

# Request for Proposals: Permit System and Land Management Software

The City of Edmonds is seeking to implement a comprehensive, state-of-the-art automated Permit System and Land Management Software product providing efficient internal processing, excellent customer service, long-term record retention, and effective public access. This procurement has been funded by the Edmonds City Council.

This system is intended to replace an existing permit system containing building, planning and other permit data. The existing permit tracking system is based on PermitTrax by Bitco Software and is a web based system with approximately 80,000 permit records. Implementation should be completed no later than December 31, 2018; sooner if feasible and practical. The proposed system should be of an expandable modular design to readily incorporate additional future enhancements. It should be developed, tested, and maintained using a high-quality software development methodology for long-term reliability and technical efficiency.

Vendors should have substantial knowledge of the municipal permit process and of a permit system's functional requirements. Vendors should have demonstrable successful expertise and experience developing, implementing, and maintaining community development management (land, permit, project, code enforcement, citizen response and business license) software.

Interested vendors must submit proposals by 4:40 p.m. on the date due (June 30, 2017). Proposals may be submitted via email, mail, or hand delivery. Postmarks will not be accepted. Email attachments must be less than 10MB in size.

Proposals must be submitted to:

City of Edmonds  
Development Services Department  
121 5<sup>th</sup> Avenue North  
Edmonds, WA 98020  
Email: [Planning@edmondswa.gov](mailto:Planning@edmondswa.gov)

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## 1. System Features

The system should be designed and implemented to be easy to learn and easy to use. Rapid response to customers, efficient data entry, and high staff productivity are important factors. The system must be able to track the status and history of permit processes and provide on-demand reporting and summary statistics, as well as generate permit forms and communications. The City intends to streamline operating procedures wherever possible, and the Vendor's capability to advise and assist as necessary during system implementation will be considered in evaluating proposals. Software required functions include, but are not limited to:

Requirements:

- a. General Permit and Land Use Application Management
- b. State-of-the art security and user administration
- c. Public portal with online permit submittal and tracking
- d. GIS Integration
- e. Mobile Inspection
- f. Automated remote inspection requests, such as by website and/or Integrated Voice Response (IVR)
- g. Electronic Plan Review Integration
- h. Ability to integrate with existing Eden financial software (or successor)
- i. Ability to integrate with existing Laserfiche records management database
- j. Integrated Cashiering / Point of Sale with online and in-person components
- k. System-calculated fees and charges with manual adjustments
- l. Flexible permit types and numbering system, with annual reset
- m. Robust and flexible search and display capabilities
- n. Ability for users to do custom reporting and data extraction
- o. Ability to automate generation of customized forms, letters, and permits/licenses

## 2. Organizational Units

Several organizational units are expected to utilize the Permit System. Development Services (including Code Enforcement and the Planning and Building divisions), Public Works (including Engineering and various utilities), Fire, City Clerk, Parks, Police, and others all use permit data.

Organizational units are dispersed in different City facilities across the City. Departments and locations are listed below.

### **City Hall (121 5<sup>th</sup> Avenue North)**

- Development Services Department (Building, Planning, and Code Enforcement) and Engineering
- City Clerk
- Finance (including Information Services)

### **Public Works (7110 210<sup>th</sup> Street SW)**

- Various permits are routed to Public Works for comments and conditions.

## **3. Technology Requirements**

The City of Edmonds operates an information technology infrastructure based on common and established practices within the industry and local government, and includes the following features:

- A centralized technology department.
- All City buildings are connected via 1Gb fiber links.
- WiFi in all City buildings with either 2.4GHz or 5GHz access points.
- A 1Gb full duplex internet connection.
- Virtualized Datacenter using VMWare to host both Microsoft and Linux/Unix based server systems.
- Microsoft server and application technologies, including the following:
  - Windows 7/10 Operating Systems
  - Microsoft SQL Server 2012 / 2014 / 2016
  - Microsoft Active Directory
  - Microsoft Exchange Server 2010 / 2013
- Citizen-facing internet services using City owned public IP address space.
- VoIP-compatible phone system.

In addition to operating within this framework, the permitting system should be able to function with the following requirements and guidelines:

#### Public Portal

On premise customer-facing components must be able to operate within a DMZ, or be able to accessed using a reverse proxy. Online systems must be encrypted with a strong SSL certificate when accepting payment card information from customers.

#### GIS Integration

The software will require integration with GIS to allow spatial queries on top of the permit data. Linking to parcels, projects, permits, or other containers will be needed to capture the various location information.

The City utilizes ESRI Software and relies on a parcel database (shapefile) from Snohomish County that is updated month to month. Seamless integration and updating of the parcel information should be a feature of the permit system, as well as maintaining historical changes.

