	City employees	
Operational or Strategic Map (Which map or process will this map be used to replace or improve?)	Public Works and other City functions	
Process Identifier	0271-000-0000	
Process Version	1.000 am - 1.000 pm	
Business Process		
Event	Operational Map	Strategic Map
1	Event: The location of property address (intersection & block number) (Ensure address is up-to-date)	call center
2	Task 1: If available, report to public works and check status 2. Use process map 3. Use process map	call center
3	Event: Public works and other staff. Public works staff are notified and report to other staff. The staff that receive the report are available to complete the work. The staff that receive the report are available to complete the work.	call center
4	Task: Public works and other staff 2. Use process map 3. Use process map	call center
5	Event: Public works and other staff. Public works staff are notified and report to other staff. The staff that receive the report are available to complete the work. The staff that receive the report are available to complete the work.	call center
6	Task: Public works and other staff. Public works staff are notified and report to other staff. The staff that receive the report are available to complete the work. The staff that receive the report are available to complete the work.	call center
7	Event: Public works and other staff. Public works staff are notified and report to other staff. The staff that receive the report are available to complete the work. The staff that receive the report are available to complete the work.	call center
8	Task: Public works and other staff. Public works staff are notified and report to other staff. The staff that receive the report are available to complete the work. The staff that receive the report are available to complete the work.	call center
9	Event: Public works and other staff. Public works staff are notified and report to other staff. The staff that receive the report are available to complete the work. The staff that receive the report are available to complete the work.	call center

WHAT IS A BUSINESS PROCESS MAP?



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MASSTOWN

- Masstown has decided to implement a new work order management (WOM) system, called Worker Bee. The Department of Public Works tracks their work orders in a system called Sloth that wasn't designed for that purpose, and is no longer maintained by the developer. Mark, the Director of DPW, knows that his staff have adapted many of their daily activities around Sloth, and believes that Worker Bee represents an opportunity to improve the effectiveness of his department.
- Mark asks Alisa to develop a plan to transition DPW to Worker Bee without disrupting their current operations.

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CHOOSING A BUSINESS PROCESS

Guidelines for choosing the first business process to map:

Clearly defined	The end of the business process should be a product/service that is easily described and understood.
Relatively simple	All of the tasks are performed within one department or division, and there are few decision points
Public facing	The product/service can be requested by a member of the public
Transactional	The business process starts with a request, and ends with service delivery

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MASSTOWN: SERVICES

- Mark has given Alisa a list of some of the services that DPW performs. Which should she choose to start with:

A. Repair a street light	Most of the street light poles in Masstown are owned and maintained by the local utility company
B. Repair a sidewalk	Masstown ordinances state that sidewalks must be maintained by the property owner, except when the sidewalk has been damaged by a tree planted by Masstown or is located in a town park. Depending on the situation, DPW must coordinate with the Parks Dept arborist or maintenance staff.
C. Fill a pothole	DPW dispatches a crew to fill potholes when requested; Masstown does not have the staff to patrol the streets looking for potholes.
D. Perform routine maintenance on a snow plow	Masstown has a small fleet of snow plows. The vehicle maintenance crew inspects each plow in October to prepare them for the coming winter.

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MASSTOWN: SERVICES

A. Repair a street light	Clearly defined	Yes
	Relatively simple	No – most of the poles are owned by the utility company
	Public facing	Yes
	Transactional	Yes
B. Repair a sidewalk	Clearly defined	No – it's not obvious what "repair" means when the sidewalk is primarily the responsibility of the property owner
	Relatively simple	No – requires coordination with the Parks Dept
	Public facing	Yes
	Transactional	Yes
C. Fill a pothole	Clearly defined	Yes
	Relatively simple	Yes
	Public facing	Yes
	Transactional	Yes
D. Perform routine maintenance on a snow plow	Clearly defined	Yes
	Relatively simple	Yes
	Public facing	No – internal work for Masstown
	Transactional	No – done by schedule, not request

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INTERVIEWS

- What do you gain from interviews?
 - Primary benefits: Tactical / Technical
 - Accurate details about how tasks are completed
 - Gaps and inefficiencies in the process
 - Secondary benefits: Organizational / Personal
 - Historical knowledge about how the process has evolved into what it is today, including the factors that shaped the evolution of the process
 - Information about each person involved in the process – details about their personality and background that will factor into the process redesign
 - Political environment – office politics cannot be ignored! This information will also factor into the process redesign
- Each person involved in the business process has a unique perspective and could hold knowledge that no one else has

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IDENTIFYING INDIVIDUALS TO INTERVIEW

There will likely be more people involved in a process than you have time to interview. Here are some guidelines to help you prioritize who should be interviewed.

