CITY OF ROCKWALL, TEXAS

REQUEST FOR PROPOSAL FOR PERMIT AND PROJECT TRACKING SYSTEM

The City of Rockwall, Texas is accepting sealed proposals for the purchase, implementation and support of a Permit and Project Tracking System (software application).

Also commonly referred to as a: Permitting, Licensing, Inspection, and Project Management System

It is understood that the City reserves the right to reject any or all proposals as it shall deem to be in the best interests of the City. Receipt of any proposal shall under no circumstances obligate City to accept the lowest dollar proposal. The award of this contract shall be made to the responsible offerer (hereinafter referred to as "Contractor") whose proposal is determined to be the lowest evaluated offer resulting from negotiation, taking into consideration the relative importance of price and the other evaluation factors set forth in the request for proposal.

Proposals shall include this RFP and all additional documents submitted. The proposal shall be placed in a separate, sealed envelope, marked clearly on the outside as shown below. FACSIMILE AND ELECTRONIC TRANSMITTALS SHALL NOT BE ACCEPTED.

Submission of proposals: One original and one copy of all proposal documents shall be sealed and submitted no later than 2:00 PM CST on January 10, 2019 to:

Mailing Address:

City of Rockwall Lea Ann Ewing, Purchasing Agent 385 S. Goliad Rockwall, Texas 75087

MARK ENVELOPE: RFP PERMIT AND PROJECT TRACKING SYSTEM

ALL PROPOSALS MUST BE RECEIVED IN THE CITY'S PURCHASING OFFICE BEFORE OPENING DATE AND TIME.

LATE PROPOSALS: Proposals received in City's General Service Office after submission deadline will be considered void and unacceptable. City is not responsible for lateness or non-delivery of mail, carrier, etc., and the date/time stamp in the Purchasing Office shall be the official time of receipt.

ALTERING PROPOSALS: Any interlineation, alteration, or erasure made before opening time must be initialed by the signer of the proposal, guaranteeing authenticity.

WITHDRAWAL OF PROPOSAL: A proposal may not be withdrawn or canceled by the offerer without permission of the City for a period of ninety (90) days following the date designated for the receipt of proposals, and offerer so agrees upon submittal of their proposal.

PROPOSALS WILL BE received and publicly acknowledged at the location, date and time stated above. Offerers, their representatives and interested persons may be present. The proposals shall be received and acknowledged only so as to avoid disclosure of the contents to competing offerers and kept secret during negotiations.

However, all proposals shall be open for public inspection after the contract is awarded, except for trade secrets and confidential information contained in the proposal and identified by offerer as such.

SALES TAX: City is exempt by law from payment of Texas Sales Tax and Federal Excise Tax, therefore the proposal shall not include sales taxes.

CONTRACT: This proposal, accompanying documents, and any negotiated terms, when properly accepted by City, shall constitute a contract equally binding between the Contractor and City. No different or additional terms will become a part of this contract with the exception of change orders.

CHANGE ORDERS: No oral statement of any person shall modify or otherwise change, or affect the terms, conditions of specifications stated in the resulting contract. All change orders to the contract will be made in writing by the Purchasing Department.

IF DURING THE life of the contract, the successful offer's net prices to other customers for the Permit and Project Tracking System awarded herein are reduced below the contracted price, it is understood and agreed that the benefits of such reduction shall be extended to the City.

A PRICE redetermination may be considered by City only at the time of a model change during the year or at the anniversary date of the contract and shall be substantiated in writing (i.e. manufacturer's direct cost, postage rates, Railroad Commission rates, wage/labor rates, etc). The offerer's past history of honoring contracts at the contract price will be an important consideration in the evaluation of the lowest and best proposal. City reserves the right to accept or reject any/all of the price determination as it deems to be in the best interest of City.

RIGHT TO PURCHASE ELSEWHERE: City will not actively solicit bids, proposals, quotations or otherwise test the market solely for the purpose of seeking alternative sources; however, City reserves the right to purchase elsewhere any and/or all items covered by this contract if available from another source at a price lower than the contract price or if contract term(s) are not met.

DELIVERY: All delivery and freight charges are to be included in the contract price.

DELIVERY TIME: Offerer shall address number of days required to deliver the completed Permit and Project Tracking System at the above referenced delivery point. Contractor shall notify the Purchasing Department immediately if delivery schedule cannot be met. If a delay is foreseen, Contractor shall give written notice to the Purchasing Department. City has the right to extend delivery time if reason appears valid. Contractor must keep the Purchasing Department advised at all times of the status of the order.

CONFLICT OF INTEREST: No public official shall have interest in this contract, in accordance with Vernon's Texas Codes Annotated, Local Government Code Title 5, Subtitle C, Chapter 171.

ETHICS: The offerer shall not offer or accept gifts or anything of value nor enter into any business arrangement with any employee, official or agent of City.

EXCEPTIONS/SUBSTITUTIONS: All proposals meeting the intent of this RFP will be considered for negotiations. Offerers taking exception to the specifications, or offering substitutions, shall state these exceptions in the section provided or by attachment as part of the proposal. The absence of such a list shall indicate that the offerer has not taken exceptions and the offerer shall be responsible for performing in strict accordance with the specifications of the RFP. Council reserves the right to accept any and all or none of the exception(s)/substitutions(s) deemed to be in the best interest of City.

DESCRIPTIONS: Any reference to model and/or make/manufacturer used in RFP specifications is descriptive, not restrictive. It is used to indicate the type and quality desired. Proposals on items of like quality will be considered.

