



**Request for Proposals for
LAND MANAGEMENT SYSTEM
(LMS)
and
IMPLEMENTATION SERVICES**

Date Issued: *September 23, 2022*

City of Malibu RFP
Land Management System, including Implementation Services
September 23, 2022

NOTE: Proposals must be received no later than *Thursday, October 27, 2022, at 3:00 PM PDT* at the following address:

City of Malibu
Attn: Steve McClary, City Manager
23825 Stuart Ranch Road
Malibu, CA 90265

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1. Introduction

1.1 Purpose of RFP

The City of Malibu, hereinafter referred to as “City”, is seeking proposals from qualified software vendors to provide an integrated land use management, permitting, and code compliance/case management system. The City seeks a qualified firm (Proposer) with the experience, expertise, and qualifications to provide a fully integrated, proven state-of-the-art solution. The City will also be looking to partner with the selected vendor to provide the associated professional services to complete implementation.

Interested firms should be aware that the award is:

- A subaward of the City’s ARPA funds.
- The funds will be subject to any and all federal compliance requirements.
- The funds will be subject to any and all reporting required by the Department of Treasury.

The City reserves the right to audit programs and the use of grant funds for any firm that is selected to administer the ARPA funds.

1.2 RFP Schedule of Events

Table 1, RFP Schedule of Events, identifies the RFP schedule that will be followed (dates are subject to change).

Table 1 – RFP Schedule of Events

RFP EVENT	DATE/TIME
City Issues RFP	September 23, 2022
Deadline for Proposer Questions	October 5, 2022
City Responses to All Questions	October 7, 2022
Deadline for Proposal Submission	October 27, 2022
City Completes Evaluations	October 31, 2022
Finalist(s) Notified & Proof of Capabilities (POC) Packet Provided	First Week of November 2022
POC (Proof of Capabilities) Sessions	Week of November 14, 2022
Finalist Due Diligence	November / December 2022
Select Vendor / Begin Contract Negotiations	December 2022
City Council Approval	January / February 2023
Project Kickoff	TBD

Proposers should be aware that selected finalist(s) will be required to participate in a minimum of two (2) days of scripted POC sessions to allow staff to fully understand the proposed solution; Proposers should plan for availability according to the above calendar. The sessions will be attended by City subject matter experts, will focus on the functions deemed most critical to the City and will consist of vendors working through scenarios provided by the City. The POC is not intended to be a generic demonstration of the application. Rather, it is designed to address specific product functionality concerns of the City. Proposers must be prepared to invest the time and resources necessary to complete a successful POC and be considered for final selection.

Note: A determination will be made closer to the scheduled date of the POCs as to whether these sessions will be scheduled for onsite or remote delivery; the City will work with the selected vendor(s) to ensure the safety and well-being of all participants in light of the on-going COVID-19 pandemic.

The City reserves the right to request that Proposers clarify the capabilities of their solutions through follow-up conversations, emails or limited remote demonstrations of solution functionality (i.e., GoToMeeting, WebEx) prior to formal invitation to participate in the POC and selection.

1.3 Public Records Law

Pursuant to California Government Code Section 6250, public records may be inspected and examined by anyone desiring to do so, at a reasonable time, under reasonable conditions, and under supervision by the custodian of the public record. All submitted proposals are subject to this code section.

2. Background

The City of Malibu (City) is a coastal city located in the northwestern portion of Los Angeles County, California, and has a population of approximately 10,654. The City is host to approximately 15 million visitors a year. The City is a general law city incorporated under California law in 1991. It operates under the Council/Manager form of government and is considered a contract city and offers a full range of municipal services. The five Members of the City Council are elected at-large. They serve staggered four-year terms, with the Mayor being selected from among the Councilmembers. The City spans approximately 21 miles of the Pacific Ocean coastline, and extends inland less than a mile in most parts of that span, and slightly more than 2 miles at its widest span. The City currently has 97 full-time employees and 13.27 full-time equivalent part-time employees. The City, organized into seven departments, provides a number of services in-house, including management and administrative services, building safety, community services, environmental sustainability, planning, public works and engineering. The City's Adopted Fiscal Year 2022-2023 totals \$89.8 million and includes General Fund annual expenditures for ongoing City operations of \$44.2 million.