Guidelines for prioritizing interviewees (highest to lowest)

Individuals involved in the tasks	<ul style="list-style-type: none">• These individuals will have the most accurate tactical information about the process, because they can clearly tell you what they do, but not always why they do it.• If there are several people that perform the same job function, it isn't necessary to interview each of them, unless there is a wide variation in their output.
Direct managers of those individuals	<ul style="list-style-type: none">• Managers should have a broader view of the tasks their staff perform, and can possibly provide more context for why certain steps are required.
Others	<ul style="list-style-type: none">• If the interviewees are unable to fill in all the gaps and/or provide necessary details, you should begin looking for additional sources of information.• Long-time staff that have been promoted or moved to another department can be helpful, as well as municipal executives (department director, Town Manager, Chief of Staff, Mayor, etc.)

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SETTING UP THE INTERVIEWS

- It can be helpful to schedule the interviews in the same order that a service request follows
 - This gives you an opportunity to identify the decision points and all potential branches that the process can take without having to backtrack when you learn something new
- Having this information early allows you to ask better questions to individuals that are later in the process

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CONDUCTING THE INTERVIEWS

- Getting the best responses (i.e. truthful and accurate) from interviewees requires that they feel comfortable speaking freely
 - Emphasize to them that there will be no repercussions from them speaking honestly to you, and have their manager repeat that point to them directly
 - It's usually beneficial to have someone other than their manager conduct the interview
- Be prepared with as much background information about the process as you can, and bring artifacts from earlier interviews (e.g. paper forms or reports) to prompt responses
- Avoid questions that suggest a "correct" answer:
 - No: "After Jerry gives you this form, you take it straight to Claire, right?"
 - Yes: "When you receive this form from Jerry, what's the first thing you do with it?"

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CREATING THE BUSINESS PROCESS MAP: PROCESS DOCUMENTATION

- Section 1: Core details
 - Description of the service request
 - As clearly as possible, describe the service that is delivered, including what is not in scope of the service
 - Department / Division
 - Individual responsible for operational tasks associated with delivery of the service
 - Even though they have ultimate responsibility for the service, this isn't necessarily the department head; it could be a division head or supervisor.
 - Other operational details about the service, such as the phone number the public call to request the service, the hours that someone is available to answer the phone, etc.

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CREATING THE BUSINESS PROCESS MAP: PROCESS DOCUMENTATION

- Section 2: Business Process
 - The prose descriptions of the individual tasks
- Create a table with three columns:
 - Step #: identify each step / task with a unique number
 - Description: description of the step, such as the action an individual takes, a question asked, or decision that is made
 - Responsible Party: the individual(s) that execute the step, also called the "actors"
- Section 3: Notes
 - Any additional relevant information about the service delivery process

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CREATING THE BUSINESS PROCESS MAP: PROCESS DOCUMENTATION

- Tasks
 - What constitutes a "task" varies depending on the relevance to the reason you're documenting the process.
 - In the example scenario, Alisa's goals are documenting how DPW uses Sloth and evaluating how replacing Sloth with Worker Bee will impact their work. The complex process that the field crew follows to use the "Pothole Killer" vehicle to fill potholes has no bearing on those goals, so she didn't document that process, and summarized it with a single "task" in her business process map.
 - On the other hand, who has the "Daily Report" and what they do with it is vitally important, and warrants a "task" for every change.

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CREATING THE BUSINESS PROCESS MAP: PROCESS DOCUMENTATION

- Review the Masstown Pothole Process Documentation

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CREATING THE BUSINESS PROCESS MAP: CROSS-FUNCTIONAL FLOWCHART

- A cross-functional flowchart is a visual representation of activities using geometric shapes to differentiate activity types. The shapes are grouped together into horizontal bands called "swim lanes" that represent a single person (or group) that executes the activities.
- The shapes:
 - Rectangle – a single activity
 - Diamond – a binary decision point (e.g. Yes/No, True/False, etc.)
 - Rectangle with rounded corners – the start or end of the process
 - Arrow – represents the relationship between two shapes

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CREATING THE BUSINESS PROCESS MAP: CROSS-FUNCTIONAL FLOWCHART

- Creating a cross-functional flowchart
 - There are tools that make creating cross-functional flowcharts easier by building the structure and maintaining the relationships automatically, such as Microsoft Visio.
 - However, there are countless applications that can draw the basic geometric shapes necessary (any paint program or most MS Office applications).
 - It can also be helpful to sketch the flowchart on a piece of paper first.

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CREATING THE BUSINESS PROCESS MAP: CROSS-FUNCTIONAL FLOWCHART

- Why are decision points binary only?
 - Breaking apparently complex decisions into binary choices causes you to consider every possible outcome, and document it's impact on the process.
 - This can also reveal "decision points" that don't impact the process, and are therefore unnecessary.
 - In the Masstown scenario, Alisa is told that the Inspector can tell in a single glance if there's work to do and who's responsibility it is. When she sits down to create her cross-functional flowchart, she realizes that this is actually two decisions (1. "Is there work to do?" and 2. "Who's responsibility is it?"), with three possible outcomes (1. No work to do, 2. Masstown is responsible for the work, or 3. an external agency is responsible). Alisa only has outcomes 2 and 3 documented, but a quick call to DPW reveals a new activity (task 19).