#### Mobile Inspection

The City of Edmonds employs both Windows Surface and Apple iOS devices for use in the field. Software for mobile inspections will need to work with both these technologies. Route maps using GIS integration are preferred.

#### Point of Sale (PoS)

The system should provide a fully functional Point of Sale component for both in-person and online cashiering. This system needs to be able to integrate directly with a merchant services provider for processing payment cards, and be verified as PCI compliant. The in-person cashiering system should allow the user to purchase both fee items generated by the systems as well as other over-the-counter items (such as maps or photocopies), and have a "Shopping Cart" feature to allow multiple items (e.g. multiple permits) to be tendered in one transaction.

#### Financial Integration

The system should be able to interface with Eden Finance Software by Tyler Technologies (or successor software) for the purpose of posting transactions to our General Ledger.

#### Document Management

The Development Services Department and City Clerk use Laserfiche for managing all documents retained by the departments. The system needs to fully integrate with a Laserfiche repository, including the ability to search, load, view, and save documents and document metadata to and from Laserfiche. The system must be configurable to use the folder structure and metadata templates already established by Development Services.

## 4. Permit Types

The Permit System should support a full range of permit types used in local government. Building permit types include the full range described in the State Building Code, such as:

<b>Permit Type</b>	<b>Volume/Year</b>
✓ Building Permits	~1,500
✓ Engineering Permits	~500
✓ Planning Permits	~150
✓ Inspections	~9,000

Planning and discretionary permits include the full range of permits issued by a typical agency of that type. Edmonds contracts with a Hearings Examiner to conduct public hearings on many discretionary permits. The City also has an Architectural Design Board which is responsible for approving new designs and additions for major commercial and multifamily projects. Although the bulk of the permits issued by the City are related to Planning and Building, certain Fire and Public Works (e.g. right-of-way or encroachment) related permits are also issued.

Typical land use permit applications include, but are not limited to, the following:

- Administrative Decisions
- Appeals
- Conditional Use Permits
- Critical Areas Determinations
- Development Code Amendments (including Comprehensive Plan Amendments)
- Environmental Checklists and Environmental Impact Statements under SEPA
- Lot Line Adjustments
- Rezones
- Shoreline Permits
- Short Subdivisions
- Subdivisions
- Variances

## 5. Existing Permit System

The City of Edmonds currently uses PermitTrax by Bitco Software for its primary permitting and land management system. It is a web-based product that includes websites for both Development Services staff and the public, as well as a mobile inspection application for the iPad.

PermitTrax contains modules for permit tracking, reporting, land management, GIS integration, inspections (including mobile), cashiering, messaging, and routing, among other features. The public component is accessible via our website at <http://www.edmondswa.gov> and allows users to search permits, view and request inspections, and apply for permits online.

The City of Edmonds has used PermitTrax since 2002. The system currently stores approximately 80,000 permit records and is the primary database for historical permit information for Development Services. The system also ties permit information to parcel information, including addresses and property ownership, so that conditions and permits can be tracked by property ID over time.

Currently, all Building, Planning, and Development Services staff has access to PermitTrax by using a personal computer and accessing a web based interface. Engineering also has access to the permit system, as does the Development Services receptionist and the permit counter. Staff members in other departments have limited access to PermitTrax on an as-needed basis.

Current permit staffing levels are shown below.

➤ Building	8
➤ Planning	7
➤ Development Services Admin	4
➤ Engineering	5

The current system is used extensively as a source of current permit information and permit history. In its initial deployment, the new permit system should anticipate setup for at least the following set of users (30 in all):

➤ Building	8
➤ Planning	7
➤ Development Services (1 code enforcement + 1 reception + 3 counter + Director)	6
➤ Engineering	6
➤ Public Works	1
➤ Fire Administration	2

## **6. Development Services Functions**

Development Services is a cross-departmental functional organization consisting primarily of the Planning, Engineering, and Building divisions.

Development Services staff work with citizens, property owners, and interest groups to accommodate the City's growth and development and reviews proposed projects for compliance with all land use and development regulations, including mitigation of potential environmental impacts. Land use planning fulfills the City's regulatory obligations under federal, state, and local land use laws and policies, and takes an active role in the development and updating of land use laws. Applicable land use laws include the Edmonds Zoning Code, Land Division Ordinance, Shoreline Master Program and Ordinance; State Environmental Policy Act (SEPA), and the Regulatory Reform Act. Development Services also interprets and enforces the Building Codes (currently the 2015 State Building Code, with minor modifications). A full range of building permits are issued under the authority of the Building Official.

Preliminary review is provided at the Development Services Counter located on the second floor of City Hall. Pre-application conferences with developers and their representatives, and affected City Departments, are optional and can be scheduled prior to submission of a formal development application.

