

City Of Norcross
Request for Proposal



Integrated Community Development
System Software

CCD-S

Date Issued: May 14th, 2010

Date Due: July 26th, 2010

Section I - Introduction

A. Purpose for RFP: City of Norcross is interested in contracting with a Community Development Software vendor to provide Workflow Automation and Tracking Services. Additional interest is in an Integrated Land Use and Zoning Management, Permitting, Code Enforcement, Inspections, and Project Management Software System with related services. Lastly, we are seeking mobile capabilities, citizen access and response functionality.

B. Background Information:

Brief background on the City of Norcross, Community Development:

The Community Development Department is being headed up with a community development director, Chris McCrary. He has staffed a Community Development Coordinator, Community Development Engineer, Economic Development Manager, two Code Enforcement Officers, and a Building Inspector. The city has an ARB (Architectural Review Board), Planning & Zoning Board, Zoning Board of Appeals, Construction Board of Appeals, and Tree Preservation Board.

There is no Community Development Software currently but the city has a Financial Management Software. It is critical for any software that is created to interact with the GL and business license part of the Financial Management Software. We currently have no GIS in place but see a GIS project in the future for the department soon. This software will have to be GIS ready for when that time comes. We do work currently with AutoDesk AutoCad Maps software. The Code Enforcement Officers are currently using Comcate for their management.

Currently, the Financial Management Software does hold some of our Community Development data and we might look at converting this data over to be solely managed by the bidding software.

C. SOW: The Scope of Work, as may be modified through negotiation and/or by written addendum, will be made a part of the Agreement. Through this RFP, it is specifically intended to procure the following:

A customized off-the-shelf software solution that will support automation of all necessary functions related to the overall permit process. The software will contain the following functions:

- **Permitting:** Monitor all public and private building activity, issue a variety of permit types (building, land disturbance, grading, mechanical, electrical, and encroachments, etc), link to related records, account for all appropriate fees, and validate contractors.
- **Inspection Tracking and Scheduling:** Track both routine and periodic inspections of buildings, site development and property, and manage all site and building inspection scheduling activities.
- **Plan Application Tracking:** Provide on-line and reporting capabilities of all plan check and review activities from permit issuance to project.
- **Planning and Zoning Application Tracking:** Track Planning and Zoning applications from the initial application submittal through the various public hearing processes. Rezoning, Annexations, Special Use Permits, Variances, and Architectural Review Board.
- **Reporting:** Generation of ad-hoc reports using any combination of all data elements maintained by land use and permitting systems.
- **Code Enforcement:** Allows for the monitoring of codes and management of violations associated with all building projects.

- Development Review and Tracking: Necessary software tools and integrated databases for central coordination and tracking of the general development review processes.
- Public Online Application Submittal, Complaint and Inquiry Capabilities: The software will have the capability to integrate with existing web site and allow public online submittal of complaints, access of information, online permit applications, and plan submittal.
- Mobility/In-Field Usage: View, schedule and modify inspections and record notes while in the field. Have the ability to quickly access all contact details for the owner, applicant, contractor or complainant. Retrieve data by searching any parameter, including permit #, contractor, address, etc.
- Capability to integrate to the following systems:
 - Geographic Information System
 - Document Imaging System
 - County Assessor Data
 - Finance Management software
 - Complete software documentation for support staff, users, and administrators.

The Scope of Work must include implementation services, including, but not limited to:

- Software installation and setup
- Data conversion
- Template and application form development
- Web integration services
- Application Integration services
- Testing, including acceptance testing
- Training for support staff, end users, and administrators
- Associated vendor project management
- Software maintenance and warranty services.

The Scope of Work must also include a schedule of deliverables and milestones associated with each of the above modules or phases. A solution that will provide a high level of functionality with ease of use is desired. Consideration will be given to a well-designed and proven software system that has excellent vendor support, rich capabilities, and robust ad hoc reporting tools.

D. Proposal Contact Information: For questions regarding this RFP please contact: Contact to any other email will not be responded to. Phone calls are not going to be fielded at this time. **Maintain to emails only.**

James Beagle
IT Manager
CDsoftwareRFP@norcrossga.net

E. Proposal Submission Information: All proposals must be in and received no later than 16:00 local time (4:00 pm.) on July 26th, 2010. That would include Section II of this RFP and Section III along with the Scope of Work, detailed Planning with est dates and a breakdown of each cost in the project.

