THE CITY OF
Fargo
FAR MORE

REQUEST FOR PROPOSALS

For

Permit and Project Management System

January 2018

Issued By:

City of Fargo, North Dakota
200 3rd Street N.
Fargo, ND 58102

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Introduction

Purpose

The purpose of this Request for Proposal (RFP) by the City of Fargo, North Dakota (City) is to solicit proposals from interested software firms (Proposer) to provide a permit and project management software system to be utilized by the City's Building Inspections Department and Department of Planning & Development.

The software solution shall manage and track projects from submission to approval, permitting and inspections and shall automate much of these processes. Also, integration with The City's existing software is crucial for successful and complete software solution. The City is seeking a software solution that will leverage the city's ESRI GIS environment currently in use.

The City of Fargo intends to award a contract to the Proposer whose solution most closely meets the requirements defined in this RFP. Additionally, cost and the Proposer's ability to provide a clear project plan and approach towards the successful implementation of these services, as well as providing on-going support, are critical factors in the selection process.

Background Info

The Department of Planning & Development Department has a staff of about 16 and the Building Inspections Department maintains a staff of 23, all of whom will access the permit and project management system. There will also be additional users in other departments, such as the Engineering, Fire, Public Works, and Health Departments.

The City of Fargo has a population of about 120,762 and contains approximately 31,923 parcels of land over an area of 45 square miles. Additionally, the City maintains extraterritorial jurisdiction over approximately 1,000 additional parcels within unincorporated areas surrounding the City.

In 2016, the Department of Planning & Development processed approximately:
- 100 entitlements (subdivisions, zoning map amendments, etc.)
- 50 administrative permits

And the Building Inspections Department processed:
- 1,979 plumbing permits
- 762 sewer permits
- 2,910 heating permits
- 873 sign permits
- 2,449 building permits for a total value of over $454 million

This can be considered a typical year.

Department Operations

The City of Fargo Building Inspections Department and Department of Planning & Development are seeking a permit and project management system to serve the following operation needs:

1. An entitlement process management system to automate and aid the City's monthly Planning Commission application process. This would include all phases of the entitlement process including, but not limited to: application submittal, application review, public notification, comment tracking (staff & public), preparation of meeting packets, final approval, and archiving. (We use the term "entitlement" to mean an approval that is granted through a public hearing process, such as approval of a subdivision, zone change, or conditional use permit.)

2. A permit process management system to automate and aid the City's building permit application process. This would include all phases of the building permit process including, but not limited to: application submittal, application review, communication of review comments and revisions between the city and the applicant, comment tracking (staff & public), final approval, archiving, and having the application information, including approved plans, accessible to inspectors in the field.

    The solution should include ability to receive inspections requests in the field and be able to complete inspections on a hand held device. This should include a mapping feature. It should also include the ability to view other inspector's comments on-line, and should include all previous comments from previous projects.

    The software should have a portal for permit holders to request inspections online along with the ability to see if the inspection has been completed and passed. It will also give the ability for the inspector to instantly send a violation email to the permit holder.

3. The software should include a solution for property maintenance or apartment inspections. This should include a way to merge new rental properties into the schedule of inspections. The system should be able to mail a series of violation letters to property owners from the field application. It should be linked to county/city records for current property owners. The solution needs to include a way to create letters requesting inspection for new rentals properties. For reporting purposes all records for a specific address or parcel should be able to report in one module.

4. The permit and project management system should also be customizable to other processes that may or may not be conducted on a routine basis, including application and review for: annual Community Development Block Grant (CDBG) funding, economic incentive programs, administrative permits, administrative appeals, house moving requests, and variances.

5. The permit and project management system should include a data management system. This system should serve two purposes: 1) data tracking, record keeping, & archiving and 2) data export & analysis. This system should be GIS-based and will need to interface directly with the City's existing data management infrastructure, including the City's ESRI-based GIS programs. Additionally, the data management system should provide some level of data analysis capability, such as the ability to track and report on predefined performance metrics.

Project Schedule

The City reserves the right to modify the timeline if necessary.

RFP Available for Viewing	January 2, 2018
Questions Due	January 19, 2018
Answers Due	January 26, 2018
Proposals Due	11 AM February 2, 2018 (Central Time)
Interview Selection Notice	February 16, 2018
Interviews	February 26 – March 9, 2018
Award Notice	March 16, 2018
Contract Due	March 29, 2018
Contract to City Commission for Approval	April 9, 2018
Implementation Plan Due	April 20, 2018
Go Live	December 10, 2018

Scope of Work

Software

The City of Fargo is seeking a proven software solution that is pre-configured and modifiable. All specific requirements outlined within this RFP must be met through Proposer-supplied configuration tools. The selected product/solution will be expected to support Federal, State, and City rules, policies, ordinances, building codes and other regulations where required.