ADDENDA: Any interpretations, corrections or changes to this RFP and Specifications will be made by addenda. Sole issuing authority of addenda shall be vested in the Purchasing Department. Addenda will be mailed to all that are known to have received a copy of this RFP. Offerers shall acknowledge receipt of all addenda.

PROPOSAL MUST COMPLY with all federal, state, county, and local laws concerning this type of service.

DESIGN, STRENGTH, QUALITY of materials and workmanship must conform to the highest standards of manufacturing and engineering practice.

THE Permit and Project Tracking System MUST be new and unused, unless otherwise specified, in first class condition and of current version or manufacture.

MINIMUM STANDARDS FOR RESPONSIBLE PROSPECTIVE OFFERERS: A prospective offerer must affirmatively demonstrate offerer's responsibility. A prospective offerer must meet the following requirements:

- 1. have adequate financial resources;
- 2. be able to comply with the required or proposed pickup/delivery schedule;
- 3. have a satisfactory record of performance;
- 4. have a satisfactory record of integrity and ethics;
- be otherwise qualified and eligible to receive an award.

City may request representation and other information sufficient to determine offerer's ability to meet these minimum standards listed above.

REFERENCES: Offerer shall supply with this RFP a list of at least three (3) references where like services have been supplied by their firm.

OFFERER SHALL PROVIDE with this proposal response, all documentation required by this RFP. Failure to provide this information may result in rejection of proposal.

CONTRACTOR SHALL defend, indemnify and save harmless City and all it's officers, agents and employees from all suits, actions, or other claims of any character, name and description brought for or on account of any injuries or damages received or sustained by any person, persons, or property on account of any negligent act or fault of the Contractor, or of any agent, employee, subcontractor or supplier in the execution of, or performance under, any contract which may result from proposal award. Contractor shall pay any judgment with costs which may be obtained against City growing out of such injury or damages.

TERMINATION OF CONTRACT: This contract shall remain in effect until contract expires, delivery/completion and acceptance of products and/or performance of services ordered or until terminated by either party with a thirty (30) day written notice prior to any cancellation. Contractor must state therein the reasons for such cancellation. City reserves the right to award cancelled contract to next best offerer as it deems to be in the best interest of City.

TERMINATION OF DEFAULT: City reserves the right to enforce the performance of this contract in any manner prescribed by law or deemed to be in the best interest of City in the event of breach or default of this contract. City reserves the right to terminate the contract immediately in the event the Contractor fails to:

- 1. meet delivery or completion schedules;
- 2. otherwise perform in accordance with the accepted proposal.

Breach of contract or default authorizes City to award to another offerer, purchase elsewhere and charge the full increase in cost to the defaulting offerer.

NOTICE: Any notice provided by this proposal (or required by Law) to be given to the Contractor by City shall be conclusively deemed to have been given and received on the next business day after such written notice has been deposited in the mail in Rockwall, Texas, by Registered or Certified Mail with sufficient postage affixed

thereto, addressed to the Contractor at the address so provided; provided this shall not prevent the giving of actual notice in any manner.

PATENTS/COPYRIGHTS: The Contractor agrees to protect City from claims involving infringements of patents and/or copyrights.

CONTRACT ADMINISTRATOR: Under this contract, City may appoint a contract administrator with the designated responsibility to ensure compliance with contract requirements, such as but not limited to, acceptance, inspection, and delivery. The contract administrator will serve as liaison the between the City (which has the overall contract responsibilities) and the Contractor.

TESTING: Testing may be performed at the request of City, by an agent so designated, without expense to the City.

PURCHASE ORDER: A purchase order(s) shall be generated by City to the Contractor. The purchase order number must appear on all itemized invoices and packing slips. City will not be held responsible for any orders placed/delivered without a valid current purchase order number.

PACKING SLIPS or other suitable shipping documents shall accompany each special order shipment and shall show: (a) name and address of Contractor; (b) name and address of receiving department and/or delivery location; (c) City purchase order number; and (d) descriptive information as to the Permit and Project Tracking System and accessories delivered, including serial number, quantity, number of containers, etc.

INVOICES shall be issued within ten (10) days following the end of the preceding month for services rendered during that month. Invoices shall include copies of reports specified in Section 11.0 of the attached RFP. Invoices shall be mailed directly to: Donna Allen, City of Rockwall, 385 South Goliad, Rockwall, TX 75087.

PAYMENT will be made upon receipt and acceptance by City of all completed services and/or item(s) ordered and receipt of a valid invoice, in accordance with the State of Texas Prompt Payment Act, Article 601f V.T.C.S. Contractor(s) is required to pay subcontractors within ten (10) days.

The Permit and Project Tracking System supplied under this contract shall be subject to City's approval. Item(s) found defective / inoperable or not meeting specifications shall be repaired / replaced by the Contractor within one (1) week after notification at no expense to City.

WARRANTY: Contractor shall warrant that all equipment/accessories/services shall conform to the proposed specification and/or warranties as stated in the Uniform Commercial Code and be free from all defects in material, workmanship and title.

REMEDIES: The Contractor and City shall agree that both parties have all rights, duties, and remedies available as stated in the Uniform Commercial Code.

VENUE: This agreement will be governed and construed according to the laws of the State of Texas. This agreement is performable in Rockwall County, Texas.

ASSIGNMENT: The Contractor shall not sell, assign, transfer or convey any contract resulting from this RFP, in whole or in part, without prior written consent of City.

SILENCE OF SPECIFICATION: The apparent silence of these specifications as to any detail or to the apparent omission from it of a detailed description concerning any point, shall be regarded as meaning that only the best commercial practices are to prevail. All interpretations of these specifications shall be made on the basis of this statement.

