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**INSTRUCTIONS**

**Proposers must respond to the Community Development Software requirements included herein. Proposers are to respond to each of these requirements with one of the following response codes:**

* **Y – Meets Requirement**
* **N – Does Not Meet Requirement**
* **F – Planned for future release**
* **W/C – Workaround Proposed or Customization Needed to Meet Requirement**
* **T – Third-Party Solution to Meet Requirement**

**Response Codes “Y” and “N” do not require written responses unless the Proposers wish to present additional benefits or opportunities related to their solution and the requirement. However, response codes “F”, “W/C” and “T” do require written responses. For these response codes, Proposers must describe how the requirement will be met and when (if applicable).**

# General

## User Interface

| **#** | **Requirement** | **Response Code** | **Response / Comments** |
| --- | --- | --- | --- |
|  | Provides a browser-based user interface |  |  |
|  | Supports mobile technologies (e.g., smartphones, tablets) |  |  |
|  | Provides the ability to drill-down and drill-across from a transaction view to the supporting source data and documents |  |  |
|  | Provides fully integrated functionality such that data is entered only one-time and available throughout the system(s) and available in real time (single points of data entry) to eliminate re-keying of information |  |  |
|  | Provides organized screen layouts that are customizable |  |  |
|  | Provides consistent use of icons, colors, and menus across all elements |  |  |
|  | Provides shortcuts for frequently accessed processes, screens, reports, etc. |  |  |
|  | Provides search functions that reach across all applications/modules and attachments |  |  |
|  | Provides online help that is context sensitive and content appropriate with manuals also available for download |  |  |

## Workflow

| **#** | **Requirement** | **Response Code** | **Response / Comments** |
| --- | --- | --- | --- |
|  | Provides integrated workflow management including generation, routing, notification and approval of forms, reports, other documents, and processes |  |  |
|  | Ability to establish multiple workflows (e.g., depending on permit or project type) |  |  |
|  | Ability to route applications to any defined user (internal city email account and external consultants) as needed |  |  |
|  | Ability to set expected timelines for completion of tasks and the ability to create reports related to timelines status |  |  |
|  | Ability to add conditions based on “what if” scenarios (e.g., if permit is extended timelines related to other permits are extended) |  |  |
|  | Ability to establish multiple approval levels based on user-defined criteria (e.g. types of permits, document types, etc.) |  |  |
|  | Allows out of office approval delegation |  |  |
|  | Integrates with the email system to assist in the notification/ request of approvals, rejections, corrections, and approvals through/from email systems and mobile devices |  |  |
|  | Allows document attachment and allows attached documents to be available for review through all levels of approval for all core modules |  |  |

## Reporting and Analysis

### General

| **#** | **Requirement** | **Response Code** | **Response / Comments** |
| --- | --- | --- | --- |
|  | Provides a reporting toolset that is consistent across all modules |  |  |
|  | Provides for the following report writing capabilities:   * Ability to arithmetically calculate functions. * Capability to generate reports using "include" and "exclude" statements. * Capability to generate reports using "equal to", "less than", and "greater than" statements. * Capability to use an "if-then-else" sequence within one query. |  |  |
|  | Allows users to drill down from reports and inquiries to source transaction |  |  |
|  | Provides full integration with MS Excel for all modules (e.g., worksheet export to Excel, data imported from Excel, etc.) and allows users to export reports to Excel that include formulas/ formatting |  |  |
|  | Provides the ability to copy and customize standard reports |  |  |
|  | Provides the ability for reports to access data across all modules |  |  |
|  | Provides the ability to create report notification groups and inform/alert groups a new report is available |  |  |
|  | Provides the ability to choose a format when exporting a report (e.g., Excel, Adobe, flat file, delimited, etc.) |  |  |
|  | Provides the ability for a dashboard/scorecard to include, at a minimum, user defined metrics, key performance indicators (KPIs), reports, charts, etc. |  |  |
|  | Allow dashboard to extract and display information from all modules |  |  |
|  | Provides the ability for reporting to be based on user security/permissions setting |  |  |
|  | Provides the ability to save and “publish” ad hoc reports for use by others |  |  |
|  | Provides the ability to report/query on any field within an application |  |  |
|  | Allows for multiple output options (e.g., display, print, email, etc.) |  |  |
|  | Provides the ability to automatically run scheduled reports for distribution to a group or individuals |  |  |
|  | Provides ability to run reports on all projects, including inactivated projects |  |  |
|  | Ability to perform searches by using wildcards or partial information (e.g., searching for accounts, permit number, projects, etc.) |  |  |
|  | Ability to distinguish between active and inactive case using defined criteria. |  |  |
|  | Ability to automatically make projects “inactive” based on defined criteria. |  |  |
|  | Capability to combine the use of multiple fields from multiple modules’ database tables in a single query. |  |  |
|  | Capability to store and recall items whose values are derived from other values in the data files. |  |  |
|  | Capability to support the use of arithmetic: "addition", "subtraction", "multiplication", and "division" calculations. |  |  |
|  | Ability to report on any user-defined field across modules. |  |  |
|  | Capability to query on any element of a transaction history file, including the type of transaction and the process that originated the transaction. |  |  |
|  | Electronically save reports for subsequent users’ access (e.g. on an internal intranet page, user dashboard or report menu, etc.) |  |  |
|  | Ability to email report links. |  |  |
|  | Provide report scheduling along with email distribution for recipients. (Repeat options of specific days, weeks, weekly, monthly) |  |  |
|  | Ability for a user to view a report prior to exporting or printing. |  |  |
|  | Ability to save and maintain report specifications for periodic use. |  |  |
|  | Ability to integrate SQL Server Reporting Services (SSRS) Reporting Services into each module for custom reporting. |  |  |
|  | Ability to integrate with a third-party report writing tools, such as Microsoft Report Builder. |  |  |
|  | Ability to provide California mandated reporting related to Annual Progress Reports  [Annual Progress Reports | California Department of Housing and Community Development](https://www.hcd.ca.gov/planning-and-community-development/annual-progress-reports) |  |  |
|  | Ability to audit and report any fees changed/overrides |  |  |
|  | Ability to report on permit processing timeframe (e.g., time between permit application submittal and other workflow milestones like permit issuance and permit final) |  |  |