Implementation

The following provides a high level outline of the project implementation requirements. The scope of the project includes, but is not limited to professional services to install, configure, and implement the software system as follows:

1. A comprehensive hardware, software, network and architectural design that delivers the core system which meets the requirements of this RFP

2. The business and technical best practice design solution based on review of the existing process flow analysis for both departments

3. A sound implementation strategy that ensures a smooth transition from the current system to the new system without interruption of business operations, loss of revenue, loss or duplication of data, and interruption of transaction flow during the cutover. The plan should describe the transition method (100% cutover, phased, parallel run, or others), and address all the stages of the implementation from the planning, through system setup, data import, and go-live stages.

4. Design and configure the software to deliver the full set of functionalities described in this RFP

5. Convert data from existing databases and assist the City in data cleanup

6. Create interfaces enabling the software solution to interact with other software

7. Change control during all phases of product implementation

8. Ninety (90) days post go-live support as part of the project activities and prior to the maintenance agreement start date

9. A Project Management Office that defines and maintains project standards including project management policies, processes, templates, methods

10. Knowledge transfer to City staff during implementation and post go live

11. Training of staff in using and administering the new system

12. Annual production support and maintenance that includes trouble-shooting, upgrades and enhancements

13. A Contingency/Fall-back plan that defines processes and procedures to cover the possibility of unexpected failure where the new system proves to be unusable after deployment. The fall-back goal is to restore the old system environment with minimum interference to the day-to-day business activities.

14. Disaster recovery process, policies, and procedures for recovering the system (infrastructure and application) in the event of a catastrophe.

15. Project documents, including but not limited to system administration, user and training manuals, etc

Functional/Technical

Meet the technical and functional requirements as identified in Appendix A.

Submission Requirements

Proposal Requirements

The content and sequence of the information contained in each copy of the proposal shall be as follows:

A. Letter of Transmittal
    Include your firm's understanding of the work to be performed within the terms and conditions set forth in this RFP. In addition, state why your firm believes it to be the best qualified to perform the services requested. The length of time during which the proposal and the prices quoted shall be valid for consideration by the City is required to be 120 days from the proposal's due date. The RFP submittal letter must be signed by an officer of the Proposer or a designated agent empowered to bind the firm in the contract offer. (Keep response under one page.)

B. Table of Contents
    Include a clear identification of the material by section and by page number.

C. Contact Summary Sheet
    This section of the proposal must be a completed copy of the Contact Summary Sheet (Appendix B) included with this RFP. Provide the name, title, experience and qualifications of the personnel who will be assigned to the project, individuals who will be responsible for providing training and technical support, including the appropriate contact numbers.

D. Conceptual Plan and Implementation
    Provide a conceptual plan for services and product type to the City that you believe is appropriate for the implementation of this program based on your understanding of the City's needs. Indicate features, skills or services which distinguish your firm and make it the better choice for the City. Please note if your product service will be "off the shelf," fully customized, and/or a combination of both.

    Submittal of a project schedule is required as part of the Conceptual Plan. Submit specific plans of how you will manage, control, and supervise the project in order to ensure satisfactory provision of services. Provide a description of the implementation plan considerations, including estimated time frames and deliverables for each stage of the project. Please also indicate any possible obstacles that may arise during system implementation and explain how your firm will overcome them. The description should also include anticipated deliverables and should describe how the new functionality could enhance the solution described in this proposal. Detail the amount of support to be provided including number and type of personnel, time commitment and training content and format, at each stage listed above. (Keep response under three pages.)

E. Product Vision
    Describe your vision for the continuing expandability of your System. Statements made in this section of the RFP response shall not be construed to be a contractual commitment to deliver future functionality to the City beyond that which is included in the other sections of

this proposal. In addition, the Proposer shall disclose the evolution of its software functionality. Future versions and/or upgrades should be discussed in addition to the proposed version. Describe the methods by which clients are kept informed of new releases, new hardware component, known bugs and fixes, and any additional information the Proposer deems appropriate. Describe any implications of new releases to purchase price or maintenance contract. Describe how enhancements are prioritized and by whom. Explain the effect of any customization on future upgrades and maintenance. (Keep this narrative under one page.)

F. Technical Specifications
List all specifications for hardware, operating environment, database, mapping, and maintaining your software. This includes, but is not limited to, disk storage and memory requirements, maximum file size, number of records and lengths, etc.

G. Maintenance and Support
Provide a comprehensive description of support options, including the following:

1. *Hours of Support*. Describe options for hours of support and the cost of each option. Provide the response time, and associated guarantee, for each option.

2. *Maintenance Costs*. Explain maintenance cost options and what is and/or is not included with the product's final cost. If maintenance cost is a percentage of the purchase price, describe needed maintenance and provide an estimate (in time and cost) of maintenance to be performed.

