



REQUEST FOR PROPOSAL #7028 COMPUTERIZED MAINTENANCE MANAGEMENT SYSTEM (CMMS)

Submittal Date: December 14, 2012, 4:00 p.m. Exactly Pacific Local Time

Primary Objectives

The City of Shoreline intends to update its current enterprise resource planning software, Infor Public Sector (formerly known as Hansen Information Technologies), implemented in 2000, with a GIS centric Computerized Maintenance Management System (CMMS).

The Public Sector system currently includes a Customer Relations Management (CRM) module, a Community Development Regulatory (Permitting - CDR) module and an Asset Maintenance Management System (AMS), which is not GIS centric. The City is requesting proposals for a CMMS and will also look at additional options for replacing the CRM and Permitting functions. The primary objective is for a CMMS and all requirements within the Request for Proposal reference the CMMS.

The CMMS solution should promote these City operational objectives:

- Improve levels of customer service
- Improve operational efficiency
- Optimize the life-cycle of assets
- Provide reliable critical business information systems which minimizes service disruptions and loss of revenue

Section 1 –Project

1.1 Description

I. The City of Shoreline, Washington (“City”) intends to procure a CMMS software application that supports asset management and inventory control to support the City’s Public Works Department (surface water, facilities, streets, and future water and sewer), and Parks Department (facilities).

II. Preferred proposals will also support the City’s Customer Response Team (customer inquiries, responses and associated work orders) and the Planning and Community Development Department (building and land use permitting, code enforcement and customer inquiry), either through replacement software for the City’s current Infor Public Sector or software that most successfully interfaces with the existing applications. Proposals will include all necessary software, and hardware and implementation services.

1.2 Project Drivers

The City of Shoreline's current integrated Infor Public Sector application is shared across all City facilities. The City intends to replace the asset management system with a GIS centric application.

The CMMS will support the following City Departments and Divisions:

- The Surface Water Management Program within the Public Works Department's Operations Division is responsible for maintaining and improving the quality of streams, lakes and constructed drainage facilities in the City of Shoreline. It also manages the NPDES Phase II stormwater permit activities for the City.
- The Street Maintenance Division within the Public Works Department's Operations Division is responsible for keeping the City's roadways, sidewalks, vegetation, rights-of-way and drainage system in good repair.
- The Fleet, Facilities, and Property Services Divisions within the Public Works Department's Operations Division are responsible for managing City-owned property and assets. Fleet Administration, facility maintenance, janitorial services and facility leasing are some of the services provided by this division.
- Traffic Services is responsible for addressing and enhancing traffic and pedestrian safety.
- The Customer Response Team (CRT) interacts with all City departments. CRT inputs data, responds to and resolves citizen inquires and complaints regarding all City services, infrastructure hazards and code enforcement issues. The service requests CRT cannot resolve are referred to other departments. CRT generates department work orders for Public Works and open code enforcement case issues to the City's Code Enforcement Module.
- Planning and Community Development performs intake, review and issuance of all building and land use related permits and provides inspections and approval of conditions for all permitted work. Code Enforcement tracks violations including notifications and determination of fines and penalties.

Current System User Counts: AMS – Asset Management System, CRM – Customer Response Management, CDR – Community Development Regulatory

Category	Functional Group	# of Primary Users
ACCIDENT	Traffic Services	4
AMS	Surface Water Management	4
AMS	Street Maintenance	11
AMS	Fleet/Facilities Management	9
CRM	Customer Response Team	30
CDR	Code Enforcement	21
CDR	Permitting	22
ADMIN	Administration and Support Staff	5
FIRE	Permitting	3
GIS	ALL	50
IT Users	IT System Administrators	3

1.2 Minimum Requirements

- I. The proposal must provide a comprehensive asset management and inventory control software system that serves the different asset classes described in 1.1 that can be implemented with minimal modifications required by the City of Shoreline. The City is not interested in extensive product customization. However, solutions that allow the non programmer users to configure and develop custom workflow will be given maximum score in the area of workflow automation section.
- II. The vendor must have experience in the successful implementation of the proposed system with at least two other utilities or municipalities of a comparably sized user group.
- III. The vendor must have the financial resources to support a project of this size within the timeframe specified.
- IV. The proposed system(s) must not be proprietary systems that restrict customization and modifications.
- V. The proposed software system must comply with four basic requirements:
 - A web-based user interface
 - GIS centric
 - Support real time access for field (remote) workers
 - On-line web-based or phone app to support customer interaction with City services.
- VI. CMMS software should be implemented for the stormwater division before June 1, 2013 with other departments or modules of the accepted proposal implemented before the end of 2013.

1.3 Preferred Proposals

Proposals that provide an integrated system that meet the minimum requirements but also have the potential to replace the current Infor Public Sector functions of the CRM and Permitting, or can successfully interface with the Infor Public Sector system will be scored separately from proposals that only meet the CMMS system requirements. The integrated enterprise system will be the preferred alternative if proposal costs are reasonable. Parties interested in proposing a replacement to the current Infor Public Sector CRM and Permitting functions must complete both Appendix A (CMMS) and Optional – Appendix A (Enterprise System). The City has sole discretion to select the highest scoring preferred proposal or the highest scoring proposal meeting the CMMS requirements.

Section 2 – RFP Instructions and Schedule

2.1 Submittal Requirements

Responses to this RFP must adhere to the submittal format described below with the information as identified in the following table. The cover letter and, where required, all referenced forms, are to be signed by an authorized representative of your organization.

To prepare your proposal, follow these instructions:

- a) Open the electronic version of this RFP in your word processing application (Microsoft Word 2003 or later is recommended).
- b) Copy all the appendices in this RFP into your response and complete them.
- c) Your RFP response (your proposal) must adhere to the format described below with Sections numbered as shown and the content to be included in each Section.
- d) Your RFP response should be clearly tabbed, indexed and organized. All sections, pages, figures and tables must be numbered and clearly labeled. E.g. Section 1 should be located behind the first tab, Section 2 should be located behind the second tab, etc.
- e) Focus should be on accuracy of content, clarity and conciseness.

SECTION	TITLE	INFORMATION TO BE INCLUDED IN THIS SECTION
Section 1	Cover Letter and Executive Summary	<p>Signed Cover Letter.</p> <p>A Cover Letter should be:</p> <ul style="list-style-type: none"> • On your company letterhead • Signed by an official in your organization authorized to bind the vendor to all of the statements, including services, terms and conditions, and prices, contained in the proposal. • State the length of time the proposal terms remain firm, which must be for a minimum of 120 days from the proposal due date. <p>Please note that an unsigned cover letter may be cause for rejection of the proposal.</p> <p>The Executive summary should include a brief statement to the work, understanding of the project's goals and objectives and demonstrated understanding of the project's potential challenges.</p>
Section 2	Product Information	<p>Provide a general description of the proposed solution (e.g. whitepapers, technical specifications, and/or manuals), including a functional overview of each module proposed. Also provide descriptions of other modules that you offer, which may be of interest to the City of Shoreline that are not contained in this document.</p> <p>An overview document shall describe the operating system used and any special utility programs (which are not a standard part of the operating system configuration) required to support the application software. Include a description of the programming language and utilities used in developing and maintaining the proposed software. Discuss how the proposed software can be upgraded as</p>

SECTION	TITLE	INFORMATION TO BE INCLUDED IN THIS SECTION
		the City of Shoreline expands the use and/or grows beyond the capacity of the current hardware configuration.
Section 3	Company Information and Qualifications	<ul style="list-style-type: none"> • Complete the Company Information and Qualifications in this Section • If a 3rd party implementation partner or a Value Added Reseller (VAR) is part of this proposal. Complete the Implementation Partner/VAR information and qualifications form.
Section 4	Audited Financial Statement & Annual Report	<ul style="list-style-type: none"> • Copy of the Software Vendor's most recent audited financial statement. • Copy of the Software Vendor's most recent annual report. • If applicable, copy of the Implementation Partner's or VAR's most recent audited financial statement • If applicable, copy of the Implementation Partner's/VAR's most recent annual report. <p>If you are privately held and do not disclose this information in your proposal, please include a signed statement in this Section that states how you will provide us with financial information that will assure us of your viability.</p>
Section 5	Requirements	<p>For each numbered requirement in Appendix A (CMMS), the vendor(s) should indicate the status of the requirement within the vendor's solution by using the following columns and/or a short explanation (clarification) of vendor's capabilities. Place an " X " in the appropriately named column on Appendix A:</p> <p>Y Yes, Completely Available: A feature that is a standard item currently included in the solution (off the shelf) as proposed or YES to the question.</p> <p>A Alternate. A requirement that can be satisfied through:</p> <ul style="list-style-type: none"> • Advanced configuration using application configuration tools • By a predefined general purpose field or modifications within the database • By another vendor's existing package using a predefined set of Application Programming Interface (API) • Custom development using a .Net development environment <p>For each question answered by an alternate method, describe the proposed solution to address the question You may include a feature that is currently in development or will</p>

SECTION	TITLE	INFORMATION TO BE INCLUDED IN THIS SECTION
		<p>be developed at no additional cost if noted as such.</p> <p>N Not Available: A feature that is not available and is not scheduled for development at this time or NO to the question.</p> <p>Optional Appendix A (Enterprise) – Parties interested in proposing a replacement to the current Infor Public Sector CRM and Permitting modules must complete this section. Follow the same instructions as provided for Appendix A.</p>
Section 6	Customer References	<p>Please include the completed Customer References form (Appendix E – Customer References) in this section. Provide at least five utility or public agency references that are similar in user group size to the City of Shoreline and that have implemented your software in the past three years. Reference installations should be comparable in scope and scale. Please include links to applications.</p> <p>References will be contacted (this may be an on-site visit) as part of the proposal evaluation process. We are particularly interested in organizations with similar requirements, and size (population, parcels, users, etc.).</p>
Section 7	Cost Proposal	Complete the Cost Proposal form (Appendix B)
Section 8	Implementation Methodology	Provide an overview of your implementation methodology and expected timeframe for this project including resources that we are required to provide (see mandatory deadlines under 1.2 VI). This overview should address a Project Management Plan, System Implementation Schedule, Data Security Plan, Master Test Plan, Data Migration Plan, Change Management Procedure, Training/Education Plan, System Cut Over Plan and Ongoing Maintenance and Support when it is appropriate to do so.
Section 9	Contracts, Terms and Conditions	Appendix C is the City’s Sample Contract, all proposers must carefully review terms, conditions and requirements. Exceptions, if any, must be noted on the RFP Proposed Alternatives Terms form (Appendix D).
Section 10	RFP Exceptions	Complete and sign the RFP Proposed Alternatives Term form (Appendix D) Identify ALL exceptions to this RFP, including contract terms and conditions, and proposed payment schedule. If you provide a sample of your contract, you are still required identify exceptions to contract terms and conditions the City of Shoreline Sample Contract.
Section 11	Other requirements	Other Requirements of your proposal: Non-Collusion Certificate (Appendix F). This certificate must be notarized and signed by a person authorized to

SECTION	TITLE	INFORMATION TO BE INCLUDED IN THIS SECTION
		bind the Vendor to the assertions of compliance in that certificate. Insurance Requirements. Refer to Appendix C – Sample City Contract for specific requirements.
Section 12	Alternative Proposal or Other Vendor Information	Use this section if you have an Alternative Proposal that does not fit into the normal structure of the required submittal format for this RFP, or any other material that you feel is important for our evaluation. <i>Please limit the pages in this section. Clarity and conciseness are very important and any Alternative Proposals must support the project goals, scope, requirements and maximization of return on investment.</i>

2.2. Delivery

Three (3) completed and bound proposals as well as two (2) electronic copies, one in PDF format and one in the native file format of the form (e.g. Microsoft Word 2003 or 2007) must be received by **4 p.m. December 14, 2012**. Submittals shall be delivered in a sealed envelope or sealed box clearly marked with:

ATTN: RFP #7028 Enterprise Resource Planning Software
City of Shoreline
City Clerk's Office
17500 Midvale Avenue N.
Shoreline, WA 98133-4905

The City, at its discretion, may make additional copies of the proposal for the purpose of evaluation only. The original proposal will include original signatures, in ink, by authorized personnel, on all documents that require an authorized signature.

The electronic document must be submitted in native file format (Microsoft Word 2003 or 2007), and in PDF format.

The following schedule is to inform vendors of the estimated timetable of the software evaluation. Dates are estimated and can be moved out by the City of Shoreline.

SCHEDULE DATES	DATE
RFP released to Vendors	November 5, 2012
Deadline to submit written clarification questions regarding the RFP	November 29, 2012
Answers to questions provided to vendors	December 5, 2012
RFP Due - respondents shall be responsible for delivery of three (3) hardcopies of the RFP at this time, an electronic copy should also be sent in addition to the hardcopies.	December 14, 2012
Complete reference checks and finalists selected	December 21, 2012
Demonstrations with finalists	January 7-11, 2013
Vendor Selection and begin contract routing	January 25, 2013
Council action awarding contract	February 4, 2013

3. EVALUATION CRITERIA

3. 1. Evaluation Procedures

Proposals provided in response to this RFP that comply with the minimum requirement of Section 1.2 and submittal requirements set forth in Section 2, including all forms and certifications, will be evaluated in accordance with the criteria and procedures described in this section. Based on the results of the evaluation of written proposals, the City will short-list the highest scoring proposals to complete reference interviews, and request demonstrations of critical functions specified by the City to supplement scoring. A recommendation will be submitted to the City of Shoreline City Council for approval of a contract based on the evaluation criteria.

3. 2. Evaluation Criteria

The objective is to choose the vendor capable of providing quality software and professional services that will help achieve the goals and objectives for the enterprise resource planning software within a reasonable budget. All proposals will be evaluated using the same criteria and possible points.

Evaluation Criteria/ Maximum Possible Points

- Related Experience and Past Performance **15 points**
- System Technology Requirements **30 points**
- Implementation and Workflow Automation Requirements **25 points**
- Cost/Budget **30 points**

Maximum points -100

Experience/Past Performance: Does the proposing party have experience working within the requested services arena; experience working with municipalities; and ability to successfully deliver/implement the scope of services? Note that partial points will be awarded after reference checks and site visits (if necessary and applicable) for finalists selected for demonstrations.