CITY OF ROCKWALL, TEXAS

REQUEST FOR PROPOSAL FOR PERMIT AND PROJECT TRACKING SYSTEM

1.0 General Information

1.1 Intent: The intent of this request for proposal (RFP) is to provide offerers with sufficient information to prepare a proposal for a Permit and Project Tracking System with various types of equipment, accessories and services needed by the City. Offerer is requested to address their entire line of equipment and services.

THIS PROJECT PROVIDES A COMPUTERIZED PERMIT AND PROJECT TRACKING SYSTEM FOR THE CITY'S DEVELOPMENT SERVICES DEPARTMENTS.

THE PERMIT AND PROJECT TRACKING SYSTEM WILL DELIVER THE TOOLS FOR COMPLETE MANAGEMENT OF PERMITTING AND PROJECTS INCLUDING PERMITTING, LICENSING, INSPECTION, AND PROJECTS. THE DESIRED SOLUTION WILL INTEGRATE WITH THE DEPARTMENTS OF PLANNING, GIS, BUILDING INSPECTIONS, CODE ENFORCEMENT, FIRE MARSHAL'S OFFICE, AND ENGINEERING TO ALLOW REAL-TIME CASE MANAGEMENT AND REPORTING OF DEVELOPMENT PROJECTS. HAVING THIS TIMELY AND COMPLETE DATA IS CRUCIAL FOR THE CITY TO BE EFFECTIVE IN PROVIDING ITS STEWARDSHIP RESPONSIBILITY OVER PERMITTING AND PROJECTS MANAGEMENT TO CURRENT AND FUTURE GENERATIONS OF ITS RESIDENTS.

TAKING AN INTEGRATED APPROACH TO PERMIT AND PROJECT TRACKING WILL ENABLE STAFF AND COUNCIL TO MANAGE DEVELOPMENT IN A MORE EFFICIENT MANNER.

1.2 City of Rockwall Profile: The City of Rockwall, TX is located in Rockwall County, approximately 20 miles east of Dallas, TX. It is the largest city in Rockwall County with a population of approximately 43,750. The City covers about 30 square miles.

The City operates under the Council-City Manager form. The Council, consisting of the Mayor and Council members elected by and responsible to the people, that appoints a City Manager, who is directly responsible to the Council for the execution of the laws and the administration of the government of the City. The City has the following metrics:

Metric	Information
Population (2018)	43,750
Employees	450
Operating Budget	\$34,744,300
Parcels	18,314
Situs Addresses	20,927
Planning / Eng. Cases (2017)	199
Code Cases (2017)	3,262
Business License Volume	~208
Permit Volume – By Department (2017)	Engineering: 1,757 Building: 4091 applications; 3,824 issued; 2,742 finaled
GIS Layers	~277

- 1.3 Inquiries: Any questions or requests for clarification must be submitted to the City's Purchasing Agent, in writing, no later than seven (7) business days before the RFP due date. There will be no exceptions. All responses to the questions will be sent to all offerers.
- 1.4 Selection: The award of the contract shall be made to the responsible offerer whose proposal is determined to be the lowest evaluated offer resulting from negotiation, taking into consideration the relative importance of price and other evaluation factors set forth in the Request for Proposals in accordance with Texas Local Government Code, Chapter 262.

The evaluation criteria will be grouped into percentage factors as follows:

- 10% OFFERER'S QUALIFICATIONS/EXPERIENCE.
- 15% OFFERER'S TOTAL PROPOSED PRICE
- 20% OFFERER'S SUPPORT/SERVICE.
- 15% OFFERER'S WARRANTY/MAINTENANCE.
- 40% THE PROPOSED PRODUCT MEETING CITY'S PRESENT NEEDS AND REQUIREMENTS AS WELL AS FUTURE NEEDS THROUGH ENHANCEMENTS AND UPGRADES.
- 1.5 Guidelines for Proposal Evaluation: Proposals will be evaluated using a comprehensive set of criteria. A list of these criteria is presented below:
 - 1.5.1 Are the hardware, software technical and compatibility requirements addressed in the proposal?
 - 1.5.2 Are the proposed products and services responsive to the City's needs?
 - 1.5.3 Has offerer addressed their entire line of hardware, software, accessories and services available?
 - 1.5.4 Is offerer's participation and responsibility clearly defined?
 - 1.5.5 Is City's participation and responsibility clearly defined?
 - 1.5.6 Are high quality service, warranty and maintenance available?
 - 1.5.7 What are the offerer's service/support hours?
 - 1.5.8 Has requested information been supplied?
 - 1.5.9 Due to technical nature of this product, has the offerer addressed future use of equipment, future expansion possibilities and possible upgrading?
 - 1.5.10 Has accessory equipment or modules been addressed?
 - 1.5.11 Has cost, both total and itemized, been addressed?
 - 1.5.12 Has offerer addressed previous experience in providing these types of equipment and services?
 - 1.5.13 Has offerer addressed the type of support and repair service available?
 - 1.5.14 Have installation procedures been defined?
- 1.6 Submittal: For proper comparison and evaluation, City requests that proposals address, at a minimum, **Section 2.0** by number stated herein.
- 1.7 Confidential Material: Any material that is to be considered as confidential in nature must be clearly marked as such and will be treated as confidential by City to the extent allowable in the Open Records Act.
- 1.8 Contract Negotiations: City reserves the right to negotiate a contract with the selected offerer.
- 1.9 Contract Obligations: This proposal, submitted documents and any negotiations, when properly accepted by City, shall constitute a contract equally binding between the successful offerer and City. The selected offerer will be considered as the prime contractor and shall assume total responsibility for the product, accessories and services. Failure to meet obligations may result in the cancellation of any contracts.

