

**City of Creve Coeur
Permitting Software RFP (June - July 2022)
Questions and Answers (due to vendors 7/8/22)**

Here are questions submitted by vendors and the City's response. If there were duplicate questions we tried our best to answer them only once.

Q1. Vendor is reviewing the City's RFP for permitting software. We note in the 2022 budget document from the City's website, that the allocated funding is \$70k and this applies to 2022 only. See pages: 32, 167, 207, 242, and 247. Please advise if this is the total available funding and if annual fees for future years are not considered.

A1. \$70K is upfront costs and was budgeted before a software was selected. Money has been allocated in the 2023 Budget (ending June 20, 2023). We are aware that there will be monthly/annual subscription/maintenance fees.

Q2. What software are you currently using?

A2. We are using software that was built in-house and modified over the years. It uses a MySQL database and HTML/ASP pages to query the database for viewing, input, or reports.

Q3. How many total users will there be for the system?

A3. 30-35 users could have access to the system, but not all would be in at the same time. Total concurrent users could be 15-20 but that could fluctuate.

Q4. What software are you currently using for tracking business licenses?

A4. Incode 9 (Central) and Incode 10 by Tyler Technologies

Q5. Whether companies from outside the USA can apply for this? (ex. India or Canada)

A5. Companies outside the USA may submit a proposal. The Creve Coeur Purchasing Policy states that companies that reside in the United States are preferred.

Q6. Do we need to come over to the United States for meetings?

A6. Yes, the expectation is some meetings will need to be on-site. Other meetings may be conducted virtually.

Q7. Can we perform the tasks (related to RFP) outside the USA? (ex. India or Canada)

A7. The expectation is that most tasks will require on-site use. Coordinating meetings or other items may be virtual or on-site.

Q8. Can we submit proposals via email?

A8. Email can be used to submit digital copies. We will still need to have the appropriate number of physical copies supplied as well. Submit digital copies to ctumbarello@crevecoeurmo.gov.

Q9. Beginning on page 10 there is a section that appears to be asking for a narrative description of modules, security, reports, etc. It's unclear where in the response to include the information as it's not listed in Section 8 – Response Format.

A9. Please submit any descriptions of your software at the end of the submission (ie. after Form 2 - Cost). A copy of page 3 revised section 8 is attached.

Q10. Beginning on page 13 there is a table that addresses Technology and Module Requirements. It's unclear where in the response to include the information as it's not listed in Section 8 – Response Format.

A10. Please submit Form 3 - Technology and module requirements after Form 2 - Cost. A copy of page 3 revised section 8 is attached.

Q11. Beginning on page 15 there is a table that lists "General System Requirements". It's unclear if the vendor/proposer is required to complete the three blank columns and if so where in the response to include the information as it's not listed in Section 8 – Response Format

A11. Please submit "General System Requirements" after Form 2 - Cost. A copy of page 3 revised section 8 is attached.

Q12. Has the City engaged in product demos from potential vendors in the past two years, and if so is it possible to disclose which products were demonstrated so that we may present our product differentiators?

A12. We haven't engaged in product demos from potential vendors in the past two years.

Q13. Does the City have a preference for a Self-Hosted or SaaS solution?

A13. From research and discussion, the City realizes more software is moving to a SaaS solution and we assume we would head in that direction. If a self-hosted (onsite solution) is offered that meets the needs of the City, that would be considered as well.

Q14.Does the City already have an existing payment gateway for credit card and/or echeck transactions? If so can the name of the vendor be supplied?

A14. We use OpenEdge (Global Payments Integrated) for credit card transactions.

Q15.Does the City currently use ESRI products for Geospatial data? If so what product and version would be available for integration over web services?

A15. We use a hosted ESRI GIS solution that has availability for integration over web services.

Q16.How many licensed users would require permissions greater than that of applicant or read only? These roles typically include plan reviewers, inspectors, permit coordinators, department supervisors, outside consultants, and system administrators.

A16. There will be approximately 30-35 users (non-concurrent). We estimate 10 would have mobile (in field) capabilities. These 10 would overlap and still need access via desktop.

Q17.What system or database would records be migrated from?

A17. We use an in-house built system. It is a mySQL database that uses html/ASP webpages for interaction.

Q18.Approximately how many records would need to be migrated? Size of Data

A18. There are 57,252 records in mySQL (87.5 MB). There are 37,464 file attachments (26.GB). File attachments are PDF, DOC, or JPG. It would be desirable to migrate all records, but final determination based upon cost.

Q19.How many years of data would need to be migrated?

