



REQUEST FOR PROPOSALS FOR PERMITTING, LICENSING, AND LAND-USE MANAGEMENT SOFTWARE

The City of Mission requests proposals by qualified vendors for the above-referenced project. Interested vendors should submit seven (7) hard and (1) digital copy of a proposal in a sealed envelope to the City Clerk's office at Mission City Hall, 6090 Woodson Rd., Mission, KS 66202.

**RESPONSES MUST BE RECEIVED BY
Friday, September 3, 2021 by 5:00 P.M. CDT**

Questions regarding this RFP may be submitted in writing to:

Brian Scott, Assistant City Administrator
6090 Woodson Street
Mission, KS 66202
bscott@missionks.org

City of Mission
REQUEST FOR PROPOSALS
Permitting, Licensing, and
Land-Use Management Software

1. INTRODUCTION

The City of Mission is seeking proposals for a **Permitting, Licensing, and Land-Use Management Software** solution. A full Request for Proposals (RFP) can be obtained from the City’s website – www.missionks.org. The RFP contains specifications for proposals and requirements for submittal. Any revision to the RFP, or additional information to be provided, will be through addenda published on the City’s website. All respondents must verify with their submittal that they have received and considered all addenda.

To be considered, seven (7) hard copies and one (1) digital copy of a proposal should be submitted in a sealed envelope labeled “Permitting and Land-Use Management Software” to the City Clerk’s Office, Mission City Hall, 6090 Woodson, Mission, KS 66202 by 5:00 p.m. CDT, Friday, September 3, 2021. Any proposals received after this date and time will be returned unopened.

Questions regarding this RFP should be submitted in writing to:

Brian Scott
Assistant City Administrator
City of Mission
6090 Woodson
Mission, KS 66202
bscott@missionks.org

The City will not pay for any information herein requested, nor is it liable for any costs incurred by those responding to this RFP. The City reserves the right to select the proposal that best meets the needs of the City and to waive any informalities, technicalities, or irregularities in the proposal. Proposals that do not meet the stated requirements will be considered non-compliant and will be disqualified unless the City waives such non-compliance.

2. BACKGROUND

The City of Mission:

The City of Mission (hereafter, City) is a municipal corporation organized under the constitution and laws of the State of Kansas. The City serves a population of approximately 9,400 residents within a 2.87 square mile area located in Northeast Johnson County, Kansas; two miles west of the Missouri/Kansas border.

Mission is a first-tier suburb within the Kansas City metropolitan area. Incorporated in 1951, the city experienced much of its growth and development in the decades following the Second World War. The city is now nearly fully developed and landlocked by neighboring communities of similar size and make-up. Much of the development that

has occurred in the past decade has been in the form of redevelopment of existing property and small infill projects.

The City is comprised of six operating departments: administration, municipal court, community development, police, public works, and parks and recreation. The City has 73 full-time employees and an annual operating budget of approximately \$12 million. Respondents unfamiliar with the City can find more information online at the City’s website, <http://missionks.org/>.

Community Development:

The City of Mission’s Community Development Department is comprised of five, full-time employees. These are: a building official (1), planner (1), neighborhood services officer (1), community development coordinator (1), and a permit technician (1). Oversight of the department is provided by the assistant city administrator.

The Community Development Department is responsible for the land-use management, building safety, and property maintenance functions of the City, as well as neighborhood and community support through various grant programs and initiatives. The department also oversees solid waste collection services for single-family residential properties provided by a third-party contractor, and a robust rental licensing program for multi-family complexes.

The table below provides summary information on the activity level of the Community Development Department over the past three years.

| Activity | 2018 | 2019 | 2020 | 2021 Year to Date |
|--|--------------|--------------|--------------|-------------------|
| Land-Use Cases | 12 | 7 | 5 | 3 |
| Building Permits | 338 | 390 | 330 | 181 |
| Total Valuation of Building Permits Issued | \$94,883,429 | \$45,274,478 | \$11,765,611 | N/A |
| Code Enforcement Violations | 859 | 829 | 847 | 317 |

Land-use cases include preliminary and final development plans for new development projects; plats, lot-splits, and minor plat adjustments; rezoning; special use permits; variances; and other situations that pertain to the use of a specific property. These are in addition to the plan review that is done in conjunction with building permits that are issued.

Building permits are issued for both commercial and residential projects and include electrical, mechanical, plumbing and structural. Most commercial permits consist of tenant finishes for commercial and retail spaces; roof work; electrical, plumbing and mechanical updates. Residential permits include room additions, remodeling, accessory structures, decks, roofs, hot water heaters, and electrical and mechanical updates.

Building permits issued for new commercial construction included a mixed-use development in 2015; a movie-theater and entertainment facility in 2019; a multi-level parking structure, car wash, and commercial renovation all in 2020; and two commercial renovations in 2021.

Building permits issued for new home construction were as follows: 2017 (1), 2018 (2), 2019 (3), 2020 (1). The City issued two (2) building permits in 2019 for multi-family apartment buildings, with approximately 200 units each. Only one apartment building has been built. The City anticipates issuing another building permit by year-end for a third multi-family apartment building with 168 units.

The Community Development Department is responsible for enforcing the City’s property maintenance codes for both commercial and residential projects. Most violations that are cited are addressed after the property owner is notified by letter of the violation. Approximately five percent of the cases result in a court case being filed in municipal court.

In addition to these primary functions, the Community Development Permit also issues several permits specific to property including:

- Sign Permits (including temporary signs),
- Fence Permits,
- Swimming Pool Permits,
- Accessory Animal Permits (chicken coops and beehives),
- Demolition Permits,
- Land Disturbance Permits,
- Temporary Dumpster Permits,
- Temporary Storage Pod Permits,
- Temporary RV Storage Permits, and
- Rental Licenses

Other City departments also issue permits and licenses that are specific to a parcel of property and could be tracked in a land-use management software application. These include:

- Right-of-way permit (Public Works) – approximately 75 per year
- Occupational License (Administration) – approximately 450 per year
- Message Therapy and Message Therapist Licensing (Administration) – approximately 10 per year
- Alarm Permits (Police Department) – approximately 100 per year

Building permits that are issued are tracked through an Access data base and on spreadsheets. Code enforcement violations are also tracked through an Access data base. Both data bases are well over a decade old and can no longer be supported. Land use management cases and others permits are tracked on spreadsheets.

Occupational Licenses are also tracked through an Access data base that is past its useful life. Other permits such as right-of-way and alarm permits are tracked on spreadsheets.

The City utilizes a GIS database maintained by Johnson County, Kansas for parcel information. The system, known as Automated Mapping Information System (AIMS), can be accessed through a public portal at this web address: <https://aims.jocogov.org/myaims.aspx>. The information provided by this system includes street address, parcel ID, ownership information, tax information, lot size, zoning, utilities, flood zones, planimetric, and arial imagery. The parcel database (shapefile) is updated monthly.

The City did have a subscription to ESRI’s ARC GIS software, but has let it lapse in the past few years due to a general lack of knowledge among staff in how to use the software.

There are 4,517 total parcels of property in the city of Mission. Of these, 3,777 (84%) are residential, 281 (6%) are commercial, and the remainder (10%) are exempt, vacant, or utilities.