1.10 Supporting Materials: All questions asked in this RFP will be used in making a selection and should be addressed by section and number.

2.0 MINIMUM TECHNICAL REQUIREMENTS

2.1 The City is in the process of evaluating its current software system, Trak-it (provided by Central Square Technologies) which was implemented in 2003, and is exploring replacement software options to help manage its Permit and Project Tracking needs.

It is the City's intent to utilize current technologies consistent with the City's technology plans, upgrade its system to better meet the needs of the public and its users, and to improve upon its business practices.

Departments directly involved in the project include Planning, GIS, Building Inspections, Neighborhood Improvement Services (Code Enforcement), Engineering, and the Fire Marshal's Office.

The purpose of this project is to assess leading and established Permit and Project Tracking systems that provide the flexibility to meet the City's functional, reporting, and technical requirements and strategy. The functionality under consideration in this software selection project includes the following:

- GIS Integration
- Citizen Access Web Portal and /or Kiosk
- Planning/Applications
- Property Information/Attributes
- Permitting
- Project Tracking/Community Development
- Inspections (Building, Code, Planning, Fire, Health, Engineering/Public Works, etc.)
- Code Enforcement
- Business License /Taxes
- Cash Receipting
- Electronic Workflow (e.g. applications, plan review, documentation, approvals, alerts, and triggers)
- Reporting and Query Tools
- Document/Image Management or Links
- Enterprise POS/Cashiering
- Event Management and Facility Scheduling

2.1.2 Electronic Data Transfer Functionality

- Solution must create electronic data file (of commonly used formats), and provide the ability to
 export/transmit that data to other systems utilized by the City of Rockwall.
- Software must provide ability to automatically transfer the electronic data file to a predetermined destination on the connectivity network utilizing established file transfer protocols.

2.1.3 Vendor Requirements – Installation and Support

- Software installation must be an automated process that requires minimal I.T. involvement.
- Vendor must offer 24/7/365 customer support.
- Vendor maintenance plan must be all inclusive 'flat-fee' that will not require the agency to pay any additional fees for changes, modifications, and updates throughout the year (i.e. fixes, patches).
- Vendor must provide all necessary training and support documentation.
- Vendor must provide all installation and maintenance services.
- Vendor must have been in business for a minimum of 3 years.
- Application must be provided with a 100% satisfaction guarantee of a operable system for daily business.
- Vendor must have at least (3) references for like product specifications quoted.
- Company must provide Permit and Project Tracking System for both desktop and mobile computers to ensure the appropriate integration between the two hardware components.
- Company must have the ability to fully deploy both solutions within 180 days of receiving the purchase order.
- 2.2 Ancillary Equipment: All unique items and accessories (i.e. cables, components, (non-pc) etc.) necessary to render the Permit and Project Tracking System complete, operable and ready to use shall be included as part of the package. Any item appearing in the manufacturers published specifications are to be included. Any additions, deletions, or variations shall be outlined by the offerer.
- 2.3 Quantity/Users: The City expects 50 named users but seeks the purchase of an <u>unlimited</u> <u>license option</u>. This approximate quantity does not constitute an order, but only implies the probable quantity City requires.
- 2.4 Delivery: Delivery and installation location shall be indicated on each purchase order issued for the Permit and Project Tracking System. Delivery shall be FOB Destination, City of Rockwall, 385 S Goliad St, Rockwall, Texas 75087.
- 2.5 Acceptance: All components, materials equipment, parts and supplies necessary to render the installation complete shall be included.
- 2.6 Warranty Service: Systems shall have a (2) year warranty (100% parts and labor) and tech support calls preferably taken 24/7. Please document if different.
- 2.7 Manuals: All user/owner/technical reference manuals shall be included with each type of equipment.
- 2.8 Shall be an authorized dealer for the product proposed.
- 2.9 Training: The City seeks 6 month and 1 year training sessions in addition to basic training since end users may require additional training once they have had time to use the software. A "train the trainer" session would also be preferred so on-site staff could train staff as needed.

3.0 ADDITIONAL POINTS TO BE ADDRESSED

- 3.1 Installation Procedures: Offerer shall address installation procedures, estimated setup time required, other needed modules or API's, and cost, if any. If included in price of equipment, please state.
- 3.2 Delivery/Installation Time: Offerer shall state length of time necessary to deliver and/or install.
- Product Enhancements: Explain possible product enhancements/upgrades that may be available. Can additional features be added to the purchased product?
- Optional Maintenance Contracts: Are optional maintenance contracts available? If so, please address maintenance coverage, special arrangements, staff, and service times.
- 3.5 Offerer's Principal Location: Give your principal location address with applicable contact information.
- 3.6 Descriptive Literature: Please provide all available descriptive literature on Permit and Project Tracking System and enhancements.
- 3.7 Historic Background: Provide a historic background of offerer's company and included a list of comparably-sized local government customers.
- 3.8 Experience: How long have you been selling this type of equipment? Give experience and background.
- 3.9 The successful firm shall assume single source responsibility and will be the sole point of contact for all system delivery, installation, operation, testing, training, warranty, maintenance, problem determination and resolution.
- 3.10 Note: The City is not interested in any cloud solutions.
- 3.11 <u>Historic Data to be Imported:</u> (as of October 9, 2018)