Mark Envelope with the following: CCD-S, Community Development Software Package

Please submit one (1) original, three (3) copies, and one (1) electronic copy on a CD-Rom or USB thumb drive device. The electronic copy shall be submitted in PDF format. The proposal containing the original signatures should be clearly marked "Original." All responses must be submitted in the form set forth in this RFP, sealed and delivered to:

City Of Norcross
James Beagle
IT Department
65 Lawrenceville St
Norcross, Ga 30071

All proposals received after the deadline will be considered non-responsive. No faxed or emailed proposals will be accepted.

Section II – Proposal Format and Evaluation Process

A. To simplify the evaluation process, the Vendor’s proposal shall be submitted in the format outlined below:

- 1. Letter of Transmittal** – The proposal letter shall be addressed to the Contact listed and shall include the complete name of the firm or person(s) submitting the proposal, the main office address, primary contact person’s name, title, telephone number, email as well as a signature of representative legally authorized to bind the proposal.
- 2. Table of Contents** – Clearly defined sections and pages numbered.
- 3. Executive Summary** – A summary of the proposal stating the proposer’s understanding of the requested system and highlights of the proposed solution.
- 4. Vendor Profile and Qualifications** – Include vendor and executive information, including management team, resumes and qualifications of key staff that would be assigned to the implementation of the solution.
- 5. Experience** – Provide a description of local government experience and experience completing similar projects.
- 6. References** – Provide at least three (3) references of current clients of similar scope with the proposal. Include name, title, address, phone number and email of contact person. Please include clients that are from closest to the City of Norcross.
- 7. Software Description** – Provide multiple screen shots and an overview of the system’s features.
- 8. Technical Requirements** – All hardware requirements, system software, and application requirements must be listed.
- 9. Response to the Matrix (Use Form)** – Responses to Section III of the RFP must be provided in this section of the Vendors Proposal. Vendors should use the format provided and add explanatory details as necessary in the comments section.
- 10. Implementation Services/Scope of Work** – Provide a sample project management plan including reasonable target dates. This section must also outline key activities, work products and assumptions.
- 11. Training** – Provide an overview of proposed training, including options for on-site or training center services, end users, and system administrators. This section should also include an implementation and training plan including an estimated time-frame and deliverables for each stage of the project and training documentation provided.
- 12. Support and Maintenance** – Provide support services including provisions of regular updates and new releases, as well as technical consultation and support. As well as a breakdown of the yearly cost. Provide a detail listing of what it means to have yearly support for both end-users and for administrators (back-office, IT) support.
- 13. Cost Proposal** – Please provide costs for licensing, maintenance, training and any additional services.

14. Addenda Acknowledgements – If revisions become necessary, these addenda will be available by Mail to the City of Norcross, Atten: James Beagle, 65 Lawrenceville St, Norcross, GA 30071. Vendors must acknowledge receipt of all addenda issued.

15. Information about the Company/ Company Background – Please include information about Company history and how the company got started in the business. Please give a brief financial information on the company as to the information that the company is not going to stop supporting the software for some time after purchase.

16. Additional Information – Please provide any other information you feel is important for consideration in our evaluation of proposals.

B. Inquiries/Clarifications/Questions – Questions regarding this RFP must be put in writing and received no later than 17:00 (5:00pm.) on July 15th, 2010. Please direct all correspondence to City of Norcross, IT Manager, James Beagle, CDsoftwareRFP@norcrossga.net and the subject line put “Community Development Software RFP”. Responses will be communicated in writing or email to all recipients of this RFP. Inquiries received after the stated date and time will not be accepted and receive no response.

C. Confidential Material – Any information contained in the proposal that is proprietary must be clearly marked as such and will be treated as confidential to the extent allowable in the Open Records Act.

D. Anticipated Schedule of Events:

Event	Date
Release RFP to Vendors	May 14 th , 2010
Deadline for Vendor Questions	July 15 th , 2010
Proposals Due	July 26 th , 2010
Final 2 or 3 Vendors Notified	July 30 th , 2010
Vendor Demonstrations for the 2-3 Finalist	August 12 th -19 th , 2010
Vendor Reference Checks	August 23 rd - 27 th , 2010
Finalists Notified	September 1 st , 2010
Contract Review and Negotiation	

E. Proposal Evaluation and Selection Process

Following the submission deadline, a selection committee will evaluate all responses and short-list the proposing vendors. Responders will be notified and finalists will be invited to present demonstrations to our staff. After all demonstrations are completed, the selection committee shall reconvene to either make a decision or to request further information.