Mission Technology Environment:

The City has made a considerable investment in technology upgrades in the past few years. All City facilities were upgraded to Category 6 network cabling in 2018. A new data closet was established with the re-cabling project and new switches installed. A new VoIP phone system and IP security camera system were also installed as part of this project. In 2019, the City replaced nearly half of its aging desktop computers throughout the organization. Replacement of another quarter in 2020 and 2021 has resulted in an entirely new fleet of end-user devices with Microsoft Windows 10 OS. All computers are now less than three years in age, and the City will begin an annual replacement program of desktop and laptop computers to ensure that older units are replaced before failure and updates and operating software is as current as reasonably possible. Likewise, servers and switches are being replaced on a similar replacement schedule.

The City's network is divided into two segments, one for police and one for all other City functions. The police department functions are segmented for security reasons and compliance with Kansas Bureau of Investigation (KBI) standards. The City's segment utilizes two servers that have been replaced within the last four years. Servers utilize Microsoft Server 2019 OS and VM Ware.

The City migrated to Microsoft Office 365 earlier this year. The City had been using Google for its productivity software (primarily email and calendaring) with certain employees having Microsoft applications such as Word, Excel, Access, and Power Point to access files on the server. Office 365 government platform will provide greater security going forward and set the stage for eventually moving to an entirely cloud based computing environment.

With upgrades to network structure, hardware, and productivity systems complete, the City is now turning its attention to software applications. The City recently entered into a contract with Tyler Technologies for municipal court case management software. In addition to this RFP for permitting, licensing, and land-use management software, the City is intending to issue an RFP in the near future for financial management software.

Ongoing network and IT support for the City is provided by Johnson County Department of Technology and Innovation (DTI). It is expected that the selected vendor for this RFP will work closely with DTI in setting up any software on the City's server (if on-premises solution is selected) and any necessary applications on desktops, laptops, and other end-user devices.

3. SCOPE OF SERVICES

The City of Mission is seeking proposals for a permitting, licensing, and land-use management software solution that will replace the current Microsoft Access database solution that the City is using. The proposed permitting, licensing, and land-use management software should be a state-of-the-art, automated system that provides easy and effective access for the public, efficient internal processing for City staff, and long-term record retention.

It is anticipated that the permitting, licensing, and land-use management software will be used by several City departments for processing and managing various permits and licenses that are issued by the City that are specific to a particular parcel of property. It is expected that applicants will be able to apply for a permit or license through an on-line portal via the City's webpage on a 24/7 basis. Once received, the software will then route the application to the appropriate staff member for processing. Notes concerning the application and any follow-up communication and/or requests for additional information will be captured within the software. Once issued, the software will retain the permit or license in a searchable database for future reference and reminders provided when renewals occur. It is

also expected that payment for the permit or license will be through the same on-line portal.

Likewise, it is expected that the permitting, licensing, and land-use management software will be used by the Community Development Department for receipt of applications for building permits and land-use matters through an on-line portal via the City's webpage. Once received, the software will route the application to the appropriate staff member for processing. The software will capture notes on the application that can be seen and responded to by other staff members participating in the review process. The software will allow for reviewer's comments to be captured on the plans submitted electronically (paperless review). The software should be able to identify where the application is in the review process and provide reminders to complete a review or task to ensure that the application is reviewed within a certain overall time period. Once issued, the software should be able to retain the permit or land-use decision in a searchable database tied to parcel data for future reference. The applicant should be able to access the software through the on-line portal to track the application, respond to questions or comments, provide additional information, and make payment.

Applications for land-use matters often involve reviews and approvals that are discretionary in nature. Examples of these include preliminary and final development plans, plats, and special use permits. Conditions as part of the approval process may be placed on these applications that must then be captured when an application for an associated building permit is submitted. The permitting, licensing, and land-use management software should include features to make such conditions and agreements accessible during the permitting process and afterwards. Searchable historical records are a critical part of ongoing permit tracking, as are notices of key milestone dates, and events that trigger a certain action. The software must assist in coordinating staff inspections and verifications from land-use application, through permit application, through project completion and beyond (e.g. tracking of performance and warranty bonds).

In addition, the Community Development Department would like to utilize the software for the purpose of tracking and responding to property maintenance violations. The neighborhood services officer should be able to log violations into the software by parcel address or ID, send notices of the violation, and keep notes. The software should have an automated process for generating notices, tracking notices, and reminders provided when abatement or some other action should occur after a certain number of days. Again, property maintenance violations should be retained in a searchable data base for future reference. The system should also allow for complaints to be received through an on-line portal via the City's webpage and a means for tracking of the case by the complainant.

It is also expected that staff can use the permitting, licensing and land-use management software in the field to record notes on inspections and issue reports and citations directly at the location where the inspection is being done.

The permitting, licensing and land-use management software should link with Johnson County's AIMS parcel database. Seamless integration and updating of the parcel information will be required of the software as well as maintaining historical files. The City did have a subscription to ESRI ARC GIS at one time, but has let it lapse primarily due to lack of knowledge among staff on how to use it. The City would be open to renewing this subscription if beneficial to offering a more complete experience with a permitting, licensing, and land-use management software solution.

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

The permitting, licensing and land-use management software should provide a fully functional point of sale (PoS) component for both in-person and online cashiering. The software needs to be able to integrate directly with a merchant services provider for processing of payment cards and be verified as PCI compliant. The cashiering component should allow the applicant to purchase both fee items generated by the software as well as other over-the-counter items such as maps and photocopies, and have a “shopping cart” feature to allow multiple items (e.g. permits) to be tendered in one transaction.

It is expected that the permitting, licensing and land-use management software will be able to integrate with a financial management software for purposes of recording transactions and deposits and reconciling. The City is in the process of issuing an RFP for a new financial management software.

In summary the software will be required to do the following functions at a minimum:

- General permit and land-use application management
- Public portal with online permit submittal and tracking
- GIS integration
- Electronic plan review integration
- Mobile inspection capabilities
- Automated remote inspection requests
- Robust and flexible search and display capabilities
- Ability for users to do custom reporting and data extraction
- Ability to automate generation of customized forms, letters, and permits/licenses
- Flexible permit types and numbering system, with annual reset
- Ability to calculate fees and charges with manual adjustments
- Integrated cashiering / point-of-sale with online and in-person components
- Ability to integrate with financial management software.

This is not intended to be an exhaustive summary of capabilities, but rather one that exemplifies some of the more common features sought in permitting, licensing and land-use management software. Appendix A of this RFP contains a matrix with more specific criteria that the City is seeking in such a software. Respondents will be expected to complete Appendix A by identifying whether their proposed solution offers a particular function or not, and if it does, is it one that requires the software to be modified.

The City is open to considering either a cloud-based or an on-premise solution. If a respondent offers either, the respondent should speak to the advantages and disadvantages of each, and the cost of each, in their proposal.

The vendor of the selected software solution will be required to install the software on the City’s server, if an on-premises solution is selected, and any applications on end-user devices (desktop/laptop/tablet). There is a potential for as many as 10 to 12 users of this software. If a specific operating or integration software is required, and/or specific computer or server specifications, such should be called out in the proposal and whether this is included in the price or in addition.

The vendor of the selected software solution will be required to provide training and on-going help-desk support for their solution. Respondents should be prepared to speak to this in their proposal, and when is such available and at what cost.

The vendor of the selected software solution will be required to provide on-going maintenance and updates of their solution. Respondents should be prepared to speak to this in their proposal and in particular, the frequency of maintenance and updates and cost.

