



Request for Proposals: Online CRM Solution for Online Permitting & Payment System

The Town of Freedom, WI in Outagamie County seeks proposals for an integrated Licensing & Permitting Software/AI Solution to modernize municipal operations. This RFP prioritizes a comprehensive platform combining CRM capabilities with automated workflows for permits, licenses, payments, and potentially other items like meeting minute management.

Community Overview

The Town of Freedom is a growing community of approximately 6,200 residents. Freedom is known as the Crossroads of the Fox Valley for its centralized location between Appleton and Green Bay via County Highway E and halfway between Kaukauna and Seymour via State Highway 55.

The Town only has three office staff responsible for administration of all town-related business, an Administrator, a Clerk/Treasurer, and a Deputy Clerk/Treasurer. Due to these significant staffing limitations, we are seeking to leverage technology to assist staff and provide greater access to services to our residents. Along with being a small staff, the office is closed on Fridays, limiting the amount of time residents can take care of town business and limiting the staff's time to take care of it as well.

The Town of Freedom currently does not offer modern online services for filling out, submitting, and processing permits, applications, fees, payments, etc. In an effort to provide streamlined services to residents, increase access to forms and payments, and generally improve record keeping and data collection, the Town of Freedom is seeking software/AI systems that can help address as many of the town's needs as possible in a single system. This project was budgeted for in the Town's 2025 budget.

Project Objectives

Core requirements include:

- Unified system handling building permits, zoning approvals, and business licenses.
- Automated or AI-driven workflow automation for application review and status updates.
- Integrated payment processing with multiple gateway support (credit/debit, ACH).
- 24/7 public portal mirroring current online permit submission requirements.
- Document management supporting PDF, CAD, image files, and other standard file types.

Additional Options of Interest

- Automated meeting minute generation with speech-to-text transcription.
- Resident reporting platform for logging general concerns/complaints/public works issues.

Technical Specifications

Feature	Requirement
Permitting	Online submission with auto-validation of electronic plans ^[1]
CRM	AI chatbots for resident inquiries and deadline reminders
Compliance	Automated inspection scheduling tied to permit timelines
Reporting	Real-time dashboard with permit status tracking
Integration	API compatibility with existing financial systems



Submission Requirements

Vendors should provide:

1. Demonstrated experience with small municipal governments
2. Implementation timeline under 6 months
3. Training program for staff and residents
4. Detailed cost breakdown for short and long-term costs
5. 5-year total cost of ownership breakdown
6. Policy for handling town's sensitive data and transfer of that data upon discontinuing service
7. Up to three references from similar-sized municipalities

RFP Timeline

1. Proposals due by end of day Friday, May 16, 2025, to Town Administrator Justin Carlson at administrator@tn.freedom.wi.gov.
2. Deadline for vendor questions is Wednesday, May 7, 2025 at 4:00pm cst.
3. Scheduling product demonstrations, as needed, during week of May 19th. Product demonstrations may take place prior to these dates if scheduling allows.
4. Town staff will present comprehensive findings to Town Board at the monthly meeting on May 28th and recommend a vendor based on comprehensive staff evaluation of needs and costs.
5. Upon approval by the Board, vendors will be contacted regarding the town's decision by May 30th.
6. Questions can be directed to Administrator Carlson via email at administrator@tn.freedom.wi.gov or via phone at 920-716-0710.