System Technology Requirements: How well does the proposal solution meet the requirements in Appendix A; will there be unmet needs; how much will custom configuration cost if the functionalities are not included in the proposal?

For proposals offering enterprise solutions and scored against other such proposals this criteria will include whether proposed software applications support the modules named; how well the proposed software integrates the permitting, work order, asset management, and service request systems; whether common tables and databases between different modules available for customers, addresses, vendors, etc., and whether the system is designed with master data management perspective. Points may be revised for finalists following the software demonstration.

Workflow Automation Requirements: Ease of use, ease of configuration, ease to train, ease to develop, modify, and maintain the Standard Operation Procedures. Points may be revised following software demonstration.

Cost/Budget: For comparative purposes, break down all costs including individual licenses for specific modules. For professional services, if rates are different between project implementers, identify them with recommended hours per individual.

3.3 Vendor Scripted Demo and Presentation, Committee Interview and/or Additional Information or Reviews

After the proposals are evaluated, the City may contact officials from references or other customers regarding the vendor, their prior work experience and their ability to successfully complete the scope of services.

After evaluation, the Selection Committee will determine whether formal presentations, scripted software demonstrations and interviews are necessary, and if so, which proposing parties may be invited to make a formal presentation or scripted demo or interview with the Selection Committee. The City cannot pay for travel during the selection process. Required demonstrations may cover product features such as:

- Installation Procedures and Security Setup
- Configuration Features and Tools
- Customization Environment, Standard API's review, Report Writers
- Third-party Applications
- Asset Setup – Facilities and Equipment – Parts Inventory
- Preventive Maintenance (SOP, EOP, Workforce Scheduling, Work Review)
- Reactive Maintenance and Customer Relationship Management (Service Requests, Work Orders, Workforce Scheduling, Work Review)
- Remote Data Collection, Entry, and Processing
- Time Data Entry and employee Setup (work hours, rates, overhead)
- Built in GIS Interface Capability
- ArcGIS Server Integration Capability (established services use)
- Web and Outlook Interface
- On-line access for customer interaction with City services
- Online look-up and status of current and historic permit activity

- Standard Reports – Assets (History), Labor related, Facility related, Work Order (Tasks), Project, Condition Assessment, Planning, Permit activity (all facets), and Code violations
- Automated notifications, status updates and correspondence to customers
- Level of Service and Cost Analysis - Labor, Equipment & Material Rollups by Asset
- Capital Improvement Project Projections (Lifecycle management)
- Other modules as used to meet the needs of this RFP

Our Selection Committee will evaluate the product demonstrations based on how well demonstrated functions meet business needs.

3.4 Vendor Questions and Participation.

Prospective vendors are prohibited from discussing the RFP and the selection process with City staff, except as provided for in this RFP. Failure to do so may be grounds for disqualification from the process. All questions regarding this RFP and the selection process should be written and addressed to Debbie Tarry, Assistant City Manager (dtarry@shorelinewa.gov). Requests for clarification must be submitted by November 29, 2012. The City of Shoreline reserves the right to revise the RFP and/or to issue addenda to the RFP. The City may require changes in the scope of services as deemed necessary, before execution of the Contract with the successful vendor.

Response to this RFP does not commit the City of Shoreline to pay any costs incurred in the preparation of the response, demonstrations, or any other activities related to this response. All responses and accompanying documentation become the property of the City of Shoreline and will not be returned. This RFP does not obligate the City of Shoreline to contract for services or products specified herein.

APPENDIX A – System Information

CMMS Software Information		Vendors Deliverables			
		YES	Alternate Development	Not Available	Clarification
1	System Technology				
1.1	Operating Platform (Server, Client, DBMS)				
1.1.1	Support Windows 2008Server (R2)				
1.1.2	Clarify the current Windows Service Pack supported				
1.1.3	How long does it generally take to qualify a new Server Service Pack				
1.1.4	Do you support all current Windows Server critical updates				
1.1.5	Can your application be run on a virtualized server or in the cloud				
1.1.6	Do you support Windows XP SP2				
1.1.7	Clarify the current Service Pack and OS supported				
1.1.8	How long does it generally take to qualify a new Desktop Service Pack				
1.1.9	Do you support all current Windows Desktop critical updates				
1.1.10	Do you support Windows 7				
1.1.11	Clarify your minimum recommendation for Server specifications				
1.1.12	Can your application run in a shared server environment				
1.1.13	Clarify the interaction between client and server (e.g. client architecture)				
1.1.14	Do components of the application run on a server (e.g. as a service)				
1.2	Security/User Profile Management				
1.2.1	Clarify how your application handles authentication of users				
1.2.2	Does the application server need to be a Windows Active Directory member				
1.2.3	Are all Active Directory user and groups visible in your application				
1.2.4	Can permissions be assigned at the Active Directory group level				
1.2.5	What domain permissions are required to administer your application				
1.2.6	What local server permissions are required to administer your application				
1.2.7	What are the minimum user permissions required for user access				
1.2.8	Can your application be administered through a remote desktop				
1.2.9	Does your application require file shares				
1.2.10	Are there any special requirements for disk or system file access				

CMMS Software Information		Vendors Deliverables			
		Yes	Alternate Development	Not Available	Clarification
1.3	Advanced Configuration/Development Tools				
1.3.1	What Application Programming Interfaces (API) are available with your application				
1.3.2	Are your API's language independent				
1.3.3	Does your application accommodate expansion of the data model				
1.3.4	Does your application support custom domains				
1.3.5	Does your application support customization of the user interface				
1.4	Integration Dependencies				
1.4.1	Does your application require installation of 3rd party applications (e.g. java)				
1.4.2	Clarify required 3rd party installations				
1.4.3	Are there user permissions necessary to install or use the 3rd party applications				
1.4.4	Does your application integrate with Microsoft Exchange 2007				
1.4.5	Does your application support Microsoft SQL Server 2005 (SP2)				
1.4.6	Does your application support Microsoft SQL Server 2008 R2				
1.4.7	Does your application require Microsoft Internet Information Server (IIS)				
1.4.8	Does your application support ArcGIS Server 10 or 10.1				
1.4.9	Does your application support ArcGIS SDE 10 or 10.1				
2	General CMMS Software Application Functions				
2.1	User Interface				
2.1.1	Is the client interface web-based				
2.1.2	Single entry of data is preferred using a dashboard style interface				
2.1.3	Is the client interface a desktop install				
2.1.4	Can the client interface be personalized by the end user (e.g. move views)				
2.1.5	Is the client a dashboard style interface				
2.1.6	Does the client have a GIS viewer component				
2.1.7	Does the user interface modify based on workflow (e.g. object combinations)				
2.1.8	Does the interface have standard Windows menu items				
2.1.9	Does the interface support standard Windows navigation (keyboard and mouse)				
2.2	Administrative Interface				
2.2.1	Clarify the administrative structure of the application				
2.2.2	Is the administrative tool an extension of the user interface (e.g. additional menus)				

CMMS Software Information		Vendors Deliverables			
		YES	Alternate Development	Not Available	Clarification
2.2.3	Ability to associate a validation rule, domain, list of values with any attribute				
2.3	Data Import/Export Capability				
2.3.1	Use a find function using multiple user-selectable search criteria				
2.3.2	Use spatial search functions to identify records based on proximity, buffer, overlay				
2.3.3	Clarify the format(s) that data can be exported to (e.g. excel, shape file)				
2.3.4	Would the application support migration of Hansen version 7.x				
2.3.5	Can the system interface with surface water, transportation, wastewater, or water distribution models				
2.4	Reporting and Analysis Capabilities (internal/external)				
2.4.1	Provide a standard set of maintenance management, inventory control, and asset management reports				
2.4.2	Ability to create custom reports from any data within the asset management system and provide access to reports based on user profile (e.g. AD permissions)				
2.4.3	Report financial information (e.g. beginning balance, ending balance, movement by fund)				
2.4.4	Report usage information by part, tool, equipment, etc.				
2.4.5	Work Order progress reports based on user, dates, status				
2.4.6	Work Order attainment reports based on user defined interval (e.g. daily, weekly, annually, etc.)				
2.4.7	Purchasing reports for invoiced requisition				
2.4.8	Purchasing reports for order requisition				
2.4.9	Purchasing reports for open account requisition				
2.4.10	Purchasing reports for vendor invoices				
2.4.11	Graphical reports on asset attributes; age, condition, rating, risk				
2.4.12	Capital investment v. rating and criticality graphs (e.g. Nessie Curves) on asset and asset group				
2.4.13	Labor Cost reports for; employee type, labor type, account code, project, asset for definable time intervals				
2.4.14	Rollup reports for; task and activity level, asset, workgroup, project				
2.4.15	Geographic reporting; cluster analysis, buffer, upstream/downstream by leveraging the functions of ArcGIS Server 10/10.1				
2.4.16	Create multiple print formats based on department layout requirements				
2.4.17	Ability to create on-screen filters and queries for data retrieval (interface menu item)				

CMMS Software Information		Vendors Deliverables			
		YES	Alternate Development	Not Available	Clarification
2.5	Notification/Alert Management and Calendar				
2.5.1	Ability to plan Work Order through workflow, where assigned staff or work units are automatically notified through City email, Blackberry to commence their assigned tasks associated with a work order				
2.5.2	Automatically notify all assigned workgroups through City email when in progress Work Orders are changed				
2.5.3	Includes 24/7 calendar for working days and hours by employee tracking availability, holidays, vacation, etc. for master scheduling				
2.5.4	Tracks injury and safety records by resource and job				
2.5.5	Has a customizable calendar for specific facilities				
2.5.6	Provides Work Order scheduling calendar by supervisor, resource, asset, tool, equipment				
2.5.7	Ability to use Work Order calendar to forecast future workforce needs and standards				
2.6	Interoperability and Data Integration				
2.6.1	Would the application support integration of an external (doc/image management)				
2.6.2	Does your application support wireless data entry and processing				
2.6.3	What minimum wireless bandwidth is recommended for field level use				
2.6.4	What mobile devices are supported by your application				
2.6.5	Does your application have a data synchronization process for disconnected edits				
2.6.6	Can data model elements be freely indexed				
2.6.7	Can ArcSDE ESRI 10. or 10.1 geodatabase data be used for the storage and editing of Asset and Land Records data				
2.6.8	Upload data (batch file) payroll (labor) hours to SunGard Public Sector Payroll system (http://www.sungard.com/publicsector/)				
2.6.9	Upload data (batch file) AP (Purchasing) to SunGard Public Sector system				
2.6.10	Support Budgetary Accounting and Reporting System (BARS) chart of account structure (City to provide SunGard Public Sector logical model)				
2.6.11	Support bar-coding for inventory, equipment, parts, labor tracking				
2.6.12	Support RFID for assets, inventory, equipment, parts tracking (GPS)				
2.6.13	Does the system store non-redundant, spatially enabled asset data?				

CMMS Software Information		Vendors Deliverables			
		YES	Alternate Development	Not Available	Clarification
2.6.14	Does the asset database provide direct use of GIS modeling, analysis and location tools (i.e. SQL Server 2008 spatial, ESRI Geodatabase, ArcGIS Server, Google or Bing Maps API)?				
3	Asset Management System Automation				
3.1	<i>Support Operations (Reactive Maintenance):</i> Work Orders are created to support a response to a complaint, service request, or event that will require City resources to install, repair, replace, or remove City owned or maintained assets. Work orders are issued for preventive maintenance, reactive maintenance, and capital projects. Work order management requires a holistic and integrated view of City resources including staff availability, skills, costs, inventories, equipment, and location. Work order estimating and scheduling is a core function of the City's asset management system and drive the flow of information for decision making. The automation of work orders through definition of tasks and assignments will drive management reporting and metric building for support operation Citywide.				
3.1.1	Support Work Order, Task, Activity hierarchy or has multi-level relationships and roll-ups with unlimited resources assignment at each level				
3.1.2	Work Orders and related tasks have definable priority values				
3.1.3	Work Orders and related tasks have definable status values (e.g. pre-planning, planning, waiting for approval, approved, current, hold, waiting parts, waiting equipment, waiting labor, work completed, closed)				
3.1.4	Work Orders and related tasks have definable category values				
3.1.5	Work Orders and related tasks have definable type values				
3.1.6	Work Orders have pre-defined tasks, resources, schedules based on type/category				
3.1.7	Unique identifier for all Work Orders				
3.1.8	Work Orders have cascade relationships to individually and group assigned tasks				
3.1.9	Work Orders has roll-up view of tasks (child) and related (other Work Order) records				
3.1.10	Work Orders linked and identifiable to GIS based features (map interface)				
3.1.11	All Work Orders critical path and task items have date/time stamps (e.g. status, close); audit trail				
3.1.12	Work Order creation not dependent on Service Requests records				
3.1.13	Work Orders can be linked to Service Requests				
3.1.14	Work Orders can be linked to other Work Orders				
3.1.15	Work Orders can be linked to Projects				
3.1.16	Tracks a group of Work Orders and tasks as a Project				

CMMS Software Information		Vendors Deliverables			
		YES	Alternate Development	Not Available	Clarification
3.1.17	Multiple Work Order or Project creation from single Service Request				
3.1.18	Allows Work Order to be created without a Service Request				
3.1.19	Allows a Work Order to be created without associating with an Asset				
3.1.20	Has the ability to create Work Orders for a contract service				
3.1.21	Allow contract services to be monitored for on-time delivery, actuals, parts, equipment, labor, and service provider SLA/contract parameters				
3.1.22	Display Work Orders or task related instructions (e.g. HazMat, special tools)				
3.1.23	Has ability to set "warning" (e.g. safety, inspection requirements) flags on Work Orders				
3.1.24	Allows re-assigning tasks left unfinished on Work Orders to new Work Orders				
3.1.25	Allow reference documents, images, video, audio to be linked to Work Orders				
3.1.26	Use GIS Interface to create/identify Work Orders based on feature (asset) location				
3.1.27	Use automation to create pre-defined Work Orders tasks and assignments				
3.1.28	Link Work Orders (task level) related to projects for account and payroll tracking				
3.1.29	Allows multiple and different users assigned per Work Order task				
3.1.30	Ability to refer to Service Requests or Work Orders at locations defined by user not specific asset location or other defined GIS point or feature				
3.1.31	Ability to automate status and priorities based on Work Order type; prioritization and assignment schema				
3.1.32	Must be able to assign a work order against any defined (e.g. part, tool, location) of an asset				
3.1.33	Provide the ability to determine if a Work Order has already been issued for the same service request				
3.1.34	Ability to create parts, material, and tool list for Work Order tasks				
3.1.35	Can view Work Orders by multiple criteria (e.g. user, group, assigner, asset, date, type, status)				
3.1.36	Ability to "flash" warnings during Work Order data entry for safety or special considerations and requirements to complete or assign the work				
3.1.37	Ability to use any past or current Work Order as a template for future work (e.g. copy work order records and change attributes or components to meet current situation)				