The selection committee will then make recommendations regarding the selection and request authorization to enter into a contract with the approved vendor. The committee reserves the right to accept/reject any or all proposals. Submission of a proposal indicates acceptance of the conditions contained in the RFP and an agreement to negotiate a contract for services. An award can be made on the basis of greatest benefit and not necessarily the lowest cost option.

Section III –Matrix

Please complete the following Matrix to assist the City of Norcross in determining an appropriate vendor. Place a large “X” in the column that best describes your solution according to the legend below. If additional comments are necessary in conveying features, please use the Comments column for additional details. If something can be done but would be at additional cost, please indicate as so in the “Comments” box, as well as still marking the “C” box.

Legend for Completing the following Requirements

- S = Standard functionality out-of-the-box
- M = Modification required (i.e. standard script or other work-around)
- C = Requires customization to the base code/API
- N = Unable to provide this feature

Request	S	M	C	N	Comments
General Functionality					
1. Windows 7, Windows Vista compatible.					
2. Microsoft Office 2007 compatible.					
3. Microsoft Server 2008 compatible.					
4. IPV6 compatible.					
5. Vendor must have a proven track record of being in business for more than 12 years.					
6. The Application System Administrator must be able to configure all End-User settings, without the need to rely on the IT Department or Vendor’s Help Desk.					
7. End-Users have the ability to edit and save their own search parameters.					
8. Able to search on any field within the database, including custom fields developed over time.					
9. Allow a “time-out” period for Users not working at their computer, ensuring that a license is freed up. (If Per-seat License is required).					
10. System must be flexible to allow for End-Users to determine information displayed on their screen.					
11. Does it have Personalization options?					
12. Have a real-time dashboard to display dynamic charts & graphs that the User wants to view.					
13. Ability to view emails from Microsoft Outlook directly within the system.					
14. Ability to store document shortcuts from the User’s computer for quick access.					
15. Application System Administrators can create new fields and screens after implementation.					

Request	S	M	C	N	Comments
16. Allow users to use/access several records at one time.					
17. Automatic email notification to users when assigned activities have been updated or new tasks have been assigned to them.					
18. Ability to create, assign and maintain approval groups and manage data access ability.					
19. The proposed system must provide user-defined security, differential rights distribution, role designation, and user options.					
20. Provide detailed audit trails / reports for financial activity.					
21. Provide a configurable, flexible workflow management system to automate business processes performed by each department and agency involved with the development review process.					
22. Track time spent on daily activities.					
23. Place warnings, holds and restrictions on a record.					
24. Link to browse recently viewed records.					
25. View and link to all related records.					
26. Ability to enter notes with unlimited characters.					
27. Link to favorite websites directly from software.					
28. Assign permit, project, code violation, and complaint types to specific departments.					
29. Customize workflow according to our business processes.					
30. Link software login to Windows ID allowing for automatic login upon opening the application.					
Reporting					
1. System comes with over 100 standard reports.					
2. End-Users are able to customize reports.					
3. Report engine utilizes version 11 of Crystal Reports.					
4. End-Users are not required to have a copy of Crystal Reports to execute standard reports.					
5. Users are able to create queries on the fly and save those queries for future use.					
6. Ability for Users to select Favorite reports and group them into folders for future use.					
7. View a preview of report prior to executing.					
8. Export reports into an Adobe PDF, MS Excel, or MS Word format.					

Request	S	M	C	N	Comments
9. Select different date ranges to view report information.					
10. Able to print and attach a Report to a record within a single step.					
11. Users can merge data in MS Word doc templates.					
Permitting					
1. Provide ability to track any type of permit and to add additional permit types as needed.					
2. Ability to link records together creating parent-child relationships.					
3. Ability to duplicate part or all of the data from one permit record to another.					
4. Calculate permit fees based on our fee schedule and ensure fees are collected.					
5. Provide interactive permit application ability to the public.					
6. Able to attach associated documentation to a record (pictures, word docs etc).					
7. Link record to GIS.					
8. Restrict the issuance of permits for certain parcels based on access authority (e.g. certain permits require approval by flood plan administrator, fire chief, engineer, planning or building official).					
9. Link to contact information of contractors, applicants, property owners, etc.					
10. Ability to add, modify and delete job valuation details.					
11. Automatic inspection, reviews and fees based on type and sub-types.					
Inspections					
1. Have a work center within the software where Inspectors can view all of the inspections assigned to them, and result those Inspections from this area.					
2. Ability to quickly re-assign a group of inspections to a new Inspector.					
3. Allow different check-lists for each inspection type.					
4. Have standard notes unique to each inspector and each inspection type.					
5. Capable of batch scheduling inspections from a single screen for all inspection requests.					
6. Able to automatically insert a re-inspection fee based on the failed status of an inspection.					
7. Able to automatically email the contractor/developer of inspection results.					
8. Ensuring that previous inspections are					