# Community Development Requirements

## Land Management

### General

| **#** | **Requirement** | **Response Code** | **Response / Comments** |
| --- | --- | --- | --- |
|  | Provides a configurable, database-driven tracking and management system for development agency records and processes, including applications, reviews, permits, approvals, forms, cases, and activities |  |  |
|  | Provides a system interface with the City’s GIS platform ESRI |  |  |
|  | Provides table-driven application lookups (drop-down box), text libraries, data fields, screen layouts, application dependencies and business rules that are available for update by the City |  |  |
|  | Provides the ability to create an unlimited number of City-defined data fields (i.e., Maintenance) |  |  |
|  | Provides the ability to define default values for data fields |  |  |
|  | Provides the ability to place warnings, flags, holds and restrictions on a record, case, parcel, or person with a comment/notes field, and the ability for authorized user(s) to override, if needed |  |  |
|  | Provides the ability to track and display the history of a parcel number |  |  |
|  | Provides the ability to prevent the update to records against which a prior hold has been established |  |  |
|  | Provides a library for standard comments/condition tracking and reporting, including ordinances and regulations, grouped/filtered by category (e.g. plan review, zoning, inspections) |  |  |
|  | Provides the ability to store and access standard/typical user comments with codes/text in a table for use by staff |  |  |
|  | Provides the ability to select and modify standard comments and other stored text values according to the needs of the specific project or record to which they are added |  |  |
|  | Provides the ability to track actual staff time spent on activities (e.g., inspections, plan reviews, etc.) within each module. |  |  |
|  | Provides the ability to compile and maintain master files for architects, contractors, owners, tenants, engineers, and developers including contact information (including multiple telephone numbers and email addresses) and license numbers |  |  |
|  | Provides an interface with the State licensing database to determine if contractor licenses are active |  |  |
|  | Provides the ability to interface with the City’s business license system to validate license |  |  |
|  | Provides project application, plans and related forms that can be completed and submitted electronically |  |  |
|  | Provides the ability to establish and maintain multiple fee schedules with effective dates |  |  |
|  | Provides the ability to track total time in days for process and workflow steps |  |  |
|  | Provides the ability to automatically generate a unique identifier for any activity, application, permit, etc. initiated in the system |  |  |
|  | Provides the ability to issue refunds or adjustments to fees (including waiver of fees) |  |  |
|  | Provides the ability to utilize the City’s accounting codes associated with fees |  |  |
|  | Provides the ability to assign unique, alpha-numeric identifiers for projects |  |  |
|  | Provides the ability to select multiple items. (e.g., complaints, violations, inspections, and comments) to add to a case or activity at one time |  |  |
|  | Provides the ability to track and modify status of individual items associated to a case or activity. (e.g., complaints, violations, inspections, and comments) |  |  |
|  | Provides the ability to update fields in multiple cases or update multiple activities at one time (e.g. assignment, approve multiple inspections, add fees, set permit type) |  |  |
|  | Provides the ability to associate an address on a permit/case with an occupant/tenant in a structure |  |  |
|  | Provides the ability to attach or otherwise track correspondence, including outside of workflow steps |  |  |
|  | Provides the ability to enter and track multiple names, addresses, & phone numbers associated with a case and specify the role(s) of all contacts (e.g. owner, contractor, sub-contractor) |  |  |
|  | Provides the ability to clone an existing record (case, permit or project) and all associated information to a new record, edit as necessary and identify record from which it was cloned |  |  |
|  | Provides the ability to notify customers via email if status of their license or permit is changing (i.e. expired, suspended, etc.) |  |  |
|  | Provides the ability to track and alert users to special fees attached to a parcel |  |  |
|  | Provides the ability to specify and manually enter anticipated or past Planning Commission, City Council Meeting and other Board or Commission Meeting dates related to a case, permit, or process |  |  |
|  | Provides the ability to capture and track project appeals, extensions, revocations, and/or modifications that may occur after the initial approval |  |  |
|  | Provides a configurable, flexible workflow management system to support the automation of business processes |  |  |
|  | Provides the ability to complete workflow tasks in sequential order, or in parallel where no dependencies remain incomplete |  |  |
|  | Provides a dashboard viewer to notify assigned task owners of assignments, including ability to drill into the dashboard to view tasks, view/update related records, and access linked documents |  |  |
|  | Provides for automated escalation/notification of overdue tasks according to a City-defined reporting hierarchy |  |  |
|  | Provides the ability to reschedule or re-order workflow steps based on City-defined rules and proper authorization |  |  |
|  | Provides the ability to alert internal and external task owners about assigned task(s) and time frames |  |  |
|  | Provides the ability to track (i.e. generate a log record) and report on actions based upon action type, user, time, and date in order to provide for accountability and review tracking, including response times |  |  |
|  | Provides automated notices and triggers for required conditions (e.g. notifications when site plans have been revised, including square footage, driveway changes) |  |  |
|  | Provides the ability to automatically verify all required fields and conditions (e.g. fees, approvals, requirements, no holds) are met prior to proceeding to next step or allowing certain activities to happen |  |  |
|  | Provides the ability to automatically calculate permit/plan expiration date based on user parameters, and extend expiration date automatically based on inspection or other activity and manually based on written request |  |  |
|  | Provides the ability to manually assign project applications to specific staff for review |  |  |
|  | Provides a real-time, user-configurable dashboard to display dynamic charts and graphs. (e.g., pie, bar, Gantt charts) |  |  |
|  | Provides a real-time, configurable task (to-do) list for each user with the ability to drill down, filter and sort |  |  |
|  | Provides customizable screens based on user role and case types |  |  |
|  | Provides the ability to define data field requirement dependencies (e.g. based on a field selection or a case type or activity that was added, fields become mandatory and/or display as needed) |  |  |
|  | Provides the ability to auto-populate fields based on previous information captured, stage of workflow, and related cases, including information entered by the customer |  |  |
|  | Provides easy method to view information on associated or linked records from within a specific case, permit, plan, or project |  |  |
|  | Provides the ability to search on fields including City-defined (custom) fields, notes, and comments |  |  |
|  | Provides an intuitive, simple to use, and flexible search interface (e.g. not case sensitive, smart search, accommodates wildcards or keywords) |  |  |
|  | Provides the ability for each user to edit and save their own search parameters |  |  |
|  | Provides the ability to export search results into common Microsoft formats (i.e. Excel spreadsheet) |  |  |
|  | Provides the ability to attach and/or link to electronic documents and media to permits, inspections, plans, activities, cases, parcels, violations etc. |  |  |
|  | Provides the ability to select and attach multiple documents at once |  |  |
|  | Provides the ability for applications, permits and property-based documents to be linked or associated to a parcel, specific address, people, or case number |  |  |
|  | Provides the ability for assigned staff to access documents and provide ability for customers to have restricted access for their projects |  |  |
|  | Provides the ability to track revisions on attached edited documents |  |  |

