



**REQUEST FOR PROPOSALS**

**PROPOSAL NUMBER: 19-20-06**

**PERMIT AND INSPECTION SOFTWARE**

**Community Development**

**Return Sealed Proposals to:**

SAN JUAN COUNTY  
Central Purchasing Office  
213 S. Oliver Drive  
Aztec, NM 87410

Attn: Kathleen Begay  
Purchasing Coordinator  
Phone: 505-334-4556  
Fax: 505-334-4561  
E-Mail: [jjones@sjcounty.net](mailto:jjones@sjcounty.net)

**CLOSING DATE: November 14, 2019**

**TIME: 5:00 p.m. (Local Time)**

NIGP Commodity/Services Codes: 961-09 Building Permit Services

- 
- **Proposal of Offeror Form must be completed in full and returned with the Proposal Offer.**
  - This proposal is subject to the Terms and Conditions shown on the following pages and any/all additional instructions.
  - Do not return the Request for Proposal (RFP) in case of "No Response".
  - Proposal must be received in the County's Central Purchasing Office by the Proposal Closing Date and Local Time as indicated above. **Any proposal received after the specified time and/or date will not be accepted and will be returned to the sender unopened. Faxed Proposals will not be accepted.**
  - **Proposals shall be submitted sealed. The outside package should clearly identify the Project Name, Proposal Number, Proposal Closing Date and Name of Offeror. Submit Proposal Offer in accordance with the Request for Proposal.**

***Failure to complete the proposal documents in accordance with all instructions provided is cause for this office to reject the proposal.***

***THE PROCUREMENT CODE SECTIONS 13-1-28 THROUGH 13-1-99 NMSA 1978, IMPOSES CIVIL AND CRIMINAL PENALTIES FOR ITS VIOLATION. IN ADDITION, THE NEW MEXICO CRIMINAL STATUTES IMPOSE FELONY PENALTIES FOR BRIBES, GRATUITIES AND KICKBACKS.***

# ACKNOWLEDGEMENT OF RECEIPT FORM

PROPOSAL NO.: 19-20-06

**AUTOMATED PERMIT ISSUANCE AND TRACKING SOFTWARE**

**23 PAGES (INCLUDING ACKNOWLEDGEMENT, CAMPAIGN DISCLOSURE FORM, AND ATTACHMENT A).**

***NOTE: ONLY POTENTIAL OFFERORS WHO COMPLETE AND RETURN THIS FORM WILL RECEIVE COPIES OF ADDENDUMS, IF ISSUED.***

## **PROPOSAL INFORMATION:**

In acknowledgement of receipt of the above referenced Proposal Packet, the undersigned agrees that he/she has received a complete copy.

\_\_\_\_\_  
OFFEROR NAME

\_\_\_\_\_  
SIGNATURE OF AUTHORIZED REPRESENTATIVE

\_\_\_\_\_  
PRINTED NAME OF AUTHORIZED REPRESENTATIVE

ADDRESS: \_\_\_\_\_

CITY: \_\_\_\_\_ STATE: \_\_\_\_\_ ZIP CODE: \_\_\_\_\_

PHONE NO.: \_\_\_\_\_ FAX NO.: \_\_\_\_\_

E-MAIL: \_\_\_\_\_

### **RETURN TO:**

Jaime Jones  
Contracts Analyst  
SAN JUAN COUNTY  
213 South Oliver  
Aztec, NM 87410  
(505) 334-4548  
FAX (505) 334-4561  
[jjones@sjcounty.net](mailto:jjones@sjcounty.net)

**Faxed copies of the Acknowledgement of Receipt Form will be accepted.  
Faxed Proposal responses will not be accepted.**

## **TERMS AND CONDITIONS** (Unless otherwise specified)

1. **GENERAL.** When the Chief Procurement Officer issues a purchase document in response to the Offeror proposal, a binding contract is created.
2. **FORM OF SUBMISSION.** Each proposal shall be typewritten on standard 8 ½" x 11" paper and placed within a binder with tabs delineating each section. One (1) original and six (6) copies of the Proposal shall be supplied. **Only one Proposal may be submitted by each individual Offeror. Proposals shall be submitted sealed. The outside package should clearly identify the Project Name, Proposal Number, Proposal Closing Date and Name of Offeror.**

In addition to the above requirements, the Offeror must provide one (1) electronic copy organized in the format requested with each tab's information as a separate file on a CD-R, CD-RW or Flash Drive in one of these formats: Adobe PDF (pdf), Microsoft Word (doc), or Microsoft Excel (xls). The electronic copy must be organized and laid out in the same format as outlined in Contents of Proposal Offer, pgs. 6-8, with each tab as a different folder.

3. **DEBARRED OR SUSPENDED CONTRACTORS.** A business (contractor, subcontractor or supplier) that has either been debarred or suspended pursuant to the requirements of §13-1-177 through §13-1-180, and §13-4-11 through §13-4-17 NMSA 1978 as amended, shall not be permitted to do business with San Juan County and shall not be considered for award of the contract during the period for which it is debarred or suspended.
4. **CONFLICT OF INTEREST.** The successful Offeror covenants that neither it nor its officers, directors, agents and employees, have any interest and shall not acquire any interest, direct or indirect, financial or otherwise, which would conflict in any manner or degree with the performance of the required services.
5. **AMENDMENT.** An Offeror may submit an amended proposal before the due date and time. An amended proposal shall be complete, as it will be substituted for the earlier proposal(s), and shall be clearly identified as an amendment. The County will not merge, collate or assemble proposal materials.
6. **WITHDRAWAL.** An Offeror may withdraw its Proposal at any time prior to the deadline for receipt of proposals. An Offeror desiring to withdraw a proposal shall submit a written request to the Bid/Contract Administrator signed by the Offeror's duly authorized representative(s).
7. **PROPOSAL OFFER FIRM.** Responses to the RFP, including costs, shall be firm for ninety (90) days after the due date for receipt of proposals.
8. **COST OF PREPARING RFP.** Any cost incurred by the Offeror in preparation, transmittal, or presentation of any proposal or material submitted in response to this RFP shall be borne solely by the Offeror.
9. **CONFIDENTIALITY.** Each proposal will be kept confidential until a contract is awarded. Following award of a contract, all documents pertaining to each proposal shall be open for public inspection, except for any material, which is designated by the Offeror as proprietary or confidential. Proprietary or confidential data is normally restricted to confidential financial information concerning the Offeror's organization and data that qualifies as a trade secret in accordance with the Uniform Trade Secrets Act, 57-3A-1 to 57-3A-7 NMSA 1978. The price of products offered or the cost of services proposed shall not be designated as proprietary or confidential information. The County will not disclose or make public any pages of a proposal on which the Offeror has stamped or imprinted "proprietary" or "confidential." Such data shall be readily separable from the proposal in order to facilitate eventual public inspection of the non-confidential portion. If a citizen of this State requests disclosure of data for which an Offeror has made a written request for confidentiality, the Central Purchasing Department shall examine the Offeror's Proposal and make a written determination which specifies which portions of the proposal should be disclosed in accordance with applicable New Mexico law. Unless the Offeror takes action to prevent the disclosure, the proposal will be so disclosed. The proposal shall be open to public inspection subject to any continuing prohibition on the disclosure of confidential data.
10. **PUBLICATION.** Offeror shall secure from the County written approval prior to publication of any information that pertains to the potential work or activities, which are solicited in this procurement.
11. **LEGAL REVIEW.** Since Offerors will be bound by the specifications, terms and conditions herein, it is strongly recommended that each Offeror obtain legal advice concerning the proposal.
12. **GOVERNING LAW / VENUE.** The laws of the State of New Mexico shall govern this procurement and any resulting

contract. Any action to enforce terms and conditions herein shall be brought only in the Eleventh Judicial District Court, San Juan County, State of New Mexico.