The City is interested in a solution that provides all the functionality identified below by a single proposer. Detailed requirements are included in Attachment 2, Response Requirements Template. At a **minimum**, the proposed solution should include the following integrated functionality and features:

- Planning
- Public Works/Engineering
- Permits & Building Safety
- Plan Check
- Code Enforcement
- Inspections & Administration
- GIS Integration (note that additional system integration requirements apply, as detailed in RFP Section 3.3 Interfaces / Integrations)
- Robust Inquiry and Reporting
- Online Portal (including public inquiries)
- Mobility
- Automated Workflow

2.1 Technology Standards

Table 2, Technology Standards, identifies technology standards for the City. Proposers will be required to conform to these requirements or clearly articulate proposed alternatives.

Table 2 – Technology Standards

Technology	Current Standard/Versions
Database(s)	MS SQL Server
Server OS	Windows Server 2016, Windows Server 2019
Desktop OS	Windows 10, Windows 11
Server Hardware	Dell EMC R440
Desktop Hardware	Lenovo intel 5th
Laptop/Mobile Hardware	iPhone and Samsung
Office Productivity	Microsoft Office 365
Browser	Chrome
Email Server/Client	Outlook Office 365 Enterprise
Virtual Environment	VWMare

Technology	Current Standard/Versions
Storage Area Network (SAN)	Regular HDD
Active Directory	Windows Server 2019 AD
VPN	Dell SonicWall

3. Scope Of Work

The City seeks a proven, fully integrated (i.e., data entered in one proposed solution module is available / viewable as appropriate in other proposed solution modules) LMS solution. It is willing to modify existing business processes to accommodate best practices and will be looking to select a system that drives the implementation of those best practices. More specifically, the proposed solution should provide the following capabilities in terms of its user interface and other general system characteristics:

- a. Enhance operational effectiveness by making more timely, accurate and complete information available to citizens, the Mayor and City Council, City Manager, and other City personnel (i.e., dashboard, portal)
- b. Increase public access to information and services through online portals/modules
- c. Improve management and public policy decision making by increasing the ability to analyze data
- d. Allow for ongoing upgrades of technology to support current and future core functional needs
- e. Utilize and manage technology in a cost-effective manner
- f. Continual innovation to encourage implementation of best business practices (i.e. encourage streamlining and automation of standard business transactions, enhanced and on-line capabilities, etc.)
- g. Enhanced features and functionality to support increased automation and operational efficiencies (i.e. workflow, mobility, online application submission, integrated document management, capturing electronic signatures, etc.)
- h. Improved reporting and simplified staff access to planning, permitting, inspections and code enforcement data and information for self-serve access and activities
- i. Robust audit and transaction logging capabilities
- j. Regulatory compliance to protect personal identifying information and cardholder data, and to adhere to State and Federal mandated regulations
- k. An intuitive, consistent (within and across modules), well-designed and browser-based user interface

- l. Fully integrated system where data is only entered one-time (single points of data entry) to eliminate re-keying of information but available for viewing or update as appropriate across the functions of the proposed solution
- m. Ability to drill into a record view to the supporting source data and documents that have been added, and to drill across from a record into related data in other, integrated modules
- n. Processing of transactions in real-time, making data immediately available for inquiry and reporting
- o. Ability to easily export information directly to Excel, Adobe, and flat file formats, etc.
- p. A well-documented and accessible API (Application Programming Interface) or web API that can be used for integrations and data extraction.
- q. City-defined fields, reports, hot keys, and business rules/workflows
- r. Ability to modify setup/configuration (i.e., setup codes, report parameters, etc.) without the assistance of the software provider
- s. Robust security capabilities with the ability to integrate to MS Active Directory and with the ability to apply security access by role, individual or member of group and apply rules for exception based on functions, departmental data, etc.
- t. Ability to define workflow by record-type (i.e., building permit application, code enforcement complaint, etc.) and department, applicable across all appropriate modules
- u. Ability to view and manage workloads, assignments, and related thresholds