3. *Support*. Provide information on the nearest support center to the City and if support will be on-site or remote. Provide a list and description of applicable training courses that will be made available to the City. The training must be comprehensive enough so that the City's staff and systems administration personnel can effectively use, operate, and maintain the system. Provide support details, including any requirements for modem communication, cost, and problem reporting and tracking methodology used.

4. *Ownership*. Provide ownership information on the source code in the event the City drops support of the software and/or Proposer goes out of business.

5. *User Groups*. Provide information on active user groups. Describe user conference frequency, location, and other details.

6. *Maintenance.* The Proposer shall provide system maintenance, software patch updates, and technical support services in the first 12 months following the completion and implementation of the project in normal business usage. The submitted proposal should indicate the number of hours as well as an estimated cost for this required support, and be included in the proposal's total cost.

H. References
List all of the municipal governments that your firm has worked for or with in a similar capacity to the work outlined within this RFP within the last five (5) years. List names of organizations, and names, telephone numbers, and email addresses of persons who can be contacted with regard to the services you have provided.

I. System Functional Requirements
Complete the System Functional Requirements Matrix provided herein as Appendix A.

J. Cost
Cost Quotations Summary. The City wishes to know the final and complete cost of each proposal and to realize only those additional costs beyond the proposal that the City requests. All cost quotations must include but not be limited to license fees, modifications, training, travel and per diem, installation, service charges, upgrades, documentation, taxes, discounts, etc. Costs associated with on-going maintenance and support must be identified. All Cost tables should be sub-totaled and totaled. Costs should be broken down as follows:

1. One-Time Costs: Please provide a lump sum with an itemized list of costs.
   - Application software (broken down by application)
   - Implementation costs, including the cost of transferring applicable, existing data
   - Hardware (if necessary)
   - Operating and system software, if necessary
   - Training
   - Applicable taxes
   - Support costs, including the 12 months of required support following system implementation
   - All other one-time costs. Please define each cost.
2. Recurring Costs:
   - Concurrent software license/maintenance agreements, if applicable (per user and total)
   - General software license/maintenance agreements, if applicable (per user and total)
   - Necessary upgrades, if applicable
   - Other (list all other recurring costs)
3. Hourly Rates:
   - List all hourly rates for additional contract work requested by the City outside of the scope of work indicated in this RFP, as may be necessary or recommended
4. Hosting options
   i. List all hosting options (including on-premises) and include pricing for each

Proposal Submission

This Request for Proposals (RFP) is available to download at the City's website: http://fargond.gov/work/bids-rfqs-rfps.

Any addendum made to this Request for Proposals will be posted at the same website used for downloading the RFP.

Proposers are to submit seven (7) copies of the Proposal in accordance with the requirements set forth within this RFP. In addition, an electronic version of the proposal shall be provided on a CD, DVD, or Flash Drive. The information included should be as concise as possible. Late Proposals cannot be accepted and will be returned unopened to the Proposer.

The Proposal must be placed in an envelope securely sealed therein and labeled: "**Proposal for Permit & Project Tracking System for the City of Fargo"**

Sealed proposals must be submitted to the City of Fargo auditor's office, 200 3rd Street North, Fargo, ND 58102 at or before 11:00 A.M., February 2, 2018 (Central Time). Proposals received later than the time and date specified will not be considered.

Communications

Interested parties, including Proposers, are directed NOT to contact any employees or officials of the City other than those specifically designated in the RFP and its Attachments. Unauthorized contact may be cause for rejection of proposals at the City's sole and absolute discretion.

All questions related to this RFP must be submitted in writing and submitted by email to PPMSRFP@FargoND.gov. The question period shall expire as defined within the Project Schedule, found on page 5. Responses to questions will be posted on the same webpage as this RFP (http://fargond.gov/work/bids-rfqs-rfps). Questions received after the deadline for questions will not be answered.

For technical issues, Proposers can dial (701) 476-4058 for assistance. Office hours are 7:45 a.m. to 4:30 p.m. Monday through Friday, excluding holidays.

Evaluation, Selection, & Contract Award

Selection Process

Proposals will first be reviewed for completeness. Only those proposals that are properly completed and meet the minimum content requirements will be considered in the evaluation process. Complete proposals will then be evaluated and scored by an evaluation committee. Proposals will be evaluated based on the following general categories: *System Functionality* (refer to Appendix A), *Proposal Cost*, and *Implementation & Support*.

Written proposals that are scored the highest by the evaluation committee will be invited to give a product demonstration to the evaluation committee. Demonstrations will be scored by the evaluation committee and combined with the Proposer's score from the written proposal. The Proposer with the highest combined score will be selected to proceed with contract negotiations with the City of Fargo.

The City reserves the right to reject any/all Proposal(s) or accept what is, in its judgment, the Proposal which is in the City's best interest. The City further reserves the right, in the best interests of the City, to waive any technical defects or irregularities in any/all Proposal(s) submitted.

Discussion may be conducted with responsible Proposers who are determined to be reasonably capable of being selected for award for purpose of classification and to assure full understanding of, and responsiveness of the Proposal to the solicitation requirements.