**13. CONTRACT DOCUMENTS.** The Contract Documents shall consist of this Request For Proposal, the Response of the successful Offeror, a separate written contract and the County's Purchase Order.

**14. CONTRACT TERMS AND CONDITIONS.** A contract between the County and the successful Offeror shall follow the format specified by the County. The County reserves the right to impose, as it sees fit, additional terms and conditions upon the successful Offeror, should conditions warrant. The contents of this RFP, as revised and/or supplemented, and the successful Offeror's proposal, will be incorporated into and become part of the contract.

Should an Offeror object to any of the County's terms and conditions, as contained in the document, that Offeror shall propose specific alternative language that would be acceptable to the County. General references to the Offeror's terms and conditions, or attempts at complete substitutions *are not* acceptable to the County and will result in disqualification of the Offeror's proposal. The Offeror shall provide a brief explanation of the purpose and impact, if any, of each proposed change, following by the specific proposed alternate wording.

Any additional terms and conditions, which may be the subject of negotiation, will be discussed only between the County and the selected Offeror and shall not be deemed an opportunity to amend the Offeror's proposal.

**15. CONTRACT AMENDMENTS.** The County reserves the right to make changes or revisions to the scope of work as required during the term of the contract if it determines it to be necessary or desirable. No changes, revisions, modifications, or amendments of any of the terms or conditions of the contract specifications and requirements shall be valid unless reduced to writing by the County. Verbal discussions or agreements shall not bind the County.

**16. TERMINATION OF CONTRACT.** In case of a breach on any provision of a contract, the County reserves the right to terminate the contract, procure the services from other sources, or take other steps, as it deems appropriate. Additionally, the County reserves the right to cancel a contract at any time, for any reason, without penalty, by giving at least thirty (30) days written notice to the successful Offeror. Written notice shall be deemed delivered when deposited in the United States Mail and certified.

In addition, any contract awarded as a result of the Request for Proposal may be terminated if sufficient appropriations or authorizations do not exist. The County's decision concerning whether sufficient appropriations or authorizations exist will be final.

**17. SPECIFICATIONS.** It is the intent of the County to make this Request for Proposal in such a manner as to be open to all qualified Offerors. Any specification that tends to limit or eliminate a qualified Offeror shall be brought to the attention of the County not less than ten (10) days before the date when responses are due. Failure to bring such a matter to the attention of the County shall bar the Offeror from asserting a later claim in this regard.

**18. INDEMNITY.** The Offeror awarded the contract agrees, as material consideration for this Agreement, to defend, indemnify, and hold harmless the County, its Elected Officials, agents, and employees from and against any and all claims arising out of any asserted negligent act, error or omission of the Offeror, its officers, directors, employees or agents or arising in any way from this agreement or the Offeror's activities hereunder. The indemnity agreed to in this paragraph shall not extend to liabilities, claims, damages, losses or expenses, including attorney fees arising out of: The preparation or approval of maps, drawings, opinions, reports, surveys, change orders, designs or specifications by the County, or the agents or employees of the County, or the giving of or the failure to give directions or instructions by the County, or the agents or employees of the County, where such giving or failure to give directions or instructions is the primary cause of bodily injury to persons or damage to property.

**19. LICENSING.** The Offeror awarded the contract shall possess a current license in the State of New Mexico, and shall obtain and hold such additional licenses as are reasonably required to accomplish his or her duties under this Agreement.

**20. STATUS OF OFFEROR.** The successful Offeror and its officers, directors, agents and employees, are independent contractors performing services for the County and are not employees of the County. The Offeror and its officers, directors, agents and employees, shall not accrue leave, retirement, insurance, bonding, use of County vehicles, or any other benefits afforded to employees of the County. The Offeror shall perform his/her obligations under this Contract as necessary and appropriate under all Federal, State, and local laws, codes, ordinances, rules, regulations, and standards applicable to this type of service. The County will not supervise the Offeror in the day-to-day performance of this Contract.

**21. DISCRIMINATION / EQUAL EMPLOYMENT OPPORTUNITY / CIVIL RIGHTS.** The successful Offeror shall be an equal opportunity employer, and shall not discriminate with regard to race, age, religion, color, national origin, ancestry, sex, sexual orientation, gender identity, spousal affiliation, physical or mental handicap or serious medical

condition as specified in N.M.S.A. 1978, §§ 28-1-7 (as amended) in the performance of this contract. The successful Offeror agrees to abide by all Federal and State laws, rules, and regulations pertaining to equal employment opportunity, discrimination, and civil rights.

- 22. NOTICE.** The New Mexico Procurement Code, N.M.S.A. 1978, §§ 13-1-28 through 13-1-199, imposes civil and criminal penalties for its violation. In addition, the New Mexico Criminal Statutes impose felony penalties for illegal bribes, gratuities and kickbacks.
- 23. TAXES.** The Offeror awarded the Contract shall be responsible for the payment of all federal, state, and local taxes on monies received pursuant to this Agreement.
- 24. ASSIGNMENT.** An Offeror shall not transfer, sell, assign, sublicense, pledge or otherwise dispose of in any way its interest in any contract which may result from this solicitation, or assign any claims for money due or to become due under any contract, without having first obtained the prior written consent of the County to do so. Any attempt by an Offeror to do any of the foregoing without such consent shall be null and void, and may result in disqualification of the Offeror or termination of any contract resulting from this solicitation. The County's consent to any of the foregoing shall not constitute consent to any other act, nor shall such consent relieve the Offeror from any of its duties to perform all agreements, covenants, and conditions set forth in this solicitation or any resulting contract.
- 25. RECORDS.** All records and documents are property of San Juan County and shall be returned to San Juan County upon termination of any contract.
- 26. OWNERSHIP OF PLANS.** The County shall receive a mylar original of the bid plans which will include a San Juan County cover sheet. The Offeror awarded the contract acknowledges that the reports, plans, specifications, field data, field notes, laboratory test data, calculations, estimates and other similar documents of the successful Offeror are instruments of service, not products. Although ownership of such documents is normally retained by the Offeror, they nonetheless shall on this project become the property of the County. Plans, drawings, and other similar documents shall not be reproduced, copied or duplicated without the express written authorization of the County.

The County agrees that no such documents will be subject to unauthorized re-use without written authorization of the successful Offeror to do so. Such authorization is essential because it requires the successful Offeror to evaluate the documents' applicability to new circumstances, not the least of which is the passage of time. In return for the successful Offeror's relinquishment of ownership, the County agrees to defend, indemnify and hold the successful Offeror harmless from any claim or liability for injury or loss allegedly arising from unauthorized re-use of the successful Offeror's instruments of service. The Owner further agrees to compensate the successful Offeror in defense of any such claim, in accordance with the successful Offeror's prevailing fee schedule and expense reimbursement policy.