It is anticipated that the software solution selected shall be designated as the City’s long-term permitting, licensing, and land-use management system with the assumption of an auto-renewal contract with termination at the sole discretion of the City. Discontinuation of services will require a transition period. This transition period will be a minimum period of six months under full-service terms. All data stored in the software solution will be the property of the City and can be retrieved upon termination of the contract at no cost.

Finally, the City is seeking not only a software solution that will automate many of its processes in regards to permits, licenses, and land-use matters, but also an opportunity to review and improve upon those processes, implementing best practices where feasible. To this end, the City will be seeking input and assistance from the selected vendor based on their experience working with agencies for opportunities where the City may improve or even “re-engineer” its practices.

4. PROCEDURES FOR SUBMITTING A PROPOSAL

4.1. Submission of Proposal

Vendors wishing to submit a response to this RFP shall **submit seven (7) hard copies and one (1) digital copy of their proposal to the City Clerk’s Office by no later than 5:00 p.m. (CDT), Friday, September 3, 2021.** Submission should be in a sealed envelope clearly marked “Permitting and Land-Use Management Software” and addressed to:

City Clerk
City of Mission
6090 Woodson St.
Mission, KS 66202

Submissions received after the date and time stated in this RFP shall not be considered. Any submissions received after the deadline shall be returned unopened providing the entity submitting the response is identified on the response envelope.

4.2. Submission Timeline

The anticipated schedule for review of proposals is outlined below:

| | |
|---|---|
| Issue RFP | August 2, 2021 |
| Proposals Due | September 3, 2021 |
| Interviews of Top Candidates and Product Demonstrations | Week of September 20 th , 2021 |
| Recommendation to City Council | October 6, 2021 |
| Approval of Contract by City Council | October 13, 2021 |
| Notice to Proceed | November 1, 2021 |

5. ITEMS TO BE INCLUDED IN A SUBMITTAL

5.1 Vendor Profile

Please provide information about the vendor, the software solution offered, and the proposed project staff. If the firm submitting the RFP and the product software provider are not the same company, a separate Vendor Profile page must be provided for the vendor submitting the proposal and the software product provider. Please provide the following information in your submittal:

- **Vendor Name:**
- **Vendor Address:**
- **Vendor Website:**
- **Vendor Phone:**
- **Vendor History (*Please provide a brief history of your company.*):**
- **Software Solution Being Offered/Proposed**
- **Name and contact information of the individual with the vendor who is responsible for submitting this proposal.**

5.2 Experience and References

Describe past projects that are similar to this project in terms of size and scope, and that utilize the proposed software solution. Please provide the following information in your submittal:

- **Name and address of the client (municipal or local government preferred):**
- **Name, title and telephone number for a contact person:**
- **General description of the project requirements:**
- **Size of the client organization in terms of number of permits issued in a year:**
- **Timeframe for the project (include training period):**
- **Number of vendor staff involved in the project and their responsibilities:**

5.3 Product Description and Specifications

The proposal should describe clearly and fully the proposed software and its features and components. In particular, the proposal should detail how the vendor and the proposed software solution will meet the needs of the City as outlined in Section 3 - Scope of Work. Brochures, standard product documentation, including user manuals, is encouraged, as well as demonstration software and sample files, but the vendor should not rely on these solely.

The vendor shall describe in detail the hardware and operating system software configuration requirements for successful operation of the proposed software product at the City of Mission.

Appendix A of this RFP contains a matrix with detailed specifications that the City is seeking in a new permitting, licensing and land-use management software. The vendor is to indicate if the listed specification

is available with the software being proposed or something that would require modification. If a modification is required, then whether the vendor will modify at fixed costs or maintenance cost. If the specification is not available at all, then put N/A in the first box.

Failure to complete Appendix A and include it in the submittal will result in an automatic disqualification from further review.

5.4 Process Improvements / Adjustments

In implementing a new permitting, licensing, and land-use management software, the City is willing to consider modifying its own internal processes to take advantage of software features it considers valuable. However, it is important for the City to understand how flexible the software can be in allowing the customization to fit the City's needs. Vendors should be prepared to describe and demonstrate their proposed solution's ability to be flexible and be customized to fit established processes and reporting needs. Vendors should also describe any available capabilities to assist the City to improve its internal needs procedures to take advantage of operational features of the proposed software.

5.5 Maintenance and Support

Please provide information about maintenance and support offerings. In particular how will the vendor support the City staff and the County's Information Technology Staff in terms of maintenance and support of the proposed software?

Describe your problem escalation process, including:

- **Initial problem identification**
- **Triage for priority and severity of problem**
- **Steps for resolving problem escalation when a solution is not forthcoming, or an implemented solution is unsatisfactory**
- **Final authority regarding conflicts**
- **After hours availability of support staff**

How do you propose to access a computer and/or the server to troubleshoot issues?

Describe the change request processing procedures and policies that you currently use.

Do the annual maintenance fees entitle the city to upgrades and enhancements with no added costs and/or fees?

Describe how the City will be notified of updates and modifications.

5.6 Interface with Other Applications

Please review and provide information relative to the ability of the proposed software solution to interface with existing programs and databases maintained by the City and those maintained by a third party:

Email integration - The City currently uses Microsoft Office 365

Online payments - The City currently contracts with Transaction Express for PoS payments in person or over the phone.

Financial Management Software – The City currently utilizes Governmentor for its financial management software. The City will be issuing a RFP this year for a new financial management software. Please provide a list of those vendors for such software that your firm software solution works with.

5.7 Implementation Plan

Please provide a detailed implementation plan for installation and testing of the new software. This should include specific items that are required from the City as well as a turn-key project plan with key dates and milestones to reflect the amount of time it would take to begin and complete the project. At a minimum, the following should be covered in the proposal:

- **Installation Plan**
- **Testing Plan**
- **Turn-key Project Plan and Schedule (include key dates and milestones)**
- **Migration of existing data from an Access data base.**

5.8 Education and Training Plan

Please provide a proposed plan for education and training including the anticipated number of hours, and the location where the training is to take place. At a minimum, the following should be covered in the proposal:

- **Provide a detailed narrative of the proposed education and training plan.**
- **Proposed time frame for the training plan.**
- **Who will set-up the new software and what type of impact will it have on current department operations?**
- **Where will the training be located?**
- **Is there an online training option?**
- **Does the vendor provide manuals (printed and electronic)?**
- **Does the vendor offer a helpline? If so, what hours is it staffed?**
- **Is the training included in the cost of the proposal?**

5.9 Pricing

Appendix B of this RFP contains a pricing matrix that must be completed and included with submission.

Failure to complete Appendix B and include it in the submittal will result in an automatic disqualification from further review.

5.10 Cybersecurity

Please provide a brief description of your efforts to ensure cyber security for both your software and the clients that host your software.

5.11 Key Issues and Consideration

Please provide any key issues and/or factors the City should consider in selecting and implementing the proposed software solution.

6. PROPOSAL EVALUATION PROCESS

The City will evaluate vendor proposals in two phases. In Phase 1 the City will review vendor qualifications, system features, and proposed work plans to determine those proposals to be selected as finalist. Only a limited number of finalists will be selected for further evaluation, and those vendors will be invited to demonstrate their products to the City evaluation team. In Phase 2, the City will thoroughly evaluate selected proposals, observe vendor demonstrations, and contact references. Additional questions may be asked of finalists if necessary for clarification. Contract negotiations may be undertaken with one or more finalist prior to final selection.