Request	S	M	C	N	Comments
approved, before accepting the next inspection type.					
9. Able to view a centralized Work Calendar for all inspectors.					
10. Able to use GIS information to automatically route an inspection to a default Inspector based on a geographic area.					
11. Adding attachments to the permit from a camera.					
12. Able to change the status codes of an inspection to our agency's terminology.					
13. Being able to associate a unique amount of time with each inspection type, to allow for a daily "cap" of inspections.					
14. Required previous inspections to occur before allowing for subsequent inspections to be added.					
15. Re-inspection fees automatically schedule based on a failed inspection.					
Code Enforcement					
1. Allow multiple violations to be added to a single case while tracking each resolution and status individually.					
2. When a violation is added, the code text is automatically inserted.					
3. Track follow-up dates to ensure the issue is resolved.					
4. View/add restrictions to the parcel when a Case is created.					
5. User rights determine which Users are able to view Case information/details.					
6. Able to attach images to the Case.					
7. Create a Case Details Report which itemizes all details pertaining to the case, including the photos attached.					
8. Easily create MS Word letters and merge data from system into letter.					
9. Track all activities on the record, including when a phone call is made, a letter is printed, etc.					
10. Automatically assign a Case to a default Officer by address or zoning if received from online.					
11. Ability to automatically lock a parcel when certain code Cases are created, to prevent permits from being issued.					
12. Restrict access to the Complainant information to only Code Officers.					
13. Allow code officers to enter results of their inspections including items for correction in the field either online or offline.					

Request	S	M	C	N	Comments
14. Ability to create code violation cases related to permit inspections in the field.					
15. Print images associated with the case into a letter.					
16. Automatic inspection, reviews and fees based on type and sub-types.					
17. Ability to automatically lock down activity at a location where there is an outstanding issue.					
Project Planning & Zoning					
1. Track plan review by address and review results from reviewers in multiple departments.					
2. Provide for logging dates sent, reviewed, due, rejected or approved for multiple reviewers, as well as a remarks area for each reviewer.					
3. Track multiple submittals on any project.					
4. Ability to create a list of standard comments for plan review.					
5. Link multiple permits, cases, plans and licenses to a single master project.					
6. Supports Multiple Parcels & Addresses (unlimited) for each plan case.					
7. Ability to track the physical location of plans.					
8. Attach associated plans to record.					
9. Track inspections by type, inspector, scheduled date and completed date.					
10. Track contact information of contractors, applicants, property owners, etc.					
11. Ability to duplicate part or all of the data from one project record to another.					
12. Ability to merge conditions into letters and other documents.					
13. Automatic inspection, reviews and fees based on type and sub-types.					
GIS					
1. Must be an ESRI Business Partner for more than 10 years.					
2. Allow for the assignment and reassignment of property addresses to parcel numbers.					
3. Real-time link to GIS data.					
4. Create GIS maps that display queried data.					
5. Email map as an attachment.					
6. Create mail merge notifications from GIS data.					
7. Add new records to selected parcel(s) directly from GIS map.					
8. View detailed parcel information from GIS					

Request	S	M	C	N	Comments
application.					
9. Create permits and other records directly from the map.					
10. Measure the distance from one parcel to another or a collection of selected parcels.					
11. Select parcels within a radius or draw a boundary.					
12. Access summary information and related records from map.					
13. Allow users access to GIS information without the need to purchase additional ESRI licenses.					
Mobility / In-Field Usage					
1. Access to aerial photo information through Microsoft Live Maps/Google Maps.					
2. Be able to access all property information while mobile.					
3. Ability for field inspectors to print documents stored in the system in the field.					
4. Ability to configure security to assure that only authorized persons are allowed to sign off on an inspection.					
5. Supports remote data entry.					
6. Provide the appropriate capabilities to allow users to operate in the field with either hand-held devices or with laptop computers.					
Online / Citizen Access					
1. Information is posted real-time to the database.					
2. View a map of the selected parcel using Microsoft Live Maps/Google Maps.					
3. Able to file a complaint online.					
4. Apply for simple permit types online.					
5. Pay for outstanding fees online.					
6. Have a shopping cart feature that Users can log into and pay for fees.					
7. Match the web pages to our web page format, not only a header bar with the agency's logo.					
8. Have different security levels that determine information available to certain citizens (i.e. Generic login vs. Contractor login vs. Applicant login).					
9. Upload plans and any attachment type online.					
10. Able to require certain fields and collect custom information during online entry.					
11. Request inspections online.					