- 27. PERFORMANCE BOND.** The County reserves the right to require a performance bond from the Offeror awarded a contract if deemed to be in the best interest of the County. The bond shall be acquired and paid for by the Offeror and shall be in form satisfactory to the County.
- 28. CODES LAWS / REGULATIONS.** The successful Offeror shall be properly licensed and shall meet and comply with all applicable Federal, State, and local government codes, laws, regulations, and requirements in the performance of the work described herein.
- 29. INSURANCE.** The successful Offeror is required to carry and maintain during the period of the contract General Liability, Auto and Workman's Compensation insurance from an insurance company or companies with a Best Rating of A, or better, licensed to do business in the State of New Mexico and admitted by the Department of the State of New Mexico. At a minimum, each Offeror must carry comprehensive General Liability Insurance and Automobile Insurance with combined single limits of not less than \$1,000,000.00 and Workman's Compensation in amounts as required by the New Mexico Workers Compensation Act. The successful Offeror must also carry and maintain during the period of the contract Errors and Omissions Insurance coverage (Professional Liability Insurance) with limits of not less than \$1,000,000.00, from an insurance company or companies with a Best Rating of A, or better.

***Each Offeror is asked to submit a Certificate of Insurance, commensurate with the above requirements, along with their proposal Offer.***

***The Offeror selected for an award under this solicitation shall provide the appropriate certificates of insurance to the County prior to award of a contract. The County shall be named as an Additional Insured on the General Liability policy required by this section.***

## CONTENTS OF PROPOSAL OFFER

### The proposal Offer submitted by the Offeror shall, at a minimum, contain the following:

To be considered for award of a contract pursuant to this Request for Proposal, each proposal Offer shall contain the materials required herein and shall comply with the format described. The Offer shall contain a response to the specifications and requirements, and a response to other items identified in the Evaluation/Award section. Failure to provide required documentation and information as requested may result in rejection of the Offeror's Proposal.

### PROPOSAL FORMAT/CONTENTS.

The proposal must be organized and indexed in the following format and must contain, **at a minimum**, all listed items in the sequence indicated:

#### SECTION 1. TRANSMITTAL / COVER LETTER.

- A. **IDENTIFY THE OFFEROR AND CONTACT PERSON.** Each Offeror shall identify the organization submitting the proposal. Provide the name, address and telephone/facsimile number of the Offeror. Each Proposal shall further identify its organizational structure (e.g. sole proprietorship, corporation, etc.), whether the organization is authorized to do business in the State of New Mexico, where the organization is based, where its principal place of business is located and, if a corporation, where it is incorporated.

Each Offeror shall name a primary contact and contact information of the person whom the County may contact for clarification or for further information.

- B. **BIND THE OFFEROR.** Each Offeror shall identify, by title and/or position, the person authorized by the organization to enter into a Contract with the County. That person shall sign the proposal. If written authority exists (such as corporate minutes), a copy of that document shall be attached. The Proposal shall bind the organization to complete the work described in the Proposal.
- C. **ACCEPTANCE OF TERMS.** Each Proposal shall explicitly indicate the organization's acceptance of the terms and conditions set forth in this Request for Proposal, if awarded a contract. If the organization proposes alternative terms and conditions, it shall set each out with specificity in its Proposal. The County will not be obligated to accept any such terms and conditions and may consider submission of it to be an exception. Each Proposal shall also acknowledge receipt and acceptance of any and all amendments to this Request for Proposal.

#### SECTION 2. REQUIRED FORMS.

The following forms are required and must be signed by an authorized representative, when applicable.

- A. Proposal of Offeror Form. Offeror shall acknowledge receipt and acceptance of any and all addendums.
- B. Campaign Contributions Disclosure Form
- C. Current certificate of insurance

D. **IN-STATE RESIDENT PREFERENCE.**

Pursuant to section 13-1-21 NMSA 1978, to be considered for the 5% resident preference, the Offeror shall include its in-state resident preference number and a copy of the Certificate provided to it by the New Mexico Taxation and Revenue Department.

Please be aware, all In-State Resident Preference Numbers issued by the New Mexico State Purchasing Division expired on December 31, 2011. All Offerors/Contractors must re-apply for a new In-State Resident Preference Number with the State of New Mexico Taxation and Revenue Department. For questions, please call the New Mexico Taxation and Revenue Department at 505-827-0951

E. **RESIDENT VETERANS PREFERENCE.**

Pursuant to Sections 13-1-21 and 13-1-22 NMSA 1978 to be eligible for the 10% resident veterans preference, the Offeror shall include a copy of the resident veterans preference Certificate provided to the Offeror by the New Mexico Taxation and Revenue Department. This preference is separate from the in-state preference and is not cumulative with that preference.

All Offerors/Contractors may apply for a Resident Veterans Preference Number with the State of New Mexico Taxation and Revenue Department. For questions, please call the New Mexico Taxation and Revenue Department at 505-827-0951.

**CRITERIA.**

**POINTS.**

**New Mexico Business/Veterans Preference**

**+10% of Total Points**

Points will be awarded based on Offerors ability to provide a copy of a current Resident Business Certificate or Resident Veterans Certificate.

F. Attachment "A"

**SECTION 3. RESPONSE TO SCOPE OF SERVICES.**

Each Proposal shall contain a written response to the specifications and requirements as identified throughout this Request for Proposal. If an Offeror is unable to provide an item or service, which is required by the specifications, it shall take written exception to the specification. The Offeror's Proposal must be as specific as possible.

- 1) **INTRODUCTION AND BACKGROUND.** Each Offeror shall provide an Overview of current and prior experience in work comparable to the scope of services required in this Request for Proposals.
- 2) **QUALIFICATIONS OF PRINCIPAL PERSONNEL.** Background, qualifications, education, training and years of experience of key personnel to be involved in these services shall be included. Identify special skills or strengths of key personnel. Included qualifications for any subcontractor the Offeror has indicated to be part of this Response to Proposal. Include all areas of work that is to be performed by the subcontractor(s).
- 3) **REFERENCES.** Provide a listing of three (3) clients (i.e., clients to whom the same type of services have been provided to in a similar environment and/or facilities). The listing shall include current clients for which services have been provided to within the past three (3) years, and of former clients who are no longer being provided services for, along with each client's contact person(s) and telephone number(s). The County reserves the right to contact references/clients for verification and pertinent information.
- 4) **RESPONSE TO SPECIFICATIONS AND REQUIREMENTS.** Each Proposal shall contain a written response to the specifications and requirements as identified throughout this Request for Proposal, including a response to other items identified in the Evaluation/Award section. If an Offeror is unable to provide an item or service, which is required by the specifications, it shall take written exception to the specification. The Offeror's Proposal must be as specific as possible.
- 5) **CUSTOMER SERVICE/ADDITIONAL SERVICES.** Each Offeror shall provide information relative to their ability to provide customer service and account representation, as well as an overview of any additional services such as cost containment practices, and organizational tools, etc.
- 6) **OTHER SUPPORTING OR RESOURCE MATERIAL.** Offerors are encouraged to thoroughly describe any other value-added services they feel that may contribute to the success of the project.
- 7) **COST OFFER.** Each Offeror's proposal shall include a Cost Offer along with its Proposal Offer, commensurate with the services and options as required under this solicitation.