In addition to price, any specific criteria listed herein may be considered in judging which Proposal is in the best interests of the City. Things such as recommended installation, perceived ability to deliver services, input from references, level of experience in providing solutions for similar entities, ease of use of and functionality for end-users and complexity and ability to capture and report on information and data could all prove to be vital components in the selection process.

Contract Award

The City will select a Proposer with whom City staff shall commence contract negotiations. The selection of a proposal shall not imply acceptance of the City of all terms of the proposal, which may be subject to further negotiations and approvals before the City may be legally bound thereby. If a satisfactory contract cannot be negotiated in a reasonable time the City, in its sole discretion, may terminate negotiations with the highest ranked Proposer and begin contract negotiations with the next highest ranked Proposer.

Appendix A: Functional Requirements

Legend for Evaluation Criterion

In addition to price, the criteria set forth in the Proposal Requirements and any specific criteria listed below will be considered in judging which Proposal is in the best interests of the City. One letter should be entered in the right-hand column for each evaluation criterion from the following legend. Additional explanation should be provided as needed either on or attached to this sheet.

S = Standard, included in the base package with no extra programming.

N = Not available and cannot be implemented in the proposed version.

I = Included, provided by a third party/business partner.

O = Optional, extra programming or cost involved.

Evaluation Criteria:

LINE	DESCRIPTION	RESPONSE
A	**General**	
1	Users can select from different displays to personalize their own screens	
2	Have a real-time dashboard to display dynamic charts & graphs that the User wants to view.	
3	Automatic email notification to users when assigned activities have been updated or new tasks have been assigned to them. Automatic email notification to supervisors and staff when a task is overdue.	
4	The proposed system must provide user-defined security, differential rights distribution, role designation, and user options. Provide detailed audit trails for security mgt. changes. Ability to add time/date stamped user notes to audit trail.	
5	Provide detailed audit trails/reports for financial activity tied to permits. Selected system must have either an embedded full function Cash Receipts module or the ability to integrate with HTE SunGard Cash Receipts module.	
6	Provide a configurable, flexible workflow management system to automate business processes performed by each department and agency involved with the development and business license review process.	
7	Assign permit, project, code violation, and complaint types to specific departments.	
8	Flexible, open architecture allowing for customization of fields/reports/views without Proposer assistance and all-data access from system to external systems and custom fields.	
9	A development architecture ensuring that Proposer updates are deployed rapidly and effectively.	

10	Hyperlinks between related data sources such as current permit and related permits	
11	Provide a data dictionary to simplify integration of City's systems with the selected system.	
12	Ease of adding and updating complex fee structures. Extensive fee note and definition field(s) to allow for detailed description of fees. Tracking of historic fees. Fee Reports	
13	Built-in fee calculator across multiple types of permits/fees	
14	Fee override by authorized individuals and appropriate audit trail. Audit trail should allow for notes	
15	Ability to track plan review deposit balances/bonds/insurance information.	
16	Note/Description fields throughout. Current and future users should be able to easily discern the purpose of a permit, fee, reports, forms etc.	
17	Plan/Permit status field, e.g. awaiting applicant revised plans. Ability to report status by plan/permit and assigned staff with project start date and projected end date.	
18	Plan/Permit project staff defined alerts/triggers/reminders	
19	Flexible auto permit/plan numbering and formatting.	
20	Ability to validate the City address and APN in City's ESRI system when initializing permit application. If address cannot be verified, system should give option to allow address by exception for validation prior to issuance of permit.	
21	Ability to support multiple (unlimited) parcels and addresses for each project	
22	Ability to list by APN, address, contractor or developer all open or expired permits / permit applications during permit initializing process	
23	Ability to track multiple applications to a single master project and the ability to link records together creating parent-child relationships	
24	Ability to auto populate and identify hazard zone information (i.e. Flood, WUI, Seismic/Liquefaction Hazard zones, historical structures / Heritage Trees / covenants, etc.) based on address or APN.	
25	Ability to list any Warnings, Locks, Holds and Notices or Restrictions for parcel during permit initializing process.	
26	Ability to add additional permit types as needed for permits types that cannot be categorized with existing permit type database.	
27	Ability to duplicate part or all of the data from one permit record to another.	
28	Ability to attach associated documentation to a permit or parcel record (i.e. Picture files, PDF, Word, Excel, PowerPoint/Keynote, etc.).	