CMMS Software Information		Vendors Deliverables			
		YES	Alternate Development	Not Available	Clarification
3.1.38	Ability to enter staff time sheet data only once in order to meet Work Order close out and payroll requirements				
3.1.39	Ability to enter all Work Order related attributes, tasks, activities and associated work plan resources into a single entry screen or dashboard				
3.1.40	Ability to develop and assign business rules to each Work Order status				
3.1.41	Can the system provide optimal driving directions for a field worker's daily activities (Work Orders, inspections, service requests)?				
3.2	<p>Support Operations (Preventative Maintenance):</p> <p>Preventative maintenance work includes regularly scheduled and periodic maintenance as directed by equipment and asset vendors, engineering specifications, environmental or planning requirements, and inspection regulations. All preventative maintenance work orders are scheduled in advance with completion due dates and pre-defined work tasks, equipment, parts, etc.</p>				
3.2.1	Ability to automatically schedule PM work orders based on unique criteria or status of asset				
3.2.2	Ability to schedule PM work orders against assets, group of assets, or specific location				
3.2.3	PM must be able to be named and have description (template pick list)				
3.2.4	PM work orders should have parent/child relationships				
3.2.5	PM work orders should be interruptible and modifiable				
3.2.6	PM work orders should support downtime functionality (change asset status)				
3.2.7	PM work orders not completed by assigned date are clearly indicated as such (e.g. visible difference)				
3.2.8	Ability to enable PM work order frequency to start at next cycle (days, months, quarters, season, metered interval) or after the previous PM work order is closed				
3.2.9	Historic PM work orders are accessible, including notes/briefs during current PM cycle				
3.2.10	Ability to report (dashboard) view on PM backlog				

CMMS Software Information		Vendors Deliverables			
		YES	Alternate Development	Not Available	Clarification
3.3	<p><i>Project Management and Resource Estimating and Scheduling:</i></p> <p>The City wishes to support activity-based annual planning in conjunction with capital improvement and preventative maintenance. Corrective maintenance and capital renewal work is typically project based. Projects include resources from multiple organizations and require coordination among staff, management, and contractors. Additionally, the City needs to plan for capital renewal of assets over the short and long term as assets approach the end of their useful life.</p>				
3.3.1	Ability to assign any staff to Work Orders and related tasks				
3.3.2	Ability to enter estimated number of work units (accommodate 2 decimal points)				
3.3.3	Ability to provide a default estimate of costs using average unit rates and estimated number of work units				
3.3.4	Ability to estimate Work Order and task requirements by listing out required staff, equipment, parts, materials, and contracts expected to be needed to complete the work; estimates can be given an estimate status for review prior to be issued as a work order or template				
3.3.5	Ability to log notes/briefs on a work entry; automatically assigning a date/time stamp and user identification				
3.3.6	Work Order automation tool that systemically assigns status as the Work Order progresses through the stages from start to finish; filter and/or sort job by status				
3.3.7	Work Order automation tool to automatically maintain/display timeline of work order components based on the work completion date				
3.3.8	Ability to assign Work Orders to alternative resources based on availability (e.g. over allocated, vacation)				
3.3.9	Work Order automation tool that will automatically "Close" Work Orders with no outstanding (pending) tasks or other related Work Orders, Service Requests				
3.3.10	Ability to view key employee attributes to enable selection of appropriate labor				
3.3.11	Create license/certification renewal lists based on labor records (resource attributes) and time parameters				
3.3.12	Ability to create rotation/prioritization scheduling (e.g. schedule full time employees ahead of temporary, rotating crews, volunteers)				
3.3.13	Ability to constrain labor availability by hours, days, months and notify of over-allocation				

CMMS Software Information		Vendors Deliverables			
		YES	Alternate Development	Not Available	Clarification
3.3.14	Ability to create user-defined activities and associated information for work plans (e.g. accomplishment type, operational goals, sustainability parameters)				
3.3.15	Track employee assignment by labor class, budget, fund, labor distribution,				
3.3.16	Ability to display unit cost by task and activity				
3.3.17	Ability to define and track various employee attributes (e.g. hourly rates, operator certificates, professional certificates, special trainings, safety training)				
3.3.18	Ability to define and track various employee attributes (e.g. hourly rates, operator certificates, professional certificates, special trainings, safety training)				
3.4	<p><i>Asset, Inventory, and Equipment Management:</i></p> <p>An asset is defined as physical infrastructure or support component of a facility or infrastructure which has value, enables service delivery, and has an economic life spanning multiple years. Minor infrastructure such as small tools, office furniture accessories will not be considered individual assets. Minor infrastructure will be managed through operating and maintenance budgets. Additionally, assets require equipment, parts, and services that need to be inventoried and purchased the AMS should have a comprehensive inventory (purchasing and receiving) capability that will enable the City to manage its asset related work requirements</p>				
3.4.1	Asset identifier must be unique and flexible (user-definable); The City would like GIS to support in total or part of the asset inventory based on feature classes (infrastructure groups)				
3.4.2	Can Assets be associated using unlimited relationship levels (e.g. assets, components, subcomponents)				
3.4.3	Can validation rules be applied to Asset relationships (e.g. a pump cannot be the parent of a pump station)				
3.4.4	Can linear relationships be applied to Assets based on geometric network or linear referencing rules in a GIS geodatabase				
3.4.5	Ability to assign owner(s) to an asset by account (e.g. BARS account)				
3.4.6	Ability to assign a user/assignee to an asset separate from the owner by account or description				
3.4.7	Ability to move asset or group of assets from one parent to another and maintain the asset's work and cost history from its previous parent/child relationships (e.g. move a pump from one station to another)				

CMMS Software Information		Vendors Deliverables			
		YES	Alternate Development	Not Available	Clarification
3.4.8	Has an audit trail for asset ownership and assignment				
3.4.9	Has user definable and unlimited asset classifications				
3.4.10	Ability to develop asset templates based on asset class or group				
3.4.11	Ability to create unlimited user-definable attributes for an asset or class of assets (1:1 relationship)				
3.4.12	Asset attributes should have user-definable valid list of values, domains, or pick lists				
3.4.13	Ability to record multiple vendor, contractor, and/or supplier details per asset				
3.4.14	All asset attributes should be accessible to data, data queries				
3.4.15	Ability to identify asset specific safety considerations, licenses, policies				
3.4.16	Ability to create user-definable codes for an asset, asset class, or location (1:M relationship); add information on codes (e.g. cause, consequence)				
3.4.17	Ability to validate codes based on work group				
3.4.18	Ability to track information related to failure, cause, consequence of failure, criticality, current condition, warranty, installation, replacement, and expected useful life				
3.4.19	Ability to track downtime/availability metrics (e.g. status based)				
3.4.20	Ability to assign asset a status: active, inactive, retired, replaced, pending				
3.4.21	Ability to develop business rules based on asset status; change asset status based on work order task and status or inability to create work order for inactive asset				
3.4.22	Ability to create asset specific maintenance schedules or flags based on routes, condition assessment, code values, or criticality				
3.4.23	Ability to identify items that have dropped below minimum quantities and issue reorder reports				
3.4.24	Ability to issue and return multiple items, to and from work orders, tasks, equipment, locations				
3.4.25	Track store memos, remarks, notes on transactions				
3.4.26	Ability to receive, issue, and adjust via barcode				
3.4.27	Ability to capture last cost, moving average cost by part				
3.4.28	Ability to transfer stock from one fund inventory to another				
3.4.29	Ability to display year-to-date transactions at various levels within the inventory control				
3.4.30	Ability to track items in multiple storerooms				
3.4.31	Ability to tie inventories to different funds and accounts				
3.4.32	Have an audit trail for each transaction (e.g. user, work order, task, asset, invoice number, purchase order, date)				

CMMS Software Information		Vendors Deliverables			
		YES	Alternate Development	Not Available	Clarification
3.4.33	Ability to adjust and track inventory balances, cycle counts, and stock counts				
3.4.34	Store and update vendor and pricing information				
3.4.35	Create user definable part numbers				
3.4.36	Identify minimum and maximum quantities by location, bin, fund				
3.4.37	Define stock types (e.g. stocked, non-stocked, special order)				
3.4.38	Identify economic breaks for order quantities				
3.4.39	Designate items as spare parts for equipment and tools				
3.4.40	Associate manufacturer/vendor information for each part				
3.4.41	Track on-hand quantities by location, bin, unit				
3.4.42	Receive inventory items into multiple inventory storerooms				
3.4.43	Receive non-inventory materials and outside services to work orders, tasks, assets, and accounts				
3.4.44	Track purchase orders by approval, receipt status, vendor, and user				
3.4.45	Ability to create purchase order approval level based on user (e.g. supervisor)				
3.4.46	Ability to create new inventory item within the purchase order workflow				
3.4.47	Provide fields for vendor invoice number, quote number, freight terms				
3.4.48	Provide fields for requisition number, Finance PO number				
3.4.49	Provide fields for BARS accounts, equipment number, work order number and task				
3.4.50	Enable validation (pulled list of values) for item, account, work order, purchase order numbers during data entry process				
3.4.51	Enable validation (domains) for PO types, terms, tax codes, unit measure, locations				
3.4.52	Allow receipts to be reversed, partial receipt, and price corrections				
3.5	<p>Condition Assessment/Asset Rating (Risk Assessment):</p> <p>The City needs a centralized information source to track the condition of major infrastructure and facilities to optimize preventative maintenance workflows and reduce the risk of failure. Assessing the probability and impact severity of single asset failure on City services and stakeholders provides a quantifiable measurement of risk versus assumed risk. The AMS should also support the impact on other related assets, AMSs, and services based on various failure scenarios.</p>				
3.5.1	Use GIS to review condition and asset information (history)				

CMMS Software Information		Vendors Deliverables			
		YES	Alternate Development	Not Available	Clarification
3.5.2	Ability to identify crucial assets that must not be allowed to fail (e.g. pressurized mains) and assign a risk rating to individual or groups of assets				
3.5.3	Ability to define multiple risk elements (domain) to associate with each asset				
3.5.4	Ability to assign notes/briefs on risk elements for each asset				
3.5.5	Has risk assessment guides and definitions to help users identify and use risk elements appropriately				
3.5.6	Has condition rating guides and definitions to help users identify and use rating and assessment values correctly and uniformly				
3.5.7	Ability to define relationships (quantifiable) between risk and condition ratings and other asset attributes as related to service lifecycle				
3.5.8	Ability to track measurement data and history associated with an asset and compare with user defined warnings and action limits for an assortment of attributes (e.g. pump run times, burn hours, tire wear measurements)				
3.5.9	Ability to trigger Work Order creation when a user defined measurement threshold is reached (e.g. inspection after run time is reached)				
3.5.10	Ability to assign and modify a condition rating to each asset				
3.5.11	Ability to develop unique condition assessment functions based on templates for use with specific types of assets which may monitor various assessment attributes to trigger actions or notifications				
3.5.12	Ability to assign notes/briefs on condition elements for each asset.				
3.6	<p>Asset Lifecycle Management:</p> <p>The City needs to track asset maintenance history, assess condition, and develop deterioration curves to predict future conditions and capital improvement projections/planning to optimize capital and operating expenditures. Additionally, identification of problems before failure will ultimately reduce reactive maintenance costs. When planning for asset renewal, different rehabilitation and renewal options need to be considered to ensure selection of the option with the highest benefits to cost and life expectancy.</p>				
3.6.1	Assets should have status or like function that accommodates expansion/ contraction of infrastructure or retirement, removal or replacement from inventory				
3.6.2	Ability to predict lifecycle costs based on failure (excluding depreciation value)				

CMMS Software Information		Vendors Deliverables			
		YES	Alternate Development	Not Available	Clarification
3.6.3	Ability to predict lifecycle costs based on proactive rehabilitation and/or replacement				
3.6.4	Ability to predict lifecycle costs based straight line depreciation				
3.6.5	Ability to create, reference, modify formulas to describe the deterioration curve for each asset				
3.6.6	Ability to assign notes/briefs for deterioration formula on each asset				
3.6.7	Ability to graph the deterioration curve for each asset (e.g. water main)				
3.6.8	Ability to graph the roll-up deterioration curves for each asset group (e.g. all water mains)				
3.6.9	Ability to calculate predicted remaining life of an asset based on counting down from construction or in-service dates				
3.6.10	Ability to graph deterioration curves across any and all selected asset groups				
3.6.11	Ability to import data on options for alternative renewal technologies (e.g. open trench replacement vs. trenchless)				
3.6.12	Ability to compare lifecycle costs for alternative renewal technologies				
3.6.13	Ability to identify opportunities for optimized renewal options amongst different asset types through geographic coincidence (e.g. sewer and water trench work in conjunction with road replacement or other road work)				
3.6.14	Ability to create and define input (asset renewal) parameters to a replacement analysis including: the time period for the analysis, future costs escalation, initial replacement fund balance, earnings rate, borrowing rate, and revenue sources.				
3.6.15	Ability to create, define, and compile output (budget) parameters such as, escalation rates, the timing of bond issues, and cash flows from surcharges for other revenue sources, for development of graphical diagrams, often referred to as Nessie Curves.				
3.6.16	Ability to predict and plot individual asset "Nessie Curves"				
3.6.17	Ability to change financial parameters such as discount rate				
3.6.18	Ability to model different scenarios for asset renewal				
3.6.19	Ability to compare asset renewal costs against budget				
3.6.20	Ability to model budget dependent or renewal dependent scenarios				
3.6.21	Ability to calculate net present value of future renewal project requirements				
3.6.22	Ability to track the backlog of capital renewal work				