6.1 Evaluation Criteria

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

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

Vendors should note that proposals will be evaluated on factors other than just price, and there is no assurance that a proposal will win the contract based solely on lowest price. The apparent ability of proposed software solutions to be implemented with low risk and to facilitate the provision of excellent customer service when operated by the present complement of City staff will be important considerations.

6.2 Vendor Product Demonstrations

Finalist will be required to perform a live demonstration of their proposed software solution. The specific software version proposed for implementation shall be demonstrated. Vendor demonstrations are considered one of the most important parts of the selection process.

Two hours will be allotted to each finalist for product demonstrations. Demonstrations will be via Zoom to save on time and expense of travel. Demonstrations should simulate the actual operational practice using the proposed software solution. Slide-show overviews of system features may be included but are not an acceptable substitute for demonstrations of operational usage. Any existing City permit functions not directly supported by the proposed software shall be explicitly highlighted and addressed by the vendor in the demonstration. Prior to the demonstration, the City may request the vendor to demonstrate system operations using specific scenarios representative of operational experience in the City.

7. GENERAL REQUIREMENTS AND STIPULATIONS WITH SUBMISSION

The City reserves the right to reject any or all submissions and to waive any minor informality, technicality or irregularity in any submission.

All responses, and related reference information, submitted in response to this RFP will become the property of the City and will not be returned. Each Respondent submitting a response waives any right of confidentiality as to the response documents. If a Respondent submitting a response considers certain material in the response proprietary information, it shall clearly designate those portions of the response it wishes to remain confidential. As a public entity, the City is subject to making records available for public disclosure. The City will attempt to maintain confidentiality of material marked proprietary; however it cannot guarantee that information will not be made public.

The City reserves the right to (1) accept or reject any and all submissions and to waive any technicalities or irregularities involving any submission and to cancel the RFP process at any time prior to entering into an agreement, (2) not award a contract for any or all of the services that are the subject of this RFP process, (3) negotiate contract terms acceptable to the City with the Respondent and (4) disregard all nonconforming, non-responsive or conditional submissions.

During the evaluation process, the City reserves the right to request additional information or clarifications from those Respondents submitting proposals and to allow corrections of errors and/or omissions.

Submission of a proposal indicates acceptance by the Respondent submitting the proposal of the terms, conditions and specifications contained in this RFP to include any contract requirements set forth herein.

The City will not pay for any information herein requested, nor is it liable for any costs incurred by those Respondents submitting proposals. The City reserves the right to select the submission that will best meet the needs of the City. Submissions that do not meet the stated requirements will be considered in non-compliance and will be disqualified unless the City waives such non-compliance.

No submission may be withdrawn for a period of ninety (90) days from the date set for the opening thereof.

By submission of a response, each Respondent submitting a proposal certifies and acknowledges that:

- a. It has not paid nor agreed to pay any person, other than a bona fide employee, a fee or brokerage fee resulting from the award of the RFP.
- b. The City may, by written notice to the respondent submitting the response, reject the RFP or cancel any award under this RFP if it is found by the City that gratuities, in the form of entertainment, gifts or otherwise were offered or given to any representative of the City with a view toward securing an agreement or other favorable treatment with respect to this RFP or the entity submitting the response participated on collusion with another entity to restrain or eliminate competition.
- c. The contents of this RFP and any clarifications distributed or issued by the City shall become part of the contractual obligation and incorporated by reference into the ensuing contracts as the City deems appropriate.

APPENDIX A

SPECIFICATIONS FOR A CASE MANAGEMENT SOFTWARE

The following pages relate to specifications, or needs, the City of Mission is seeking to fulfill with a permitting, licensing, and land-use management software. The term “Out of the Box” refers to the software’s ability to perform the specified function without modifications. If modifications are needed, then indicate where the vendor can make the modification and if it is a one-time, fixed cost, or part of the maintenance costs. If the software does not have the ability to perform the specified function at all, then indicate so with a N/A.

| Section 1 – INDIVIDUAL APPLICATION FUNCTIONALITY REQUIREMENTS | | | | | |
|--|--|-------------------------------|--------------------------------|------------------------------------|--------------------------------------|
| <i>The City is seeking a state-of-the-art software solution that will automate the permitting, licensing, land-use management, and code enforcement functions of the City. The software solution should provide an easy and efficient means for City staff to manage the process of receiving, reviewing, and issuing a variety of permits and licenses provided by the City, as well as receiving and reviewing applications for land-use decisions and building permits, and managing property maintenance violations. The software solution should also provide a seamless and efficient interface with the applicants and the general public that engage with the City in these matters.</i> | | | | | |
| <i>The following are general requirements that the City is seeking for each application of the software solution including general permits and licenses, land-use management, building permits and inspections, and code enforcement. While some requirements may be listed under a specific application, it is expected that the requirement would be applicable across the software for all applications.</i> | | | | | |
| Sec. | Software Requirements | | Modifications | | |
| 1 | Questions to be answered | Software Has [Yes] [No] | Vendor to modify [Yes] [No] | Fixed cost to modify [Yes] [No] | Maint. cost to modify? [Yes] [No] |
| 1.1 | <i>Permitting and Licensing (Occupational Licenses, Rental Licenses, Alarm Permits, etc.)</i> | | | | |
| 1.1.1 | Software provides automated processes for billing, payment, issuing, and renewal of licenses and permits. | | | | |
| 1.1.2 | Software provides the ability to receive applications for permits and licenses electronically via the City’s web page. | | | | |
| 1.1.3 | Software provides the ability to route an on-line application to the correct staff member for processing. | | | | |
| 1.1.4 | Software provides the ability to create and modify document templates for licenses and renewal notices. | | | | |
| 1.1.5 | Software provides the ability to automatically send email notifications to license and permit holders about upcoming renewals. | | | | |

| | | | | | |
|------------|---|--|--|--|--|
| 1.1.6 | Software provides for the identification of non-renewable license types so renewal notices will not be produced for them. | | | | |
| 1.1.7 | Software provides the ability to print licenses, registrations, and certifications in either batch or on demand during processing without exiting the processing program. | | | | |
| 1.2 | <i>Land-Use Management</i> | | | | |
| 1.2.1 | Software provides the ability to create/modify workflows for mapping business processes using an intuitive graphical interface. | | | | |
| 1.2.2 | Software utilizes existing address, parcel and property ownership data through an import process from Johnson County AIMS. | | | | |
| 1.2.3 | Software utilizes existing address, parcel and property ownership data through an import process from ESRI ArcServer. | | | | |
| 1.2.4 | Location data is kept in a single data store that is accessible by all program modules. | | | | |
| 1.2.5 | Software provides the ability to identify or reference a location by parcel ID, address, structure, geographic coordinates, zone, or district. | | | | |
| 1.2.6 | Software provides the ability to link multiple persons or business contacts with a location. | | | | |
| 1.2.7 | Software provides the ability to specify the relationship of a person or business to a location (e.g. property owner, facility manager). | | | | |
| 1.2.8 | Software provides the ability to create user defined attributes for location records. | | | | |
| 1.2.9 | Software provides the ability to add narratives or notes to individual locations. | | | | |
| 1.2.10 | If software data entry screens contain pre-populated person or location data, software allows users to override pre-populated information. | | | | |
| 1.2.11 | Software provides the ability to store validated person or location data that supersedes data imported from an outside source such as AIMS or ESRI. | | | | |
| 1.2.12 | Software provides the ability to add, delete, or modify location records in bulk. | | | | |
| 1.2.13 | Software provides the ability to search for a location by parcel ID, address, street, related person or business, legal description, common name, structure, geographic coordinates, zoning, or district. | | | | |