Information sheets summarizing many of the permits issued by the City can be found online at <http://www.edmondswa.gov/handouts.html>.

Discretionary permit reviews (SEPA, rezones, conditional use, subdivision, etc.) are generally conducted prior to submission of building permit applications. After discretionary permit review and approval, developers must comply with any discretionary permit conditions during the Building Permit approval process. These conditions apply for an extended period and act as requirements for the issuance of related permits. Often, performance guarantees and assurance devices provide the applicant a number of years to reach compliance with the conditions of the permit. Discretionary permit approvals can be complex, since approvals can be issued by staff, by the Hearing Examiner, by the Architectural Design Board, or by City Council. Regulatory Reform requires staff to track application dates, review periods, completeness dates and deadlines, and the overall time that is required to issue a permit. Appeal periods must also be tracked.

The new permit system should include features to make such conditions and agreements accessible during permit processing and afterwards. Searchable historic records are a critical part of ongoing permit tracking. The system must also assist in coordinating staff inspections and verifications, from permit application through project completion and beyond (including tracking of bonds).

Permit functions should be supported by the proposed permit system as an integrated management control system. Land records and permit data should be accessible by all system users and readily available to the public via the internet, subject to customization and security controls.

## **7. Additional Features Beyond Specifications**

Additional permit types and related features beyond these specifications are encouraged to be included in the proposed permit system. Vendors may propose such additional

features as options if in their judgement and experience they would add value beyond any associated additional startup and ongoing costs.

## **8. Standard Commercial Product**

The City desires and expects to purchase a complete comprehensive permit system that has been developed and is being continuously maintained as a commercial off-the-shelf software product installed at and used by multiple customers. Vendors should provide references to other customers where the proposed system has been installed. The practical experience of other customers is an important factor in evaluating competing proposals.

## **9. Configuration and Customization**

The City expects that proposed systems will need to be configured and customized to work in the city's specific environment. Additional customizations may be required from time to time as the City's requirements change. Such customization should ideally not require software redevelopment or modifications to program source-language code that would cause the installed system to not be maintained as part of the company's normal update and maintenance program. Proposed systems should be designed and constructed to allow substantial customization through the manipulation of configuration tables, or similar external data structures, preferably by non-programming departmental "user" staff.

## **10. Training and Installation Support**

Vendors will be expected to provide training and installation support at time of implementation. Vendors should describe all training available, and propose selected training modules that will ensure smooth, successful implementation and operation in the City of Edmonds.

Training and installation support will be needed in all stages of systems implementation:

- Pre-installation familiarization overview
- Business process and procedure advisory consulting
- Configuration/customization assistance
- Database loading
- End-user operational training
- System administrator training
- Post-implementation tuning

Training should be provided for both end users and technical system administrators. Topics covered should include system operation, system configuration & customization,

system tuning, problem diagnosis and resolution, database management, and system management. Classes should be held on-site in Edmonds, Washington. Initial training should be delivered to a core group of “expert” system users. This core group should be sufficiently trained to act as trainers and mentors to other system users. The core group should also be sufficiently trained so as to be able to customize and expand the system to the full extent allowable by the system. Subsequent training may be delivered by City staff. However, the availability of regular training classes at other locations for follow-up or refresher training is desirable.

Installation support should include initial software installation and operational demonstration, business process and procedure consulting, system configuration and customization services, database loading, functional testing, performance testing, initial operational support, and post-operational system tuning. Specific training curriculum decisions will be subject to negotiation between the parties.

## **11. Implementation Approach**

The City contemplates a phased approach to implementation. A phased approach could include:

1. Install basic system on-site and demonstrate baseline operation.
2. Analyze requirements and plan necessary customization, procedure modification, and data conversion efforts.
3. Execute customization plan and update internal City permit processing procedures.
4. Create any required data conversion software.
5. Test and demonstrate planned functionality using completed software.
6. Convert historical data to new system. Train operational staff.
7. Test and verify acceptable performance levels at two times the anticipated initial volumes of data input, online access, and report generation. Tune system as needed.
8. Perform any final activities necessary to complete implementation and decommission existing (old) permit system.
9. Begin operational use of new system.
10. After implementation, tune system as needed.
11. Proceed to any subsequent implementation phases.

## **12. Proposal Format**

Other than a limited number of informational items that must be submitted as part of the proposal, the City does not require a specific proposal format.

The City desires to receive a clear, concise, economical presentation of the vendor's proposal.