CMMS Software Information		Vendors Deliverables			
		YES	Alternate Development	Not Available	Clarification
3.6.23	Ability to define parameters and criteria to calculate priorities for renewal projects				
3.6.24	Ability to constrain available renewal funding by year and re-generate recommended renewal projects with funding				
3.6.25	Prepare timeline for planned renewal projects based on scenario outputs				
3.7	<p>Financial Management (Asset and Work Costs):</p> <p>The AMS will be required to maintain a direct relationship between an asset and all associated cost transactions that will enable detailed activity based costing as part of the City's capital depreciation and improvement process. Maintaining detailed activity cost transactions will also support summary reporting and data transfer to the City's financial record management AMS (SunGard Public Sector) for fiscal and budgetary reporting. The AMS is expected to utilize online tools for activity costs and budget management, as well as reporting functions that create, maintain, and compare monthly/annual budgets in comparison to actual costs (detailed transactions).</p>				
3.7.1	All asset cost related data must be accounted for through the City's SunGard Public Sector GMBA module and other modules (e.g. purchasing, payroll, AP chart of accounts, vendor information)				
3.7.2	Ability to define and track an unlimited number of user-definable asset cost attributes				
3.7.3	Ability to track historical purchase and install values				
3.7.4	Ability to track capital additions				
3.7.5	Ability to track individual maintenance events (work order history; value add)				
3.7.6	Ability to track disposal/salvage value				
3.7.7	Ability to track repair parts				
3.7.8	Ability to track cost of replacement				
3.7.9	Ability to track depreciated value (based on acquisition value)				
3.7.10	Ability to track warranty parameters (contract details)				
3.7.11	Ability to create unique vendors so that purchase orders can be associated with vendors or work orders				
3.7.12	Ability to create specific user-defined information on each vendor (e.g. contact information, work hours)				
3.7.13	Ability to store and track vendor number, customer number or other identification numbers for ordering, work, or information access				
3.7.14	Ability to assign and track costs against a work order for all labor costs based on resource usage, individual employee rates including overtime, overhead, and premiums as defined in rate tables for each employee				

CMMS Software Information		Vendors Deliverables			
		YES	Alternate Development	Not Available	Clarification
3.7.15	Ability to assign and track costs against a work order for stock parts and materials that are normal stock inventory				
3.7.16	Ability to assign and track costs against a work order for all non-stock parts and materials (special order) including notes/briefs on purchased items use.				
3.7.17	Ability to assign and track costs against a work order for all bulk materials based on material usage reported for the task (e.g. asphalt, salt, gravel)				
3.7.18	Ability to assign and track costs against a work order for outside contracted services based on invoice entries				
3.7.19	Ability to assign and track costs against a work order for equipment use by tracking equipment usage through work order tasks and calculate cost based on equipment rate tables; equipment rates based on hours, task, tool class				
3.7.20	Ability to assign and track costs against a work order for overhead and/or billing factors for out-of-class rates or other labor distribution factors using percentage or flat rate changes				
3.7.21	Ability to assign and track costs against a work order for multiple tax rates				
3.7.22	Ability to indicate a work order as reimbursable or billable (e.g. to other jurisdiction, homeowner, company)				
3.7.23	Ability to define labor classes and assign to employees, workgroups, crews, rotations				
3.8	<i>Fleet Maintenance and Facilities Management:</i>				
3.8.1	Ability to track multiple meter information on assets; including AVL and related sensor data feeds				
3.8.2	Ability to track and report on all asset insurance related data (insured value, deductible, provider, premium)				
3.8.3	Ability to leverage ArcGIS Server 10/10.1 or SQL Server 2008 R2 to assign multiple location attribute to an asset (e.g. situs address, x-y-z)				
3.8.4	Ability to use a predefined set of reason codes for fleet maintenance				
3.8.5	Ability to track and report fuel consumption data for each vehicle				
3.8.6	Ability to track claims against a vehicle (e.g. accidents, windows)				
3.8.7	Ability to record third-party repairs				
3.8.8	Ability to track additional equipment or features added to vehicles				

CMMS Software Information		Vendors Deliverables			
		YES	Alternate Development	Not Available	Clarification
3.8.9	Ability to track maintenance on equipment that is associated with vehicles (e.g. tanks on fire trucks)				
3.8.10	Ability to record vehicle emissions for each vehicle				
3.8.11	Ability to provide vehicle maintenance scheduling				
3.8.12	Ability to assign multiple mechanics at different charge-out rates on one work order				
If you will be responding to the optional section Appendix A - Optional, please skip forward to that section now. If not, please complete Section 6 below.					
6	Professional Service and Application Support				
6.1	Implementation Services				
6.1.1	Does your company have a professional services organization				
6.1.2	Does your company partner with third party service providers for implementation services (if so, who are your certified providers)				
6.1.3	Describe the services approach you take to implementation (e.g. traditional project management, mentoring, off-site/remote)				
6.1.4	Describe the phases of work in a typical implementation project				
6.1.5	Describe the project management approach you take to organizing and managing your implementation services				
6.1.6	How do you report on project status and progress				
6.1.7	What types of training does you company offer (e.g. onsite, classroom, online)				
6.2	Technical Support				
6.2.1	Does your company offer multiple support plans				
6.2.2	Clarify the levels of support plans				
6.2.3	Do you offer support via email, web, and phone				
6.2.4	What are your hours of support				
6.2.5	Do you automatically notify or provide links to service packs, updates, releases				
6.2.6	Provide list and description of last 12 month release, update and SP schedule				
6.3	Online Knowledge Base				
6.3.1	Do you have a searchable online knowledge base				
6.3.2	Is your knowledge base accessible to anyone				
6.3.3	Do you monitor the knowledge base; how often				
6.3.4	Does you development staff contribute to the knowledge base				
6.4	Developers Network				
6.4.1	Do you have a developers network site				
6.4.2	Who can access the developers network				
6.4.3	Do you test the code published to the developers network				
6.4.4	Do you monitor the developers network; how often				

CMMS Software Information		<i>Vendors Deliverables</i>			
		<i>YES</i>	<i>Alternate Development</i>	<i>Not Available</i>	<i>Clarification</i>
6.4.5	Does you development staff contribute to the developers network				
6.5	Corporate Outlook				
6.5.1	How long has the company been in this market				
6.5.2	Is the company profitable				
6.5.3	Do you have an annual users conference				

Appendix A – Optional

Enterprise Software Information		Vendors Deliverables			
		YES	Alternate Development	Not Available	Clarification
4.1	Service Request Management (CRM): The City has a constituent relationship management application that will support service request creation, notification, and integration with our work order management system. The ideal solution provides the public with an interactive experience that will guide them through qualifying and requesting the correct service to fulfill their needs.				
4.1.1	Service Request form/interface for quick entry of subset Work Order fields				
4.1.2	Provide intranet and Internet forms to initiate and create Service Requests				
4.1.3	Ability to create Service Request queues based on Service Request type				
4.1.4	Service request workflow automation that enables stepwise development for qualification and identification of correct City service selection				
4.1.5	Integrate IVR (e.g. Teleworks) for automated SR creation and queue assignment				
4.1.6	Use GIS Interface to create/identify service request (SR) for asset or location (x, y)				
4.1.7	Use mobile/web application (i.e. SeeClickFix) as Citizen interface for identifying SR locations				
4.1.8	Search through the customer master file to locate a calling customer or allow the City to add to the customer base with the incoming call. Search parameters are customer name, customer address or customer parcel number.				
4.1.9	Provide for management of citizen contacts: requests for service, suggestions, complaints by location and citizen name, type of complaint, phone, address, and prioritization.				
4.1.10	To avoid multiple entries of the same incident, the system must allow multiple reporting customers to be tied to the same incident. Thus, when the incident is corrected, all reporting parties can be notified.				
4.1.11	Provide field to insert digital images (e.g., plans, photos, letters, and documents). Tie to customer name, parcel no., address, and/or project number. Ability to open within program or interface with another graphic program (e.g., ArcGIS, Auto Cad, Photo Shop). Allow capability to attach images to other modules with a user friendly process for attachment.				
4.1.12	Queuing reviews - When the program is started in the a.m., it should notify users of incidents that need reviewing using the next review date.				
4.1.13	Has the ability to generate post-incident survey for customer satisfaction gathering				

Enterprise Software Information		Vendors Deliverables			
		YES	Alternate Development	Not Available	Clarification
4.1.14	Online interfaces – Receive new requests as well as provide status of previous requests via web portal				
5.1	Permitting Module				
5.1.1	PRE-APPLICATION CONSULTATION Ability to track all pre-application meetings by customer name, parcel no., address. Provide means to convert into permit number. Assign fees as applicable.				
5.1.2	DIGITAL IMAGES AND DOCUMENT INPUT Provide field to insert digital images and documents (e.g., plans, photos, documents). Tie to customer name, parcel no., address, and/or project number. Ability to open within program or interface with another software program (e.g., ArcView, Auto Cad, MS Office, Photo Shop). Provide method to add multiple images or documents at once.				
5.1.3	APPLICATION DATA TRACKING Capture basic application data and track review status. Interface with Finance and Geo-base systems.				
5.1.4	ASSIGN PERMIT NUMBER Ability to assign a unique permit number to each project.				
5.1.5	PERMIT TYPES Select permit type from menu and determine requirements from at least 150 unique categories with different types of information, activities, dependencies, inspections, fee determination, rating and reporting needs.				
5.1.6	CUSTOMIZABLE DATA ENTRY SCREENS Provide ability to customize screens or templates for data entry for each permit application type. Provide ability to hide or turn off unneeded fields when not needed. Ability to create internal review checklist for staff.				
5.1.7	BULK ENTRY OF MULTIPLE APPLICATIONS Allow multiple similar permit applications to be entered simultaneously				
5.1.8	AUTOMATIC LABEL PRINTING Provide automatic printing of required labels for files based on application type				
5.1.9	FREQUENTLY USED PHRASES Provide menu or other means (such as auto-populating suggested text) for selecting frequently used phrases for project descriptions and permit conditions for inclusion on permit cards				
5.1.10	CODE REFERENCE CITATIONS Ability to have a menu of International Code, Municipal Code, and Engineering Design Manual citations to select and insert into notes and correspondence.				

Enterprise Software Information		Vendors Deliverables			
		YES	Alternate Development	Not Available	Clarification
5.1.11	FEE CALCULATION/COLLECTION Provide for calculation of standard fee amounts using user-specified formulas or tables. Allow for fees unique to specific permit type categories. Track fee collections, receivables, and balance of fees due. Generate payment receipts, invoices. Fee schedule and individual fee amounts must be modifiable by users as needed. Provide running total of fee estimate without having to progress application to next stage.				
5.1.12	CONTRACTOR AND BUSINESS LICENSE SUPPORT Provide automated means for verifying active contractor registration and business licenses. Allow current contractor information to be automatically inserted during application data entry.				
5.1.13	CUSTOMER/CONTACT DATABASE Provide automatic cross-referencing while entering customer and/or contact information to reduce or eliminate duplicate entries				
5.1.14	REVIEW PROCESS Ability to track each review element status and user assigned to that element.				
5.1.15	PSUEDO PARCEL NUMBER Permit assignment of pseudo or temporary parcel number in the event actual parcel numbers have not been assigned (e.g., WA State plane coordinates, milepost reference, street or parcel number).				
5.1.16	SEARCH FEATURE Provide integrated search feature with multiple options for search criteria across all modules				
5.1.17	RIGHT-OF-WAY ADDRESSING Ability to assign location identification to right-of-way projects in the tracking system without tying the permit to the owner of the adjacent parcel and putting their name on the permit card.				
5.1.18	TEXT NARRATIVE SUPPORT Ability for users to manually input narrative in their project and identify each user by I.D. Allow unlimited text length. Provide means to cut and paste between projects and/or modules.				
5.1.19	CORRESPONDENCE SUPPORT Provide customized templates for correspondence and general customer contact, linking to specific permit number. Provide ability to e-mail that information to the customer and automatically generate a log note for documentation. Provide templates for generic correspondence and save into project file.				

Enterprise Software Information		Vendors Deliverables			
		YES	Alternate Development	Not Available	Clarification
5.1.20	CUSTOMER NOTIFICATION				
	Provide automatic notification to customer by e-mail or text to confirm receipt of materials submitted. Provide automatic notification to customer when project manager is assigned and when permit is ready to be picked up (including fee balance).				
5.1.21	TIMELINE TRACKING/MANAGEMENT FUNCTION				
	Ability to track basic permit application data, to ensure that state law timelines are not exceeded. Provide a user-determined preliminary warning system. Ability for user to assign completeness date and to change status from active to on-hold. System to track active time and on-hold time separately.				
5.1.22	PROJECT MANAGEMENT				
	Provide field indicating current workload for individual user and status of specific project assignments of that user. Notify users of tasks assigned to them by e-mail or some other direct means. Ability to assign or automatically assign due dates based on task or permit type. System would allow project manager to assign specific tasks to specific team members and track status. Provide detailed status inquiry capability tied to timeline tracking function.				
5.1.23	APPROVAL/DENIAL DECISION				
	Capability to accurately track approval/denial decision timeline.				
5.1.24	OTHER JURISDICTION APPROVALS				
	Include field to check off completion of specific jurisdiction approvals required before permit issuance or during inspection.				
5.1.25	PERMIT ISSUANCE				
	Prints permit card with all necessary information and applicable expiration date. Allows user to attach conditions to permit. Ensure that all requirements are met before issuance.				
5.1.26	LABOR COST TRACKING				
	Ability to record internal and external labor costs to permit project. May include travel time, actual inspection time. Allows user to assign time to each review/task element.				
5.1.27	MULTI-PARCEL PROJECT TRACKING				
	Allow users to track projects taking place on multiple parcels or on right-of-way.				
5.1.28	MULTI-PERMIT TRACKING				
	Allow users to identify all permits related to particular project. Tie in to parcel no., customer name and/or address. Track status. Allow projects to be tied together in parent/child relationship with conditions on sequence of issuance and/or final.				