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| 1.2.14 | Software provides the ability to quickly see all current and historic activity for a specific location. | | | | |
| 1.2.15 | Software provides the ability to drill down on a location to see location attributes and associated data such as open/historic work activity, fees and assessments, and related people or locations. | | | | |
| 1.2.16 | Software provides the ability to associate multiple addresses with a structure. | | | | |
| 1.2.17 | Software provides the ability to associate multiple structures with an address. | | | | |
| 1.2.18 | Software provides the ability to track changes made to location records and retain a change log for historical lookup (e.g. rezoning or new plat). | | | | |
| 1.2.19 | Software provides for the ability to receive applications for land-use actions such as rezoning, variance, and preliminary development plan electronically through the City's web page. | | | | |
| 1.2.20 | Software allows for an applicant to create an "account" as part of the submission with unique identifier for the applicant. The applicant can start an application and save it to be completed later, track the review process, and provide additional material if needed. | | | | |
| 1.2.21 | Software has the ability to check an application submitted electronically for completeness of information and materials submitted. | | | | |
| 1.2.22 | Software has the ability to verify that the address exists and that the subject property is within the City limits. | | | | |
| 1.2.23 | Software provides the ability for the applicant to upload attachments in .pdf, txt., Word, PowerPoint or other commonly used productivity software as part of the electronic submission. | | | | |
| 1.2.24 | Software provides the ability to for the applicant correct their submittal, including deletion of uploaded files and uploading new, corrected files prior to the application being accepted and assigned. | | | | |
| 1.2.25 | Software provides the ability to process multiple applications in a single transaction (e.g. rezoning, plat, and preliminary development plan). | | | | |
| 1.2.26 | Software provides error message to applicant highlighting omitted mandatory inputs. | | | | |

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| 1.2.27 | Software has the ability for an applicant to sign an electronic application using an e-signature either integrated into the software or via DocuSign or similar 3 rd part software application. | | | | |
| 1.2.28 | Software has the ability to send an email to the applicant upon successful application submission. | | | | |
| 1.2.29 | Software has the ability to send an email to the applicant when the plan review has begun. | | | | |
| 1.2.30 | Software provides the ability to automate the review process of land-use application by assigning a case number to the application and directing it to a specific staff member. | | | | |
| 1.2.31 | Software supports digital plan review with the ability to track comments from reviewer and responses from applicant for each round and have standard plan review comments that can be generated in a letter to the applicant. | | | | |
| 1.2.32 | Software provides the ability to allow multiple staff to review the application at the same time and provide notes/comments in a central location that can be viewed by others. | | | | |
| 1.2.33 | Software provides the ability for the reviewer(s) to make comments directly on a set of digital plans (e.g. a site plan or building plans). via Bluebeam or some other application, that can be saved then transmitted back to the applicant for response. | | | | |
| 1.2.34 | Software provides the ability to track the calendar days from submittal of an application and to send email reminders to staff of tasks to be performed as part of the review process. | | | | |
| 1.2.35 | Software allows staff to email multiple parties (applicant, design professionals, and contractor) directly from the plan review application screen. | | | | |
| 1.2.36 | Software provides the ability to calendar future dates such as when a special use permit is to be renewed, and send an email or calendar reminder when that date is approaching. | | | | |
| 1.3 | <i>Permitting</i> | | | | |
| 1.3.1 | Software provides the ability to create/modify workflows for mapping business processes using an intuitive graphical interface. | | | | |
| 1.3.2 | Software provides automated processes for issuing building permits and certificates of occupancy. | | | | |
| 1.3.3 | Software provides the ability to receive applications for building permits electronically via the City's web page in a manner similar to requirements 1.2.19 through 1.2.29. | | | | |

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| 1.3.4 | Software automatically checks that contractors have a valid contractor license through Johnson County prior to accepting application. | | | | |
| 1.3.5 | Software has the ability to receive updates from Johnson County when their list of contractor's license holders is updated once a month. | | | | |
| 1.3.6 | Software provides the ability to rapidly collect payments and issue simple permits that do not require review. | | | | |
| 1.3.7 | Software provides the ability to associate groups of permits that relate to a common project. | | | | |
| 1.3.8 | Software provides the ability to link an unlimited number of parties to a permit application. | | | | |
| 1.3.9 | Permit record retains a history of all contacts ever associated with the permit application | | | | |
| 1.3.10 | Software has the ability to take conditions and stipulations associated with an application for a land-use matter and transfer those to the application for the building permit (or flag them) so that they can be incorporated into the plan review for the building permit. | | | | |
| 1.3.11 | Software supports digital plan review with the ability to track comments from reviewer and responses from applicant for each round and have standard plan review comments that can be generated in a letter to the applicant. | | | | |
| 1.3.12 | Software provides the ability to allow multiple staff to review the application at the same time and provide notes/comments in a central location that can be viewed by others. | | | | |
| 1.3.13 | Software provides the ability for the reviewer(s) to make comments directly on a set of digital plans (e.g. a site plan or building plans) via Bluebeam or some other application that can then be saved then transmitted back to the applicant for response. | | | | |
| 1.3.14 | Software provides the ability to track the calendar days from submittal of an application and to send email reminders to staff of tasks to be performed as part of the review process. | | | | |
| 1.3.15 | Building code references are pre-populated in dropdown lists wherever appropriate. | | | | |
| 1.3.16 | Software has the ability flag certain applications or files for a specific action to occur or follow-up. | | | | |
| 1.3.17 | Software provides the ability to create and automatically address and print letters or notices to a list of addresses. | | | | |

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| 1.3.18 | Software provides the ability to send an email to the applicant when the permit has been approved and amount due for payment. | | | | |
| 1.3.19 | Software provides the ability for staff to receive an email when permit has been paid for. | | | | |
| 1.3.20 | Software allows creation of a “stop work” order that prevents the user from continuing with a process without an override. Overrides are recorded in an audit report of all overrides performed. | | | | |
| 1.3.21 | Stop work orders are visible in all application interfaces (client, web portal, mobile application, etc.). | | | | |
| 1.3.22 | Software automatically calculates permit expiration date based on user parameters. Expiration date extends automatically based on inspection activity. | | | | |
| 1.4 | <i>Inspections</i> | | | | |
| 1.4.1 | Software provides a process to centrally schedule and manage inspections for all types of work activity (permits, code compliance, rental inspections) | | | | |
| 1.4.2 | Software provides the ability for inspections to be requested/scheduled on-line. | | | | |
| 1.4.3 | Software provides the ability to define availability times or windows for individual inspectors. | | | | |
| 1.4.4 | Software prevents overscheduling of inspectors | | | | |
| 1.4.5 | Software provides the ability for contractors and citizens to schedule permit inspections on-line. | | | | |
| 1.4.6 | Software provides the ability to schedule or assign inspectors based on availability, inspection locations, or inspection type. | | | | |
| 1.4.7 | Software provides the ability to reassign an inspection to a different inspector. | | | | |
| 1.4.8 | Inspection calendar can synchronize with Microsoft Outlook Calendar. | | | | |
| 1.4.9 | Software automatically checks for holidays or other scheduled office closings prior to scheduling an inspection. | | | | |
| 1.4.10 | Software automatically checks that inspections are performed in the correct sequence, and if not denies request for scheduling. | | | | |