## Planning

| **#** | **Requirement** | **Response Code** | **Response / Comments** |
| --- | --- | --- | --- |
|  | Provides a customer portal to allow online submission of applications across multiple application types (e.g. site plan reviews, use permits, subdivisionsetc.) |  |  |
|  | Provides the ability to include required attachments to an online application |  |  |
|  | Provides the ability to calculate and pay application-related fees online |  |  |
|  | Provides the ability to automatically validate a property owner on an application |  |  |
|  | Provides the ability to automatically populate required setbacks from GIS |  |  |
|  | Provides the ability for planning conditions of approval and/or mitigation measures to be attached or transferred to a subsequent building permit application for the related parcel, and for conformance and progress toward meeting conditions of approval or mitigation measures to be tracked through the building permit application |  |  |
|  | Provides the ability for the applicant to view online the current status of an application |  |  |
|  | Provides the ability to generate an email from the system to the applicant, as well as to other project stakeholders |  |  |
|  | Provides the ability to collect, bill to, and track applicant deposits, including automated notification of deposit amount available, the need to provide additional deposit amounts, and the ability to refund remaining deposit once project is complete |  |  |
|  | Provides the ability to generate reports listing plan checks pending, plan checks returned, revisions, deferred submittals |  |  |
|  | Provides the ability to generate reports indicating missing application materials, missing reports related to environmental review and other information required to process the application. |  |  |
|  | Provides the ability to create and tie revisions and deferred submittals to a plan check |  |  |
|  | Provides automated notification and reporting for pending permit expiration, along with automatic generation of notification to applicant via the applicant’s preferred notification method |  |  |
|  | Provides the ability to automatically generate a report to identify applicants with issued permits that have not requested an inspection after a specified number of days |  |  |
|  | Provides the ability for parcel- or address-related Code Enforcement actions to alert user when entering a new permit |  |  |
|  | Provides the ability to flag a parcel or address with an alert, including notes and related information, to be displayed to the user when entering a new permit |  |  |
|  | Provides the ability to hold certificates of occupancy until all conditions of approval are satisfied and automatic notification when an inspection is required for planning conditions of approval. |  |  |
|  | Provides the ability to enter information related to pre-application inquiries and responses. |  |  |
|  | Provides the ability to assess permit fees, impact fees and engineering fees |  |  |
|  | Provides the ability to generate an invoice including all fees (permit, impact, and engineering), either for a single permit or in permit multiples |  |  |
|  | Provides the ability to create a customized application based on the customer's project requirements |  |  |
|  | Provides the ability for the applicant to submit electronic copies of plans associated with the application as well as Planning application fees for each application submitted |  |  |
|  | Provides the ability to automatically populate system with information from fillable forms |  |  |
|  | Provides the ability for automatic time and date stamp of submittal |  |  |
|  | Provides the ability for project file numbers to be system generated according to the City’s preferred numbering sequence or for City staff to enter project numbers manually |  |  |
|  | Provides the ability to track grant projects and budgets for Planning projects, including “match” hours or tasks |  |  |
|  | Provides the ability to track consultant contracts (i.e., budgets, invoices, task completion, etc.) for Planning services, such as for environmental reviews, specific plans, etc. |  |  |
|  | Provides the ability to link multiple permits, cases, plans, licenses, and other processes to a single master project |  |  |
|  | Provides the ability to create multiple levels of parent/child relationships between permits, cases, and other records |  |  |
|  | Provides the ability to generate application/project status reports which identify key project details, planned milestone dates, task completion dates, and planned vs. actual task durations |  |  |
|  | Provides the ability to track the location of plans in the process |  |  |
|  | Provides the ability to track status of corrections by a reviewer, which may activate approval or redistribution e-routing to applicable departments |  |  |
|  | Provides the ability to automatically generate a report to identify applicants that have not responded to request for additional information after a specified number of days |  |  |