A19. It is necessary to migrate all the permit records. The file attachments for the records only need to be migrated from 2010 to present

Q20.How many web forms would need to be professionally configured into the system of the following? Application forms that do not result in a permit (plan review only) Application forms that do result in a permit

A20. These numbers are subject to change depending on needs assessed during the process. 20-30

Q21. How many permit types will need to be professionally configured (please include any documents requiring a sequential number scheme)?

A21. There are approximately 54 permit types that are used.

Q22. How many inspection types will need to be professionally configured (i.e. Foundation, Electrical Rough-In, Final, Etc.)?

A22. There are approximately 35 inspection types.

Q23. How many document templates will need to be configured (i.e. permit cards, check print/comment letter, C.O. etc.)?

A23. There are approximately 20 document templates.

Q24. How many external users (applicants) will be using the new solution? Please provide the approximate count

A24. There could be approximately 2500 unique external users but could fluctuate depending on adoption and usage

Q25. What is the Public Works software program you use?

A25. Public Works doesn't use a software program.

Q26. Plan Review. Do you mean electronic plan review? Is it possible that it be non-electronic, Is it possible this will be second phase instead of first?

A26. The software must allow electronic submission of building construction plans for review. We can either generate a separate plan review comment list or mark up the plans then reply back to the applicant. Electronic plan submission and review is a key feature that is a "must have" to facilitate ease of service for our customers. The goal is to eventually get away from paper submittals although we may allow some compromise in the beginning while we and the public get familiar with the new software program.

Q27. Integration. Could the City please clarify what they mean by "integration" in the following requirement: "History of ability to integrate with applications developed by 3rd parties"

A28. History of successful cooperation with vendors that provided software to supplement your software product.

Q28. Permit Volume. Approximately how many permits did the City issue in 2021?

A28. The Building Division received 1,617 permit application submittals. Our tracking system indicates that the PW department received 145 permits in 2021 for excavation, ROW, Grading and Site Improvements etc.

Q29. Implementation Schedule. Does the City have a desired go-live date?

A29. We do not have a specific date set although we fully anticipate to go live with at least a phased opening sometime during the Spring 2023. We realize that a specific date is only a wild guess at this stage of the software acquisition process.

Q30. Plan Review & Markup. Is the City open to vendors who have a native integration with an electronic plan review partner?

A30. Yes, we may consider plan review markup programs from other vendors although the cost may limit our ability to do so this year.

Q31. How many mobile users does the City anticipate?

A31. Estimated 10-15 mobile users

Q32. Are there any program integrations, such as Laserfiche, Outlook, etc.?

A32. Currently, there are no integrations at this time.

Q33. Our software comes with development review; however, does the City want plan review markup capabilities?

A33. Plan review markup capabilities are a plus although not a requirement if it's not currently part of the forthcoming software program.

Q34. Is the City interested in a Work Orders module?

A34. We are not interested in a work order module at this time.

Q35. Is Escrow management a business critical requirement to the City?

A35. Our current tracking system is how we manage all escrow payments, return information, and deductions. We are unsure how else we would be able to track this if not in a permitting software system. Escrows are required for a majority of the permits we issue.

Q36. Form 3 - "15. Hosted & Cloud services provide additional hardware or software connection requirements" Please clarify

A36. Requirements such as web browsers, internet speed, firewall settings for a hosted environment.

Q37. Do you have a mark-up tool solution such as Bluebeam or ProjectDox?

A37. We do not have mark-up tool solutions at this time.

Q38. What is the reasoning behind integrating with EAM? Both Community Development and EAM can handle right-of-way permits and inspections.

A38. We are interested in a system that fully meets our permitting needs. Right-of-Way permits and inspections would be a part of this new system.

Q39. Will the City accept Electronic submittals, either through a designated portal or through email?

A39. If referring to electronic submittal of the RFP, the City is willing to accept the digital copy via email or a designated portal. Digital submissions can be sent to Chris Tumbarello (ctumbarello@crevecoeurmo.gov). If electronic submittal is referring to building permit submittals by applicants, then they should come through a portal.

Q40. How many reports are produced by the current system today?

A40. We have approximately 56 reports. 48 in Permits, 7 in Site Improvement, 2 in Code Violations, and 9 in Apartment Re-Occupancy. Some are deprecated and others are duplicates with slight variations since it was an in-house software build and there wasn't a full-fledged report writing system.

Q41. Are there any specific systems the City has that should be considered for conversion/interfaces?

A41. Interfaces GIS and Incode. Conversion is converting old permit records from mySQL.

Q42. Has the city used an outside consultant/firm to prepare this RFP document?

A42. No.

Q43. What costs has the City incurred for the initial set up, ongoing maintenance, hosting, software licensing, support, and enhancements (ie. "change orders") over the lifetime of the current systems to be replaced by the new solution?