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| 1.4.11 | Software automatically checks that a permit application is valid prior to scheduling an inspection. | | | | |
| 1.4.12 | Software has the ability to allow for inspections in the field using a mobile data device. | | | | |
| | <i>Please list those mobile data devices that can be used with the software (i.e. Surface Pro, I-pad, etc.) and any interface applications that may be needed.</i> | | | | |
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| 1.4.12 | Software provides a user-defined table of standard comments that can be used to speed up inspection results entry. | | | | |
| 1.4.13 | Software provides the ability to generate/print inspection checklists and results sheets in the office or out in the field or electronically via an email or posted on-line. | | | | |
| 1.4.14 | Software provides the ability to create and automatically address and print letters or notices to addresses. | | | | |
| 1.5 | <i>Property Maintenance/Code Enforcement</i> | | | | |
| 1.5.1 | Software provides the ability to track all property maintenance complaints and violations of City ordinances. | | | | |
| 1.5.2 | Software provides the ability to define workflow rules to enforce processes for property owner notification, allowed response times, remediation and assessments. | | | | |
| 1.5.3 | Software provides drop down menus so that users can select commonly used code violations. | | | | |
| 1.5.4 | Software provides the ability for photos of violations to be attached to the case file. | | | | |
| 1.5.5 | Software provides the ability to add specific violation location (e.g. north fence line) | | | | |
| 1.5.6 | Software provides the ability to list multiple property maintenance violations on a single case. | | | | |
| 1.5.7 | Software provides the ability to highlight or color code cases based on case status. | | | | |

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| 1.5.8 | Software provides the ability to track all contacts and types of contacts made on a case. | | | | |
| 1.5.9 | Software provides the ability to create and automatically address and print letters or notices to a list of addresses. | | | | |
| 1.5.10 | Software provides the ability to create and customize documents for inspections, notice letters, hearings, and door hangers. | | | | |
| 1.5.11 | Software notifies staff when allowed response time has passed and a property needs to be re-inspected to confirm the violation has been addressed or not. | | | | |
| 1.5.12 | Software provides the ability to track and issue invoices for property abatement performed by the City. | | | | |
| 1.5.13 | Software provides the ability to track when invoices are not paid and notify staff that an assessment needs to be placed on the property. | | | | |
| 1.15.14 | <i>Provide a brief explanation as to how the overall software will enhance work productivity</i> | | | | |
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Section 2 – GENERAL DATA MANAGEMENT FUNCTIONALITY REQUIREMENTS

The following are general functional requirements that the City is seeking in a license, permitting, and land-use management software solution. Functional requirements are broken down into general functional requirements of the software for all applications – permitting and licensing, land-use management, building permits and inspections, and code enforcement.

| Sec. | Software Requirements | | Modifications | | |
|------------|---|------------------------------|--------------------------------|------------------------------------|--------------------------------------|
| | Questions to be answered | OUT OF THE BOX [Yes] [No] | Vendor to modify [Yes] [No] | Fixed cost to modify [Yes] [No] | Maint. cost to modify? [Yes] [No] |
| 2.1 | <i>Data Entry Functionality</i> | | | | |
| 2.1.1 | Software avoids duplicate data entry between applications and functions. | | | | |
| 2.1.2 | Mandatory fields are color coded or identified in some way from optional fields. | | | | |
| 2.1.3 | Software provides the ability to attach and/or link a variety of documents, images, maps, URLs to individual locations, people or work activities. | | | | |
| 2.1.4 | Software provides the ability to create links from records to documents stored on internal shared network folders. | | | | |
| 2.1.5 | Software interface includes a list of frequently used or favorite menu options for efficient program navigation. | | | | |
| 2.1.6 | Software provides the ability to customize the user interface at the system and group level. | | | | |
| 2.1.7 | Users can adjust commonly altered variables, such as codes, drop down menu choices, and report parameters, without the services of a professional programmer. | | | | |
| 2.1.8 | Users can create, modify and delete workflows, scripts or automation process without the services of a professional programmer. | | | | |
| 2.2 | <i>Search Functionality</i> | | | | |
| 2.2.1 | Applications provide ability to store, search, access and retrieve multiple years of historical data. | | | | |
| 2.2.2 | Applications provide flexible search criteria based on partial name, description, date range, work type, assigned under or other search fields and filtering capabilities that limit the items in the selection list to those that match the specific criteria. | | | | |
| 2.2.3 | Search results can be filtered, sorted or used as the source data for further refined searches. | | | | |
| 2.2.4 | Default search, filter and sorting criteria can be set on a per-user basis. | | | | |
| 2.2.5 | Search results can be printed or exported to a file in a variety of formats - HTML, .pdf, .xlsx or text. | | | | |

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| 2.3 | <i>Dashboard Functionality</i> | | | |
| 2.3.1 | Software provides the ability to create multiple customized dashboards. | | | |
| 2.3.2 | Content on dashboards is modular and can easily be added/removed/repositioned/resized. | | | |
| 2.3.3 | Dashboard modules can be reused among multiple dashboards. | | | |
| 2.3.4 | Changes made to modules are propagated to all dashboards. | | | |
| 2.3.5 | Dashboard modules can be configured to show information that is specific to the person viewing it. | | | |
| 2.3.6 | Dashboard modules can include: list, charts, maps, calendars, user presence, and web content from external sources. | | | |
| 2.3.7 | Content on dashboards updates automatically without the need for users to poll or refresh. | | | |
| 2.4 | <i>Reporting/Exporting Data Functionality</i> | | | |
| 2.4.1 | Software includes ad hoc report writer with easy-to-use report authoring interface. | | | |
| 2.4.2 | Software includes a robust set of premade reports of typical departmental functions. | | | |
| 2.4.3 | Data dictionary is available to enable ad hoc report writes to access the necessary fields and tables. | | | |
| 2.4.4 | Report interface has the ability to modify both data and presentation layout elements. | | | |
| 2.4.5 | Reports allows users to determine which fields to display. | | | |
| 2.4.6 | Reports allow users to determine selection, sorting, grouping, and filtering criteria. | | | |
| 2.4.7 | Reports allow users to determine total and subtotals. | | | |
| 2.4.9 | Reports allow users to combine data from all functional areas/modules. | | | |
| 2.4.8 | Report templates can be created and modified to facilitate a consistent look and feel to report headers, footers, text formatting, font types, graphics and other visual attributes. | | | |
| 2.4.9 | Report interface provides an advanced interface for creating reports using non-destructive SQL queries. | | | |
| 2.4.11 | Reports can be reviewed prior to printing. | | | |
| 2.4.12 | Users can view, email, export, or print reports. | | | |
| 2.4.13 | Reports can be scheduled to run automatically. | | | |