Enterprise Software Information		Vendors Deliverables			
		YES	Alternate Development	Not Available	Clarification
5.1.29	BOND/OTHER SECURITIES AND MAINTENANCE AGREEMENT TRACKING/MANAGEMENT				
	Track type of security amount and/or agreement, requirements and status.				
5.1.30	GENERATE MAILING LABELS				
	Using the data from the GIS system, compile data to generate mailing labels within specified distance of subject property, user defined graphic, or the selected features of a geodatabase layer.				
5.1.31	INSPECTION TYPES				
	Allow customization of inspection type names, date fields, and status codes. Allow for automatic and customizable loading of inspections for different permit types. Allow custom printing of required inspections on the back of the permit card.				
5.1.32	INSPECTION REQUESTS				
	Automatic touchtone, voice, on-line, and e-mail system for receiving inspection request data defined by user.				
5.1.33	INSPECTION SCHEDULING				
	Assign inspection to personnel based on geographic location using user specified criteria (i.e. applicant name, address, permit number, etc).				
5.1.34	INSPECTION PROCESSING				
	Input narrative information such as: type of inspection, date, status and comments. Record inspection results.				
5.1.35	INSPECTION LOGGING				
	Allow logging of inspection results and narrative fields.				
5.1.36	COORDINATION WITH OTHER JURISDICTION INSPECTIONS				
	Include field to check off proof of completion of other jurisdiction inspections.				
5.1.37	MOBILE DATA INPUT				
	Ability to start new file number in the field, generate permit number, stop work orders, etc.				
5.1.38	ONSITE INSPECTION SUPPORT				
	Onsite inspection support via mobile computing or other smart devices. Upload/download either by internet, wireless transmission or other mobile interface. Provide text entry by voice-to-text technology. Provide real-time updates to the system from the field.				
5.1.39	INSPECTION RESULTS REPORT PRINTING				
	Allows mobile printing capability of inspection results in the field. Provide menu of commonly used phrases or Code references that can be selected as needed.				

Enterprise Software Information		Vendors Deliverables			
		YES	Alternate Development	Not Available	Clarification
5.1.40	INSPECTION RESULT NOTIFICATION				
	Provide automatic notification of inspection results to customer by e-mail or text. Include ability to attach correction list when applicable.				
5.1.41	ENFORCEMENT ACTIONS				
	Ability to log enforcement actions, generate notification, and initiate project files.				
5.1.42	TEMPORARY OR FINAL CERTIFICATE OF OCCUPANCY				
	Ability to generate certificate of occupancy with all required information and temporary certificate of occupancy with applicable conditions. Tie to bond/maintenance agreement tracking and other active permits.				
5.1.43	EXPIRATION TRACKING				
	Track expiration dates for permits, temporary certificates of occupancy and provide notification to original applicant and staff using user-defined threshold. Provide for manual and automatic extension of permit expiration date based on date of last inspection or code enforcement deadlines				
5.1.44	PERMIT RENEWALS				
	Track projects and generate correspondence to applicants and property owner for renewal letters of permits about to expire. Leave audit trail.				
5.1.45	CUSTOM REPORTING				
	Provide ability to generate custom reports based on such items as project status, revenue, valuation, types of project, square footage, numbers of applications, average turn-around times, assigned staff, etc. Include ability to use custom fields for report data sources.				
5.1.46	DASHBOARD				
	Provide customizable means of displaying visual information of permit activity, revenue, review activity, inspections, assigned tasks, and other pertinent information for reviewers, inspectors, supervisors, and City Manager's Office.				
5.1.47	BUILDING VALUATION				
	Provide ability to automatically calculate building valuations for the purpose of assigning fees. System must be capable of being updated with square footage valuations for a multitude of building uses and construction types.				
5.1.48	DATA CONVERSION				
	Provide a means to allow the import of data from previous permit systems used by the City so all permit history can be viewed, searched, and managed within one system.				

Enterprise Software Information		Vendors Deliverables			
		YES	Alternate Development	Not Available	Clarification
5.1.49	ON-LINE RESOURCES				
	Provide ability for customers to apply for all permits online, pay fees, and print permit cards. Provide ability for customers to check status of reviews and inspections on-line. Provide ability for customers to pay fees on-line for all permit applications.				
5.1.50	ELECTRONIC PLAN REVIEW				
	Provide means for applicants to submit plans on-line. Provide complete suite of electronic plan review tools to facilitate paper-free processing of plans. Means shall be provided to affix City approval stamps and notes to plans. Provide capability to plot plans on paper at correct scale when necessary.				
5.1.51	INTEGRATION – FINANCE SYSTEM				
	Ability to link financial transactions to City Finance system. Provide G/L postings using City G/L numbers.				
5.1.52	INTEGRATION – CASH RECEIPTS-RECEIPT NUMBER				
	Cash receipts should designate unique receipt number, validate permit number, customer name and payee information.				
5.1.53	INTEGRATION – CASH RECEIPTS-FEES				
	Cash receipts of fees paid should have G/L interface, validate permit number, customer name, and payee information. Have ability to show balance due on the receipt.				
5.1.54	INTEGRATION – PLANNING				
	Provide automatic linkage between building, planning, and code enforcement projects. Provide ability to access planning information from the Permitting Module.				
5.1.55	INTEGRATION – CASH RECEIPTS-CREDIT				
	Cash receipts should have the ability to apply credit transactions to permit, validate permit number, customer name, and payee information.				
5.1.56	INTEGRATION – PARCEL MANAGEMENT				
	Parcel Management should provide address, parcel, owner, zoning information to the Building Permit system.				
5.1.57	INTEGRATION – PERSON/ENTITY				
	The contractor's name, address, and telephone information should be retrieved from the Person/Entity database.				
5.1.58	INTEGRATION – ESRI's ARC VIEW-EXPORT				
	User should have the ability to select Building Permit data and display that data on a map. Data captured within this system should be displayed in ArcMap or as a Web Base map service (tabular or map based). Data available must include permit, application, and inspection locations by date range.				

Enterprise Software Information		Vendors Deliverables			
		YES	Alternate Development	Not Available	Clarification
5.1.59	INTEGRATION – ESRI's ARC VIEW-IMPORT				
	User should have the ability to select parcel on the map and display permit data. Parcel data shall have a direct link to the GIS mapping system. Ability to populate property research fields in application with data from GIS (such as presence of critical areas, easements, etc.)				
5.1.60	INTEGRATION-CODE ENFORCEMENT				
	Ability to access code enforcement information from Building Permits Module. Allow code enforcement module and permits module to automatically send reminders for assigned deadlines.				
5.1.61	ANNUAL FIRE INSPECTION SUPPORT				
	Provide a system for the tracking of annual fire inspections.				
5.2	Planning Module				
5.2.1	PRE-APPLICATION CONSULTATION				
	Ability to track all pre-application meetings by customer name, parcel no., address. Provide means to convert into permit number. Assign fees as applicable.				
5.2.2	COMPREHENSIVE PLAN DESIGNATIONS				
	Provide for tracking of comprehensive plan designations, standards, and restrictions. Allow for integration with GIS data so editing of this data can be synced and editing both data sets will not be necessary.				
5.2.3	ZONING INFORMATION				
	Provide for tracking of zoning designations, standards, and restrictions. Provide for ability to track multiple uses per parcel and multiple zoning designations per parcel. Effective and expiration dates of zoning designations should be tracked when new zoning designations are applied. Allow for integration with GIS data so editing of this data can be synced and editing both data sets will not be necessary.				
5.2.4	PERMIT TYPES				
	Select permit type from menu and determine requirements from at least 150 unique categories with different types of information, activities, dependencies, inspections, fee determination, rating and reporting needs.				
5.2.5	ASSIGN PERMIT NUMBER				
	Ability to assign a unique permit number to each project.				

Enterprise Software Information		Vendors Deliverables			
		YES	Alternate Development	Not Available	Clarification
5.2.6	DIGITAL IMAGES AND DOCUMENT INPUT				
	Provide field to insert digital images and documents (e.g., plans, photos, documents). Tie to customer name, parcel no., address, and/or project number. Ability to open within program or interface with another software program (e.g., ArcMap 10/10.1, Auto Cad 2012, MS Office, Photo Shop). Provide method to add multiple images or documents at once.				
5.2.7	BULK ENTRY OF MULTIPLE APPLICATIONS				
	Allow multiple similar permit applications to be entered simultaneously				
5.2.8	PSUEDO PARCEL NUMBER				
	Permit assignment of pseudo or temporary parcel number in the event actual parcel numbers have not been assigned.				
5.2.9	RIGHT-OF-WAY ADDRESSING				
	Ability to assign location identification to right-of-way projects in the tracking system without tying the permit to the owner of the adjacent parcel and putting their name on the permit card.				
5.2.10	CUSTOMIZABLE DATA ENTRY SCREENS				
	Provide ability to customize screens or templates for data entry for each permit application type. Provide ability to hide or turn off unneeded fields when not needed. Ability to create internal review checklist for staff.				
5.2.11	BULK ENTRY OF MULTIPLE APPLICATIONS				
	Allow multiple similar permit applications to be entered simultaneously				
5.2.12	AUTOMATIC LABEL PRINTING				
	Provide automatic printing of required labels for files based on application type				
5.2.13	FREQUENTLY USED PHRASES				
	Provide menu or other means (such as auto-populating suggested text) for selecting frequently used phrases for project descriptions and permit conditions for inclusion on permit cards				
5.2.14	CONTRACTOR AND BUSINESS LICENSE SUPPORT				
	Provide automated means for verifying active contractor registration and business licenses. Allow current contractor information to be automatically inserted during application data entry.				

Enterprise Software Information		Vendors Deliverables			
		YES	Alternate Development	Not Available	Clarification
5.2.15	CUSTOMER/CONTACT DATABASE				
	Provide automatic cross-referencing while entering customer and/or contact information to reduce or eliminate duplicate entries				
5.2.16	APPLICATION DATA TRACKING				
	Capture basic application data and track review status. Interface with Finance and Geo-base systems.				
5.2.17	FEE CALCULATION/COLLECTION				
	Provide for calculation of standard fee amounts using user-specified formulas or tables. Allow for fees unique to specific permit type categories. Track fee collections, receivables, and balance of fees due. Generate payment receipts, invoices. Fee schedule and individual fee amounts must be modifiable by users as needed. Provide running total of fee estimate without having to progress application to next stage.				
5.2.18	PLANNING APPLICATION REVIEW				
	Tracks application review process and status. Maintains historical application information.				
5.2.19	REVIEW PROCESS				
	Ability to track each review element status and user assigned to that element.				
5.2.20	CODE REFERENCE CITATIONS				
	Ability to have a menu of International Code, Municipal Code, and Engineering Design Manual citations to select and insert into notes and correspondence.				
5.2.21	TEXT NARRATIVE SUPPORT				
	Ability for users to manually input narrative in their project and identify each user by I.D. Allow unlimited text length. Provide means to cut and paste between projects and/or modules.				
5.2.22	CORRESPONDENCE SUPPORT				
	Provide customized templates for correspondence and general customer contact, linking to specific permit number. Provide ability to e-mail that information to the customer and automatically generate a log note for documentation. Provide templates for generic correspondence and save into project file.				
5.2.23	CUSTOMER NOTIFICATION				
	Provide automatic notification to customer by e-mail or text to confirm receipt of materials submitted. Provide automatic notification to customer when project manager is assigned and when permit is ready to be picked up (including fee balance).				

Enterprise Software Information		Vendors Deliverables			
		YES	Alternate Development	Not Available	Clarification
5.2.24	TIMELINE TRACKING/MANAGEMENT FUNCTION				
	Ability to track basic permit application data, to ensure that state law timelines are not exceeded. Provide a user-determined preliminary warning system. Ability for user to assign completeness date and to change status from active to on-hold. System to track active time and on-hold time separately.				
5.2.25	PROJECT MANAGEMENT				
	Provide field indicating current workload for individual user and status of specific project assignments of that user. Notify users of tasks assigned to them by e-mail or some other direct means. Ability to assign or automatically assign due dates based on task or permit type. System would allow project manager to assign specific tasks to specific team members and track status. Provide detailed status inquiry capability tied to timeline tracking function.				
5.2.26	APPROVAL/DENIAL DECISION				
	Capability to accurately track approval/denial decision timeline.				
5.2.27	APPEAL PROCESSING/TRACKING				
	Capability to accurately track appeal process timeline and scheduling.				
5.2.28	OTHER JURISDICTION APPROVALS				
	Include field to check off completion of specific jurisdiction approvals required before permit issuance or during inspection.				
5.2.29	LABOR COST TRACKING				
	Ability to record internal and external labor costs to permit project. May include travel time, actual inspection time. Allows user to assign time to each review/task element.				
5.2.30	RESTRICTIONS/SPECIAL CONDITIONS/COMMENTS				
	Note any restrictions or special conditions established by reviewing departments as a prerequisite for permit issuance.				
5.2.31	PERMIT ISSUANCE				
	Prints permit card with all necessary information and applicable expiration date. Allows user to attach conditions to permit. Ensure that all requirements are met before issuance.				
5.2.32	NOTICE OF LAND USE ACTION				
	Provide for automatic mail-out and e-mail notice to selected parcel owners and project contacts regarding land use actions within a user-defined radius.				