# **INTRODUCTION/SCOPE OF SERVICES**

## **BACKGROUND INFORMATION.**

San Juan County operates under the County Commission and the County Manager form of government. According to the U.S. Census Bureau, the population of San Juan County was 125,043 in 2018. There are approximately 60,000 Assessor's parcels within San Juan County. The Community Development department is comprised of these divisions:

The County's Building Department issues permits for the construction of Commercial and Residential buildings. The County also issues permits for the cities of Aztec, Bloomfield and the Town of Kirtland. Approximately 1,109 Building permits were issued in 2017.

The County's Rural Addressing Department issues addresses to the residents of the unincorporated area of San Juan County. They are linked directly to the 9-1-1 emergency services and provides assistance to the utility companies and delivery services. 184 new addresses were issued and over 29,000 addresses were maintained in 2017.

The County's Subdivision Department regulates subdividing and manufactured homes/recreational vehicle parks in the unincorporated area of San Juan County. The Subdivision Department approved 61 exemptions, 4 summary subdivisions, and 7 replat subdivisions in 2017.

The County's Community Development Department also issues Business Registration Certificates to businesses in Bloomfield, Kirtland, and Aztec, as well as to businesses located in the unincorporated areas of the County. They issued 130 certificates and issued 61 renewals in 2018.

The County's Floodplain Manager issues permits for floodplain development and manufactured home placements. In 2017, 216 permits were issued.

Community Development currently uses Accela Permits Plus for the permitting and inspection solution. All permit issuance is based on the physical address of the site, not the parcel. The Community Development department currently has eight users and one person who maintains the system. There is no software for cash receipting; the permit application doubles as a receipt. Business registrations are logged on a spreadsheet. Subdivisions are logged on a Microsoft Access table. Manufactured Home/ Recreational Vehicles are logged on a spreadsheet. There is no mobile inspection management or public access at this time.

## **SCOPE OF SERVICES.**

San Juan County is requesting proposals for a Community Development Permitting and Tracking Software. The purpose of this Request for Proposal is to select an experienced and competent Offeror (Contractor) who demonstrates a working knowledge of the business process flows and knowledge of industry-based best practices relating to community development operations. The Proposer shall provide MySQL-based permits, plan review, and inspections software and document solution for the Building, Addressing, and Floodplain Management departments. This software should also provide for contractor licensing and registration. The software should provide a solution for code violations, track violations, and prepare notices for the County code compliance officer. The County is interested in options for mobile, business registration, and citizen access portal. Proposers offering hosted services are encouraged to submit a proposal.

The software program will serve to organize and facilitate the San Juan County Building Department permitting process, address issuance and tracking processes. The system will be utilized by the Building Department for the purpose of permit issuance, permit tracking, plan review tracking, fee calculation and receipting, inspection and writing of reports. It will be utilized by the Addressing Department for the purpose of address issuance and related data tracking. It will also be utilized by the Floodplain manager for floodplain permit and manufactured home placement permit, maintenance and tracking.

Through this RFP, the County is seeking a firm that is qualified to deliver full integration: conversion, configuration, interfaces, implementation, and support as well as training of personnel. Offeror must provide a realistic time frame for testing and go-live. The County is looking for a cloud hosted program and will evaluate based on the proposals received. The County is interested in implementing the vendor's generally available software and does not want an alpha or beta software version. Products and services for a fully operational system should include the following:

- Peripheral input, display and output devices, as needed
- Physical network and communication devices necessary to integrate the system into the County's existing network
- Software to support the maintenance and enhancement of the Building, Addressing and Floodplain departments



- Property/address management
- Data conversion-transfer and utilize all or some historical permit data from existing system
- Interface to the Assessor's software, Tyler Technologies Inc. Eagle
- Interface to the GIS software, ESRI
- Full installation and testing of the system
- Training of County staff, end-users, and Administrators
- Ongoing system support, warranty, and maintenance

**PROCUREMENT SCHEDULE.**

The expected procurement schedule is listed below. The County reserves the right to change the procurement schedule. If changes are made prior to the due date, the proposers will be notified by the County in the form of an addendum to this RFP, and posted on

<http://www.sjcounty.net/departments/athrug/purchasing/current-bids>.

Procurement Schedule	
October 13, 2019	RFP released
November 4, 2019	Last day to accept questions and requests for clarifications on the RFP – 5:00 PM (MST)
November 6, 2019	Final Addendum
November 14, 2019 @ 5:00 p.m.	Proposals due
Week of November 18, 2019	Two proposers elevated and notified for software demonstrations
December 3 & 4, 2019	Software demonstrations and implementation presentations
December 4, 2019	Final Evaluation
December 17, 2019	Commission Meeting
December 18, 2019	Award Offeror
January 2020	Complete Contract Negotiations

Software demonstrations and implementation presentations will be held on-site at the County offices and can cover all functional areas listed in this RFP. The County expects to elevate up to two (2) proposers for the demonstrations. Demonstrations will include both presentations on the software and implementation services. It is highly recommended that proposed key members of the proposer's implementation staff for this project be present at the demonstration and lead presentation of any implementation topics. To avoid unnecessary delays, **the County expect that proposers will be available for software demonstrations on the dates** identified on the procurement schedule and to identify any potential issues or conflicts in their response to this RFP. Proposers that cannot demonstrate their software by the time the County requested may be eliminated. **The agenda and software demonstration requirements** will be distributed to proposers that have been short-listed for software demonstrations approximately two weeks in advance of the demonstrations. Software demonstrations will also include discussions on implementation. The County reserves the right to change the dates as needed.

The criteria that will be used to evaluate proposals may include, but are not limited to the following:

- Cost
- Response to Attachment A
- Software Demonstrations
- Implementation Approach
- Past Experience with Similar Organizations and References
- Proposed Integration to Other Modules/Systems in RFP Scope
- Technical Compatibility
- Overall Understanding of the County's Needs and Project Risk Mitigation
- Project Management Approach
- Compliance with Contract Terms and Conditions
- In-State Resident Preference
- Resident Veterans Preference

**SOURCE CODE.**

The Contractor shall provide a copy of the source code and documentation for all software applications installed and implemented at San Juan County. These source codes shall be given to the County Attorney at execution of the Contract or upon installation of software, shall be maintained in current status, and shall provide the County all information necessary to access the applications without need of the Contractor. This is to include, but not limited to any and all application software used in the proposed Integrated Software Application System. These shall be furnished

to the County prior to final acceptance and payment.

In the event the Contractor cannot provide a source code for certain software toolkits, API's, etc., a detailed explanation shall be provided with the RFP Response. For those software modules where source code cannot be furnished to the County, the Contractor shall provide a copy of the proposed Software Escrow Agreement upon final acceptance and execution of the Contract. The Contractor will pay all costs incurred for the escrow account. The County prior to final acceptance and execution of the Contract must approve the Software Escrow Agreement, and the Escrow Agent. Such escrow agreement must provide for a third-party escrow agent, acceptable to the county, to maintain a backup copy of the source code, which will be released to the County in the event of:

- Payment of sum certain by the County to Contractor;
- Failure of requested software enhancements or modifications to be performed by the Contractor;
- Failure of the contractor to continue support for the software;
- Failure of the escrow agent to be paid by Contractor;
- Bankruptcy proceedings filed by any party hereunder.

## **CLOUD/HOSTED PROPOSED SOLUTION**

The County is requesting a cloud hosted solution. Contractor shall provide the name of the product. Contractor shall provide an overall description of the project management approach your firm will pursue for this project. List the key staff involved in this project. If the product is module based, identify all modules and capabilities. Provide some screenshots of application.