|  | Provides the ability to define configurable system-generated “form letter” Public Hearing notices utilizing Microsoft Word document templates; public hearing notices should include case/ project number, applicant, locations |  |  |
|  | Provides the ability to track a variety of user-defined dates for noticing of meetings for specific Boards, Committees, and Commissions. |  |  |
|  | Provides the ability to automatically generate notices based on City directed forms. |  |  |
|  | Provides the ability to associate applications with the scheduled Planning Commission and/or City Council meeting schedules and view the items associated with specific meeting dates |  |  |
|  | Provides the ability to record the actions taken by the Planning Commission, the City Council, and/or other Boards or Commissions related to an application or project |  |  |
|  | Provides the ability to store internal communication threads within the project to promote staff collaboration |  |  |
|  | Provides the ability for simultaneous access by multiple users to input plan review conditions and comments on a single project record |  |  |
|  | Provides for easy access/retrieval of historical data (e.g. parcel, bond, submission, owner, occupancy, and transaction history) |  |  |
|  | Provides the ability to track the status of multiple plan reviewers and automatically notify project planner when reviews are due and/or late. |  |  |
|  | Provides the ability for automatic assignment of due dates for plan reviewers and provide reviewers with notification as due dates approach or are past. |  |  |
|  | Provides the ability for plan review by multiple departments or divisions, including “routing” features that allow users to determine which reviewers are required |  |  |
|  | Provides the ability to collect and assemble multiple reviewer comments, either by selectable pulldown or check off menu, into one or more consolidated reports or letters. |  |  |
|  | Provides the ability to inherit or refer to data captured on linked permits, cases, and processes, eliminating duplicate data entry |  |  |
|  | System maintains historical data, (e.g. address), even when information in GIS is changed or updated |  |  |

## Engineering

| **#** | **Requirement** | **Response Code** | **Response / Comments** |
| --- | --- | --- | --- |
|  | Provides a customer portal to allow online submission of applications (including for encroachments, grading, transportation, disabled parking etc.) |  |  |
|  | Provides the ability to include required attachments to an online application |  |  |
|  | Provides the ability to calculate and pay application-related fees online |  |  |
|  | Provides the ability to automatically validate a property owner on an application |  |  |
|  | Provides the ability for engineering permits to inherit conditions of approval and/or mitigation measures from a development application that covers the related area/parcel for the permit |  |  |
|  | Provides the ability for the applicant to view the current status of an application online |  |  |
|  | Provides the ability to generate an email from the system to the applicant, as well as to other project stakeholders |  |  |
|  | Provides the ability to collect, bill to, and track applicant deposits, including automated notification of deposit amount available, the need to provide additional deposit amounts, and the ability to refund remaining deposit once project is complete |  |  |
|  | Provides the ability to generate reports listing plan checks pending, plan checks returned, revisions, deferred submittals |  |  |
|  | Provides the ability to create and tie revisions and deferred submittals to a plan check |  |  |
|  | Provides the ability to assess permit fees, impact fees and engineering fees |  |  |
|  | Provides the ability to generate an invoice including all fees (permit, impact, and engineering), either for a single permit or in permit multiples |  |  |
|  | Provides the ability to automatically populate system with information from fillable forms |  |  |
|  | Provides the ability for automatic time and date stamp of submittal |  |  |
|  | Provides the ability for file numbers to be system generated according to the City’s preferred numbering sequence or for City staff to manually assign a project number |  |  |
|  | Provides the ability to track status of corrections by a reviewer, which may activate approval or redistribution/re-routing to applicable departments |  |  |
|  | Provides the ability to store internal communication threads stored within the project to promote staff collaboration |  |  |
|  | Provides the ability for simultaneous access by multiple users to input plan review conditions and comments on a single project record |  |  |
|  | Provides for easy access/retrieval of historical data (e.g. parcel, bond, submission, occupancy, and transaction history) |  |  |
|  | Provides the ability to inherit or refer to data captured on linked permits, cases, and processes, eliminating duplicate data entry |  |  |
|  | System maintains historical data, (e.g. address), even when information in GIS is changed or updated |  |  |