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CREATING THE BUSINESS PROCESS MAP: CROSS-FUNCTIONAL FLOWCHART

- The cross-functional flowchart and process documentation are intended to complement each other and provide important context that could be lost by just looking at one or the other.
 - In the example scenario, just looking at the flowchart would leave you with the impression that Bernadette determines if the issue is a Masstown responsibility (task 20), but in reality she is only reacting to instructions written on the Daily Report by the Inspector (task 17).
- Optionally, you can add the step numbers from the process documentation to the cross-functional flowchart. This can make it easier to compare the documents.

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CREATING THE BUSINESS PROCESS MAP: CROSS-FUNCTIONAL FLOWCHART

- Review the Masstown Pothole Cross-Functional Flowchart

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RESOURCES

- Simple example of a swim lane
 - <http://www.edrawsoft.com/swimlane-example.php>
- Using Visio 2010 to draw a flowchart
 - <http://blogs.msdn.com/b/visio/archive/2009/09/01/cross-functional-flowcharts-in-visio-2010.aspx>
- Free application for drawing flowcharts
 - <http://www.smartdraw.com/specials/ppc/flowchart.htm?id=262764>

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QUESTIONS?

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MUNICIPAL GRANT PARTICIPANT AGREEMENT

This Municipal Agreement is made between the City of Boston, SeeClickFix (the “Vendor”), and the approved Massachusetts City or Town (the “Municipality”) that executes this

Municipal Agreement and elects to utilize software and services from the Vendor awarded a contract pursuant to City of Boston RFP #DOIT090412 (the “Vendor Contract”). This Municipal Agreement is to be appended to and made a part of any contract between the approved Municipality and the Vendor pursuant to the Vendor Contract, and is a prerequisite to any payment hereunder.

RECITALS

WHEREAS, the City of Boston, through a Commonwealth of Massachusetts Community Innovation Challenge (CIC) Grant, is supporting the development of a suite of applications that work across municipalities that allows individuals to report basic problems, such as potholes, directly to the appropriate Municipality; and

WHEREAS, the City of Boston conducted a competitive solicitation pursuant to Massachusetts General Law, Chapter 30B, §6, the City of Boston’s Commonwealth Citizens Connect RFP #DOIT090412, to make these applications available to participating Municipalities at no cost to them, through the use of the CIC Grant funds; and

WHEREAS, the City of Boston awarded a contract to the successful Vendor(s) SeeClickFix (the “Vendor Contract”); and

WHEREAS, to the extent of available CIC Grant funds, approved participating Massachusetts municipalities may acquire the software and services awarded under the RFP at no cost to them, on the same terms and conditions provided in the Vendor Contract, subject to local procurement requirements and the laws of the Commonwealth of Massachusetts, as well as any applicable municipal terms and conditions; and

WHEREAS, subject to advance approval by the City of Boston, CIC Grant funds will be used by the City of Boston to pay for approved software and services provided a Municipality under the Vendor Contract.

NOW, THEREFORE, in consideration of the mutual promises contained in this Municipal Agreement, and of the mutual benefits to result, the parties agree as follows:

1. Each party will facilitate the procurement of software and services pursuant to RFP #DOIT090412 for a term not to exceed three (3) years.
2. The procurement of software and services subject to this Municipal Agreement shall be conducted in accordance with and subject to the relevant statutes, ordinances, rules and regulations that govern each party’s procurement practices.
3. The participation of any Municipality must be approved in advance by the City of Boston, and is subject to the availability of CIC Grant funds.
4. A participating Municipality must approve any Vendor invoice prior to any payment by the City of Boston, and the Municipality will make available to the City of Boston, upon

reasonable request, information and documentation which may assist in reviewing and approving any Vendor invoices to ensure compliance with all contractual requirements.

5. The City of Boston is not a party to the contract between the Municipality and the Vendor and shall have no obligations thereunder. The City of Boston's obligation is limited to paying Vendor the contracted amounts provided in the Vendor Contract awarded pursuant to City of Boston RFP #DOIT090412, and approved in advance as to the Municipality.
6. The Municipality is responsible to determine the applicability of M.G.L. c. 30B to any software, services, or any other purchases procured outside of the Vendor Contract. The City of Boston shall have no obligations with respect to such "off-contract" purchases. Payment for any off-contract purchases shall be the exclusive obligation of such procuring Municipality.
7. The Commonwealth of Massachusetts shall have no obligations under this Municipal Agreement.

Participating Municipality

City of Boston

[City/Town] of _____

Signature

Print Name and Title

Signature

Print Name and Title

Vendor

Signature

Print Name and Title