Offerors shall provide references and describe type of services provided, whether SaaS, legacy or Hosted. Offerors shall provide version of software provided.

Describe security including firewalls, authentication, and architecture of data center. Describe network level security and physical security of data center. Describe data center security policies including background checks on employees and other measure to protect confidentiality and sensitivity of County's data.

## **MILESTONES AND DELIVERABLES.**

Offeror shall provide an overview of the proposed system to facilitate understanding of the system's configuration and function. This proposal should include a Gantt or similar chart that provides for a detailed planning schedule that shows the design, data conversion, system installation, testing, go-live, milestone reviews, training and ongoing customer support as well as key activities with estimated dates.

## **INTERFACING WITH OTHER PROGRAMS.**

San Juan County currently uses Accela Inc. Permits Plus, Version 5.5.21 running on a Microsoft Access 2003 system. The Building, Floodplain, and Addressing departments utilize the system to issue addresses, permits, track inspections, and generate reports. The system has been modified in-house.

The County uses Tyler Technologies Munis for financial management, Tyler Technologies Eagle for property appraisal and assessment, and Tyler Technologies ExecuTime for time-entry, ESRI GIS software, as well as various Microsoft Excel spreadsheets, and manual or paper-based systems. The selected vendor will need to ensure their software is able to directly integrate with the Munis software, and that all interfacing requirements shall be MySQL-based.

**Indicate cost to convert the data for Building, Addressing, Floodplain from the existing Permits Plus database.**

**List additional programs that can interface with the data in the automated permitting system and the estimated cost of these supplemental modules.**

## **HARDWARE REQUIREMENTS.**

**Please describe in detail the recommended hardware, system software, application requirements, and network configurations, which will support your cloud hosted system. Also describe the minimum required and recommended configurations for the file server, cabling/communications equipment, printers, and each workstation. The recommended configuration of the workstation and printer, including specifications on processor speed, RAM and storage requirements, should be based on the number of users and permit records for the County.**

**Please describe the options available on your system and provided by your company to overcome a) corrupted**

data, and b) a complete system crash.

### **REQUESTED PRODUCT FEATURE LIST – ATTACHMENT A.**

The attached tables – see Attachment “A” – are used to describe the automated permitting system product features/capabilities. The tables indicate the features the County desires in an automated permitting system. Features within each section are not sorted in any particular priority.

Offerors must provide a rating for every item. If the requirement does not pertain to the proposal being submitted, enter “N/A.” In addition, each line item should include a brief explanation of how the required item is supported. Do not modify these pages.

Use the following rating system to evaluate each requirement:

Rating	Definition
3	Standard and available in current release. Software supports this requirement and can be implemented with minimal configuration at no additional cost. No source code modification is required.
2	Meet requirement with minor modification. Modification maintains application on upgrade path. Testing and production of modifications will be completed by implementation date. Include cost of modification.
1	Available with 3 <sup>rd</sup> party software application. Indicate name of the application recommended and number of installs jointly completed.
0	Not available. Software does/will not meet requirements.
F	Future release. Requirement will be available in future release. Indicate day and year to be released.

**Respond to all questions by rating each section and providing a comment. You can attach additional written comments by Item Number if needed.**

### **WARRANTY AND MAINTENANCE SUPPORT.**

The Contractor warrants that the configuration will be specified in the Contract, i.e. software, software updates, hardware, specification of applications capabilities, and that all services will operate together efficiently in light of industry standards, so long as the system is maintained in accordance with the manufacturer’s specifications. The Contractor shall resolve all problems with the hardware or software supplied that arise upon delivery or at any time during the warranty or maintenance periods to the satisfaction of the County. Proposer must provide a dedicated Help Desk for technical and system users. For telephone and/or email support, provide hours available, also time zone. The County expects calls and/or emails to be acknowledged, time estimate as to when issue will be resolved, along with client updates.

**Describe process for installing patches and updates.**

**Describe in detail operations support for the warranty period for the software after go-live, and for the maintenance support.**

**Describe monitoring and escalation process detailing your response time and resolution for technical support to resolve issues/problems, especially when system is down or unusable.**

### **THIRD PARTY SOFTWARE.**

Awarded vendor shall disclose whether third party software is to be used and the name of the third party. Vendor shall be responsible for payment and support of third-party software.

### **TRAINING SCHEDULE AND COST.**

Offeror shall submit a training program and associated costs for the end users, Building Department, Floodplain and Addressing personnel. It is necessary that all training be performed on-site or locally. Training schedule shall be provided and shall show the name, description and length of course(s). Include maximum number of users per training session, instructor time per hour/day and/or other instructional costs. Please indicate the cost of training per employee and specify the cost elements related to additional on-site training, if needed. These schedules must support the desire to have all users trained in a short time period. Any online webinars or knowledge base shall be disclosed.

**Any training costs shall be clearly described in the Cost Section.**

## **OPTIONAL PROGRAMS.**

The County would like pricing on these options listed below. Offeror shall provide brochures or pamphlets describing the optional modules.

The County would like to move towards mobile / in-field connectivity, usage, and compatibility with a wide range of internet devices, including desktop pc's, smart phones, notebooks, laptops, or other devices, using Microsoft or other operating systems, for viewing and inputting of data. Real time updates are preferred; the option to synchronize mobile device with the system would be a requirement. The system would have the ability to access all contact details of the owner, applicant, contractor or complainant; and retrieve data by searching any parameter, including permit number, contractor, address, etc. There are three (3) inspectors who will use this option.

The County currently has a Business Registrations program. Once a business owner registers their business, the County Fire Department may or may not do an on-site fire inspection depending on the type of business. The County issues a certificate which shows the business is registered with the County. Currently, the file is kept on a spreadsheet. The County would like to move to an electronic filing system with a numbering system. Data entered should be retrieved by various parameters. Renewals should be calendared for easy reminders.

The County would like support for portal technologies from Offerors for online interface with constituents, including permit application submittal, and constituent review of GIS data or property records. It is envisioned that software vendors will provide tools that will aid in portal development and be able to expose data to the internet/intranet while maintaining strict security standards.

## **COST/PRICING.**

The County will not consider time and materials pricing. All anticipated costs to the County shall be identified and itemized on a cost schedule. When pricing optional modules, indicate the date through which each price quote remains valid.

Automated Permit, Addressing and Floodplain Permit, Tracking System Software  
Licensing Fees  
Maintenance Costs  
Travel Costs  
Training Costs  
Shipping Costs (FOB San Juan County NM)  
Database Development  
Conversion Costs – including travel costs  
Installation Costs  
Technical and On-going Maintenance Support  
Other cost necessary to project.

## **INDEPENDENT CONTRACTOR.**

The Contractor and its employees, servants and agents shall be considered for purposes of this agreement to be an independent contractor and shall perform its obligations under this agreement, as it deems necessary and appropriate. The County will not supervise or regulate the Contractor in the day-to-day performance of this Agreement. The successful Contractor and its officers, directors, agents and employees, are independent contractors performing services for the County and are not employees of the County. The successful Contractor, and its officers, directors, agents, and employees, shall not accrue leave, retirement, insurance bonding, use of County vehicles or any other benefits afforded to employees of the County. The successful Contractor covenants that it presently has no interest, and shall not acquire any interest, direct or indirect, financial or otherwise, which would conflict in any manner or degree with the performance of the required services.