### **Product Description**

The proposal should describe clearly and fully the proposed product and its features and components, as well as the proposed approach to project execution and management. The use of standard product documentation, including user manuals and technical maintenance manuals, is encouraged. Demonstration software and sample help files may be included. System capabilities should be described with specificity, and illustrated with examples and/or cross-referenced to user and technical manuals where appropriate. However, reliance on generic or superficial brochures is not encouraged. The vendor shall describe in detail the hardware and operating system software configuration requirements for successful operation of the proposed software product at the City of Edmonds. The City intends to provide all required hardware and operating system software.

### **Implementation Approach**

Proposers should describe their recommended approach to successfully implementing the new permits system based on their experience with other similar projects and any unique aspects of the City's situation. This description should address configuration management, change orders, software quality assurance, and resources to respond to unanticipated conditions without delaying implementation beyond the proposed implementation date (see proposed schedule, below).

### **Process Improvements / Adjustments**

In implementing a new permit tracking system the City is willing to consider modifying its own internal processes to take advantage of system features it considers valuable. However, it is very important for the City to understand how flexible the system will be in allowing customization to fit the City's best practices and needs. Vendors should describe and demonstrate their proposed solution's ability to be flexible and be customized to fit established processes and reporting needs. Vendors should also describe any available capabilities to assist the City to improve its internal procedures to take advantage of operational features of the proposed software product.

*The vendor's demonstrated ability to communicate its proposal to City staff will be a factor in proposal evaluation.*

## **13. Proposal Evaluation Process**

The City will evaluate vendor proposals in two phases. In Phase 1 the City will review vendor qualifications, system features, and proposed work plans to determine those proposals to be selected as finalists. Only a limited number of finalists will be selected for further evaluation, and those vendors will be invited to demonstrate their products in Edmonds to the City's evaluation team.

In Phase 2, the City will intensively evaluate selected proposals, observe vendor demonstrations, and contact references. Additional questions may be asked of finalists if necessary to clarify issues. Contract negotiations may be undertaken with one or more finalists prior to final selection.

### **13.1. Proposal Schedule**

#### PHASE 1:

Publish RFP..... June 10, 2017

Receive proposals..... June 30, 2017

Announce finalists ..... July 10, 2017

#### PHASE 2:

Conduct vendor demonstrations..... July 27-28, 2017

Negotiate contract terms & conditions ..... Aug 4 – Aug 11, 2017

Award contract..... Aug 15, 2017

Begin project ..... Aug 25, 2017

### **13.2. Evaluation Criteria**

The City will evaluate proposals according to a number of relevant criteria. The City desires to select the proposal providing, in its judgement, the best value, considering such factors as:

- Timeliness and feasibility of implementation
- Functionality, efficiency, and effectiveness of operation
- Reliability and performance
- Compatibility with City technology standards
- Inter-operability with other City systems
- Extensibility to support future needs
- Ease of learning, ease of use, and ease of maintenance
- Software maintenance & problem-solving support, both during and after installation
- Vendor commitment to ongoing system improvement and enhancement
- Price and operating costs.

Vendors should note that proposals will be evaluated on factors other than price, and there is no assurance that a proposal will win the contract based solely on

lowest price. The apparent ability of proposed products to be implemented with low risk and to facilitate the provision of excellent customer service when operated by the present complement of City staff will be important considerations.

### **13.3. *Vendor Product Demonstrations***

Finalists will be required to perform a live demonstration of their proposed software product on-site in Edmonds, Washington. The specific software version proposed for implementation shall be demonstrated. Vendor demonstrations are considered one of the most important parts of the selection process.

Approximately two-to-three hours will be allotted to each finalist for product demonstrations. Demonstrations must be performed using equipment functionally equivalent to the equipment recommended by the vendor for implementing the proposed system in Edmonds. All necessary equipment must be provided by the vendor, including an appropriate database server and network connections. The City will provide a workstation consisting of a Windows-compatible PC suitable for installing and running the client workstation software. Demonstrations should simulate actual operational practice using the proposed software product. Slide-show overviews of system features may be included, but are not an acceptable substitute for demonstrations of operational usage. Any existing City permit functions not directly supported by the proposed software shall be explicitly highlighted and addressed by the vendor in the demonstration. Prior to the demonstration, the City may request the vendor to demonstrate system operation using specific scenarios representative of operational experience in Edmonds.

### **13.4. *Customer Site Visits***

In addition to checking references, the City may elect to conduct customer site visits to locations where the proposed software is installed and operational. These visits will be intense direct observations of ongoing system operation, in contact with actual workers performing their regular daily activities. Vendors should be prepared to arrange such visits with customers willing to make their time available to up to five City representatives. Site visit locations within convenient geographic proximity to Edmonds, Washington, will be preferred.

The City will pay its own costs of travel, lodging, and per diem as necessary.