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| 2.4.14 | Applications allows users to electronically save or archive reports for subsequent access by all system users with appropriate security authorization. | | | | |
| 2.4.15 | Access to each report can be restricted to selected individuals or groups. | | | | |
| 2.4.16 | Presentation ready reports can be saved in a variety of formats, including HTML, .pdfs, .xlsx, or text. | | | | |
| 2.4.17 | Users can integrate reports/charts into MS Office Word, Excel, and PowerPoint creating “live” links to easily refresh data when needed. | | | | |
| 2.4.18 | Software provides the ability to direct export data to file for loading into PC applications in a variety of formats including: xlsx, csv, txt, xml. | | | | |
| 2.4.19 | Reports provide the ability to attach and/or link, images, charts, maps or URLs. | | | | |
| 2.5 | <i>Data Retention Functionality</i> | | | | |
| 2.5.1 | Software provides the ability to define record retention schedules for customizable categories of data. | | | | |
| 2.5.2 | Software provides the ability to archive or delete records in bulk according to defined retention schedules. | | | | |
| 2.6 | <i>General User Functionality</i> | | | | |
| 2.6.1 | Software interface presents data based on user’s role or job position to minimize extraneous information. | | | | |
| 2.6.2 | Software interface presents onscreen help or tooltips to provide guidance to end users. | | | | |
| 2.6.3 | Application programming interfaces or software development kits are available for use in developing custom applications. | | | | |
| 2.6.4 | Software has the ability to hold critical records and the ability to flag certain work (with or without related permits) and address in a dedicated queue. | | | | |
| 2.6.5 | Software provides the ability to add an array of permit types for user selection. | | | | |
| 2.6.6 | Permit and license types can be easily changed or modified from original selection. | | | | |

Section 3 – SYSTEM REQUIREMENTS

The following are general technical system requirements for the software.

| Sec. | Software Requirement | | Modifications | | |
|------------|---|---------------------------|--------------------------------|------------------------------------|--------------------------------------|
| | Questions to be answered | Current CMS [Yes] [No] | Vendor to modify [Yes] [No] | Fixed cost to modify [Yes] [No] | Maint. cost to modify? [Yes] [No] |
| 3 | | | | | |
| 3.1 | <i>General Requirements</i> | | | | |
| 3.1.1 | If proposing an on-premise solution, please provide specifications for the server including memory, processing speed, operating software, and any particular applications. | | | | |
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| 3.1.2 | If proposing an on-premise solution, please address how software updates and patches will be handled. | | | | |
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| 3.1.3 | If proposing an on-premise solution, please address how access to the server will be handled in light of cyber-security concerns. Will access be through Bomgar, VPN, or some other format. | | | | |
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| 3.1.4 | If proposing a hosted solution (Cloud), is the database and application interface hosted entirely by the vendor (no City server required). | | | | |
| 3.1.5 | Software solution supports multiple concurrent users with features ensuring data integrity. | | | | |

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| 3.1.6 | Hosted solution has redundant processes for data back-up that are tested regularly. | | | | |
| 3.1.7 | Hosted solution has no prior instances of data compromise or intrusion. | | | | |
| 3.1.8 | Hosted software upgrades have minimal downtime and loss of end user functionality. | | | | |
| 3.1.9 | Hosted solution has less than 4 hours of unscheduled downtime per calendar year. | | | | |
| 3.1.10 | Software solution uses an industry recognized relational database management system that is ODBC compliant. | | | | |
| 3.1.11 | Vendor provides a development environment for testing upgrades, workflows, and configuration changes prior to release in the production environment. | | | | |
| 3.1.12 | Vendor has a regular software release cycle with updates at least once a year. | | | | |
| 3.1.13 | Vendor regularly supplies the City with the City's data in a format that is acceptable to the City. | | | | |
| 3.1.14 | The vendor acknowledges that the City's data is the property of the City. | | | | |
| 3.1.15 | The vendor acknowledges that it will supply the City with all of its data upon termination of the contract and in a format that is acceptable to the City. | | | | |
| 3.2 | <i>Compatibility</i> | | | | |
| 3.2.1 | Client application for a hosted solution is accessed through a web browser. | | | | |
| 3.2.2 | Hosted solution is fully functional in current versions of all major web browsers with a minimal interface differences (Internet Explorer, Chrome, and Safari). | | | | |
| 3.2.3 | Hosted solution does not require installation of desktop client or agent (excluding web browser and integrated 3 rd party applications such as Acrobat Reader). | | | | |
| 3.2.4 | Hosted solution is supported for use on new major versions updates of browsers within 3 months of browser release date. | | | | |
| 3.2.5 | Hosted solution is certified for use on new releases and major updates of Windows within 12 months. | | | | |

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| 3.3 | <i>Integration</i> | | | | |
| 3.3.1 | Software provides the ability to download or access application data through GIS application software, desktop productivity tools, spreadsheets, word processors, or report writers or any ODBC compliant application or service. | | | | |
| 3.3.2 | Software is able to interface with financial management software common to municipal governments. | | | | |
| 3.3.3 | Software is able to seamlessly present information from all applications graphically on map. | | | | |
| 3.3.4 | Software is able to access and present data stored in ESRI ArcServer. | | | | |
| 3.3.5 | Map interface contains common GIS features such as the ability to zoom, pan query, search and toggle layers. | | | | |
| 3.3.6 | Map interface provides the ability to hotlink images and documents referenced in GIS data. | | | | |
| 3.3.7 | Software is able to generate a map layer based on search results. | | | | |
| 3.3.8 | Software is able to display a user's pending, in progress, or closed work order on a map. | | | | |
| 3.3.9 | Mapping interface provides the ability to print a map formatted to fit an 8.5" x 11" or 11" x 17" landscape or portrait layout without rescaling or changing map extents. | | | | |
| 3.3.10 | Software can readily export data to an ESRI spatial data file such as a shapefile or geo-spatial database. | | | | |
| 3.3.11 | Software is able to interface with Johnson County AIMS mapping system. | | | | |
| 3.4 | <i>Security</i> | | | | |
| 3.4.1 | Software has granular access controls to grant or restrict access to system features and functions to authorized personnel, by user and group or job function. | | | | |

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| 3.4.2 | Software has security permissions that enable selected users to be designated as system administrators with the ability to perform maintenance tasks such as managing user accounts, modifying system parameters, and viewing audit logs. | | | | |
| 3.4.3 | Security permissions can be applied to groups of users in addition to individual users. | | | | |
| 3.4.4 | Users are only required to sign in once in a single session of activity to access all application features they are authorized to use. | | | | |
| 3.4.5 | Software provides an audit trail that allows an administrator to identify the individual who last entered or updated any record or transaction as well as the date of the modification. Audit trail data is inseparable from the record or transaction that it documents. | | | | |
| 3.4.6 | Software provides a log or report of all deleted records or transactions that allows an administrator to be able to identify an individual and the date of the deletion. The length of time to retain deletion logs is configurable by system administrators. | | | | |
| 3.4.7 | Software maintains a log of invalid access attempts. It includes no less than date/time of attempt, username used for the attempt, and what the user attempted to gain access to. The data is visible only to users designated as system administrators. The length of time to retain invalid access attempt logs is configurable by system administrators. | | | | |
| 3.4.8 | All credit card transactions are processed by a PCI compliant 3 rd party. | | | | |
| 3.4.9 | Software does not record or store credit card numbers. | | | | |
| 3.5 | <i>Mobile Device Support</i> | | | | |
| 3.5.1 | Mobile application supports devices running Apple iOS, Android, and Windows. | | | | |
| 3.5.2 | Mobile application interface is designed to support touchscreen capabilities. | | | | |