## Plan Check

| **#** | **Requirement** | **Response Code** | **Response / Comments** |
| --- | --- | --- | --- |
|  | Provides the ability to upload revised and subsequent plan submissions to original plan submission |  |  |
|  | Provides the ability to support single and multi-phased plan review |  |  |
|  | Provides the ability to assign plan reviews on a geographic basis (i.e., to assigned reviewers) but allow for supervisors to override assignments |  |  |
|  | Provides the ability for plan review by multiple departments or divisions, including “routing” features that allow users to determine which reviewers are required |  |  |
|  | Provides the ability to collect and assemble multiple reviewer comments, either by selectable pulldown or check off menu, into one or more consolidated reports or letters |  |  |
|  | Provides the ability for automatic assignment of due dates for reviewers and provide plan reviewers with notification as due dates approach or are past |  |  |
|  | Provides the ability to track specific review deficiencies from each review cycle, bringing forward unresolved deficiencies to subsequent review cycles |  |  |
|  | Provides the ability to automatically identify special conditions or calculate fees based on a property's location (e.g. water and sewer district, fire protection district) based on City-created GIS boundary data |  |  |
|  | Provides the ability to capture and display conditions of approval/ mitigations (including those from Planning applications) that will inherit/apply to all building permits issued within a development area or project |  |  |
|  | Provide the ability to display status conditions of approval/mitigation by assigned project manager and assigned user (e.g., fire) |  |  |
|  | Provides the ability to alert/display when there are multiple zoning/conditions on an individual parcel (i.e., single parcel with residential and commercial zones) |  |  |
|  | Provides the ability to create and tie revisions and deferred submittals to a plan check |  |  |
|  | Provides the ability to automatically generate a report to identify applicants that have not responded to correction notices after a specified number of days |  |  |
|  | Provides the ability for assignment and assignment override of specific documents for review |  |  |
|  | Provides the ability to capture and measure performance metrics of staff (i.e., number of projects assigned, number of hours reported, turnaround time) |  |  |
|  | Provides the ability to notify the reviewer of upcoming due dates and items pending or past |  |  |
|  | Provides the ability to present processing/review status and updates via the Customer Portal |  |  |
|  | Provides the ability for supervisor to see the "big picture" of assignments and due dates |  |  |
|  | Provides the ability to add bar codes and labels to hard copies of plans |  |  |
|  | Electronic plan review, including electronic approvals |  |  |
|  | Provides the ability to receive electronic plans from customers |  |  |
|  | Provides the ability to cite specific code language when reviewing and commenting on proposed plans |  |  |
|  | Provides the ability to capture standard comments that may be utilized in the plan review process |  |  |
|  | Provides the ability to associate annotations with written comments |  |  |
|  | Ability for multiple reviewers to review the same plan simultaneously and separately track each reviewer's comments |  |  |
|  | Identify if the submittal is an original or a modification through a drop-down menu |  |  |
|  | Provides notification of City staff upon receipt of documents |  |  |
|  | Provides confirmation to customer upon successful uploading of individual documents |  |  |
|  | Provides the ability to accept electronic signatures and stamps on plans/drawings |  |  |

## Permits

| **#** | **Requirement** | **Response Code** | **Response / Comments** |
| --- | --- | --- | --- |
|  | Provides the ability to do batch permitting (i.e., a project with multiple units) |  |  |
|  | Provides the ability to issue standalone permits (i.e. building, engineering, mechanical, electrical, plumbing, roof replacement, etc.), not just permits in combination with multiple disciplines |  |  |
|  | Provides the ability to identify when a permit type requires a licensed contractor, architect or owner |  |  |
|  | Provides the ability for building or engineering permits to inherit conditions of approval/mitigation measures from a development application that covers the related area/parcel for the building permit and not allow certificate of occupancy to be issued until all conditions are signed off. |  |  |
|  | Provides the ability to generate an email from the system to the applicant, as well as to other project stakeholders |  |  |
|  | Provides the ability to collect, bill to, and track applicant deposits, including automated notification of deposit amount available, the need to provide additional deposit amounts, and the ability to refund remaining deposit once project is complete |  |  |
|  | Provides automated notification and reporting for pending permit expiration, along with automatic generation of notification to applicant via the applicant’s preferred notification method |  |  |
|  | Provides the ability for parcel- or address-related Fire Department actions (such as report of a structural fire or operational permit violation) to alert user when entering a new permit |  |  |
|  | Provides the ability for parcel- or address-related Code Enforcement actions to alert user when entering a new permit |  |  |
|  | Provides the ability to flag a parcel or address with an alert, including notes and related information, to be displayed to the user when entering a new permit |  |  |
|  | Provides the ability to assess permit fees, impact fees and engineering fees |  |  |
|  | Provides the ability to prevent issuance of a permit if a related construction professional is not licensed by the state and/or if the construction professional lacks a Business License |  |  |
|  | Provides the ability to generate an invoice including all fees (permit, impact, and engineering), either for a single permit or in permit multiples |  |  |