Enterprise Software Information		Vendors Deliverables			
		YES	Alternate Development	Not Available	Clarification
5.2.33	GENERATE MAILING LABELS				
	Using the data from the GIS system, compile data to generate mailing labels within specified distance of subject property.				
5.2.34	MULTI-PARCEL PROJECT TRACKING				
	Allow users to track projects taking place on multiple parcels.				
5.2.35	MULTI-PERMIT TRACKING				
	Allow users to identify all permits related to particular project. Tie in to parcel no., customer name and/or address. Track status. Allow projects to be tied together in parent/child relationship with conditions on sequence of issuance and/or final.				
5.2.36	BOND/OTHER SECURITIES AND MAINTENANCE AGREEMENT TRACKING/MANAGEMENT				
	Track type of security amount and/or agreement, requirements and status.				
5.2.37	INSPECTION TYPES				
	Allow customization of inspection type names, date fields, and status codes. Allow for automatic and customizable loading of inspections for different permit types. Allow custom printing of required inspections on the back of the permit card.				
5.2.38	INSPECTION REQUESTS				
	Automatic touchtone, voice, on-line, and e-mail system for receiving inspection request data defined by user.				
5.2.39	INSPECTION SCHEDULING				
	Assign inspection to personnel based on geographic location using user specified criteria (i.e. applicant name, address, permit number, etc).				
5.2.40	INSPECTION LOGGING				
	Allow logging of inspection results and narrative fields.				
5.2.41	INSPECTION PROCESSING				
	Input narrative information such as, type of inspection, date, status and comments. Record inspection results.				
5.2.42	COORDINATION WITH OTHER JURISDICTION INSPECTIONS				
	Include field to check off proof of completion of other jurisdiction inspections.				
5.2.43	MOBILE DATA INPUT				
	Ability to start new file number in the field, generate permit number, stop work orders, etc.				

Enterprise Software Information		Vendors Deliverables			
		YES	Alternate Development	Not Available	Clarification
5.2.44	ONSITE INSPECTION SUPPORT				
	Onsite inspection support via mobile computing or other smart devices. Upload/download either by internet, wireless transmission or other mobile interface. Provide text entry by voice-to-text technology. Provide real-time updates to the system from the field.				
5.2.45	INSPECTION RESULTS REPORT PRINTING				
	Allows mobile printing capability of inspection results in the field. Provide menu of commonly used phrases or Code references that can be selected as needed.				
5.2.46	INSPECTION RESULT NOTIFICATION				
	Provide automatic notification of inspection results to customer by e-mail or text. Include ability to attach correction list when applicable.				
5.2.47	ENFORCEMENT ACTIONS				
	Ability to log enforcement actions, generate notification, and initiate project files.				
5.2.48	EXPIRATION TRACKING				
	Track expiration dates for permits, temporary certificates of occupancy and provide notification to original applicant and staff using user-defined threshold. Provide for manual and automatic extension of permit expiration date based on date of last inspection or code enforcement deadlines				
5.2.49	PERMIT RENEWALS				
	Track projects and generate correspondence to applicants and property owner for renewal letters of permits about to expire. Leave audit trail.				
5.2.50	CUSTOM REPORTING				
	Provide ability to generate custom reports based on such items as project status, revenue, valuation, types of project, square footage, numbers of applications, average turn-around times, assigned staff, etc. Include ability to use custom fields for report data sources.				
5.2.51	SEARCH FEATURE				
	Provide integrated search feature with multiple options for search criteria across all modules				
5.2.52	DASHBOARD				
	Provide customizable means of displaying visual information of permit activity, revenue, review activity, inspections, assigned tasks, and other pertinent information for reviewers, inspectors, supervisors, and City Manager's Office.				

Enterprise Software Information		Vendors Deliverables			
		YES	Alternate Development	Not Available	Clarification
5.2.53	DATA CONVERSION				
	Provide a means to allow the import of data from previous permit systems used by the City so all permit history can be viewed, searched, and managed within one system.				
5.2.54	ON-LINE RESOURCES				
	Provide ability for customers to apply for all permits online, pay fees, and print permit cards. Provide ability for customers to check status of reviews and inspections on-line. Provide ability for customers to pay fees on-line for all permit applications.				
5.2.55	ELECTRONIC PLAN REVIEW				
	Provide means for applicants to submit plans on-line. Provide complete suite of electronic plan review tools to facilitate paper-free processing of plans. Means shall be provided to affix City approval stamps and notes to plans. Provide capability to plot plans on paper at correct scale when necessary.				
5.2.56	INTEGRATION – PARCEL MANAGEMENT				
	Parcel Management should provide address, parcel owner, zoning, and comprehensive plan designation information and other location data to Planning application.				
5.2.57	INTEGRATION – PERSON/ENTITY				
	Applicant/ Developer name, address and telephone information should be retrieved from the Person/Entity database.				
5.2.58	INTEGRATION – BUILDING PERMITS				
	Provide automatic linkage between building, planning, and code enforcement projects. Provide ability to access planning information from the Planning Module.				
5.2.59	INTEGRATION – FINANCE SYSTEM				
	Ability to link financial transactions to City Finance system. Provide G/L postings using City G/L numbers.				
5.2.60	INTEGRATION – CASH RECEIPTS-RECEIPT NUMBER				
	Cash receipts should designate unique receipt number, validate permit number, customer name and payee information.				
5.2.61	INTEGRATION – CASH RECEIPTS-FEES				
	Cash receipts of fees paid should have G/L interface, validate permit number, customer name, and payee information. Have ability to show balance due on the receipt.				
5.2.62	INTEGRATION – CASH RECEIPTS-CREDIT				
	Cash receipts should have the ability to apply credit transactions to permit, validate permit number, customer name, and payee information.				

Enterprise Software Information		Vendors Deliverables			
		YES	Alternate Development	Not Available	Clarification
5.2.63	INTEGRATION – ESRI's ARC VIEW-EXPORT				
	User should have the ability to select Planning Permit data and display that data on a map. Data captured within this system should be displayed in ArcView (tabular or Geobase). Data available must include permit, application, and inspection locations by date range.				
5.2.64	INTEGRATION – ESRI's ARC VIEW-IMPORT				
	User should have the ability to select parcel on the map and display permit data. Parcel data shall have a direct link to the GIS mapping system. Ability to populate property research fields in application with data from GIS (such as presence of critical areas, easements, etc.)				
5.2.65	INTEGRATION-CODE ENFORCEMENT				
	Ability to access code enforcement information from Planning Module. Allow code enforcement module and permitting module to automatically send reminders for assigned deadlines.				
5.2.66	PARCEL ADDRESSES				
	Ability to associate multiple addresses per parcel number, and multiple parcels to one address.				
5.2.67	ADDRESS DATA MANAGEMENT				
	Provide capability to create, edit and associate multiple addresses related to one or more parcels.				
5.3	Parcel Management Module				
5.3.1	PARCEL GEO-BASE				
	Provide a geographic database of parcel, occupancy, and multiple land use attributes (structures and natural features, etc.). Permit access by parcel number, owner, address/location description.				
5.3.2	COMPREHENSIVE PLAN DESIGNATIONS				
	Provide for tracking of comprehensive plan designations, standards, and restrictions. Allow for integration with GIS data so editing of this data can be synced and editing both data sets will not be necessary.				

Enterprise Software Information		Vendors Deliverables			
		YES	Alternate Development	Not Available	Clarification
5.3.3	ZONING INFORMATION				
	Provide for tracking of zoning designations, standards, and restrictions. Provide for ability to track multiple uses per parcel and multiple zoning designations per parcel. Effective and expiration dates of zoning designations should be tracked when new zoning designations are applied. Allow for integration with GIS data so editing of this data can be synced and editing both data sets will not be necessary.				
5.3.4	GEOGRAPHIC DATA INTERFACE				
	Provide for the establishment and periodic update of the parcel database using County or other data sources (e.g., State, County, Metroscan, etc.)				
5.3.5	SPATIAL DATA INTERFACE				
	Provide for the establishment and periodic update of the spatial data layers using County data.				
5.3.6	USER DEFINED DATA ELEMENTS				
	Provide for a minimum of fifteen user-defined data elements. (i.e. Utility districts, drainage basins, critical areas, or other alerts). Allow for geographic data interface to populate and update these data elements.				
5.3.7	PARCEL SPLITTING/CONSOLIDATION				
	Allow tracking of split or consolidated parcels. Allow for at least four generations of parcel subdivision tracking. Maintain record and linkage of associated addresses.				
5.3.8	PLANNING INQUIRY				
	Ability to generate independent log of inquiries on planning topics, research completed, answers/findings communicated to customer for future reference. Ability to link independent inquiries to the related parcel(s)/address(es) and see/search those inquiries as independent instances. Ability to convert planning inquiry into customer service complaint or code violation case.				
5.3.9	INTEGRATION – PERSON/ENTITY				
	Property owner/occupant information to be retrieved from the Person/Entity database.				

Enterprise Software Information		Vendors Deliverables			
		YES	Alternate Development	Not Available	Clarification
5.3.10	INTEGRATION – PLANNING				
	Parcel management should provide address, parcel, owner, zoning, and comprehensive plan designation information and other location data to Planning application.				
5.3.11	INTEGRATION – BUILDING PERMITS				
	Parcel management should provide address, parcel, owner, zoning, and comprehensive plan designation information and other location data to Building Permits application.				
5.3.12	INTEGRATION – CODE ENFORCEMENT				
	Parcel management should provide address, parcel, owner, zoning, and comprehensive plan designation information and other location data to Code Enforcement application.				
5.3.13	INTEGRATION – ACCOUNTS RECEIVABLE				
	Parcel management should provide address, parcel, owner, zoning information and other location data to Accounts Receivable application.				
5.3.14	INTEGRATION – ESRI's ARC VIEW				
	User should have the ability to select parcel, zoning, and comprehensive plan designation data and display that data on a map. Data captured within this system should be displayed in ArcView (tabular or Geobase). Selecting parcel from map will populate required fields necessary to generate permit application or code enforcement action.				
5.3.15	REAL-TIME UPDATES				
	Provide interface with mapping system so there is a real-time relationship between map and permit data.				
5.3.16	PARCEL ADDRESSES				
	Ability to associate multiple addresses per parcel number, and multiple parcels to one address.				
5.3.17	ADDRESS DATA MANAGEMENT				
	Provide capability to create, edit and associate multiple addresses related to one or more parcels.				

Enterprise Software Information		Vendors Deliverables			
		YES	Alternate Development	Not Available	Clarification
5.4	Code Enforcement Module				
5.4.1	ASSIGN INCIDENT NUMBER				
	Ability to assign a unique incident number to each project.				
5.4.2	CUSTOMIZABLE DATA ENTRY SCREENS				
	Provide ability to customize screens or templates for data entry for each violation type. Provide ability to hide or turn off unneeded fields when not needed. Ability to create internal review checklist for staff.				
5.4.3	INCIDENT TRACKING				
	Identify violations by parcel, owner/occupant name, address, incident number. Provide notifications to responsible party, and establishes follow-up inspection program to ensure compliance.				
5.4.4	ENFORCEMENT ACTIONS				
	Ability to log enforcement actions, generate notification, and initiate project files.				
5.4.5	USER-DEFINED VIOLATION TYPES				
	Allow user to define violation types (from property management to vehicle abatement), ability to insert applicable code sections from a database into incident, related actions and number of days for resolution.				
5.4.6	MULTIPLE VIOLATIONS				
	Provide for a variable number of violations per incident and tracking of each violation individually.				
5.4.7	MULTI-PERMIT TRACKING				
	Allow users to identify all permits related to particular project. Tie in to parcel no., customer name and/or address. Track status. Allow projects to be tied together in parent/child relationship with conditions on sequence of issuance and/or final.				
5.4.8	REVIEW PROCESS				
	Ability to track each review element status and user assigned to that element.				

Enterprise Software Information		Vendors Deliverables			
		YES	Alternate Development	Not Available	Clarification
5.4.9	FREQUENTLY USED PHRASES				
	Provide menu or other means (such as auto-populating suggested text) for selecting frequently used phrases for project descriptions and permit conditions for inclusion on permit cards				
5.4.10	CUSTOMER/CONTACT DATABASE				
	Provide automatic cross-referencing while entering customer and/or contact information to reduce or eliminate duplicate entries				
5.4.11	AUTOMATIC LABEL PRINTING				
	Provide automatic printing of required labels for files based on incident type				
5.4.12	PENALTY CALCULATION/COLLECTION				
	Provide for calculation of standard penalty amounts using user-specified formulas or tables. Allow for penalties unique to specific permit type categories. Track collections, receivables, and balance due. Generate payment receipts, invoices. Penalty schedule and individual fee amounts must be modifiable by users as needed. Provide running total of fee estimate without having to progress application to next stage.				
5.4.13	VIOLATION NOTICE				
	Provide notification to responsible party or parties. Include automatic notification to responsible party(ies) that the compliance deadline has been missed and of fines accrued to date.				
5.4.14	USER DEFINED CORRECTION ACTIONS				
	Allow user to define corrective actions steps. Provide for the ability for the user to pre-populate and continually update a database of standard corrective action steps that may be inserted in the electronic incident file and correspondence templates.				
5.4.15	CODE REFERENCE CITATIONS				
	Ability to have a menu of International Code, Municipal Code, and Engineering Design Manual citations to select and insert into notes and correspondence.				
5.4.16	CONTRACTOR AND BUSINESS LICENSE SUPPORT				
	Provide automated means for verifying active contractor registration and business licenses. Allow current contractor information to be automatically inserted during application data entry.				

Enterprise Software Information		Vendors Deliverables			
		YES	Alternate Development	Not Available	Clarification
5.4.17	CUSTOMER/CONTACT DATABASE				
	Provide automatic cross-referencing while entering customer and/or contact information to reduce or eliminate duplicate entries				
5.4.18	PROJECT MANAGEMENT				
	Provide field indicating current workload for individual user and status of specific project assignments of that user. Notifies users of tasks assigned to them. System would allow project manager to assign specific tasks to specific team members and track status.				
5.4.19	SCHEDULING CALENDAR				
	Provide for user-defined schedule for resolution of each type of violation.				
5.4.20	VIOLATION HISTORY				
	Provide the history of code violations by parcel, owner/occupant name, and address.				
5.4.21	ONSITE INSPECTION SUPPORT				
	Onsite inspection support via mobile computing and/or upload/download either by internet, wireless transmission or other mobile interface.				