Planning / Engineering: 4,056 projects

Permits: 69,935 Code Cases: 42,761

AEC (Central directory for Architects, Engineers, & Contractors): 7,379

4.0	*Please use the following as a guideline for co	st quotation.
•	Total Implementation/Contract Cost Total Software License Cost Total Installation/Training Cost Total Migration/Data Conversion Cost Auxiliary Module Cost and Description. Additional Hardware and Miscellaneous Costs Vendor Estimated Travel Costs Yearly Ongoing Software Maintenance Cost Yearly Ongoing Costs not mentioned Delivery/Project completion: number Payment terms - Net 30 days if not otherwise indica Discount for early payment: Discount on Licensed Software (should not be included)	
Signat	iure:	
In sub the Cit	mitting the attached Proposal, the offerer ag ty of Rockwall within a reasonable period of t	rees that acceptance of any or all Proposal items by ime constitutes a contract.
FIRM/0	OFFERER:	
BY:		
Signatu	re	Title
PRINT	NAME:	
ADDRE	ESS:	
TELEP	PHONE:	FAX:
EMAIL	ADDRESS:	

RETURN ENTIRE PACKET AND ALL DOCUMENTATION REQUIRED BY THIS REQUEST FOR PROPOSAL

PUBLIC NOTICE

CITY OF ROCKWALL, TEXAS REQUEST FOR PROPOSALS

Sealed Proposals addressed to the Purchasing Agent, City of Rockwall will be received at City Hall, 385 S. Goliad St., Rockwall, Texas 75087 until 2:00 PM CST on January 10, 2019 for a **Permit and Project Tracking System**. All submitted proposals duly received will be publicly opened and the names of the proposers read aloud. The City reserves the right to reject any or all proposals, waive formalities, re-advertise, re-bid and consider the most advantageous proposal thereof. Proposal packet may be examined and or obtained without charge at City of Rockwall Finance Department, 385 S. Goliad, Rockwall, TX 75087, 972-771-7700 and on the City's web site www.rockwall.com.

Publish Dates:

November 16, 2018 November 23, 2018

ON THE FOLLOWING PAGES IS A LIST OF VARIOUS ITEMS THE CITY FEELS IS IMPORTANT FOR THIS SYSTEM TO INCLUDE:

After each specification/feature there is a checkbox. Mark the one that represents your product.

Meets Req.	Item	Module	Requirement	Vendor Response
	1	System	Accept customer payments online using credit card and ACH methods for all services rendered in the applications.	is a second of the second of t
	2	System	Track all activities/chronology performed in the system, such as activity related to a project, plan, application, inspection, case updates, violations etc. including the activity type, who performed the activity, when the activity occurred, the type of activity, status change, email notification or communications, or any other services performed.	
	3	System	Be able to use a library of fees specific to the application, plan review, permit type, violation, inspection, or any other service performed.	
	4	System	A payment reconciliation process including associated reports listing payments, services performed and bank deposits are needed.	
	5	System	Provide the ability to pull language from ICC Codes, Code of Ordinances, etc. and place them into the comments section, plans, letters, notices etc.	
	6	System	Integrated spell checker option for all free-form text entry forms.	
	7	System	Transfer comments to generated letters, notices, automatically as needed.	
	8	System	Ability to capture electronic signatures, such as from customers, contractors, or other related persons.	
	9	System	Management dashboards should be available throughout the system to help managers review work that is being performed by their employees.	
	10	System	Conversion of Trak-it records to the new system is required.	
	11	System	View/Query geographic representation of information associated with parcels, permits, plans, projects, code cases, inspections, etc. using GIS web map viewer.	
	12	System	Mobile site/tool for customers and contractors to access permit application status, inspection status, code case status, project info, reports, etc., that is optimized for use by smartphones or tablets.	
	13	System	Ability for customers and City staff to run their own reports, listing permits issued, inspections performed, applications submitted, Code cases, CO's status, Project comments etc.	×
	14	System	Receive warning emails when project deadlines are approaching.	
_	15	System	Ability to store and associate multiple instances of customer, contractor email, city employee addresses based on role(s) associated to the project, permit application, plan review, inspection, code case, etc.	
	16	System	Ability to create and modify custom reports.	
	17	System	Ability to save parameters on reports.	
	18	System	All interactions and communications related to projects, cases, permits, inspections, etc., should be able to be tracked and logged in the system (including phone calls, emails, in-person, faxes, mail (scanned) photos, scheduled meetings, etc.	
	19	System	User interfaces, both desktop and mobile device, should all be Microsoft compatible.	
	20	System	Dashboards should be available throughout the system to help prioritize and track work that needs to be performed by role. It should track all assignments, task, that are current and highlight any work that will approach/exceed acceptable turn-around times or commitment dates.	