## **SUBCONTRACTING.**

The Contractor shall not assign or subcontract the work, or any part thereof, without the written consent of the County, nor shall the Contractor assign, by power of attorney or otherwise, any of the money payable under the Contract unless written consent of the County has been obtained. No right under the Contract, nor claim for any money due or to become due, shall be asserted against the County, or persons acting for the County, by reason of any assignment of the Contract or any part thereof, unless such assignment has been authorized by the written consent of the County. In case the Contractor is permitted to assign moneys due or to become due under the Contract, the instrument of assignment shall contain a clause subordinating the claim of the assignee to all prior liens for services rendered or materials supplied for the performance of the work.

The Contractor shall be fully responsible and accountable to the County for the acts and omissions of its subcontractors and persons directly or indirectly employed by the Contractor. Subcontractors to be involved in the installment/integration of the software application system shall be identified in the Offeror's proposal. No change in the projects subcontractors shall be allowed without the written consent of the County.

## **EVALUATION / AWARD**

Responsive proposals will be evaluated in the following manner. Any proposal that is incomplete or deficient may be rejected before evaluation. Failure of an Offeror to respond to criteria set forth in this RFP document may result in a score of Zero (0).

Offeror's shall be prepared to respond to requests by the County to provide on-site presentations to address areas which may be deemed necessary to assist in the detailed evaluation process. All expenses associated with such presentations shall be borne by the Offeror.

A. EVALUATION COMMITTEE. Each responsive proposal shall be evaluated by an Evaluation Committee comprised of San Juan County personnel or representatives appointed by the Central Purchasing Office.

B. EVALUATION PROCESS.

The Evaluation Committee shall evaluate each responsive proposal according to the following criteria. The evaluation process will follow the major steps outlined below:

1. Preliminary Proposal Review:

All proposals received will be reviewed for compliance and satisfactory response to RFP requirements. Non-conforming/non-responsive proposals will be eliminated from further consideration at this step.

2. Selection of short list:

The Evaluation Committee will evaluate, score, and rank proposals to select a short list of two (2) final Offerors for further consideration.

3. On-site Oral Presentations: Short list Finalists Offerors will be given the opportunity to make on-site presentations, if deemed necessary to San Juan County's Evaluation Committee. A response to this RFP implies a willingness on the part of the Offeror to participate in on-site presentations, if requested, at the Offeror's expense, if selected for the short list.

4. Short list Offerors are given the opportunity to submit a "Best and Final" Offer.

5. Final Evaluation (initial scoring re-evaluated, existing evaluation criteria used), Selection and Notification.

C. EVALUATION CRITERIA. The Evaluation Committee shall evaluate each responsive proposal according to the following criteria/factors:

<u>CRITERIA / FACTORS</u>	<u>POINTS</u>
<b>Offerors Understanding, Experience, Qualifications, Company Stability</b>	<b>275</b>
<b>Technical quality and merit, including hardware, software and system integration</b>	<b>225</b>
<b>Quality of services, implementation plan, maintenance and support</b>	<b>150</b>
<b>Quality, Accuracy, and Completeness of the Proposal</b>	<b>50</b>
<b>Cost of system / services</b>	<b>300</b>
<b>Up to Additional 100 points for in-state Resident or Veteran Preference</b>	<b>100</b>

For In-State Resident Preference: 5%.

-or-

For Resident Veterans Preference: 10%.

**Must have a valid resident business certificate or a valid resident veteran business certificate Issued by the State of New Mexico Taxation and Revenue Department.**

**Method for evaluating the Price Proposal**

Price offered is responsive to the RFP requirements and instructions, and is realistic in respect to specifications and requirements. The Cost Score will be evaluated using the following equation.

$$\frac{\text{Price of Lowest Offeror}}{\text{Price of this Offeror}} \times \text{Maximum Price Score (300)} = \text{Price Score of this Offeror}$$

C. **COMMITTEE'S RECOMENDATION.** The Evaluation Committee shall rank each responsive proposal according to the numerical score achieved by the Offeror after evaluation according to the criteria. A responsive Offeror with the most highly ranked proposal will be recommended to the Board of County Commissioners or its delegate for further consideration.

D. **NEGOTIATION.** Award of a contract by the Board of County Commissioners or its delegate is subject to successful negotiation of the cost of services with the most highly ranked Offeror. No contract will be awarded if fair and reasonable compensation cannot be agreed to. If an agreement cannot be reached with the most highly ranked Offeror, negotiations will be terminated with that Offeror, and negotiations undertaken with the second most highly ranked Offeror. If an agreement cannot be reached with the second most highly ranked Offeror, negotiations will be terminated with that Offeror and negotiations undertaken with the third most highly ranked Offeror, and so on pursuant to N.M.S.A. 1978 § 13-1-122. If negotiations are successful with any Offeror, the County shall publicly announce the name of the Offeror selected for award.

E. **INVESTIGATIONS.** The County may, at its option, contact a given Offeror for clarification of its proposal or for additional information. The Offeror(s) SHALL NOT initiate discussions with the County. The County may make such investigations as necessary to determine the ability of the Offeror to meet the specifications and adhere to the terms and conditions set forth within this Request for Proposals and in the accompanying documents. The County will reject the proposal of any Offeror who is not a "responsible Offeror" as that term is defined in N.M.S.A. 1978. §§ 13-1-83.

F. **RIGHT TO DISCONTINUE PROCUREMENT.** The County reserves the right to waive minor irregularities in an Offeror's proposal. The County also reserves the right to waive mandatory requirement(s) so long as all responding vendors fail to meet the mandatory requirement(s) and the failure to do so does not otherwise materially affect the procurement. The County reserves the right to cancel this Request for Proposals at any time, and to reject any or all proposals, or otherwise to proceed in the best interests of the County. This Request for Proposals in no manner obligates the County or any of its agencies to the eventual purchase of any product or service, whether explicitly described or implied herein, until confirmed by a written contract and/or Purchase Order.

**QUESTIONS/SUGGESTIONS**

Questions and/or suggestions concerning this Request for Proposal shall be submitted in writing no later than seven (7) days prior to the Proposal Closing Date and shall be directed to:

Kathleen Begay, Purchasing Coordinator

Phone: 505-334-4556

Fax: 505-334-4561

E-mail: [kbegay@sjcounty.net](mailto:kbegay@sjcounty.net)

**Offerors are specifically notified that any attempt to contact any person other than the party listed above concerning this procurement, shall be cause to reject said respondent(s) from further consideration.**

**Note: Information provided in this Request for Proposal shall only be used for the purpose of submitting a Proposal Offer to the County and shall not be used, released, or disclosed for any other purpose or use.**

**PROPOSAL OF OFFEROR**

**THIS FORM MUST BE COMPLETED AND RETURNED BY ALL OFFERORS**

**\* Do not reference another section within your Proposal Offer as a response.**

The following proposal is made for furnishing the following service for San Juan County, New Mexico.

**RFP # 19-20-06 Permit and Inspection Software**

The undersigned declares that the amount and nature of the service to be furnished is understood and that the nature of this proposal is in strict accordance with the conditions set forth and is a part of this Proposal, and that the undersigned Offeror has read and understands the specifications and conditions of the Proposal.