Enterprise Software		Vendors Deliverables			
		YES	Alternate Development	Not Available	Clarification
5.4.22	MOBILE DATA INPUT				
	Ability to start new file number in the field, generate incident number, enforcement action, notice, order etc.				
5.4.23	TEXT NARRATIVE SUPPORT				
	Ability for users to manually input narrative in their project and identify each user by I.D. Allow unlimited text length. Provide means to cut and paste between projects and/or modules.				
5.4.24	CORRESPONDENCE SUPPORT				
	Provide customized templates for correspondence and general customer contact, linking to specific incident number. Provide ability to e-mail that information to the customer and automatically generate a log note for documentation. Provide templates for generic correspondence and save into project file.				
5.4.25	DIGITAL IMAGES AND DOCUMENT INPUT				
	Provide field to insert digital images and documents (e.g., plans, photos, documents). Tie to customer name, parcel no., address, and/or project number. Ability to open within program or interface with another software program (e.g., ArcView, Auto Cad, MS Office, Photo Shop). Provide method to add multiple images or documents at once.				
5.4.26	SECURITY REQUIREMENTS				
	Provision made for read/write access at user-defined levels.				
5.4.27	INSPECTION TYPES				
	Allow customization of inspection type names, date fields, and status codes. Allow for automatic and customizable loading of inspections for different incident types.				
5.4.28	ONSITE INSPECTION SUPPORT				
	Onsite inspection support via mobile computing or other smart devices. Upload/download either by internet, wireless transmission or other mobile interface. Provide text entry by voice-to-text technology. Provide real-time updates to the system from the field.				
5.4.29	INSPECTION RESULTS REPORT PRINTING				
	Allows mobile printing capability of inspection results in the field. Provide menu of commonly used phrases or Code references that can be selected as needed.				
5.4.30	INSPECTION RESULT NOTIFICATION				
	Provide automatic notification of inspection results to customer by e-mail or text. Include ability to attach correction list when applicable.				

Enterprise Software		Vendors Deliverables			
		YES	Alternate Development	Not Available	Clarification
5.4.31	INSPECTION PROCESSING				
	Input narrative information such as: type of inspection, date, status and comments. Record inspection results.				
5.4.32	INSPECTION LOGGING				
	Allow logging of inspection results and narrative fields.				
5.4.33	COORDINATION WITH OTHER JURISDICTION INSPECTIONS				
	Include field to check off proof of completion of other jurisdiction inspections.				
5.4.34	MOBILE DATA INPUT				
	Ability to start new file number in the field, generate permit number, stop work orders, etc.				
5.4.35	ONSITE INSPECTION SUPPORT				
	Onsite inspection support via mobile computing or other smart devices. Upload/download either by internet, wireless transmission or other mobile interface. Provide text entry by voice-to-text technology. Provide real-time updates to the system from the field.				
5.4.36	INSPECTION RESULTS REPORT PRINTING				
	Allows mobile printing capability of inspection results in the field. Provide menu of commonly used phrases or Code references that can be selected as needed.				
5.4.37	INSPECTION RESULT NOTIFICATION				
	Provide automatic notification of inspection results to customer by e-mail or text. Include ability to attach correction list when applicable.				
5.4.38	COMPLIANCE MONITORING				
	Track multiple compliance dates for each case type. Provide notification to code enforcement staff using user-defined thresholds.				
5.4.39	OTHER JURISDICTION APPROVALS				
	Include field to check off completion of specific jurisdiction approvals required before case is closed.				
5.4.40	ON-LINE COMPLAINT REPORTING				
	Provide an anonymous means for customers to report code enforcement concerns. Automatically populate new file in system and notify responsible staff by e-mail or other means.				
5.4.41	SEARCH FEATURE				
	Provide integrated search feature with multiple options for search criteria across all modules				
5.4.42	DASHBOARD				
	Provide customizable means of displaying visual information of permit activity, revenue, review activity, inspections, assigned tasks, and other pertinent information for reviewers, inspectors, supervisors, and City Manager's Office.				

Enterprise Software		Vendors Deliverables			
		YES	Alternate Development	Not Available	Clarification
5.4.43	LABOR COST TRACKING				
	Ability to record internal and external labor costs to permit project. May include travel time, actual inspection time. Allows user to assign time to each review/task element.				
5.4.44	DATA CONVERSION				
	Provide a means to allow the import of data from previous permit systems used by the City so all permit history can be viewed, searched, and managed within one system.				
5.4.45	ON-LINE RESOURCES				
	Provide ability for customers to apply for all permits online, pay fees, and print permit cards. Provide ability for customers to check status of reviews and inspections on-line. Provide ability for customers to pay fees on-line for all permit applications.				
5.4.46	CUSTOM REPORTING				
	Provide ability to generate custom reports based on such items as project status, revenue, valuation, types of project, square footage, numbers of applications, average turn-around times, assigned staff, etc. Include ability to use custom fields for report data sources.				
5.4.47	INTEGRATION – BUILDING PERMITS				
	Provide automatic linkage between code enforcement cases and building projects, planning projects and parcel number. Provide ability to access planning, building permit and right of way permit information from the code enforcement module.				
5.4.48	INTEGRATION – PLANNING				
	Provide automatic linkage between building, planning, and code enforcement projects. Provide ability to access planning information from the code enforcement module.				
5.4.49	INTEGRATION – PARCEL MANAGEMENT				
	Parcel Management should provide address, parcel owner, zoning information, and/or street intersection to the Code Enforcement system.				
5.4.50	INTEGRATION – ZONING INFORMATION				
	Provide for tracking of zoning designations, standards, and restrictions. Provide for ability to track multiple uses per parcel and multiple zoning designations per parcel.				
5.4.51	INTEGRATION PERSON/ENTITY				
	Property owner/occupant name, address, telephone number information for properties requiring code enforcement should be retrieved from the Person/Entity database.				
5.4.52	INTEGRATION – ESRI's ARC VIEW-EXPORT				
	User should have the ability to select code enforcement data and display that data on a map. Data captured within this system should be displayed in ArcView (tabular or Geobase). Data available must include permit, application, and inspection locations by date range.				

Enterprise Software		Vendors Deliverables			
		YES	Alternate Development	Not Available	Clarification
5.4.53	INTEGRATION – ESRI's ARC VIEW-IMPORT				
	User should have the ability to select parcel on the map and display code enforcement data. Parcel data shall have a direct link to the GIS mapping system. Ability to populate property research fields in incident with date from GIS (such as presence of critical areas, easements, etc.)				
5.4.54	INTEGRATION-CUSTOMER RESPONSE COMPLAINT TRACKING SYSTEM				
	Ability to transfer narrative data from internal Customer Response program into the Code Enforcement module. Ability to access or transfer photos from initial customer response file so duplicate uploading or storage is not required.				
5.4.55	INTEGRATION – CITY CLERK (APPEAL PROCESS/TRACKING)				
	Capability to accurately track appeal process timeline and scheduling.				
5.4.56	INTEGRATION – FINANCE SYSTEM				
	Ability to link financial transactions to City Finance system. Provide G/L postings using City G/L numbers.				
5.4.57	INTEGRATION – CASH RECEIPTS-RECEIPT NUMBER				
	Cash receipts should designate unique receipt number, validate permit number, customer name and payee information.				
5.4.58	INTEGRATION – CASH RECEIPTS-FEES				
	Cash receipts of fees paid should have G/L interface, validate incident number, customer name, and payee information. Have ability to show balance due on the receipt.				
5.4.59	INTEGRATION – CASH RECEIPTS-CREDIT				
	Cash receipts should have the ability to apply credit transactions to permit, validate permit number, customer name, and payee information.				
6	Professional Service and Application Support				
6.1	Implementation Services				
6.1.1	Does your company have a professional services organization				
6.1.2	Does your company partner with third party service providers for implementation services (if so, who are your certified providers)				
6.1.3	Describe the services approach you take to implementation (e.g. traditional project management, mentoring, off-site/remote)				
6.1.4	Describe the phases of work in a typical implementation project				
6.1.5	Describe the project management approach you take to organizing and managing your implementation services				
6.1.6	How do you report on project status and progress				
6.1.7	What types of training does you company offer (e.g. onsite, classroom, online)				

Enterprise Software		Vendors Deliverables			
		YES	Alternate Development	Not Available	Clarification
6.2	Technical Support				
6.2.1	Does your company offer multiple support plans				
6.2.2	Clarify the levels of support plans				
6.2.3	Do you offer support via email, web, and phone				
6.2.4	What are your hours of support				
6.2.5	Do you automatically notify or provide links to service packs, updates, releases				
6.2.6	Provide list and description of last 12 month release, update and SP schedule				
6.3	Online Knowledge Base				
6.3.1	Do you have a searchable online knowledge base				
6.3.2	Is your knowledge base accessible to anyone				
6.3.3	Do you monitor the knowledge base; how often				
6.3.4	Does you development staff contribute to the knowledge base				
6.4	Developers Network				
6.4.1	Do you have a developers network site				
6.4.2	Who can access the developers network				
6.4.3	Do you test the code published to the developers network				
6.4.4	Do you monitor the developers network; how often				
6.4.5	Does you development staff contribute to the developers network				
6.5	Corporate Outlook				
6.5.1	How long has the company been in this market				
6.5.2	Is the company profitable				
6.5.3	Do you have an annual users conference				

APPENDIX B – Vendor Cost Worksheet

The following describes the minimum information to be contained regarding the cost of the system. Recognize that it is the intent of this section to obtain a complete system cost. Therefore, if this installation could potentially incur other costs in delivering the system that are not included in this section, those must be added to the worksheet. If you are pricing different configuration options, please copy the Worksheet and fully price each option.

	Pricing Options: Explain your pricing options (i.e. per user, per device, concurrent site, etc.) and recommended training and consulting expenses.
	Example: Please provide an example/standard implementation timeline for delivery, data conversion, hardware/software installation, etc.
Identify all costs associated with acquiring and modifying the specific solution. Please use an additional sheet but follow the outline as defined below.	
	Base System: Identify the costs by individual module associated with supplying the system that meets the City's basic requirements. Specify the number of users that are included or give us the structure (i.e. per user, per x number of users, etc.) for pricing the software, database, and any other licenses needed.
	Additional Modules: Identify any additional modules that are not part of the base requirements but may enhance the system to further meet our needs.
	Modifications to Meet Requirements: Identify the costs associated with completing modifications necessary to meet the basic functional and data requirements. Provide the cost estimate for each modification required.
	Interfaces Proposed: Identify examples and the method of costing interfaces to CAD, GIS, Payroll, and Accounting functions.
	Installation-Related Costs: Identify other charges to the City of Shoreline as a result of the installation, including training and professional support. Please provide a list of classes with maximum number of students allowed and target audience (i.e. clients, technical, etc.)
	Consulting: Recommended consulting services including any and all proposed training for city staff on the application usage, configuration, reports development, estimated costs by function/hourly rate, estimated hours needed. Include normal per diem and travel charges. Can the City be responsible for booking travel and hotels?
	Hardware Costs: Please identify any hardware costs associated with this installation (client PC's are already in place) such as a server, remote devices (as completely set up to process).
	Warranty Period: Identify warranty conditions and time period(s). Include any software, support and/or equipment purchased directly from you.
	Annual License and Maintenance Costs: Identify the annual software system maintenance cost and any other annual costs for ongoing system operation and maintenance that would be provided by the vendor.
	<i>Additional Client License Costs: Please identify the costs for additional licenses if purchased with or after the initial project (if units of 5, 10, etc. enhance pricing include that information).</i>

VENDOR PRICING WORKSHEET AND COST PROPOSAL

Quantity	Item Description	Unit Price	Extended Price
<i>Base System (server and client licensing if applicable):</i>			
<i>Additional Modules:</i>			
<i>Modifications to Meet Requirements (custom development):</i>			
<i>Interfaces Proposed (API costs):</i>			
<i>Professional Services (recommended consulting costs, training costs):</i>			

<i>Data Conversion Costs:</i>			
<i>Total Vendor Costs:</i>			
<i>Washington State Sales Tax @ 9.5%:</i>			
TOTAL COST PROPOSED:			
<i>Annual License and Maintenance Costs:</i>			
<i>Additional Client License Costs (if applicable):</i>			

APPENDIX C – City Contract



Contract Number: _____

Brief Description:

CITY OF SHORELINE

AGREEMENT FOR SERVICES

This Agreement is entered into by and between the City of Shoreline, Washington, a municipal corporation hereinafter referred to as the “CITY,” and _____, hereinafter referred to as the “CONSULTANT.”

WHEREAS, the City desires to retain the services of a consultant to _____ and

WHEREAS, the City has selected to perform the above-mentioned services;

NOW, THEREFORE, in consideration of the mutual promises and covenants contained herein, it is mutually agreed as follows:

1. Scope of Services to be Performed by the Consultant.

The Consultant shall perform the services outlined in Exhibit A. In performing these services, the Consultant shall at all times comply with all federal, state and local statutes, rules and ordinances applicable to the performance of such services. In addition, these services and all duties incidental or necessary therefore, shall be performed diligently and completely and in accordance with professional standards of conduct and performance.

2. Compensation.

- A. Services will be paid at the rates set forth in Exhibit A, not to exceed a maximum of \$_____, including all fees and reimbursable expenses.
- B. The City shall pay the Consultant for services rendered after receipt of a billing voucher in the form set forth on Exhibit B. **NO PAYMENT WILL BE ISSUED WITHOUT A BILLING VOUCHER.** Payments will be processed within 30 (thirty) days from receipt of billing voucher. The Consultant shall be paid for services rendered but, in no case shall the total amount to be paid exceed the amount(s) noted in the Exhibit(s) and approved by the City. The Consultant shall complete and return Exhibit C, Taxpayer Identification Number, to the City prior to or along with the first billing voucher. No payment will be issued without a Taxpayer Identification Number on file. Mail all billing vouchers to: the attention of the contract manager identified in Section 14, 17500 Midvale Avenue North, Shoreline, Washington 98133-4905.
- C. Consultant agrees to perform Enterprise Resource Planning Software updates including software, installation, training and hardware as described in Exhibit A at a price of \$ _____. City agrees to pay Consultant for work completed according to the progress schedule included in Exhibit A.

3. Term.

- A. The term of this Agreement shall commence _____ and end at midnight on the _____ day of _____, 2013, provided, the asset management system and training for the stormwater utility must be completed before June 1, 2013.