Additionally, the solution selection will take into consideration the following criteria:

- a. Are the **Implementation Risks** clear?
- b. Can the needs of the City be met with proposed **Commercial-off-the-Shelf** solution?
- c. Does system provide **Information Sharing, Transparency and Robust Reporting**?
- d. Does the vendor have a clear, stated approach to achieve **User Buy-In**?

In addition to the software functionality identified previously, the City is seeking a Proposer to provide professional services that will ensure a successful implementation. The professional services should include the following:

- Project Management
- Software Installation and Configuration
- Business Process Review and Redesign
- Implementation Consulting

- Data Conversion Services
- Acceptance Testing Support
- End User Training
- Documentation
- Report Writing
- Software Maintenance and Post-Implementation Support

The City will consider and evaluate both on-premises solutions and Software-as-a-Service (SaaS) implementation models. SaaS solutions are preferred; however, vendors must clearly identify and discuss proposed mitigations for any challenges raised by a SaaS implementation with respect to the City’s existing technology infrastructure and the stated required integrations. Proposers are also encouraged to offer alternatives to the traditional license purchase approach. If alternatives are offered, the Proposer should clearly identify what is being offered and the pricing to allow the City to fully evaluate the offering as compared to the traditional licensing approach.

3.1 Business and Operational Metrics

Table 3, Business and Operational Metrics, provides Proposer with key information that will help promote an understanding of the current environment. Based on the current usage of the development database by City Staff, proposers should anticipate approximately 60 users of the proposed solution.

Table 3 – Business and Operational Metrics

Department/Division	Count of Record types
Building and Safety	• 14
Planning	• 8
Environmental Sustainability Department (i.e., Operating permit (Septic))	• 1
Code Enforcement	• 2
Public Works/Engineering	• 9
Finance (i.e., Alarm permits)	• 1

3.2 Current LMS-related Technology

Table 4, Overview of Current LMS-related Technology presents a consolidated list of the applications that support the City’s land management and related services.

Several systems, applications and manual processes are used to support the City’s land management-related functions. A home-grown development database is used for

Planning and data management. Hyland OnBase system currently supports land management records; complaints are received by phone or via email. Additional information regarding current integrations, technology standards, key business and operational datapoints are included in the information that follows.

A copy of the City’s fee schedule may be found on the City’s website at <https://www.malibucity.org/316/Fee-Schedule>.

Table 4 – Overview of Current LMS-related Technology

Vendor / Source	Product	Purpose
IRIS Consulting	Development Database (proprietary solution)	<ul style="list-style-type: none"> • Planning • Code Enforcement • Building Plan Check • Permits (including but not limited to building, outdoor dining, encroachments, residential/commercial moving, etc.) • Environmental Programs • Encroachment Permit Intake & Communication
Springbrook	Springbrook	<ul style="list-style-type: none"> • From Springbrook SQL DB (real-time) read Springbrook customer table for customer info (Name, ID) – Deposit Tracking • To Springbrook Cash Receipts module (batch) Cash, Check, and Credit Card transaction data with correct Springbrook customer ID from fees collected
Stripe	Stripe	<ul style="list-style-type: none"> • Online Payments
Microsoft	Office365 Business	<ul style="list-style-type: none"> • Online Platform for office apps • SharePoint Land development
Adobe	DocuSign	<ul style="list-style-type: none"> • Automate Document Signing
Esri	ArcGIS	<ul style="list-style-type: none"> • Spatial data
Bluebeam	Revu	<ul style="list-style-type: none"> • Plan review
Hyland Software	OnBase	<ul style="list-style-type: none"> • Document imaging/Management, historical document repository

Vendor / Source	Product	Purpose
State of CA	California Environmental Reporting System (CERS)	<ul style="list-style-type: none"> Reporting of hazardous waste and hazardous materials data related to permits issued as well as related inspections, compliance, and enforcement

3.3 Interfaces / Integrations

The City looks to identify best practices and have the new solution provide required functionality where possible; when not possible, the proposed solution should provide for integration to external systems supporting City requirements. An **integration means an automated process where data inputs and outputs are shared within systems in real time**. Automated process would mean that there is no manual intervention. Table 5, Required LMS Integrations, identifies the integrations that will be required and/or desired with the new land management system.