Request	S	M	C	N	Comments
12. File a new project online.					
13. View the status of a permit, project, license or case online.					
14. Allow outside inspectors and plan reviewers to input results & comments online, with a unique login.					
15. Application System Administrators are able to change the configuration and preferences of the online system.					
16. View and attachments online.					
17. View the plan review notes and comments online.					
18. Submit a request for service online, to be notified of the service request receipt and case initiation, and subsequently find and track the case online.					
19. Ability to add attachments online.					
License Management					
1. Comprehensive License History tracking by User, date, time stamp.					
2. Automatic Renewals and fee calculations.					
3. Supports Multiple License Cycle Types.					
4. Supports Unlimited User-defined License Types & Auto-Generated License numbers.					
5. Track multiple licenses per single Business.					
6. Track Registration, Insurance and Expiration information.					
7. Customize license labels as well as all drop downs fields.					
8. Automatic inspection, reviews and fees based on type and sub-types.					
Contact Management					
1. Tracks Unique Contactor number.					
2. Unlimited User-defined Contractor types.					
3. Tracks company and contact info, address, email, phone, fax, etc.					
4. Tracks Primary and Sub-Contractors.					
5. Supports Unlimited Contract License Types per Contractor with associated Expiration Cycles.					
6. Internal Flagging for Licensing issues.					
7. Comprehensive Activity Tracking (i.e. Permits, Plans, Code Cases, Inspections, etc.) and quick access to this information.					
8. Multiple Invoice Management / Individual Fee Payments.					
9. Supports Free Form Entry Fields for Comments related to individual contractors.					

Request	S	M	C	N	Comments
10. Link contact information to associated projects and activities.					
11. Ability to send email notifications.					
12. Ability to enter Trust Account information.					
13. Ability to add alerts/flags to contact information e.g. they can only pay in cash for writing bad checks.					
Citizen Response Management					
1. Route complaint information to the appropriate department.					
2. Store contact information for site of complaint and complainant.					
3. Ability to link to site address.					
4. Ability to provide the description and resolution of the complaint with unlimited text.					
5. Generate email with issue details.					

Section IV – Additional Information

Questions/Additional Requirements:

Right to Cancel – The City of Norcross reserves the right to change any aspect of, terminate, or delay this RFP, the RFP process and/or the program which is outlined within this RFP at any time, and notice shall be given in a timely manner thereafter.

No Award – Recipients of this RFP are advised that nothing stated herein, or any part thereof, or any communication during the evaluation and selection process, shall be construed as constituting, offering or awarding a contract, representation or agreement of any kind.

Not Liable for Costs – The City of Norcross is not liable and will not be responsible for any costs incurred by any vendor(s) for the preparation and delivery of the RFP responses, nor will we be liable for any costs incurred prior to the execution of an agreement, including but not limited to, presentations by RFP finalists.

Property of the City – Responses to this RFP will become the property of the City of Norcross, and will form the basis of negotiations of an agreement with the apparent successful vendor.

Waiver of Irregularities – The City of Norcross reserves the right, at its sole discretion, to waive minor administrative irregularities contained in any proposal.

No Obligation to Buy – The City of Norcross reserves the right to reject any or all proposals at any time without penalty and from contracting with any vendor. The release of this RFP does not convey the initiation of a purchase.

Withdrawal of Proposals – Vendors may withdraw a proposal that has been submitted at any time up to the proposal closing date and time. To accomplish this, a written request signed by an authorized representative of the vendor must be submitted to the RFP Contact. The vendor may submit another proposal at any time up to the proposal closing date and time.

Errors in Proposal – The City of Norcross will not be liable for any errors in vendor proposals. Vendors will not be allowed to alter proposal documents after the deadline for proposal submission.

Corrections or amendments due to errors identified in the vendor's Proposal may be accepted if this type of correction or amendment is due to typing, transposition or any other obvious errors. Vendors are liable for all errors or omissions contained in their proposals.

After opening and reading proposals, they will be checked for correctness. If, after the opening and tabulation of proposals, a vendor claims error and requests to be relieved of award, s/he will be required to promptly present certified work sheets. The RFP contact will review the work sheets and if the RFP Contact is convinced, by clear and convincing evidence, that an honest, mathematically excusable error or critical omission of costs has been made, the vendor may be relieved his/her proposal.