29	Ability to review permit information even if the permit is closed or expired without having to change status to "active".
30	Restrict the issuance of permits for certain parcels based on access authority (e.g. holds are placed on certain permits, parcel may require approval by Planning Manager or Building Official).
31	Track contact information of contractors, applicants, property owners, etc.
32	Ability to lookup contractor information on Contractors State License Board website to check validity of license.
33	Automated response to applicant when all comments are ready for viewing
34	Restrict resubmittal of plans until all comments are submitted to system and automated response is sent to applicant.
35	Ability to view historical permit data such as floor area or valuation within a certain date range issued for a particular structure.
36	Some developments will require periodic inspections after acceptance. Program should generate recurring inspection requests and generate task.
37	Ability to route electronic plans and other electronic documents to users both internal and external required to review the plans.
38	Ability to define project timelines and schedule project milestones in a single module/screen
39	Ability to print cover sheet with permit card to show/list all locks, holds, warnings & restrictions
40	Ability to auto-generate expiration notification letters at multiple custom intervals ahead of expiration and have them automatically e-mailed to various recipients and sent to printer for hard copy mail out
41	Ability to expire permits if no action is taken prior to the expiration date of the application and send out letters to notify applicants of the expired status.
B	**Entitlement Process Management**
1	Ability to customize project workflow based on application type.
2	Ability to track, identify, and search for projects by multiple attributes (such as address, subdivision, date, parcel number, etc.)
3	Ability to validate the City address and/or parcel number within City's ESRI system when initializing application. If address cannot be verified, system should give option to allow address by exception for validation prior to acceptance of application.
4	Ability to support multiple (unlimited) Parcels & Addresses for each project.

5	Ability to list any Warnings, Locks, Holds and Notices or Restrictions for parcel during permit initializing process.	
6	Ability to establish critical path for each workflow and establish deadlines with automated reminders & warnings.	
7	Ability to define project timelines and schedule project milestones in a single module/screen	
8	Ability to submit applications online (including all necessary attachments).	
9	Ability to process application fees online.	
10	Ability to customize application submittal requirements based on application type.	
11	Ability to attach associated documentation to a permit or parcel record (i.e. Picture files, PDF, Word, Excel, PowerPoint/Keynote, etc.).	
12	Ability to interface with City's ESRI GIS platform.	
13	Ability to assign various levels of permission to identified users or user groups.	
14	Ability to automatically generate draft public notification letters & legal notices.	
15	Ability to generate mailing labels for property within a defined distance of application property(ies).	
16	Ability to identify and auto-populate project with geographic information such as zoning districts, floodplains, historic districts, neighborhoods, school boundaries, etc.	
17	Ability to route electronic plans and other electronic documents to users both internal and external required to review the plans.	
18	Ability to receive and track application comments made by reviewing departments and agencies.	
19	Ability to automate messages to applicants and system users at defined milestones within the workflow.	
20	Ability for applicants and other users to track application status online.	
21	Ability to archive and save application materials within the City's data management systems.	
22	Ability to automatically generate draft meeting agendas.	
23	Ability to automatically generate draft meeting and presentation materials (staff report templates, maps, etc.)	
24	Ability to distribute meeting materials (such as meeting packets) to system users.	
25	Ability to track the physical location of documents (such as subdivision plats) as they are transferred back and forth between departments.	

26	Ability to link multiple applications into one project	
27	Ability to summarize and display defined metrics and permit data within a customizable dashboard	
28	Ability to restrict certain actions based on required order of actions and/or access authority (should be able to assign ability to override to certain users).	
C	**Site Plan Review/Plan Routing**	
1	Track plan review by selected fields (i.e. address, APN, Plan Review #, etc.) and access plan review comments from all departments and agencies.	
2	Provide for logging dates sent, reviewed, due, rejected or approved for multiple reviewers, as well as a remarks area for each reviewer.	
3	Ability to redline plans submitted electronically.	
4	Ability for a plan reviewer in each Department to select a specific plan review comment from a list of standard comments.	
5	Ability to define and add standard conditions as well as free form condition information.	
6	Ability to merge conditions into letters and other documents along with sending to various recipients electronically.	
D	**Property Maintenance**	
1	Allow multiple violations to be added to a single case with the ability to schedule different inspection dates consistent with compliance requirements.	
2	Ability to track multiple violations with different statuses per case.	
3	Track follow-up dates to ensure resolution.	
4	View/add restrictions to the parcel when a case is created.	
5	User rights determine which users are able to view case information/details	
6	Able to attach images to the case.	
7	Create a Case Details Report which itemizes all details pertaining to the case, including the photos attached.	
8	Easily create MS Word letters and merge data from system into letter.	
9	View all details of a case from a single screen, without selecting different tabs or windows.	
10	Track all activities on the record, including when a phone call is made, a letter is printed, etc	