A43. Since the current system was built in-house (on-premise server), and runs on a MySQL database using HTML/ASP web pages for access, the costs have been minimal, with two server refreshes in the past 12 years, and employee time making any modifications to the system.

Q44. Is the City open to a proposal that extends beyond 12 months for initial system implementation?

A44. We anticipate a go-live (phase 1) of implementation in Spring of 2023. We are aware the timeline can change based on pre-meetings, reviews, contract negotiations and approvals.

Q45. Please elaborate upon any timing considerations for when specific programs / areas / functions will need to be fully transitioned to the new solution.

A45. Permit entry, inspections and plan review internally is assumed for a phase 1. On-line permit/plan submissions and inspections (external) and other items could be phase 2.

Q46. Please provide an approximate number of standard email/letter templates that will be used by the City that are to be integrated and automated by the system.

A46. Approximately 15-20 standard email/letter templates.

Q47. Please identify ALL other systems that the new solution will need to integrate with (i.e. payment processor, other systems such as financial, etc.) along with an inventory of which interfaces will need to be with a one-way (import or export) or two-way data exchange?

A47. It would have to integrate with a credit card processor. It is desirable to try and send data to Incode (financial).

Q48. Can bidders assume that the portable tablets for City staff and internet connectivity will be supplied by the City?

A48. Yes. The City provides an Ipad with data plan for mobile users.

Q49. Is the City expecting the vendor to incorporate a payment processor within the proposal, or provide recommendations?

A49. Yes. We currently use OpenEdge (Global Payments Integrated)

Q50. How many specific reports will need to be developed per Program, or is the City open to leveraging the new solution's ad-hoc reporting capabilities to fulfill data reporting needs?

A50. There may be approximately 10 reports that would be used on a regular basis. Ad-hoc reporting system is also a preferred solution as it would allow each user to create their own reports.

Q51. What criteria are being used to select the best solution for the City and qualify vendors? How important is cost in the overall solution?

A51. City will review submittals via a score sheet based upon the qualifications of the vendor and other requirements of the RFP. Cost is an important factor for the City, as we have to be mindful of how we use taxpayer money.

Q52. Will selected vendors have the opportunity to provide exceptions and/or alternative contract language during contract negotiations, or will vendors need to provide those within their respective proposals?

A52. Vendors should try and get proposals as close to a final quote as possible. City is aware that contract negotiations could entail modifications and adjustments throughout the process.

Q53. Given the complexity of the RFP, extensive requirements, etc. can the State extend the proposal due date by at least 2-4 weeks?

A53. Currently not anticipated. If this is determined to be in the best interest of the City we may advise accordingly.

Q54. Which companies have been sent the RFP already?

A54. List of companies will be provided at bid opening.

Q55. The scope of the project mentioned 'Escrow Management'. What is expected around 'Escrow Management' and how is this being supported currently?

A55. An escrow deposit is paid when the approved permit is picked up. The escrow information (amount, date of payment, return address) is entered into the system. After the final inspection, deductions are applied, and the remaining escrow amount is entered into the system. Typically this is done weekly for several escrows at once. A report is run for escrows being released, and is formatted accordingly for the finance department's use.

Q56. Regarding 'Project/Grant Management', what capabilities would support this and does the evaluation team rate its requirements as required, highly desirable or desirable?

A56. Upon further review, this feature is not required at this time.

Q57. What are some example public hearing requirements based on application types?

A57. Planning & Zoning and Board of Adjustment applications such as rezonings, text amendments, conditional use permits and variance requests.

Q58. Are the Executive summary and the 10-page maximum in addition to the forms in section 16, 17, 18, and 19?

A58. Yes.

Q59. Are the prompts under *18. Scope of Project* to be answered in addition to Form 3 or should the "description of all modules including platform, proposed version, any third-party solutions and interfaces to be included in this proposal" be completed in response to a related space on Form 3 under 18. Form 3?

A59. Yes if you would like to clarify your software's handling of the specific content.

Q60. Should the description of proposed module follow the structure of the "brief overview of the modules requested along with expected functionality" or should it follow the structure of the vendor's module set-up?

A60. Vendor can decide how they want to address this.

Q61. If form 3 is to be included as part of a vendor response, what does column 5 "rate" refer to, and if the vendor is required to fill it out, what scale does the City wish for the vendor to use?

A61. That is a misprint. Vendor should be able to designate whether they can offer the items or not.

Q62. Should the "sample reports" requested be included as an attachment in the proposal appendix or a separate document?

A62. Sample reports can be attachments at the end of the proposal.