Table 5 – Required LMS Integrations

Vendor	Product	Purpose
ESRI	ESRI	<ul style="list-style-type: none"> GIS layers include parcels, tracts, and zoning
Springbrook	Springbrook	<ul style="list-style-type: none"> For online payments
Microsoft	Office 365	<ul style="list-style-type: none"> Productivity
Hyland Software	OnBase	<ul style="list-style-type: none"> Document imaging/Management, historical document repository (City will continue to utilize OnBase for its land-related documents)
State of California	Contractor State Licensing Board	<ul style="list-style-type: none"> Validate professional licenses

3.4 Conversion

The City desires to retain, convert and load its current and historical data (including records, libraries, supporting documents, and related file attachment meta-data) to the proposed solution. Table 6, Conversion Requirements, provides a list of data by functional areas and a description.

Table 6 – Conversion Requirements

Current Repository	Description
Development Database (Proprietary Solution)	<ul style="list-style-type: none"> All land related data records

4. The Proposal

Proposals should not include any materials to be returned to the Consultant and should be a concise statement. The City’s RFP and Vendors proposal will be incorporated to the Contract as exhibits. Each proposal must include the following information:

1. Organization, Credentials and Experience

- a. Provide a summary of the company’s qualifications, credentials and related past experience.
- b. Describe the size of the company, and indicate the principal, company official(s) and other personnel who will be assigned to work on behalf of the City. Provide resumes, biographies and information on the key personnel who will be assigned to this work.
- c. Provide five (5) references for projects of similar size and scope, including a description of the project and identification of solution components that were implemented, the project duration and implementation date, and contact information including the names, titles, addresses, phone numbers and email addresses for the appropriate persons that the City may contact. **The City strongly prefers references for systems that have been implemented for California public sector agencies during the last five (5) years.**

2. Understanding of the Scope of Work

Provide a narrative of the company’s understanding of the Scope of Work and detailed proposal to meet the City’s goals and priorities.

The Proposal should identify the proposed solution up to and including the following:

- a. Provide a brief solution overview identifying origin of system, release history, the specific solution release being proposed, and number of operational installations for the proposed software solution.
- b. Provide a written description for each module included in the Proposal. It is important to note that the level of detail must be sufficient to allow the evaluators to understand your product’s features, functions, capabilities, and

shortcomings/challenges and to ensure an adequate understanding of how the proposed solution will meet the City's needs.

- c. Complete the Response Requirements Template (Attachment 2) that has been provided in Microsoft Word format. The document should be completed for each line item based on the following criteria: Y – Meets/Exceeds, N – Does not Meet, W/C – Workaround or Customization Required, or T – Alternate / 3rd Party Solution Required. Proposer is to respond with a single option and are encouraged to provide written response to adequately explain each response.
- d. Identify any additional functionality or recommended modules or services not already identified but that the Proposer recommends that the City consider. Include a description of the features and functions of each additional proposed module, service, or recommended 3rd party solution.
- e. Confirm ability to conform to the requirements in the Technology Standards table 2 above, or clearly articulate proposed alternatives.
- f. RFP Section 3.3 Interfaces / Integrations documents the City's required LMS integrations with the proposed solution, detailed in Table 5, Required LMS Integrations. Proposer's must identify the recommended method for integration for each identified system.
- g. RFP Section 3.4 Conversion describe the City's current conversion requirements; in this section of the Proposal, Proposers should describe their Conversion Methodology and approach to meet the City's desire to retain and convert data to the proposed solution, detailed in Table 6, Conversion Requirements. Proposers should identify all involved activities and responsible party (i.e., vendor, City) for the tasks to complete a successful data conversion.