The undersigned, in submitting this proposal, represents that the Offeror is an equal opportunity employer, and will not discriminate with regard to race, age, religion, color, national origin, ancestry, sex, sexual orientation, gender identity, spousal affiliation, physical or mental handicap or serious medical condition as specified in N.M.S.A. 1978, §§ 28-1-7 (as amended) in the performance of this contract.

The undersigned hereby proposes to perform necessary professional services upon the conditions stated in this proposal after notice of award and execution of a contract.

The rates/fees contained in our proposal are valid for ninety (90) days from the closing of the proposals unless otherwise stated here.

- If applicable, acknowledges receipt of the following Addendum(s):

Addendum No: \_\_\_\_\_ Date: \_\_\_\_\_ Addendum No: \_\_\_\_\_ Date: \_\_\_\_\_

Addendum No: \_\_\_\_\_ Date: \_\_\_\_\_ Addendum No: \_\_\_\_\_ Date: \_\_\_\_\_

Respectfully submitted,

By (Individual authorized to contractually bind the Offeror):

\_\_\_\_\_  
(Printed Name)

\_\_\_\_\_  
(Signature)

\_\_\_\_\_  
(Title)

\_\_\_\_\_  
(Date)

\_\_\_\_\_  
(Offeror/Contractor Name)

\_\_\_\_\_  
(Street Address)

\_\_\_\_\_  
(City, State & Zip Code)

\_\_\_\_\_  
(E-Mail Address)

\_\_\_\_\_  
(Phone No.)

\_\_\_\_\_  
(Facsimile No.)



Jack Fortner, Chairman  
Jim Crowley, Commission Pro-Tem  
John Beckstead, Commissioner  
Michael Sullivan, Commissioner  
GloJean Todacheene, Commissioner

Shane Ferrari, Sheriff  
Tanya Shelby, Clerk  
Mark Duncan, Treasurer  
Jimmy Voita, Assessor

**SAN JUAN COUNTY**  
100 South Oliver Drive  
Aztec, NM 87410-2432

January, 2019

**ATTN: SAN JUAN COUNTY VENDORS**

Subject: Campaign Contribution Disclosure Law

To whom it may concern:

Effective May 17, 2006, state legislation requires that any prospective contractor seeking to enter in to a contract with San Juan County, must file a Campaign Contribution Disclosure Form (copy enclosed) with the County. Campaign Contribution Disclosure Forms will be required for **each** Request for Proposal submitted, sole source award, or small purchase professional service contract with San Juan County.

The Campaign Contribution Disclosure Form must be filed by any prospective contractor whether or not they, their family member, or their representative has made any contributions exceeding two hundred and fifty dollars (\$250), to an applicable state or local public official **prior** to execution of a contract. Campaign contributions made during the two (2) years prior to the date on which the contractor submits a proposal, or in the case of a sole source or small purchase contract, the two years prior to the date the contractor signs the contract, requires the filing of a Campaign Contributions Disclosure Form if the campaign contribution amount exceeded \$250.

***A prospective contractor, family member, or representative of the prospective contractor shall not give a campaign contribution or other thing of value to an applicable public official or the applicable public official's employees during the pendency of the procurement process or during the pendency of negotiations for a sole source or small purchase contract. Applicable local public officials for San Juan County are listed above.***

**Failure to timely complete and return the Campaign Contribution Disclosure Form may delay or prevent business transactions with San Juan County. Should you or a family member, as defined in the Campaign Contribution Disclosure Form, make a future campaign contribution exceeding the \$250 threshold, a Campaign Contribution Disclosure Form must be completed and returned to San Juan County's Central Purchasing Office located at 213 South Oliver Drive, Aztec, New Mexico 87410.**

Please contact the Office of Central Purchasing at (505) 334-4552, Monday-Thursday, 7:00 a.m. to 5:30 p.m., should you have any questions or concerns.

Sincerely,

Diana Chapman  
Chief Procurement Officer

Enclosure



# CAMPAIGN CONTRIBUTION DISCLOSURE FORM

Pursuant to NMSA 1978, § 13-1-191.1 (2006), any person seeking to enter into a contract with any state agency or local public body **for professional services, a design and build project delivery system, or the design and installation of measures the primary purpose of which is to conserve natural resources** must file this form with that state agency or local public body. This form must be filed even if the contract qualifies as a small purchase or a sole source contract. The prospective contractor must disclose whether they, a family member or a representative of the prospective contractor has made a campaign contribution to an applicable public official of the state or a local public body during the two years prior to the date on which the contractor submits a proposal or, in the case of a sole source or small purchase contract, the two years prior to the date the contractor signs the contract, if the aggregate total of contributions given by the prospective contractor, a family member or a representative of the prospective contractor to the public official exceeds two hundred and fifty dollars (\$250) over the two year period.

Furthermore, the state agency or local public body shall void an executed contract or cancel a solicitation or proposed award for a proposed contract if: 1) a prospective contractor, a family member of the prospective contractor, or a representative of the prospective contractor gives a campaign contribution or other thing of value to an applicable public official or the applicable public official's employees during the pendency of the procurement process or 2) a prospective contractor fails to submit a fully completed disclosure statement pursuant to the law.

**THIS FORM MUST BE FILED BY ANY PROSPECTIVE CONTRACTOR WHETHER OR NOT THEY, THEIR FAMILY MEMBER, OR THEIR REPRESENTATIVE HAS MADE ANY CONTRIBUTIONS SUBJECT TO DISCLOSURE.**

The following definitions apply:

**"Applicable public official"** means a person elected to an office or a person appointed to complete a term of an elected office, who has the authority to award or influence the award of the contract for which the prospective contractor is submitting a competitive sealed proposal or who has the authority to negotiate a sole source or small purchase contract that may be awarded without submission of a sealed competitive proposal.

**"Campaign Contribution"** means a gift, subscription, loan, advance or deposit of money or other thing of value, including the estimated value of an in-kind contribution, that is made to or received by an applicable public official or any person authorized to raise, collect or expend contributions on that official's behalf for the purpose of electing the official to either statewide or local office. "Campaign Contribution" includes the payment of a debt incurred in an election campaign, but does not include the value of services provided without compensation or unreimbursed travel or other personal expenses of individuals who volunteer a portion or all of their time on behalf of a candidate or political committee, nor does it include the administrative or solicitation expenses of a political committee that are paid by an organization that sponsors the committee.

**"Family member"** means spouse, father, mother, child, father-in-law, mother-in-law, daughter-in-law or son-in-law.

**"Pendency of the procurement process"** means the time period commencing with the public notice of the request for proposals and ending with the award of the contract or the cancellation of the request for proposals.

**"Person"** means any corporation, partnership, individual, joint venture, association or any other private legal entity.

**"Prospective contractor"** means a person who is subject to the competitive sealed proposal process set forth in the Procurement Code or is not required to submit a competitive sealed proposal because that person qualifies for a sole source or a small purchase contract.

**"Representative of a prospective contractor"** means an officer or director of a corporation, a member or manager of a limited liability corporation, a partner of a partnership or a trustee of a trust of the prospective contractor.

