



## **REQUEST FOR PROPOSAL**

### **ELECTRONIC INVOICE PRESENTATION & ON-LINE PAYMENT CAPABILITIES**

*OFFICE OF THE TOWN ADMINISTRATOR  
EASTON, MA*

**Issue Date: August 18<sup>th</sup>, 2010**

**Due Date: September 15<sup>th</sup>, 2010**

## 1. GENERAL

The Town of Easton, MA is issuing this proposal for the procurement of a simple, secure web based electronic invoice presentment and processing solution. Easton has a goal of implementing paperless services to its citizens for their convenience.

The Town of Easton is located 30 minutes from Boston, 45 minutes from Cape Cod, and 45 minutes from Providence. The community is approximately 29 square miles in area and has an estimated 2010 population of 23,357. Easton is situated in the Greater Brockton Area, which is strategically located between State Route 128 and Interstate 495, the inner and outer loops around Boston. State Routes 3, 24, and 28 provide easy access to the air, port, and intermodal facilities of Boston and Providence. Easton is governed by an Open Town Meeting and the executive branch is made up of an elected five-member Board of Selectmen, serving three-year terms.

Easton, although primarily a residential community, has experienced rapid and positive growth over the last decade. Easton also has an active and vibrant small business community, and the Easton Chamber of Commerce provides services and support to its members. Approximately 15% of the community is dedicated conservation land. The Town is a participant in the state matching Community Preservation Act program and recently voted to purchase a \$1.3 million parcel adjacent to Wheaton Farm, continuing a long-standing commitment to preserve open space.

- 1.1 The Town of Easton aims to minimize its negative environmental impact by reducing all unnecessary paper usage that currently results from tax collection, billing and invoicing.
- 1.2 The Town seeks to implement paperless solutions for the purposes of cost effectiveness.
- 1.3 Easton reserves the right to waive any informality or reject any proposal. <sup>i</sup>
- 1.4 Proposals are due in the Office of the Town Administrator, David Colton, by **10:30 a.m. on September 15<sup>th</sup>, 2010.**
- 1.5 Email responses are preferred.

## 2. **STATEMENT OF WORK**

- 2.1 Integrated electronic invoice presentment and on-line payment capability where a payer can view a current, detailed invoice and then proceed to make an on-line payment within the same user interface.
- 2.2 Completely secure and compliant systems to relieve Town of any need to store sensitive customer payment information.
- 2.3 Present the bills and notifications in each department's formats.
- 2.4 Past invoice and payment history is available to customers and applicable Town employees 24/7.
- 2.5 Email notifications prior to and after payments are made containing a secure link to invoice and/or receipt of payment.
- 2.6 Bills are available to view by customers at their request.
- 2.7 Software as a service architecture – All payer financial or payment information and the application is housed offsite and not under the care or control of either department.
- 2.8 Comprehensive services to aid the Town in marketing the service to its citizens and to its employees.
- 2.9 Allow for automatic payment schedules to be set up.
- 2.10 Allow 18 months of billing and payment history.
- 2.11 Allow customers to schedule payments.
- 2.12 Allow payments beyond the due date.
- 2.13 Allow for partial payments to be made *when applicable by law*. \*Motor vehicles have to be paid in full -partial payments cannot be accepted.  
**Responders to this RFP must be able to accommodate this with their programs and have the capability to lockdown these bills while keeping others open.**
- 2.14 Allow multiple bills to be made in one single transaction.
- 2.15 Allow multiple payment types from one customer for the same bill.
- 2.16 Provide secure, private and PCI compliant storage of customer payment information.

**COST ANALYSIS:** The Town of Easton seeks to utilize a format for analyzing costs between bidders that is clear, concise, and equally comparable.

- Please base all quoted charges on one e-bill, and again on 500 e-bills.
- List total cost (to Town and/or citizen combined) of one e-check payment, and list again cost for 500 e-checks.
  - 1 -
  - 500 -
  - Comments-\_\_\_\_\_
- List total cost (to Town and/or citizen combined) of one debit card payment, and list again cost for 500 debit card payments
  - 1 -
  - 500 -
  - Comments-\_\_\_\_\_
- List total cost (to Town and/or citizen combined) of one credit card payment, and list again cost for 500 credit card payments.
  - 1 -
  - 500 -
  - Comments-\_\_\_\_\_
- Specify any differentials in percentages among different credit card providers, if applicable, and clearly state what kind of cards, if any, are NOT accepted and why.
  - Comments-\_\_\_\_\_
- If there are **any** additional costs, including: implementation fees, maintenance fees, or any other potential costs or fees to the Town of Easton or its citizens associated with the services it seeks, please list them here.
  - Include an explanation of the nature of said costs or fees (if applicable).

**3. SCHEDULE OF EVENTS**

3.1 Issuance of RFP

August 18th, 2010

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3.2	Technical Questions/Inquiries Due	September 2nd, 2010 no later than 4:30 p.m.
3.3	RFP closes	September 15th, 2010 at 10:30 a.m.
3.4	Complete Initial Evaluation	October 15 <sup>th</sup> , 2010
3.5	Final Award Notification	October 18 <sup>th</sup> , 2010

#### 4. **PROPOSAL**

##### 4.1 **Vendor's Understanding of the RFP<sup>ii</sup>**

In responding to this RFP, the vendor accepts full responsibility to understand the RFP in its entirety, and in detail, including making any inquiries to the Town of Easton as necessary to gain such understanding. The Town of Easton reserves the right to disqualify any vendor who demonstrates less than such understanding. Further, the Town of Easton reserves the right to determine, at its sole discretion, whether the vendor has demonstrated such understanding. That right extends to cancellation of award, if award has been made. Such disqualification and/or cancellation shall be at no fault, cost, or liability whatsoever to the Town of Easton.