Meets Req.	Item	Module	Requirement	Vendor Response
	21	System	Allow for preset sentences and/or phrases to be inserted quickly from a drop down menu, predictive typing, etc. which can be inputted into special text areas, like violation reason in code cases for example, or related to ordinance, code, statute, etc. as appropriate, that allow for standardized information to be added quickly and accurately.	
	22	System	Ability to search and view a property activity by any combination of address, street, case type, application type, active, closed, inspector, location ID, parcel number, and department.	
	23	System	Deposit activities can be easily and conveniently tracked.	
	24	System	Ability to place department internal-only special notes on certain properties to provide information or warning to staff (e.g. hostile owner, notable individual, special concerns etc.)	
	25	System	Ability to assign cases/inspections to specific inspectors by geographic area and/or by job function. Also be able to re-assign the case when the situation merits it.	
	26	System	Integrated task alerting functionality.	
	27	System	System should be secure with auditable reports, provide role base access, and support transaction encryption for credit card processing.	
	28	System	Workflow functionality is required for the generation of reports and emails, the progression of logical states/statuses, simple and complex approval processes, document creation, routing, storage, and queue processing.	
	29	System	Include mechanism to comply with records retention policies, such as records export, purge, and classifications.	
	30	System	Ability to generate single-family, multi-family and hotel/motel reports or other projects grouped by common names.	
	31	System	Integrate parcel (appraisal data) into new case/project creation process so that the owner information can be verified/copied into the case/project for letters etc. Also, allow tying record to parcel ID at later date if necessary.	
	32	System	Option to also search water billing or addressing for information for case/project creation.	
	33	System	Bulk/Batch output feature is needed for letters, notices, etc. that require delivery via email or mail, such as single or multi-family rental registration notices, hotel registration notices, etc.	
	34	System	Customer or City agent should be able to print an itemized receipt of customer payments and city services provided. Ability to bulk print invoices for mailing is also needed.	
	35	System	Official signatures are often needed to validate certain generated city documents (such as Certificate of Occupancy documents, violations notices, etc.) The system should support the application, management and execution of official signatures.	
	36	System	Provide the ability to issue and track invoices, such as rental registration invoices, re-inspection invoices etc.	
	37	System	Ability to access detailed case information directly from a dashboard, map or by query/report for all inspections to be completed for the day.	
	38	System	Support setting up, management, and using address/neighborhood based zones for special assessment and alerting.	
	39	System	Incorporate safe guards/rules to prevent errors such as inadvertently closing a case before necessary steps are taken.	
	40	System	Allow for hot-keys or other shortcuts to move through menus, selections, etc. without using a mouse.	

Meets Req.	Item	Module	Requirement	Vendor Response
	41	System	System must support interface, content, and workflow customizations by a trained system administrator without programming.	
	42	System	Provides a flexible and open methodology with ability to link to other city systems, 3rd party software, tools or data.	
	43	System	Ability to customize end user forms to facilitate a more focused user interface for each group of end users.	
	44	System	Ability to access in the field on a variety of devices, include laptops, tablets and smart phones.	
	45	System	Be able to retrieve data (including records, documents, images, drawings, and photos) by address, owner, permit or case #, or other identifying criteria.	
	46	System	Should display concise, clear error messages and allow the user to respond to critical error messages.	
	47	System	Ability to log system error messages, schedule and report to system administrators.	
	48	System	Must support hyperlinks and embedded documents (.pdf, etc.) and the ability to attach multimedia files to cases or projects.	
	49	System	Inter-operability with Microsoft product suite (Outlook, Word, Access, Excel, etc.), that interfaces directly with email capabilities.	
	50	System	Control of data entry to ensure user enters data into all required fields on the screen.	
	51	System	Ability to import/export select records in batch or by single record.	
	52	System	Capability to have data entry fields automatically default to a specified value (e.g., most date fields should default to current date).	
	53	System	The system provides functionality for logging, mapping, and tracking various request.	
	54	System	System is able to synchronize data between field and office installations.	
	55	System	The system provides for generating, mapping, and tracking permits, inspections, and projects.	·
	56	System	Ability for customers to locate, download, and print their own documents, such as Permits, or Certificate of Occupancy.	
	57	System	Ability to define unlimited activity types for any record entry.	
	58	System	Ability to create cases / projects from inside the map interface.	
	59		Ability to view all activities	
	60		Contains searchable, robust fields for problem and completed work descriptions that have basic word processing functionality such as spell check, copy, cut, paste, etc.	
	61	System	Ability to send scheduled tasks to responsible party(ies) for types of work and send email and task alerts.	
	62		Provides a consistently designed pop-up window or pick lists to access all domain types or codes and their description.	
	63		Ability to include an inspection checklist specific to case/inspection type	
	64		Ability to provide flexibility for user defined fields and forms.	•
	65		Ability to define custom inspection observations.	
	66		Provides a set of standard reports on a menu within the application which the vendor is responsible for maintaining with both tabular and spatial inputs.	
	67	System	The system should support Open Record research request.	
	68		Ability to give option to send report to the screen, a printer, or to a file as well as send file by email.	

Meets Req.	Item	Module	Requirement	Vendor Response
	69	System	Ability to add customized reports to the local report menu and modify the content and/or format of any standard report.	
	70	System	Ability to access all data, all historical, and charges.	
	71	System	Ability to easily and quickly access the historical archive utilizing extensive selection criteria.	
	72	System <u></u>	Ability to select date ranges and other criteria as applicable for standard reports.	
	73	System	Customers should be able to view the status of their request (Permits, Development Projects, Inspections, Plan Review, Cases etc.) online,	
	74	System	Contractors should be able to receive an automated email reminder that their registration is about to expire.	
	75	Code	Code Enforcement cases should be linked to parcel account and alternatively by addresses.	
	76	Code	Need ability to copy existing cases and/or create standard case templates.	
	77	Code	Pop-up alerts or other "attention-grabbing" alert for needs to be visible when an address property is flagged as part of an improvement zone, or other special circumstance.	
	78	Code	Ability to generate new code enforcement cases using only the parcel ID number or a location address.	
	79	Code	Photos, Inspection results, notes, and notices become an electronic record for each case.	
	80	Code	Coordinate follow up communications with other staff and appropriate members of the community.	
	81	Code	Code violation history should be available to multiple city departments, in the office or the field.	
	82	Code	Ability to simply perform analysis of staff performance in quantity and closing of cases	
	83	Code	Supports multiple cases at one location. Cloning of one record information to other cases if needed.	
	84	Code	Generate notice letters and citations with specific information to that particular case that may be printed back in the office, or can be setup for batch print run at the end of the workday. Such correspondence should attach to each case automatically.	
	85	Code	Ability to assign code cases to specific apartment/condo units at a location instead of the property at large.	
	86	Code	Generate reports with ability to: A) Track closed cases within various date ranges for the department and separately for each inspector. B) Track inspector response time for complaints. C) Track the amount of time it takes an inspector from the date inspection was performed to the time it was closed. D) Track complaint-driven cases and the duration they take to close. E) Report by specific case types, time periods, aging, resolution, officers, etc.	7
	87	Engineering	Ability to review plans and issue permits for new projects and subdivisions.	*
	88	Engineering	Track, review and issue permits for new subdivisions and various utility or earthwork projects.	
	89	Engineering	Track, review and issue Right of Way (ROW) permits	
	90	Engineering	CIP Project Management, including tracking inspections.	
	91		Ability to review planning projects/cases-plats etc.	
	92		Tracking and inspections of maintenance bonds.	
	93	GIS	System provides a map interface, allowing the user to view, search, pan, zoom, locate, measure distances and include the capability to view information about feature attributes from the GIS.	