## DISCLOSURE OF CONTRIBUTIONS:

Contribution Made By: \_\_\_\_\_

Relation to Prospective Contractor: \_\_\_\_\_

Name of Applicable Public Official: \_\_\_\_\_

Date Contribution(s) Made: \_\_\_\_\_

\_\_\_\_\_

Amount(s) of Contribution(s) \_\_\_\_\_

Nature of Contribution(s) \_\_\_\_\_

Purpose of Contribution(s) \_\_\_\_\_

(Attach extra pages if necessary)

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Title (position)

\_\_\_\_\_  
Business Name

**--OR--**

**NO CONTRIBUTIONS IN THE AGGREGATE TOTAL OVER TWO HUNDRED FIFTY DOLLARS (\$250) WERE MADE TO AN APPLICABLE PUBLIC OFFICIAL BY ME, A FAMILY MEMBER OR REPRESENTATIVE.**

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Title (Position)

\_\_\_\_\_  
Business Name

ATTACHMENT “A” (page 1 of 5)

This section shows the key system requirements. Use the electronic format provided in this RFP package. Offerors must provide a rating for every item. If the requirement does not pertain to the proposal being submitted, enter “N/A.” In addition, each line item should include a brief explanation of how the required item is supported. Do not modify these pages.

Use the following rating system to evaluate each requirement:

Rating	Definition
3	Standard and available in current release. Software supports this requirement and can be implemented with minimal configuration at no additional cost. No source code modification is required.
2	Meet requirement with minor modification. Modification maintains application on upgrade path. Testing and production of modifications will be completed by implementation date. Include cost of modification.
1	Available with 3 <sup>rd</sup> party software application. Indicate name of the application recommended and number of installs jointly completed.
0	Not available. Software does/will not meet requirements.
F	Future release. Requirement will be available in future release. Indicate day and year to be released.

Item No.	Function	Rating	Comments
A	<b>GENERAL PROGRAM FUNCTION</b>		
A1	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.		
A2	Online help files and web-browser with the most up-to-date version of support.		
A3	Supplies e-Training videos on vendor’s website to refresh users on standard functionality.		
A4	End-users have the ability to edit and save their own search parameters.		
A5	Able to search on any field within the database by keyword, including custom fields developed over time.		
A6	Able to search notes by keyword.		
A7	Ability to sort notes by type or date.		
A8	Allow a “time-out” period for users not working at their computer, ensuring that a license is freed up.		
A9	Application System Administrators can create new fields and screens after implementation.		
A10	Allow users to use/access several records at one time.		
A11	Ability to create, assign and maintain approval groups and manage data access ability.		

ATTACHMENT "A" (page 2 of 5)

Item No.	Function	Rating	Comments
A	<b>GENERAL PROGRAM FUNCTION</b>		
A12	The proposed system must provide user-defined security, differential rights distribution, role designation, and user options.		
A13	Provide detailed audit trails/reports for financial activity.		
A14	Provide a configurable, flexible workflow management system to automate business processes performed by each department and agency involved with the department review process.		
A15	Place warnings, holds, and restrictions on a record.		
A16	Link to browse recently viewed records.		
A17	View and link to all related records.		
A18	Ability to enter notes with unlimited characters.		
A19	Assign permit, project, code violation, and complaint types to specific departments.		
A20	Customize workflow according to our business processes.		
Item No.	Function	Rating	Comments
B	<b>REPORTING</b>		
B1	End-users are able to customize reports.		
B2	End-users are not required to have a copy of SQL Reporting Services to execute standard reports.		
B3	Users are able to create queries on the fly and save those queries for future use.		
B4	Ability for users to select favorite reports and group them into folders for future use.		
B5	View a preview of report prior to executing.		
B6	Track the history of reports a user has performed.		
B7	Export reports into an Adobe PDF, MS Excel, or MS Word format.		
B8	Select different date ranges to view report information.		
B9	Report of all changes to a file (changed from, date/time stamp, user that changed record).		
Item No.	Function	Rating	Comments
C	<b>PERMITTING</b>		
C1	Provide ability to track any type of permit and to add additional permit types as needed.		
C2	Ability to link records together creating parent-child relationships.		

ATTACHMENT "A" (page 3 of 5)

Item No.	Function	Rating	Comments
C	<b>PERMITTING</b>		
C2	Ability to link records together creating parent-child relationships.		
C3	Ability to duplicate part or all of the data from one permit record to another.		
C4	Calculate permit fees based on our fee schedule and ensure fees are collected.		
C5	Able to attach associated documentation to a record (pictures, word docs, etc.)		
C6	Link record to GIS.		
C7	Restrict the issuance of permits for certain locations based on access authority (e.g. certain permits require approval by flood plan administrator, fire chief, engineer, planning or building official)		
C8	Link to contact information of contractors, applicants, property owners, etc.		
C9	Ability to add, modify and delete job valuation details.		
C10	Automatic inspection, reviews and fees based on type and sub-types. Ability to modify case by case basis.		
C11	View full history of permit including changes made and who made changes in a timeline view.		
C12	Ability to obtain notifications of all changes made related to a specific record.		
C13	Ability to track customer calls including date, time, contact information and purpose.		
C14	Ability to relate an expired permit to a new permit.		
C15	Ability to schedule customer appointment.		
C16	Ability to block certificates of completion or final occupancy permit.		
C17	Allow expiration date to be extended.		
C18	Allow notes from plan review to be flagged to print on permit.		
Item No.	Function	Rating	Comments
D	<b>INSPECTIONS</b>		
D1	Have a work center where Inspectors can view all of the inspections assigned to them, and result those inspections from this area.		
D2	Allow different check-lists for each inspection type.		
D3	Have standard notes unique to each inspector and each inspection type.		
D4	Capable of batch scheduling inspections from a single screen for all inspection requests.		

ATTACHMENT “A” (page 4 of 5)

Item No.	Function	Rating	Comments
D	<b>INSPECTIONS</b>		
D5	Able to automatically insert a re-inspection fee based on the failed status of an inspection request.		
D6	Ensuring that previous inspections are approved, before accepting the next inspection type.		
D7	Able to view a centralized work calendar for all inspectors.		
D8	Adding attachments to the permit from a camera.		
D9	Able to change the status code of an inspection to our agency’s terminology.		
D10	Being able to associate a unique amount of time with each inspection type, to allow for a daily “cap” of inspections.		
D11	Drag and drop scheduled inspections from one calendar day/inspector to another.		
D12	Ability to alter inspection sequences for individual permits.		
D13	Ability to issue stop work orders.		
Item No.	Function	Rating	Comments
E	<b>GIS</b>		
E1	Must integrate with ESRI GIS software.		
E2	Allow for the assignment and re-assignment of property addresses. Most permits to be issued based on property		
E3	Real-time link to GIS data.		
E4	Add new records to selected property address(es) directly from GIS map.		
E5	View detailed parcel information from GIS application.		
E6	Create permits and other records directly from the map.		
Item No.	Function	Rating	Comments
F	<b>CONTRACT MANAGEMENT</b>		
F1	Tracks unique contractor number.		
F2	Unlimited user-defined contractor types.		
F3	Tracks company and contact info, address, email, phone, fax, etc.		
F4	Tracks primary and sub-contractors.		
F5	Supports unlimited contract license types per contractor with associated expiration cycles.		
F6	Internal flagging for licensing issues.		
F7	Comprehensive activity tracking (permits, plans, code cases, inspections, etc) and quick access to this information.		

ATTACHMENT "A" (page 5 of 5)

Item No.	Function	Rating	Comments
F	CONTRACT MANAGEMENT		
F8	Multiple invoice management / individual fee payments.		
F9	Supports free form entry fields for comments related to individual contractors.		
F10	Link contact information to associated projects and activities.		
F11	Ability to duplicate contact information from one contact type to another.		