## Inspections

| **#** | **Requirement** | **Response Code** | **Response / Comments** |
| --- | --- | --- | --- |
|  | Provides the ability to select from a common list of comments when completing an inspection (on tablet or other mobile device and automatically populate correction notices and project record. |  |  |
|  | Provides the ability to automatically assign inspections and other tasks by geographical area (i.e., zone, GIS layers, map page & grid) |  |  |
|  | Provides the ability to override automated assignments if authorized (e.g., supervisors) |  |  |
|  | Provides the ability to limit/control the number of inspections assigned to an inspector |  |  |
|  | Provides the ability to set daily inspection request limits based on type of inspection, or groups of types, and day of the week, excluding holidays |  |  |
|  | Provides the ability to record the customer’s preferred inspection time (AM or PM) |  |  |
|  | Provides the ability to set cutoff times of day for scheduling, rescheduling, and canceling inspections for the following business day |  |  |
|  | Provides the ability to set a limit on the number of business days out that an inspection may be scheduled |  |  |
|  | Provides the ability to generate an inspection checklist based on inspection type (on tablet or other mobile device) and automatically populate correction notices and project record. |  |  |
|  | Provides the ability for inspectors to enter extensive, detailed results of inspections (should have unlimited field case & field notes) |  |  |
|  | Provide the ability to track time spent on inspection. |  |  |
|  | Provides the ability to view the permit via the application |  |  |
|  | Provides the ability to view past / prior inspections in field |  |  |
|  | Provides the ability to print or email correction notices |  |  |
|  | Provides the ability to track digital signoffs of inspections |  |  |
|  | Provides the ability for supervisors and field inspectors to view the real-time status of the day’s inspections in order to reassign inspectors as needed |  |  |
|  | Provides the ability to display ‘hold’ data on the customer portal including the details of the hold |  |  |
|  | Provides the ability to display all inspections on a permit, including status. |  |  |
|  | Provides the ability to easily send code violation information to Code Enforcement |  |  |

## Code Enforcement

| **#** | **Requirement** | **Response Code** | **Response / Comments** |
| --- | --- | --- | --- |
|  | Processes, organizes, and tracks all cases of code violation by case type. |  |  |
|  | Identifies case type by parcel, address. |  |  |
|  | Allows user-defined violation types and related freeform text |  |  |
|  | Allows multiple violations to be associated with a single case |  |  |
|  | Provides notifications to responsible parties and establishes a user-defined follow-up inspection program to ensure violation corrections are made |  |  |
|  | Defines case types with user-defined sequence of actions and case data for each type |  |  |
|  | Provides a report of inspection follow-up not performed within a configurable time period |  |  |
|  | Generates user-defined notice letters to property owners / responsible parties regarding cases involving their property or of actions the city might take to resolve their cases |  |  |
|  | Allows historical tracking of notice letters |  |  |
|  | Create notices on properties generated by enforcement actions |  |  |
|  | Allows notices and liens to be attached to a case |  |  |
|  | Create liens on properties generated by delinquent account balance |  |  |
|  | Create releases of liens / notices on properties generated by payment in full and correction of violations |  |  |
|  | Allows a user to assign a case to an inspector for follow-up |  |  |
|  | Provides a method for multiple departments to use the system with security options for each department |  |  |
|  | Provides ad hoc reporting in various sort orders, including inspector, department, responsible department, case-type, and address |  |  |
|  | Allows unlimited freeform text for cases, violations, inspections, and Council meeting decisions |  |  |
|  | Locates a case by property address, names associated with the case, parcel number, user-defined look-up field, case number, report number, citation number and date |  |  |
|  | Automatically assign a citation number for each notice |  |  |
|  | Processes and tracks scheduled preventive inspections |  |  |
|  | Batch creation of cases for scheduled rental property and others as user defined |  |  |
|  | Batch creation of notice letters for scheduled preventative housing, health, property management, rental property, and fire inspections |  |  |
|  | Allows fees/fines to be billed for preventative inspections |  |  |
|  | Establishes fines based on a "per day" calculation. When users add a start date for the fine, the system keeps a running total to date |  |  |
|  | Creates and prints a case history report of multiple cases for a location or for multiple locations on one parcel. Allow the selection to include active, closed, or all cases |  |  |
|  | Creates and prints a report based on the actions per CEO (Code Enforcement Officer) based on date and case type |  |  |
|  | Creates and prints a report that shows late inspections. |  |  |
|  | Creates and prints an ownership change report |  |  |
|  | Creates and prints a code enforcement inspection list based on scheduled inspection dates |  |  |
|  | Ability to create, email or print code enforcement inspection listed based on scheduled inspection dates from mobile or portable device |  |  |
|  | Attach photos, etc. to a case in real time and apply geotags |  |  |
|  | Ability to restrict record changes in accordance with chain of custody requirements |  |  |
|  | Transaction audit trail (for example, if a $500 note was changed, who changed it from what to what). |  |  |
|  | Ability to run analytics type reports such as: active codes: number, type, how long in queue, how long from when it opened until officer gets out there, code enforcement actions; by officer by type, by reporting district. |  |  |
|  | Ability to auto-populate violation type based upon user-defined rules |  |  |
|  | Ability to track code enforcement actions by grant, or other designated category |  |  |
|  | Customer portal - for example a graffiti portal (mobile app - take a photo and it pinpoints, send it us and it opens a case) - for all types of violations |  |  |

## Customer/Citizen Access

| **#** | **Requirement** | **Response Codes** | **Response / Comments** |
| --- | --- | --- | --- |
|  | Provides the ability to enter and submit online project and/or permit applications |  |  |
|  | Provides a responsive web design to automatically adjust and render well on all screen sizes and resolutions while ensuring good usability |  |  |
|  | Provides the ability to accept electronic documents by customers and contractors to their respective projects/applications via secure web portal |  |  |
|  | Provides the ability for citizens and development customers to request a pre-application meeting |  |  |
|  | Provides the ability for citizens and development customers to access development services online via the internet via multiple, common internet browsers and versions, and mobile devices |  |  |
|  | Provides the ability for customers to request onsite or video conference meeting options |  |  |
|  | Provides the ability for customers to request the scheduling, rescheduling, or cancelation of inspections and to view status of completed inspections |  |  |
|  | Provides the ability for customers to search for and view defined electronic documents attached to cases or activities |  |  |
|  | Provides a city-definable decision tree that enables customers to enter information based on question and answer paths which result in lists of requirements (e.g. permits, plans, documents, applications) based customer's project or potential project |  |  |
|  | Provides the ability to generate project fee estimates during the application process |  |  |
|  | Provides the ability for integrated, electronic submission of applications and related forms/documents (application data populates application automatically and does not need to be manually entered later) |  |  |
|  | Provides the ability to attach and submit plans, images, or other electronic documents with online applications |  |  |
|  | Provides the ability for submittal of code enforcement and other complaints online, with option for submitter to remain confidential/anonymous |  |  |
|  | Provides the ability for payment of fees online, including generation of a receipt for payment as well as the allocation of fees paid according to City-defined accounting distribution |  |  |
|  | Provides the ability to control information visibility, and limit public access to internal information |  |  |
|  | Provides the ability of public to access project descriptions and location information on-line. |  |  |
|  | Provides a map locating all proposed development applications and certain building permits online |  |  |
|  | Provides public with ability to provide comments on proposed project directly to project planner on-line. |  |  |
|  | Gives public the ability to request automatic notification of proposed projects within defined geographic areas. |  |  |
|  | Provides the ability to provide shopping cart option so customers can apply for and receive multiple permits during one user session (i.e. different permits for different addresses) |  |  |
|  | Provides integration with underlying application database, including real-time data read/write access with encryption |  |  |
|  | Provides the ability for customers to create secure accounts/logins to access their projects and applications |  |  |
|  | Provides the ability for an individual to have multiple profiles (e.g. owner, architect, engineer, planner, developer, builder, expediter, inspector, tenant) and to associate multiple profiles to a project application |  |  |
|  | Provides the ability for online password resets for user accounts (allow staff to reset password for customer in case customer locked out) |  |  |
|  | Provides the ability to associate additional contractor licenses and disassociate existing licenses as applicable |  |  |

# Technical

## General

| **#** | **Requirement** | **Response Code** |  |
| --- | --- | --- | --- |
|  | Provides a production, training, test, and development environment |  |  |
|  | Provides the ability to configure workflows, codes, report parameters, and other elements to meet specific business needs using configuration and operating parameters provided by City and without the assistance of the software vendor |  |  |
|  | Provides for upgrades to accommodate changes in laws, regulations, best practices, and new technology |  |  |
|  | Supports ability to implement Multi-Factor Authentication for conditional access |  |  |