Meets Req.	Item	Module	Requirement	Vendor Response
	94	GIS	Ability to route request to city staff by geographic layer as defined in the GIS.	
	95	GIS	System allows the City of Rockwall to maintain only one set of data, without generating duplicates.	
	96	GIS	Provide easy method to update parcel ownership data without complex programming or steps.	
	97	GIS	Ability to summarize by heat maps within GIS.	
	98	GIS	All activities can be displayed live on the map interface based on user preferences. User should be able to open activities from the map.	
	99	GIS	Must be Geographic Information Systems (GIS) centric or connect with the City's GIS system.	
	100	GIS	Should be seamlessly integrated with ESRI Geodatabases.	
	101	GIS	Ability to import/export any types of datasets.	_
	102	GIS	Maps are comprised of ArcGIS Server Map Services hosted on the City's ArcGIS Server and ESRI ArcGIS Online Services, or a combination.	
	103	GIS	Supports multiple map services, specific to users or groups of users, to meet the various GIS needs of each department.	
	104	GIS	Ability to easily publish activities within the software to REST endpoints for consumption on ArcGIS Server or ArcGIS Online.	
	105	GIS	Uses ESRI Geocoding services for address locator, including cross streets.	
	106	Inspections	Re-inspection fees linked to Permits or addresses.	
	107		An inspector should be able to schedule inspections in the field using mobile devices, such as tablets.	
	108	Inspections	Limit by inspection type which inspectors can be assigned/work.	
	109	Inspections	Allow for the configuration of inspectors with their associated trade/specialty to limit the types of inspections they may be assigned.	
	110	Inspections	Provide inspection checklist with pictures for inspectors.	
	111	·	Field based/mobile inspection should provide a simple interface to take and store pictures related to inspections.	
	112	Inspections	Ability to manually add/update an email address for any other contact information at the time of inspection so that a home owner for example may be added and copied on inspection results, or contact info can be corrected in the field.	
	113		Mobile/Field based website or application for inspectors to access all system features but optimized for mobile devices. These features include but are not limited to inspector request inquiry, update inspector request, review violations, schedule inspections, complete inspections, access inspection checklist, capture signatures, take and upload pictures related to the inspect, generate violations, generate documents, run reports/inquiries, and send emails and documents. Also create new inspection request and schedule inspections.	
	114	Inspections	Ability to generate a daily inspection listing and be able to print if required.	
	115	Inspections	Simple to use and navigation in mobile/field based interface to search and view documents plans quickly and easily for use by inspectors.	
	116		Interactive, automated route planning for inspection assignments to facilitate efficient route planning in order to reduce travel time and mileage.	

Meets Req.	Item	Module	Requirement	Vendor Response
	117	Inspections	Customers/contractors should be able to schedule an inspection online once a permit has been issued.	
	118	Inspections	Mobile/Field based inspections tool to empower field staff to make decisions in the field, that provides access to all information associated with a property, including Permit history, Code history, Inspection history, Plans, as-built's, and associated documentation.	
	119	Inspections	Field based printing capabilities for urgent notices such as 'stop work' request issued in the field.	
	120	Inspections	Customers, Contractors, and Inspectors should be able to access the required inspections list and also see the appropriate sequence of events and their status/location in the sequence of events.	
	121	Inspections	Ability to schedule a series of recurring inspections automatically based on the application type (ex. Weekly, every other week, etc.)	
	122	Inspections	Automatically email contractors associated with scheduled Pre- Construction meetings.	
	123	ΙΤ	Ability to store attached documents within or outside of the database.	
	124	IT	Supplies various utilities to facilitate file maintenance and backup/recovery. These may include, but are not limited to, sorts, file generators, and file-to-file copying utilities.	
	125	ΙΤ	Ability to provide data dictionary, data schema and updates with any database changes.	
	126	IT	Ability to provide data warehouse environment and tools for refreshing.	
	127		Ability to utilize automated workflow to electronically route documents and maintain electronic approval processes.	
	128		Ability for managers to utilize workflow functionality to help review productivity and workload of City staff.	
	129		Ability to support workload analysis and re-route work and/or documents based upon workload criteria.	
	130		Ability for the workflow engine to utilize system security to help ensure that only users with appropriate levels of authority have access to certain system functions and data.	
	131		Ability to support a multi-level approval process for workflow.	
	132		Ability to support electronic signatures and digital certificates.	
	133		Ability to log Additions, Deletions and Changes to data and/or software	
	134		Ability to operate on thin client architecture.	
	135		All file-changes are recorded in a detailed permanent audit trail, by user ID, based on user login.	
	136		Ability to assign permissions assigned to an individual end-user; exclusive of the group they are assigned.	
	137		These permissions will supersede the permissions of the group to which they are assigned.	
	138	ΙΤ	Ability to allow users to query documents to identify what their current "status" is in the workflow process.	
	139		System allows real-time and disconnected system access by staff through web-based system.	
	140	IT	Ability to provide remote, electronic system support so application problems can be diagnosed and remedied from the City's test environment.	