##### 4.2 **Good Faith Statement**

All information provided by The Town of Easton in this RFP is offered in good faith. Individual items are subject to change at any time. The Town of Easton makes no certification that any item is without error. The Town of Easton is not responsible or liable for any use of the information or for any claims asserted there from.

##### 4.3 **Communication**

Verbal communication shall not be effective unless formally confirmed in writing by a specified procurement official in charge of managing this RFP process. In no case shall verbal communication govern over written communication.

- 4.3.1 **Vendors' Inquiries.** Applicable terms and conditions herein shall govern communications and inquiries between the Town of Easton and vendors as they relate to this RFP. Inquiries, questions, and

requests for clarification related to this RFP are to be directed in writing to:

**Town of Easton  
Easton Town Offices  
136 Elm St.  
No. Easton, MA 02356**

Attention: Teresa Desilva  
Telephone: [508] 230-0604  
E-mail: TDeSilva@easton.ma.us

4.3.2 **Informal Communications** shall include, but are not limited to: requests from/to vendors or vendors' representatives in any kind of capacity, to/from any the Town of Easton employee or representative of any kind or capacity with the exception of the Town of Easton for information, comments, speculation, etc. Inquiries for clarifications and information that will not require addenda may be submitted verbally to the named above at any time.

4.3.3 **Formal Communications** shall include, but are not limited to:

- Questions concerning this RFP must be submitted in writing and be received prior to **4:30 p.m. on September 2, 2010.**
- Errors and omissions in this RFP and enhancements. Vendors shall recommend to the Town of Easton any discrepancies, errors, or omissions that may exist within this RFP. With respect to this RFP, vendors shall recommend to the Town of Easton any enhancements, which might be in the Town of Easton's best interests. These must be submitted in writing and be received prior to **4:30 p.m. on September 2, 2010.**
- Inquiries about technical interpretations must be submitted in writing and be received prior to **4:30 p.m. on September 2, 2010.**
- Inquiries for clarifications/information that will not require addenda may be submitted verbally to the buyer named above at any time during this process.
- Verbal and/or written presentations and pre-award negotiations under this RFP.
- Addenda to this RFP.

4.3.4 **Addenda:** The Town of Easton will make a good-faith effort to provide a written response to each question or request for clarification that requires addenda within 5 business days. All

questions, answers, and addenda will be shared with all recipients. The Town of Easton will not respond to any questions or requests for clarification that require addenda, if received by The Town of Easton after 4:30 p.m. on **September 2nd, 2010.**

**4.4 Proposal Submission**

Proposals must be delivered sealed to:

David Colton, Town Administrator  
The Town of Easton  
Town Administrator's Office  
136 Elm Street  
North Easton, MA 02356

no later than 10:30 a.m. on **September 15<sup>th</sup>, 2010.** The Town of Easton shall not accept proposals received by fax. Vendors are to submit 1 original copy of proposal marked "Original" and 2 marked "Copy." Each original and copy must be individually bound.

**Criteria for Selection<sup>iii</sup>**

The evaluation of each response to this RFP will be based on its demonstrated competence, compliance, format, and organization. The purpose of this RFP is to identify those suppliers that have the interest, capability, and financial strength to supply The Town of Easton with an electronic invoice presentment and processing solution identified in the Scope of Work.

**5. References for Similar Work performed:**

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**b.**

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**c.**

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### **M.G.L. c. 30B and the Role of the Office of the Inspector General**

M.G.L. c. 30B, the Uniform Procurement Act, prescribes the procedures to be used by local governmental bodies, including cities, towns, counties, local authorities, and districts, to solicit competition for contracts for supplies and services, to dispose of surplus supplies, and to acquire or dispose of real property. Enacted in 1990, M.G.L. c. 30B was modeled on the American Bar Association's Model Procurement Code. The statute was drafted by the OIG in collaboration with the Massachusetts Association of Public Purchasing Officials, the Massachusetts Association of School Business Officials, the City Solicitors and Town Counsel Association, and others.

M.G.L. c. 30B is based on the premise that fair and open competition for public contracts promotes honesty and accountability in government and protects the taxpayers' interest in securing contracts with qualified vendors on favorable terms. The purpose of the statute is to establish a framework that ensures fair competition with all competitors on an equal footing.

The OIG continually assesses its contribution to the integrity of, and public confidence in, state and local government. The OIG is vigilant in detecting fraud, waste, and abuse, but the Office's principal objective is to prevent fraud, waste, and abuse before they occur. The OIG has set an aggressive, proactive prevention agenda reflected in a three-part prevention strategy:

- Capacity building -- providing training and technical assistance to public officials.
- Timely intervention -- intervening in transactions before fraud, waste, or abuse occurs.
- Dissemination of lessons learned -- widely distributing information to public officials to prevent the recurrence of problems we have identified in other agencies and jurisdictions.

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<sup>i</sup> Section 9 of M.G.L. c. 30B provides that "the procurement officer may cancel an invitation for bids, a request for proposals, or other solicitation, or may reject in whole or in part any and all bids or proposals when the procurement officer determines that cancellation or rejection serves the best interests of the governmental body."

<sup>ii</sup> An awarding authority must reject a bidder who is deemed not "responsible." Section 2 of M.G.L. c. 30B defines a responsible bidder as "a person who has the capability to perform fully the contract requirements, and the integrity and reliability which assures good faith performance."

<sup>iii</sup> M.G.L. c. 30B gives awarding authorities the right to reject any and all bids when rejection "serves the best interests of the governmental body."