11	Able to print and attach a letter for historical purposes in a single step.	
12	Automatically assign a case to a default Officer if received from online.	
13	Ability to lock a parcel automatically when certain code cases are created, to prevent permits from being issued.	
14	Restrict access to the Complainant information to only Code Officers.	
15	Allow code officers to enter results of their inspections, including items for correction, in the field either on-line or off-line	
16	Ability to duplicate part or all of the data from one case record to another	
17	Ability to create code violation cases related to permit inspections in the field.	
18	Print images associated with the case into a letter.	
19	Automatic inspection, reviews and fees based on type and sub-types	
20	System must have the ability to configure and execute a variety of automated batch processes for various items throughout the system. For example, these processes might include but are not limited to automatic status updates, addition of an activity or task in workflow, or addition of a letter. (Renewals for licenses) These functions should be able to use various forms of calculations using any date field.	
E	**Field application**	
1	Access to the permit data and related property information through a map service in the field.	
2	Access to aerial photo information in the field. Tie into ESRI	
3	Be able to access all property information while mobile.	
4	Ability for field inspectors to print documents stored in the system in the field.	
5	Ability to configure security to assure that only authorized persons are allowed to sign off on an inspection.	
6	Supports remote data entry	
7	Provide the appropriate capabilities to allow users to operate in the field with either handheld devices (tablet devices) or with laptop computers	
F	**Reporting**	
1	Ability for end-Users to customize, save and distribute reports in addition to system reports.	
2	Users are able to create queries on the fly and save those queries for future use, and distribute to other users. Query tool should be query-by-	

	example or other simple to use tool. Easy output of query data to text, Adobe, MS Word, MS Excel or PDF a must
3	Ability for Users to select Favorite reports and group them into folders for future use.
4	View a preview of report prior to printing.
5	Export reports into Adobe PDF, MS Excel, or MS Word format.
6	Users can create mail merge in MS Word
7	Users should be able to generate reports from ALL data fields, including audit trails.
G	**General Public Access**
1	Ability to provide interactive permit application to the public.
2	Receive notification of status change via e-mail.
3	View a chronological list of items to be completed prior to project completion
4	Ability to view inspection results
5	Access and print approved permits
6	Ability for applicant to re-print a business license or renewal notice
7	Ability to submit applications online and check application status
8	Ability to accept payments online through PayPal.
9	Information is posted real-time to the database.
10	View a map of the selected parcel using GIS Map service showing current and historical data
11	Able to file a complaint online.
12	Apply for simple permit types online.
13	Pay for outstanding fees online.
14	Match the web pages to our web page format, not only a header bar with the agency's logo
15	Have security levels that determine information available to certain citizens (i.e. Generic vs. Contractor vs. different Applicant login).
16	Upload plans and any attachment type online
17	Custom screens are viewable online
18	Able to require certain fields and collect custom information during online entry
19	Ability to schedule inspections online.
20	View the status of a permit, project, license, or case online.

21	Allow outside inspectors and plan reviewers to input results & comments online, with a unique login.	
22	Application System Administrators are able to change the configuration and preferences of the online system.	
23	Ability to view attachments online	
24	View the plan review notes and comments online	
25	Submit a request for service online, be notified of the service request receipt and case initiation, and subsequently find and track the case online.	
H	**Building Inspections**	
1	Ability to provide a configurable, flexible workflow engine, capable of defining and automating the business processes performed.	
2	Ability to create and send an email notification to interested party at various phases of any process Ability to have integrated notification Ability to (meaning notify inspection results via email, text or pop-ups)email, notifies, texts, or pop-ups	
3	Ability to accept electronic plans or scan plans as they are submitted. Plans then need to be tied to a plat or permit application	
4	Ability to create customized numbering system for any activity, application, permit, case, license, etc. initiated in the system.	
5	Ability to configure calendaring functions to plan, schedule, and track work activities	
6	Ability to configure user defined timelines	
7	Ability to maintain user-defined configuration and data definitions effective after software release upgrades	
8	Ability to maintain system lookup tables and parameters	
9	The system must allow for user definition and maintenance of system look-up tables without requiring programmer intervention	
10	System should have a dashboard style page configurable by each user for viewing assigned or monitored work activities. Should include: cost summaries, to do lists, charts graphs, maps, reports, etc. Should be configurable on any number of parameters defined by each user.	
11	System allows simultaneous access to data by concurrent users	
12	Ability to prevent a primary record from being deleted if secondary records exist	
13	Ability to link multiple permits, cases, plans, and licenses to a single master project	
14	Ability to customize the software and develop additional modules post-implementation without reliance on the Proposer	