4. Termination.

- A. The City reserves the right to terminate this Agreement at any time, with or without cause by giving fourteen (14) days notice to Consultant in writing. In the event of such termination or suspension, all finished or unfinished documents, data, studies, worksheets, models and reports, or other material prepared by the Consultant pursuant to this Agreement shall be submitted to the City.
- B. In the event this Agreement is terminated by the City, the Consultant shall be entitled to payment for all hours worked and reimbursable expenses incurred to the effective date of termination, less all payments previously made. This provision shall not prevent the City from seeking any legal remedies it may have for the violation or nonperformance of any of the provisions of this Agreement and any such charges due the City shall be deducted from the final payment due the Consultant. No payment shall be made by the City for any expenses incurred or work done following the effective date of termination unless authorized in advance in writing by the City. Upon termination of the Agreement pursuant to this Section, the Consultant will submit an invoice to the City pursuant to Section 2(C).
- C. The Consultant reserves the right to terminate this Agreement with not less than sixty (60) days written notice, or in the event outstanding invoices are not paid within 30 days.
- D. If the Consultant is unavailable to perform the scope of services, the City may, at its option, cancel this Agreement immediately.

5. Ownership of Documents.

- A. All documents, data, drawings, specifications, software applications and other products or materials produced by the Consultant in connection with the services rendered under this Agreement (“Work Product”) shall be the property of the City whether the project for which they are made is executed or not. Notwithstanding anything to the contrary herein, work product shall not include the _____ [*proprietary software*] ___dynamic components, interactive components (collectively, the “Consultant’s Proprietary Tools”), and other materials or components reasonably designated by Consultant, or any portion thereof. All such documents, products and materials shall be forwarded to the City at its request and may be used by the City as it sees fit. The City agrees that if the documents, products and materials prepared by the Consultant are used for purposes other than those intended by the Agreement, the City does so at its sole risk and agrees to hold the Consultant harmless for such use. All or portions of materials, products and documents produced under this Agreement may be used by the Consultant upon confirmation from the City that they are subject to disclosure under the Public Disclosure Act.
- B. All services performed under this Agreement will be conducted solely for the benefit of the City and will not be used for any other purpose without written consent of the City. Any information relating to the services will not be released without the written permission of the City.
- C. The Consultant shall preserve the confidentiality of all City documents and data accessed for use in Consultant’s Work Product.
- D. Consultant shall retain all right, title, and interest in all of Consultant’s Proprietary Tools and Consultant’s Proprietary Information; however, upon payment in full Consultant hereby grants to City a perpetual, non-exclusive, royalty free license to use for its own use any of Consultant’s Proprietary Tools and Consultant’s Proprietary Information that is embedded in the Work Product.

6. Independent Contractor Relationship.

- A. The consultant is retained by the City only for the purposes and to the extent set forth in this Agreement. The nature of the relationship between the Consultant and the City during the period of the services shall be that of an independent contractor, not employee. The Consultant, not the City, shall have the power to control and direct the details, manner or means of services. Specifically, but not by means of limitation, the Consultant shall have no obligation to work any particular hours or particular schedule and shall retain the right to designate the means of performing the services covered by this Agreement, and the Consultant shall be entitled to employ other workers at such compensation and on such other conditions as it may deem proper, provided, however, that any contract so made by the Consultant is to be paid by it alone, and that employing such workers, it is acting individually and not as an agent for the City.
- B. The City shall not be responsible for withholding or otherwise deducting federal income tax or Social Security or contributing to the State Industrial Insurance Program, or otherwise assuming the duties of an employer with respect to Consultant or any employee of the Consultant.

7. Hold Harmless.

The Consultant shall defend, indemnify, and hold the City, its officers, officials, employees and volunteers harmless from any and all claims, injuries, damages, losses or suits including attorney fees resulting from the negligence, gross negligence and/or intentional acts, errors or omissions of the Consultant, its agents or employees arising out of or in connection with the performance of this Agreement, except for injuries and damages caused by the sole negligence of the City.

Should a court of competent jurisdiction determine that this Agreement is subject to RCW 4.24.115, then, in the event of liability for damages arising out of bodily injury to persons or damages to property caused by or resulting from the concurrent negligence of the Consultant and the City, its officers, officials, employees, and volunteers, the Consultant's liability hereunder shall be only to the extent of the Consultant's negligence. It is further specifically and expressly understood that the indemnification provided herein constitutes the Consultant's waiver of immunity under Industrial Insurance, Title 51 RCW, solely for the purpose of this indemnification. This waiver has been mutually negotiated by the parties. The provisions of this section shall survive the expiration or termination of this Agreement.

8. Insurance.

Consultant shall obtain insurance of the types described below during the term of this agreement and extensions or renewals. These policies are to contain, or be endorsed to contain, provisions that

1) Consultant's insurance coverage shall be primary insurance with insurance or insurance pool coverage maintained by the City as excess of the Consultant's insurance (except for professional liability insurance); and
2) Consultant's insurance coverage shall not be cancelled, except after thirty (30) days prior written notice to the City.

A. Professional Liability, Errors or Omissions insurance with limits of liability not less than \$1,000,000 per claim and \$1,000,000 policy aggregate limit shall be provided if services delivered pursuant to their Contract involve or require professional services provided by a licensed professional including but not limited to engineers, architects, accountants, surveyors, and attorneys.

B. Commercial General Liability insurance covering premises, operations, independent contractors' liability and damages for personal injury and property damage with combined single limits not less than \$1,000,000. The City shall be named as an additional insured on this policy. The Agency shall submit to the City a copy of the insurance policy declaration page as evidence of insurance coverage acceptable to the City.

C. Automobile Liability insurance with combined single limits of liability not less than \$1,000,000 for bodily injury, including personal injury or death and property damage shall be required if delivery of service directly involves Consultant use of motor vehicles.

9. Delays.

Consultant is not responsible for delays caused by factors beyond the Consultant's reasonable control. When such delays beyond the Consultant's reasonable control occur, the City agrees the Consultant is not responsible for damages, nor shall the Consultant be deemed to be in default of the Agreement.

10. Successors and Assigns.

Neither the City nor the Consultant shall assign, transfer or encumber any rights, duties or interests accruing from this Agreement without the written consent of the other.

11. Nondiscrimination.

In hiring or employment made possible or resulting from this Agreement, there shall be no unlawful discrimination against any employee or applicant for employment because of sex, age, race, color, creed, national origin, marital status or the presence of any sensory, mental, or physical handicap, unless based upon a bona fide occupational qualification. This requirement shall apply to but not be limited to the following: employment, advertising, layoff or termination, rates of pay or other forms of compensation, and selection for training, including apprenticeship. No person shall be denied or subjected to discrimination in receipt or the benefit of any services or activities made possible by or resulting from this Agreement on the grounds of sex, race, color, creed, national origin, age except minimum age and retirement provisions, marital status, or in the presence of any sensory, mental or physical handicap.

12. Notices.

Any notice required under this Agreement will be in writing, addressed to the appropriate party at the address which appears below (as modified in writing from time to time by such party), and given personally, by registered or certified mail, return receipt requested, by facsimile or by a nationally recognized overnight courier service. All notices shall be effective upon the date of receipt.

Assistant City Manager
City of Shoreline
17500 Midvale Avenue N.
Shoreline, WA 98133-4921
(206) 801-2212

Consultant Name:
Name of Firm:
Address:
Address:
Phone Number:

13. Governing Law and Venue.

This Agreement shall be construed and enforced in accordance with the laws of the State of Washington. Venue of any suit between the parties arising out of this Agreement shall be King County Superior Court.

14. General Administration and Management.

The City's contract manager shall be (name and title): Debbie Tarry, Assistant City Manager.

15. Severability.

Any provision or part of the Agreement held to be void or unenforceable under any law or regulation shall be deemed stricken and all remaining provisions shall continue to be valid and binding upon the City and the Consultant, who agree that the Agreement shall be reformed to replace such stricken provision or part thereof with a valid and enforceable provision that comes as close as possible to expressing the intention of the stricken provision.

16. Entire Agreement.

This agreement contains the entire Agreement between the parties hereto and no other agreements, oral or otherwise, regarding the subject matter of this agreement, shall be deemed to exist or bind any of the parties hereto. Either party may request changes in the agreement. Proposed changes which are mutually agreed upon shall be incorporated by written amendment to this agreement.

17. Additional Terms and Conditions

A. Limited Warranty: Consultant does warrant that all of the deliverables included in this Agreement will be conveyed to City. All programming code developed by Consultant within the project is warranted for a period of twelve (12) months from the date of the completion of the project ("Completion"). If any warranted problem arises while City or its designee is maintaining the software, Consultant will restore the system back to its condition as it existed at Completion. If Consultant is maintaining the software, Consultant shall restore the system back to its condition as it existed at the day of the most recent backup. Consultant shall only be responsible for any costs associated with correcting any unmodified programming code during this twelve (12) month period following the Completion.

Except as expressly set forth in the immediately preceding paragraph, CONSULTANT MAKES NO WARRANTY OF ANY KIND, WHETHER EXPRESS OR IMPLIED, OF MERCHANTABILITY OR FITNESS OF THIS SERVICE FOR A PARTICULAR PURPOSE WHATSOEVER. In no event, at any time, shall the aggregate liability of Consultant exceed the amount of fees paid by City to Consultant and Consultant shall not be responsible for any lost profits or other damages, including direct, indirect, incidental, special, consequential or any other damages, however caused.

B. City agrees to use the software in strict accordance with, but not limited to, all local, state, and federal laws. City hereby agrees that any text, data, graphics, or any other material published by City is free from violation of or infringement upon copyright, trademark, service mark, patent, trade secret, statutory, common law or proprietary or intellectual property rights of others, and is free from obscenity or libel.

- C. The waiver by one Party of any term or condition of this Agreement, or any breach thereof, shall not be construed to be a general waiver by said Party or as a waiver of any other term or breach.
- D. Neither the course of conduct between the Parties nor any trade practice shall act to modify the provisions of this Agreement except as expressly stated herein.
- E. This Agreement may be executed in counterparts, each of which shall be an original and all of which together shall constitute one and the same Agreement. This Agreement becomes effective upon Consultant's receipt of an executed copy of this Agreement.

This agreement is executed by

CITY OF SHORELINE

CONSULTANT

By: _____

By: _____

Name:

Name:

Title: City Manager

Title:

Date: _____

Date: _____

Approved as to form:

By: _____

Flannery P. Collins
Assistant City Attorney

Attachments: Exhibits A, B

EXHIBIT A
Scope of Services

**CITY OF SHORELINE
EXHIBIT B**

BILLING VOUCHER

17500 Midvale Ave., N. Shoreline, WA 98133-4905 ♦ (206) 801-2700 ♦ Fax (206) 546-7870

Contract No. _____

Firm Name: _____

Mailing Address: _____

Invoice No.: _____ **Invoice Date:** _____

Amount of Invoice \$ _____

Contract Expiration Date: _____ Current Invoice Period: _____

Description of services performed this period, attach a separate sheet if necessary (if applicable, submit a separate voucher for each program which is funded by your City of Shoreline contract):

BUDGET SUMMARY:

Total Contract Amount, \$ _____
(Including amendments)

Previously Billed \$ _____

Current Invoice Request \$ _____

Total Payments Requested to date \$ _____

Contract Balance Remaining \$ _____

Payments will be processed within thirty (30) days from receipt of approved billing voucher.

Consultant Signature

For Department Use Only

Approved for Payment:

City of Shoreline

Date: _____

Appendix D

PROPOSED ALTERNATIVE TERMS

IF THERE ARE EXCEPTIONS TAKEN TO ANY OF THE TERMS, CONDITIONS, OR SPECIFICATIONS OF THE FORM OF CONTRACT (APPENDIX C) OR THESE REQUEST FOR PROPOSAL DOCUMENTS, THEY MUST BE CLEARLY STATED ON THE "EXCEPTIONS" TABLE BELOW AND RETURNED WITH YOUR PROPOSAL.

IF YOU PROVIDED A SAMPLE COPY OF YOUR CONTRACT(S) YOU STILL NEED TO IDENTIFY IN THIS DOCUMENT ("RFP EXCEPTIONS") ANY AND ALL EXCEPTIONS YOU HAVE TO THE TERMS AND CONDITIONS.

Exceptions Table:

	RFP Section #, Page #	Exception: Describe the nature of the exception	Explanation: Why this is an issue	Alternative: Proposed alternative to meet the needs of the City
1				
2				
3				

Add rows as needed on separate sheet

Firm or Individual	
Title	
Telephone	
Email	
Address	

PRINT NAME AND TITLE

Except as noted below, the undersigned hereby agrees to comply with all the terms and conditions put forth in the City's Request for Proposal.

AUTHORIZED SIGNATURE

_____ Date _____

Appendix E

CLIENT REFERENCES

Client Reference #1

Client Name	
Contact Name	
Contact Title	
Phone Number	
Email Address	
Type of Services Provided	
Services Provided Similar to the City's Technical Requirements?	
Provide link (URL) to live example of this work	
Contract Duration	
Contract Amount	

CLIENT REFERENCES

Client Reference #2

Client Name	
Contact Name	
Contact Title	
Phone Number	
Email Address	
Type of Services Provided	
Services Provided Similar to the City's Technical Requirements?	
Provide link (URL) to live example of this work	
Contract Duration	
Contract Amount	

CLIENT REFERENCES

Client Reference #3

Client Name	
Contact Name	
Contact Title	
Phone Number	
Email Address	
Type of Services Provided	
Services Provided Similar to the City's Technical Requirements?	
Provide link (URL) to live example of this work	
Contract Duration	
Contract Amount	

Appendix F

NON-COLLUSION CERTIFICATE

STATE OF _____

COUNTY OF _____

The undersigned, being duly sworn, deposes and says that the person, firm, association, co-partnership or corporation herein named, has not, either directly or indirectly, entered into any agreement, participated in any collusion, or otherwise taken any action in restraint of free competition in the participation and submission of a proposal to the City of Shoreline for consideration in the award of a contract described as follows:

Enterprise Resource Planning Software.

(Name of Firm)

By: _____

(Authorized Signature)

Title: _____

Sworn to before me this _____ day of _____ 2012

Notary Public

CORPORATE SEAL: