

AUTOCENE

A NEW ERA IN AUTOMATION

Autocene Use Case Series

Customer: Commonwealth of Massachusetts

Designer Selection Board & Dept. of Capital Asset
Management and Maintenance

Creation of Statewide Designer Database for
Selection of Qualified Firms

May 2020

AUTOCENE



Commonwealth of Massachusetts: Designer Selection Board

The Designer Selection Board (DSB) was created by the Massachusetts legislature in 1981 as one of the reforms recommended by the Ward Commission's investigation into waste, fraud and abuse in public building construction. The Board is charged with providing safeguards to maintain the integrity of the system for procurement of building design services within the Commonwealth. The DSB acts as the central administrative authority for the selection of firms to provide design services for public building construction projects throughout the Commonwealth. Certain public entities come under *direct* DSB jurisdiction, while others are charged with setting up a similar process following DSB guidelines and using DSB forms. The agency's stated objectives are to:

- ✓ ensure that the Commonwealth obtains the most qualified designer for each and every one of its building projects;
- ✓ maintain public confidence in the designer selection procedures;
- ✓ provide consistency in design service procurement methods;
- ✓ encourage broad-based participation in public design work;
- ✓ provide safeguards to maintain the integrity of the system of procuring design services in the Commonwealth.

DSB's ultimate goal is to improve the efficiency and cost of operation of all of the Commonwealth's public buildings which can only be achieved through the best quality design.

Problem Statement

In 2017, the state's Secretary of Administration and Finance hired Bill Perkins, PE as Executive Director. In assessing the state of the agency that he was taken over, Mr. Perkins found that the DSB was still using many of the same tired processes and protocols that it started with decades earlier. This included outdated statutes, guidelines and manually entered forms that must be used by most state agencies as well as every city and town in Massachusetts.

The Commonwealth prides itself on being business-friendly and for having programs in place to encourage new and diverse firms to apply for public work. However, the complicated and onerous designer qualification and application process was a large barrier to entry. Since state law required all agencies and municipalities to follow a similar process, small firms were at a real disadvantage. With thousands of applications for public design projects filled out in Massachusetts each and every year, the DSB had great incentive to come up with a more streamlined process!

One of the side benefits of beginning an automation process is it requires a complete assessment of *existing* requirements, policies and procedures. An evaluation of the applications and forms found that they were outdated and required information that was not even used by the DSB in their assessment of submitted proposals. This unnecessarily increased the cost for applicants and resulted in 15% of the applications rejected due to minor errors completing the complicated applications.

When the DSB first started working with Autocene, design firms interested in doing public work in Massachusetts were first required to file a paper qualification "*disclosure*" statement several pages long that also had to be regularly updated by mail. If a design firm was found to be statutorily qualified and wanted to apply for a particular project listed, they would then need to submit 16 hard copies of a 16-part application with subconsultant acknowledgement forms and certifications that would result in a 40-50 page paper application.

The Designer Selection Board Vision

Executive Director Bill Perkins saw an opportunity to streamline and automate the process. In fact, that's the reason why Bill decided to take on the role!

Since a similar, labored selection process is completed by so many state agencies and municipalities across Massachusetts, a streamlining effort represented a great opportunity for significant economic impact, but also necessitated a measured process that included input from many stakeholder's, public and private. Goals include:

Central Statewide Database

"By creating a central statewide designer database to collect firm information, verify license and ownership data, and contain performance evaluations, we are providing a single point of entry for all stakeholders to be able to find a qualified firm. This information will be linked to applications and offerings, further reducing the time and cost."

Sub-Consultant Inclusion

"While design "subconsultants" on design teams may outnumber the lead architects and engineers involved 10:1, information regarding their inclusion and performance is not currently captured by the DSB. Now, subconsultant firms will be able to develop a system profile with all their information and references for use by the public and other design firms putting their design teams together."

Faster and Easier

"By making the process easier and quicker for the design community to apply for state and municipal design work, we can use existing staff more efficiently. Electronic submission and review also means greatly reduced paper, copying, postage and document storage needs. Electronic data gets to the board quicker, reducing the time necessary to properly review an application."

Simplified Forms

"The effort will provide greatly reduced form complexity, with the elimination of required elements that are not in the statute nor needed for review by board."

Environmental Benefits

"We can foresee greatly reduced or eliminated printing, copying, postage costs, along with the elimination of the contents of 33 file drawers of stored forms: 132 linear feet just within the DSB office! Multiply that by other agencies and municipalities involved and the effect should be enormous."

Faster Board Decisions & Awards

"Improved DSB decision analytics through the use electronically submitted documents will allow for quicker decisions."

Executive Reporting

"By collecting data electronically, DSB's ability to provide reports and statistics at all levels will be enhanced. It will streamline the process of providing annual reports as well as access and opportunity reporting."

Solution Leveraging with Other State Agencies

"The streamlining effort will create a platform solution that can be leveraged by similar public organizations to support their selection processes. The board management & form solutions will be leverageable by boards and commissions across the Commonwealth."

Design Community Benefits

"By reducing the time and money needed to apply for DSB advertised projects, the DSB will broaden the field of applicants, encouraging submissions from smaller and more diverse firms. Electronic fail-safe systems will lower the application disqualification rate from 15% to 0%. The ultimate goal is that ALL MA public design projects be listed on Autocene so that interested applicants can apply to many more opportunities with the same processes."

Affirmative Marketing

"Many state agencies have goals and benchmark for inclusion in the awarding of public contracts by diverse design-related firms. The inclusion of subconsultants in the database provides a great opportunity for these firms to be noticed and included. The additional reporting capabilities will improve agency analytic capabilities to identify opportunities, track progress to meet stated goals."

The Autocene Solution

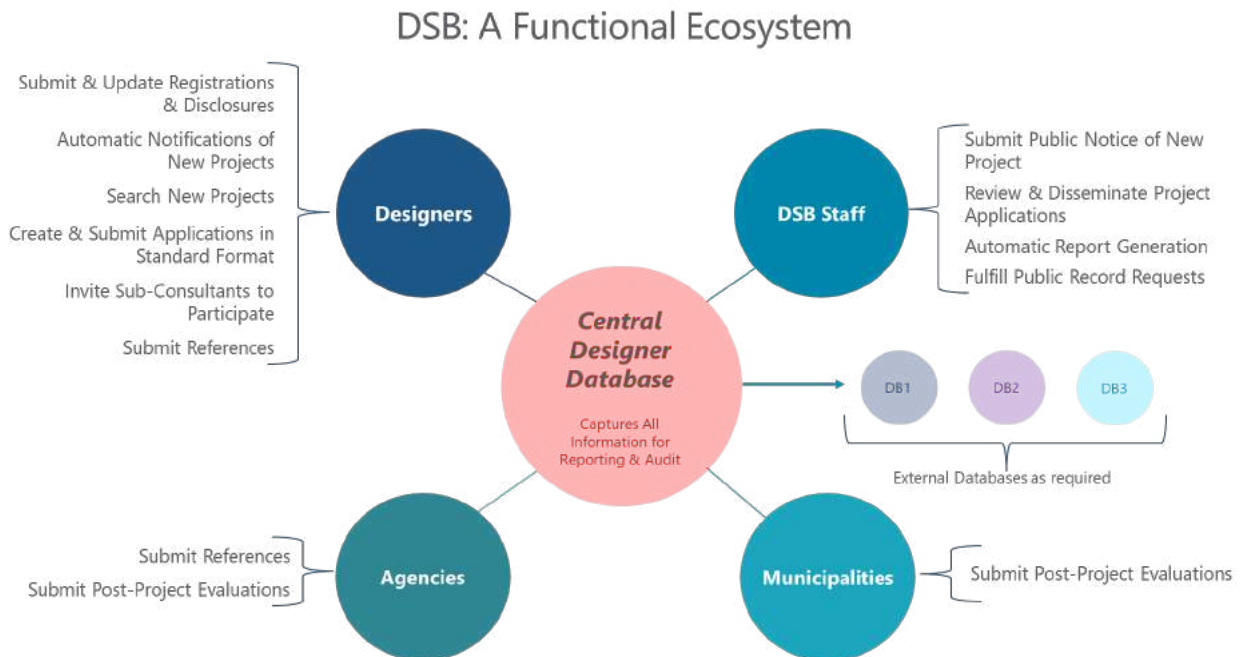
With these vision in place, the Designer Selection Board began their search for the right technology, and the right partner. After a couple of “false starts” with other vendors, the DSB selected Autocene to work with on building this innovative solution.

Working closely together, DSB and Autocene’s Customer Success Team developed a complex yet seamless set of interconnected web-based applications that provide the following functionality.

This Autocene solution allows:

- Designers to provide registration & disclosure (R&D) information
- DSB staff to create & submit a public notice of new projects available
- Automatic notifications of new projects to be sent to the designer community
- Designers to easily search a database of available projects, along with past/closed projects
- Designers to create & submit their application/response to available projects using the standard format provided by the DSB
- Designers to invite specialty “sub-consultants” to be part of their application
- Designers and agencies to submit references for registered designers
- DSB staff to rank applications based on specific criteria
- Applications for a new project generated as pdfs and made available individually or combined into a single document DSB Members to review applications on tablets or other devices
- DSB Staff to disseminate project applications without the need to scan reams of paper into pdfs
- DSB Board Members to easily vote on applications for new projects
- Documentation of every decision made for reporting & audit purposes
- Agencies (including municipalities) to submit evaluations of past projects in compliance with Commonwealth statutes
- Automatic generation of monthly, quarterly and annual reports on any & all data captured in the process
- Integration of data to-and-from other Commonwealth applications/databases (i.e. certifications from the Supplier Diversity Office)
- Automation of the Public Records Request process

All of this functionality is made possible by creating a central database of designers, their registration information, past project experience, references, evaluations of past work and integrating this Autocene application with other Commonwealth databases.



Benefits of the Platform

As mentioned above, this unique approach has been designed to be used by all state and local agencies. Those agencies are all unrelated, with the exception that they are still responsible for similar processes and complying with State Statutes. This set of Autocene automations now provides a way for those processes to be completely fully documented, paperless and searchable!

Designer Selection Board Members

- Provides an easy & paperless way to review applications for new projects
- Provides electronic applications in a structured format making for easier review & comparison
- Reduces the time required to review applications and select designers
- Provides electronic voting capabilities
- Documents all votes/decisions with reasons for selection

Designer Selection Board Staff

- Reduces the time required for preparing & submitting Public Notices of new projects
- Automatically notifies registered designers of new projects available via email helping to ensure that Commonwealth supplier diversity goals are met
- Reduces time required to validate certification information
- Reduces the time required to prepare applications & summaries for DSB Board Member to review
- Reduces time required for ranking and dissemination of applications to Board Members
- Reduces time required for reviewing & selecting appropriate references
- Reduces time required to generate monthly, quarterly and annual reports
- Reduces time required for completing Public Records Requests
- Eliminates paper application copying & distribution

Designer Community

- Enables designers to quickly search for new projects
- Provides automatic notification of new projects
- Eliminates repetitive requirements around providing Registration & Disclosure information
- Provides a faster/easier way of submitting applications for new projects
- Makes it easy to invite “sub-consultants” to participate on a project
- Makes it easy to submit appropriate references
- Eliminates the need for creating & submitting multiple paper copies of a proposal
- Easier for small firms to participate in the process

Other Agencies & Municipalities

- Provides access to a much broader set of designers than would be otherwise available
- Provides an established platform for automation of their selection process
- Makes easier & reduces time required to submit project evaluations in compliance with Commonwealth statutes

Sample Screens

Massachusetts Designer Selection Board

Designer Selection Network

This system is used by the Designer Selection Board and DCAMM to enter public notices of new projects and to provide a streamlined system for interested firms from the design community to apply to provide design services. Design firms and consultants can register to become part of a statewide designer database, review and apply for new project listings, search for other firms or applications, and check their firm's public record for accuracy. Massachusetts state agencies and municipalities can use this system to search for designers and consultants for their projects, and to enter statutorily required evaluations and references.

User Menu

- Add New User
- Admin Tools - [Rank/Notify Firms, Edit Posting, R&D Review, Old Evaluations, PDF Applications]**
- Firm Reports - [Registration, Applications, Evaluations, References] (Read Only)
- Project Application Document Generator
- Public Notice Search - [Apply for Current Notices and View Past Listings]
- Submit a New Public Notice
- Submit Evaluations & References

User summary

Login	dsbstaff
Name	Penelope
Last name	Foussekis
Email	pfoussekis@formverse.com
Roles	DSB Staff, Attachment Access

Designer Selection Board
1 Ashburton Place, Room 1018A, 10th Floor, Boston, MA 02108
www.mass.gov/dsb Telephone: (617) 727-4046

Administrative Tools

- Rank Firms**
*Rank Firms on DSB Projects for Specific Assignments & House Doctor
- Edit Posting**
*Edit Project Manager, Project Supervisor and/or the Firm's PIC
- Notify Firms**
*Notify Firms of a Public Notice via Email
- R&D Review**
*Review Firm's Registration & Disclosure and Acknowledgment
- Old Evaluations**
*View Historical Evaluations
- Participation**
*View Sub-Consultant's Project Participation Status
- PDF Applications**
*View Full & Shortened Firm Applications
- System Registered Users**
*View Users from Firms registered within the system
- Submitted Applications**
*View Applications of all the Firms that made submissions.

The screenshot shows the Designer Selection Board website. At the top, there is a navigation bar with links for Home, Action Required, Drafts, and Q&A. The user is logged in as 'Hello, dsbstaff'. The main header includes the state seal, the text 'Designer Selection Board', and the address '1 Ashburton Place, Room 1018A, 10th Floor, Boston, MA 02108'. To the right, it says 'Applications Submitted' and provides the website 'www.mass.gov/dsb' and telephone '(617) 727-4046'. Below the header, there are filter buttons for 'Back' and 'Clear Filters'. A filter section shows 'FIRM NAME' and 'DSB LIST NUMBER' dropdown menus. The main content is a table of submitted applications:

Firm Name	Project Title	Project Number	DSB List #	Date Submitted
CANNONDESIGN	CBD Testing Facility	2019-ABC	19-99	2/11/2020
ARCHITECTURAL ENGINEERS, INC.	CBD Testing Facility	2019-ABC	19-99	2/6/2020
AEOLUS ARCHITECTURE AND DESIGN	CBD Testing Facility	2019-ABC	19-99	1/17/2020

Sample Designer Application Submission



AEOLUS
ARCHITECTURE AND I

Discover Autocene

Autocene Enterprise Automation Platform give customers the flexibility of a **Code-Free** Application Development Platform, combined with the power of an Intelligent Process Automation solution. It gives enterprises the ability to rapidly deploy fully configurable **Autocene "Workcenes"** that are capable of automating even the most complicated business processes.

Autocene Workcenes improve productivity by automating both high value, mission critical processes and eliminating time consuming repetitive tasks. **Autocene** makes both Attended, Semi-Attended & Unattended automations easy, freeing end users and adding value to your organization's critical processes & bottom line. All with no developers needed!

Autocene Passport bidirectionally integrates data with any of your existing Enterprise applications & databases (On-Premise or Cloud Hosted). Data can seamlessly travel to and from multiple disparate systems and/or **Autocene Workcenes**, monitoring databases and automating integrations, centralizing data for end users & eliminating time-consuming manual data entry.

Autocene Atlas is our patented AI-based Natural Language processes solution. Atlas provides content processing, context matching & role assignment capabilities. **Autocene Atlas** takes unstructured text from emails, text messages, documents & voice messages, transforming it into structured data used to initiate your business processes. This eliminates time-consuming manual entry and reduces human error.