15	The system provides the ability for the user to bookmark their favorite pages and have them automatically load at system startup	
16	The system allows split screen views on dual monitors.	
17	System should allow configuration for holiday, weekend, or other user defined non-working days. These dates should be taken into account when computing any scheduled dates. Inspections, meetings, and other system generated activities should not be able to be scheduled on these dates. System should be capable of handling both static (i.e. New Year's Day always falls on January 1) as well as holidays like Labor Day that fall on a specific day of a given month.	
18	Be able to set one contact as the main/primary contact associated with any application, permit, case, license, etc.	
19	Ability to create a hierarchy of activities similar to a pyramid or organizational chart to follow the development process. Be able to link activities.	
20	Ability to attach comments to an activity type that are inherited by associated activities.	
21	Have multiple events that could trigger processes. Examples could be initializing an activity, collecting a fee, approvals or scheduling inspections	
22	Custom fields can be reported on, queried, and operated on through business rules and other system automation	
23	Custom fields can be configured to appear on the screen only when the situation warrants (e.g. "Number of Stories" is only required for new construction permits.)	
24	The system allows the City to determine which fields are required.	
25	The system has the ability to provide customizable screens.	
26	System enables easy access to historic data	
27	System must have the ability to edit permits after they are issued or approved and the ability to delete or void a permit.	
28	System should allow for either multiple log-ins or have concurrent access to all sections.	
29	Application, permit, case, license, etc. # should be visible to the user at all times.	
30	System should have a back button or undo button.	
I	**System and Software Requirements**	
1	Uses ESRI ArcGIS 10.5.1 (or current)	
2	All web components are fully HTML 5 based with no 3rd party plugins required	

3	User integration with Microsoft Office 2016 for email, forms, spreadsheets, and word processing. Ability to export data to MS Excel format.	
4	All staff mobile functionality is fully supported on iPhones, Droid Phones, iPads, and Windows tablets.	
5	Interface directly with email capabilities (Outlook). Information should be easily replicated into an email to send outside of the software	
6	For Internet payments, the system should be able to utilize our current payment gateway – Authorize.net\Heartland Payment Systems	
7	The proposed software must be Payment Card Industry (PCI) compliant	
8	Proposed software should run on Microsoft Server and Microsoft SQL	
9	The system shall work with standard SQL based report writers where the user can modify existing reports or create new reports based on specific user requirements	
J	**Integration and Customization**	
1	Well documented data dictionary must be provided as well as any ongoing updates to it	
2	The system must be fully integrated with the City's Master Address Database. All addresses must verified against the City's master address database that is maintained by the GIS department	
3	The data structure should allow integration with other systems with open databases, points of integration include, but are not limited to Laserfiche Document Management and IBM AS400 System	
4	The system must integrate with our existing custom Parcel Management system (SQL based)	
K	**Security**	
1	Active directory integration	
2	The system has the ability to allow the System Administrator to add and change permissions for system access.	
3	Ability to monitor when users are using the system and when licenses are in use	
4	Ability to override system-generated scheduling (with appropriate access and security)	

Appendix B: Contact Summary Sheet

Firm Name: _____

Firm Parent or Ownership: _____

Firm Address: _____

_____

Firm Telephone Number: _____

Person responsible for direct contact with the City of Fargo and services required for this Request for Proposal (RFP):

Name: _____   Title: _____

Telephone Number: _____

Email: _____

Person responsible for day-to-day servicing of the account:

Name: _____   Title: _____

Telephone Number: _____

Email: _____

Types of services provided by the firm: _____

_____

_____

_____

_____

Appendix C: Examples of Existing Permit Forms (Attached)

CITY OF FARGO

FARGO, NORTH DAKOTA

SIGN PERMIT

Date	11/28/2017
Permit No.	**SG20170821**
Investigative Fee	$0.00
Permit Fee	$35.40
Total Fee	$35.40
Vendor:	1059

Contractor **CUSTOM GRAPHICS**

Owner CORNER REAL ESTATE INVESTMENTS LLC

Permit Address **4150 19 AVE S** **NORTHERN LIGHTS DENTAL**

Legal Description Addition 3804

LOT LT 1 LESS S 50 FT FOR HWY R/W; & LT 2 LESS S 50 FT FOR HWY R/W; & LT 3 LESS S 50 FT FOR HWY R/W & LESS ELY 18 FT; & LT 8 LESS ELY 18 FT BLK 6 ADDN# 3804 (West Acres 4th) ADDITIONAL INFO: *03/27/92 LEGAL DESC CORR *06/25/98 SPL/FR 3804-06500 *11/21/16 COMB/FR 01-3804-00630-000 & 00640-000 & 00653-000 & 00701-000 SPL#2017-012

WORK DESCRIPTION

permnant sign

Material

Sign Type	Width	Height	Overall Height	Flat	Projection	Free Standing	Single Face	Double Face	Sign Size	Material
Permanent	30	4		y	8"	n	y	n	118	

INSPECTOR _____

PURCHASER _____

HISTORY REPRINT

CITY OF FARGO
FARGO, NORTH DAKOTA
MECHANICAL PERMIT

Date _____ 11/28/2017

Permit No. **HT20172393**

I, the undersigned, licensed Heating Contractor of the City of Fargo, hereby make application to do heating upon the following described property, and I hereby declare and affirm that I have been duly authorized by the owner to perform such work.