3. Professional Services Agreement

The selected provider must use and comply with the terms and conditions of the Federal Contract Provisions and the City's standard Professional Services Agreement as provided in Attachment 1 of this RFP.

4. Compliance

Provide a written statement that the Consultant shall comply with the California Labor Code pursuant to said regulations entitled: Federal Labor Standards provisions; Federal Prevailing Wage Decision; State of California Prevailing Wage Rates, and the City of Malibu's Minimum Wage Ordinance respectively.

5. Litigation

Firms are required to list past, current, or pending litigation resulting from professional services rendered over the past five years. If a court or an arbitrator rendered a decision, state the results.

6. Fees.

Provide a cost proposal for completion of the scope of work.

The City seeks a clear and comprehensive understanding of all costs associated with the proposed solution, including implementation and ongoing software maintenance / support fees. In this section, the Proposer must itemize all those costs. The City will evaluate proposals based on the “Total Cost to Implement (TCI)” and the “Total Cost to Operate (TCO).” TCI will include all costs required for a successful implementation. The TCO will be calculated based on TCI plus ten years of annual maintenance fees.

The Proposer’s price sheet(s) must identify all costs required to complete a successful implementation to include:

Solution pricing

- a. Software Subscription or Licensing and Maintenance Costs

Implementation Services

- b. Software Installation and Configuration
- c. Project Management
- d. Business Process Review
- e. Training
- f. Documentation
- g. Data Conversion
- h. Change Management
- i. Interface Services/Integrations

3rd party products required/recommended for proposed solution (i.e., software, hardware)

Optional offerings

Consultant travel and expenses not otherwise included in the implementation costs

Additional Professional Services rates (e.g., Report Writing)

Note that the City intends to purchase any required proposed solution hardware and database software independently based on recommended standards provided by the Proposer if required for proposed solution. The City has provided Proposer a mandatory electronic (Microsoft Excel – Attachment 3) spreadsheet with a pricing template **that must be filled out completely** and included in *native* format (**not** PDF) with the Proposer’s response and under separate cover.

7. Timeline

Provide a timeline for completing the scope of work including a schedule of key milestones.

5. Proposal Procedure

5.1 Clarifications

The City will respond to requests for clarification to the RFP in written Addendum(s) as needed. Inquiries should be directed by email only to amontano@malibucity.org. No verbal requests will be accepted. All requests for clarification must be received by October 5, 2022.

Proposal Deadline: Submit two (2) printed and bound copies and an electronic copy of the complete proposal to:

Steve McClary, City Manager
City of Malibu
23825 Stuart Ranch Road
Malibu, CA 90265

All proposals are due no later than the date and time specified in Table 1, RFP Schedule of Events. No faxed or emailed proposals will be accepted. The City reserves the right to extend the deadline or accept a late submittal with good cause shown.

5.2 Evaluation Criteria

Proposals will be evaluated based primarily on experience and performance in oral interviews.

The City reserves the right to select consultants without interviews however, shortlisted firms *may* be invited to meet with the selection committee. The presentation portion of the interview will be limited to no more than 30 minutes, with up to another 30 minutes set aside for questions and answers. The presenters must include the personnel who will be engaged in the project.

5.3 Response Preparations

No reimbursement will be made by the City for costs incurred in the preparation of the response to this RFP. Submitted materials will not be returned and become the property of the City of Malibu.

5.4 Right to Reject Proposals

Submission of a proposal indicates acceptance by the firm of the conditions contained in this request for proposal unless clearly and specifically noted in the proposal submitted and confirmed in the agreement between the City of Malibu and the firm selected. The City of Malibu reserves the right without prejudice to reject any or all proposals.

ATTACHMENTS

Sample Professional Services Agreement (Attachment 1), Response Requirements Template (Attachment 2), Vendor Cost Proposal Worksheet (Attachment 3).