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| 3.5.3 | Mobile application allows users to access all applications and functions of the software including (but not limited to): permitting, code enforcement, inspections, project tracking, citizen request, land database, and mapping. | | | | |
| 3.5.4 | Mobile application allows user to take pictures and then upload them directly to the case file while out in the field. | | | | |
| 3.5.5 | Mobile application utilizes GPS capabilities of the mobile device to make entering location data more efficient. | | | | |
| 3.5.6 | Mobile application receives push notifications for new relevant events (e.g. new work order, appointment change, task reassignment). | | | | |
| 3.5.7 | Updates made in the mobile application are immediately synchronized to the central database if a network connection is available. | | | | |
| 3.5.8 | Updates made in the mobile application are stored locally on the device if a network connection is not available. When a network connection becomes available, all stored updates are immediately synchronized to the central database. | | | | |
| 3.5.9 | Mobile application supports the ability to capture a digital signature from devices that support a touch screen or use of stylus. | | | | |
| 3.5.10 | Mobile application allows users to be able to print a report in the field or send to an email or upload to a website. | | | | |

Section 4 – IMPLEMENTATION, TRAINING AND ON-GOING SUPPORT

Implementation and training on the proposed software solution will be critical to the success of the proposed software solution for the City of Mission. Ongoing support will be as well. The following are requirements that the City is seeking for training and on-going support.

| Sec. | Vendor Requirement | | Modifications | | |
|------------|--|------------------------|-----------------------------|---------------------------------|-----------------------------------|
| | Questions to be answered | Current CMS [Yes] [No] | Vendor to modify [Yes] [No] | Fixed cost to modify [Yes] [No] | Maint. cost to modify? [Yes] [No] |
| 4.1 | <i>Implementation</i> | | | | |
| 4.1.1 | Vendor will provide project management and system integration functions for initial software implementation. | | | | |
| 4.1.2 | Vendor will perform business process analysis and develop work flows, wizards, custom attributes, interface customizations and web portal customization to meet the City’s unique needs. | | | | |
| 4.2 | <i>Training</i> | | | | |
| 4.2.3 | Vendor provides onsite end-user training thoroughly covering all functional areas or program modules. | | | | |
| 4.2.4 | Vendor provides on-site system administrator training. | | | | |
| 4.3 | <i>On-Going Support</i> | | | | |
| 4.3.1 | Vendor provides web-based support for diagnosis and resolution of software problems. | | | | |
| 4.3.2 | Vendor provides 24 X 7 phone support for diagnosis and resolution of software problems. | | | | |
| 4.3.3 | Vendor provides an average response time for software support 4 hours or less. | | | | |
| 4.3.4 | Vendor provides website that enables customers to view support request history and status. | | | | |
| 4.3.5 | Vendor provides online knowledgebase of support solutions, frequently asked questions and technical documentation. | | | | |
| 4.3 | Vendor provides ongoing web based training for product changes, enhancements, and continuing education. | | | | |

Section 5 – FEE COLLECTIONS / PAYMENTS / EXTERNAL ACCESS

The following are general requirements that the City is seeking for fee collection, payments, and external on-line access to the software solution.

| Sec. | Software Requirements | | Modifications | | |
|------------|---|-------------------------------|--------------------------------|------------------------------------|--------------------------------------|
| | Questions to be answered | Software Has [Yes] [No] | Vendor to modify [Yes] [No] | Fixed cost to modify [Yes] [No] | Maint. cost to modify? [Yes] [No] |
| 5.1 | <i>Fees</i> | | | | |
| 5.1.1 | Software allows users to see transaction history and process payments directly from an application. | | | | |
| 5.1.2 | Software performs automated calculations. | | | | |
| 5.1.3 | Fee calculations can be based on a variety of methods including: flat fee, tiered, percentage, project size or value basis, or hourly rate. | | | | |
| 5.1.4 | Software easily allows for fee changes (amounts or calculation methodology) or new fees to be added. | | | | |
| 5.1.5 | Fee schedules can be versioned so that historical permits accurately reflect fee at the time the permit was issued. | | | | |
| 5.1.6 | Fee schedules can be modified and scheduled to take effect on a date in the future. | | | | |
| 5.2 | <i>Collections / Payments</i> | | | | |
| 5.2.1 | Payments can be taken at counter, by mail and online (credit card or electronic check). | | | | |
| 5.2.2 | Software support multiple payment methods (cash, check, money, order, credit card, etc.). | | | | |
| 5.2.3 | Software provides the ability to process partial payments or over payment. | | | | |
| 5.2.4 | Software provides the ability to void a payment. | | | | |
| 5.2.5 | Software provides the ability to associate payments with multiple different accounting funds based on the type of permit/fee/assessment. | | | | |
| 5.2.6 | Software enforces receipt of entire payment before permit can be issued. | | | | |
| 5.2.7 | Software notifies users of all unpaid balances from all applications relating to a person or address. | | | | |
| 5.2.8 | Software provides the ability to create and print receipts to multiple paper sizes (ex. 3” receipt roll or 8.5” x 11” sheets). | | | | |
| 5.2.9 | Software provides ability to email receipt. | | | | |

| | | | | | |
|--------|--|--|--|--|--|
| 5.2.10 | Software provides the ability to process a payment without printing a receipt. | | | | |
| 5.2.11 | Software provides the ability to reprint a receipt. | | | | |
| 5.2.12 | Payment module interface is designed to accommodate a touch screen. | | | | |
| 5.2.13 | Software provides the ability for payments to be made through an on-line portal via the City's website. | | | | |
| 5.2.14 | Provide the names of 3 rd party point of sale (PoS) service provides that the proposed software solution interfaces with for both in-person and on-line sales. | | | | |
| | | | | | |
| 5.2.12 | Invoices and payment transactions can be integrated with the accounts receivable /payable and general ledger components of a financial software solution that is selected by the City. | | | | |
| 5.2.13 | Please list any financial management software solutions that the proposed software solution does integrate with including latest version. | | | | |
| | | | | | |

APPENDIX B

PRICING FOR PROPOSED CASE MANAGEMENT SOFTWARE

In this section the vendor shall provide detailed cost information for the proposed CMS. This section, at a minimum, shall include a total of ALL costs for each category listed below. If there are costs associated with categories or services that are not listed below please add them to the list along with the cost. Pricing information included in other sections of the RFP response must be incorporated into this section. “Optional” costs must be clearly marked as such in the columns provided. Cost shall be provided for the complete turn-key solution.

| PRICING | Optional Items | | | |
|---|-----------------------|--------------------|-----------------------|--------------------|
| | One-time Cost | Annual Cost | One-time Cost* | Annual Cost |
| Software/Software Licensing (Itemize below, if any) | | | | |
| Software Support/Maintenance (Itemize below, if any) | | | | |
| Hardware (Itemize below, if any) | | | | |
| Hardware Support/Maintenance (Itemize below, if any) | | | | |
| Service/Maintenance Agreements (Itemize below, if any) | | | | |
| Sub Total | | | | |
| Training and Education | | | | |
| Installation | | | | |
| Updates | | | | |
| Documentation | | | | |
| Sub Total | | | | |
| TOTAL COST | | | | |
| Additional Option: | | | | |
| Cost to add a collections module to the system if applicable | | | | |
| License for additional users | | | | |

***Include all pertinent details about any optional pricing components below:**