Permit Address **5101 19 AVE N**

Unit/Space
Establishment **MID AMERICA STEEL**
Township
Owner Name BRAND, ELWOOD J ET AL
Mail Address 5617 19 AVE N
FARGO , ND 58102
Legal Description Addition 8636

LOT 1 BLK 1 ADDN# 8636 (Mid America Steel) ADDITIONAL INFO: **4-22-08 SPL FRM 60-0000-02185-030 *12/15/16 ANNEXED/FR 60-0000-02185-040 SPL# 2017-027 DOC# 1498070 *01/19/17 PLAT/FR 01-3525-00100-000 SPL#2017-029 DOC#1498167

Contractor	HOME HTG	Vendor	1939
Work Class	IHA	Permit Fee	$66.00
Const. Type	VB	Total Fee	$66.00
Occupancy	U		

Qty.	Appliance	BTU	Description	Fee
2	Temporary Heat	1.00	400.000 btu unit heaters	$66.00

Work Description

AGREEMENT

In Consideration of the issue and delivery to me by the Building Official of the City of Fargo, of this Heating Permit I hereby agree to do the proposed work in accordance with the description above set forth and according to the provisions of the Fargo Mechanical Code and Heating Ordinance.

Signature of Contractor

Signature of Inspector

Parcels Affected By This Mechanical Permit

Parcel Number	Seg	Address
01-8636-00100-000	1	5101 19 AVE N

HISTORY REPRINT

CITY OF FARGO

FARGO, NORTH DAKOTA

SEWER PERMIT

Date 11/28/2017

Permit No. **SW20170651**

Investigative Fee: $0.00

Permit Fee: $75.00

Total Fee: $75.00

Contractor	**Greenscape Companies, Inc**	Vendor: 12389
Owner	GREENSCAPE PROPERTIES FARGO LLC	
Permit Address	**6219 53 AVE S**	**Greenscapes Companies In**

Addition   8419

Legal Description   LOT 4 BLK 1 ADDN# 8419 (Richard 3rd Subd) ADDITIONAL INFO: ANNEXED PT OF SEC 5
TWP 138N RGE 49W (11/25/2008, B-X1, P-28) *1/19/09 #09-036 SPL/FR 64-1797-00040-000

WORK DESCRIPTION

Material _____   Size _____

Description of work to be Performed.	Units	Base Fee	Total Fee
Additional sanitary or storm sewer line into building or to a manhole or	3	$25.00	$75.00

Permission is hereby granted to the above licensed plumber to construct or repair sanitary sewer as described in the above statement.

All work to comply in all things with ordinances and regulations to the City of Fargo governing this class of work. This permit is granted subject to revocation by the City without notice of liability and at its pleasure. The City of Fargo reserves the right to hereafter inpose on the property described additional special assessments for sewers, water mains or any other special assessments.

PLUMBING INSPECTOR _____

Parcels Affected By This Sewer Permit

Parcel Number	Seg	Address
01-8419-00040-000	1	6219 53 AVE S

HISTORY REPRINT

CITY OF FARGO

FARGO, NORTH DAKOTA   Date   11/28/2017

PLUMBING PERMIT   Permit No.   **PL20171515**

I, the undersigned, licensed Plumber of the City of Fargo, Hereby make application for a permit to do plumbing and install fixtures, upon the following described property, and I hereby declare and affirm that I have been duly authorized by the owner to perform such work.

Contractor   **Superior Plumbing**   Vendor: 11374

Investigative Fee $0.00   Permit Fee $95.00   Total Fee $95.00

Permit Address   **4727 41 ST S**

Addition   8517

Legal Description

LOT 9 BLK 2 ADDN# 8517 (Cottagewood 1st) ADDITIONAL INFO: *11/5/13 #14-005 PT OF S 1/2 OF SEC 24 TWP 139 N RNG 49 w (10/14/13, B: Z-1, P27, DOC#1402068)

Type of Building   VB   Occupancy   R-3   Work Classification   IPI

* * * FIXTURES * * *

Level	WTR CLST	URNL	BATH TUBS	BASN	SINK	LNDRY TUB	SLOP SINK	FLR DRAIN	WTR HTR	SHWR	GARB DISP	AUTO WASH	DRNK FNTN	LAWN SPKLR	OTHR FIXT
b	0	0	0	1	0	0	0	0	1	0	0	0	0	0	0
1	2	0	2	3	1	1	0	1	0	0	0	1	0	0	0

WORK DESCRIPTION

WV

In Consideration of the issue by the Plumbing Inspector of the City of Fargo, of this Plumbing Permit I hereby agree to do the proposed work in accordance with the description above set forth and according to the provisions of the ordinance entitled, "An Ordinance to Regulate the Construction, Extension, Alteration, and Repairing of Plumbing, and Repairing of Plumbing, and Providing for the Sanitary Installation of Such Plumbing Within the City of Fargo, North Dakota," and all other pertaining ordinances and regulations.

PERMISSION IS HEREBY GRANTED

PLUMBING INSPECTOR

Parcels Affected By This Plumbing Permit

Parcel Number	Seg	Address
01-8517-00540-000	1	4727 41 ST S

HISTORY REPRINT