Meets Req.	Item	Module	Requirement	Vendor Response
	141	IT	Ability to provide on-going, 24-hour system support for functionality, technical, or business related. By way of but not limited to toll-free hotline, online chat, email, or other similar mediums.	
	142	ΙΤ	Ability to remotely upload/download new program releases or modifications so that software upgrades can be accomplished via telecommunication with the Vendor.	
	143	IT	Ability to provide automated scheduling of jobs (processes).	
	144	IT	Ability to support high speed back-up capability.	
	145	ΙΤ	Support a redundant server environment for immediate failover in the event that the production environment goes down.	
	146	IT	Ability to support unattended back-ups.	
	147	IT	Ability to use system while backups are being performed without degraded response time.	
	148	IT	Ability to restore and view backed up records without interruption of service to the system.	
	149	IT	Ability to back-up live system with referential integrity intact.	
	150	ΙΤ	Ability of any proposed client software to execute on 32 bit and 64 bit Microsoft Windows operating systems.	
	151	IT	Microsoft Windows 7 and future Microsoft releases.	
	152	ΙΤ	Ability of the proposed software to execute with a computing platform having a minimum configuration of 2.0 GHz Intel compatible CPU, and at least 2 GB of RAM.	
	153	IT	Ability to provide security in all proposed applications that integrates with Active Directory.	
	154	IT	Ability to complete nightly batch processing and file/database maintenance cycle within (6) hours or less.	
	155	IT	Allow for or provide test, train, and live environments that are separate from one another. Train and live environments should operate from same code-base if possible.	
	156	IT	Must be compatible with Microsoft Hyper-V virtual environment.	
	157	IT	Must be compatible with Microsoft Server and MS-SQL 2016	
	158		Add standard comments and also provide other checklist.	
	159		Plans should be up-loadable and viewable electronically online by both applicant and plan reviewers.	
	160		Ability to assign projects to staff members or plan reviewers.	
	161		Ability to generate a list of all assigned projects	
	162		Applicants should be able to see the status of a project including comments, etc.	
	163		Provide customers with online self-service access to inquire for and view plans, as-built's, and archived versions of the documents.	
	164		Paperless plan review with shared access for multiple entities, such as multiple plan examiners, departments and/or customers.	
	165	Licensing	Provide web portal to allow property owners/managers to register and pay for rental registrations, re-inspections fees, etc.	
	166		Customers should be only able to select the active contractors in the system whose registration is current.	
	167		The associated contractor should be notified via email when a permit application is submitted listing their services.	
	168		A contractor or sub-contractor should be required to acknowledge/validate their connection to a permit application performing the work listed, whether the application is submitted by the customer or the contractor.	

Meets Req.	ltem	Module	Requirement	Vendor Response
	169	Permit	Customers may only download and print their permits after all associated fees have been paid and the permits have been approved.	
	170	Permit	Reminders on temporary certificate of occupancy documents that expire, the customer and the inspector should get notified and this should be tracked.	
	171	Permit	Automatic follow-up inspection scheduled for inspectors within 'X' year maintenance bond after Certificate of Occupancy document issued when a maintenance bond ahs been required. He inspection request should reference the specific CO issued without affecting the finality of the CO.	
	172	Permit	All Permit Applications shall be available online for completion by customer	
	173		24 hour online self services via the web for permit application submission with staff approval process or auto-approval based on business role/permit complexity.	
	174		Automated construction valuation or other semi-complex permit fee calculation should be included.	
	175		Contractors should be able to receive a reminder after 'X' days of no activity that no inspection scheduled, and permit is about to expire.	
	176	Permit	Generate reports for 'idle' permits (inactive 90 days or longer)	
	177	Permit	Generate email reminder to customers/contractors to pick up their Permits via online or in-person.	
	178		Generate email notifications to customers and/or contractors for changes in permit status.	
	179	Permit	Track whether/when a customer received a permit, either via download, email, or printed, and delivered by system (including from City Hall)	
	180		Ability to manage planning cases and applications throughout the process.	
	181		Automated scheduling and notifications based on key events and applications, proceedings, hearings, and other critical deadlines. Planning follows a rigid schedule of property owner notifications, sign postings, public meetings etc.; Use workflow processes to assist scheduling these events and notifications and reminders for them.	
	182	Projects	Ability to track sign-off approvals on multi-Odepartmental reviews.	
	183		Web portal that help provides a clear understanding of project timelines and objectives that can be used by both staff and citizens (city customers).	
	184		Ability to connect Planning projects and Building Inspection permits so that the associated information can be accessed for either side.	
	185		Ability to integrate Planning Cases for P&Z Commission meetings and Council meetings and other group types.	
	186	Projects	Ability to capture all documents within the Planning Cases (such as large PDF, images, MS Word, Excel etc.)	
	187		Ability to connect Plat and Zoning Cases with Building Permits	
	188	Projects	Portal that provides the ability to apply for planning cases online.	
	189	-	Organize planning information online and provide access for the public portal that allows viewing and searching of cases.	
	190		Ability to submit documents online.	
	191		Ability for City employees and customers to interact with zoning cases via GIS web map viewer as the zoning cases are being reviewed and upon completion.	