## System Security

| **#** | **Requirement** | **Response Code** | **Response / Comment** |
| --- | --- | --- | --- |
|  | Allows the system administrator to:   * Define a minimum length password. * Define a password expiration timeframe. * Prohibit reusing of passwords |  |  |
|  | Allows the system administrator to:   * Configure control access to the application, modules, transactions, data, and reports. * Define access rights (e.g., create, read, update, delete) by user ID or functional role. * Define functional access rights (e.g., processes, screens, fields, and reports) by user ID or functional role * Restrict access to sensitive data elements (e.g. social security numbers, banking data, etc.) by user ID, user groups or functional role |  |  |
|  | Restrict entry of certain transactions by password |  |  |
|  | Allow creation of new user rights by copying another user’s right levels and modifying |  |  |
|  | Ability to create groups of users by a role type and to apply/change access rights to groups of users. |  |  |
|  | Ability for the system to automatically log-off a user after an extended period of inactivity. |  |  |
|  | Ability to allow end-user accounts that are not part of the city’s domain (e.g., contract fire inspection services) |  |  |

## Integration / Interfaces

| **#** | **Requirement** | **Response Code** | **Response / Comments** |
| --- | --- | --- | --- |
|  | Provides interface to City’s ERP (Tyler Incode) – specifically Finance (i.e., GL Accounts) and Cash Receipts. Address whether information from Tyler Incode would be required to update transaction status |  |  |
|  | Ability to generate a daily cash receipt report and/or integration file that has the information needed to post into the General Ledger and Cash Receipt Module – GL coding, permit amount, etc. (Tyler Incode). Describe the type of reports available; readable detail and summary (non-text) reports as part of balancing process of integration with totals by type, GL, user, payment method, project account, and property address/APN is desired |  |  |
|  | Ability to report revenue received / collected within the system by type of payment and GL account and standard reports generated from the system for external use, including payment detail reporting for research |  |  |
|  | Provides an interface to record/data retention that meets our Retention Policy guidelines. (For example, finance related items (cash receipts) six years.) |  |  |
|  | Ability to integrate with a third-party credit card payment provider (currently Global Payments, subject to change) for online and at counter credit/debit cards |  | Please Name: |
|  | Ability to utilize alternative payment methods such as ACH, Apple/Google Wallet, PayPal, etc., for online payments |  | Please Name: |
|  | Provide an interface via APIs and web-services to push and pull data via secure methods |  |  |
|  | Provide ability to import / integrate records from Versatile Pro, Cloud-based |  |  |
|  | Provide ability to import / integrate records from Digital Reel |  |  |
|  | Provide ability to import / integrate digitized records stored on CDs |  |  |
|  | Provide integration with Avenu Business License System or successor system (note: the City is actively exploring new business license systems) |  |  |
|  | Provides integration with Blue Beam |  |  |
|  | Provide integration to ESRI ArcGIS Online |  |  |
|  | Provide integration to ESRI Cloud Based Enterprise Environment (e.g., local government) |  |  |
|  | Provide ability to receive monthly owner information updates |  |  |
|  | Via ESRI integration provides ability for GIS to serves as the “single source of truth” for all ownership and spatial related information about a parcel, address, polygon, point, segment, etc.. This data is viewable via GIS |  |  |
|  | Via ESRI integration provides ability for data records (i.e., project applications, permits, inspections, etc.) created within the proposed system include a link to the underlying parcel, address, polygon, point, segment, etc. |  |  |
|  | Via ESRI integration provides ability when viewing a parcel, address, polygon, point, segment, etc. within GIS, the user will be able to view a list of related data records (i.e., permits, inspections, etc.) and link directly from the selection of any one of those data records to the corresponding data record in the proposed system |  |  |
|  | Provides the ability to view all related application records for a parcel, address, polygon, point, etc. or within a selected buffer from a parcel. |  |  |
|  | Provides the ability to add records from a selected parcel, address, polygon, point, etc. on a GIS map and link back to the system. |  |  |
|  | Provides the ability to utilize the GIS buffering function to identify parcels within a specific distance of a project and generate a mailing list of associated property owners and residents. Including the ability to generate the “mail merge” of notification letters with addresses identified from the selected buffer |  |  |
|  | Provides the ability to identify all parcels within a radius of a parcel, point, address, polygon, etc. and return the resulting list to the proposed solution for further inquiry or reporting. |  |  |
|  | Provides the ability to query and select one or more parcels, addresses, points on a GIS map and generate the related map that includes those data points/elements.  Including ability to save the map view as a document that may be printed or emailed |  |  |
|  | Location data is kept in a single data store that is accessible  by all program modules |  |  |

## Hosted or SaaS System Requirements

| **#** | **Requirement** | **Response Code** | **Response / Comments** |
| --- | --- | --- | --- |
|  | Provides system availability 24 hours a day, 365 days a year (not including scheduled downtime) |  |  |
|  | Ensures scheduled downtime is pre-approved by the City one week in advance |  |  |
|  | Provides system uptime of 99.99% |  |  |
|  | Provides hosting facility that is SSAE 16 certified.  Ability to share third party application security audits (SOC1, SOC2). Annual compliance reports will be required for Finance/IT to review |  |  |
|  | Stores data in only in the United States. (U.S.) |  |  |
|  | Ensure provider shall not allow its personnel or contractors to store City data on portable devices, including personal computers, except for the devices used and kept only at its U.S. data centers. |  |  |
|  | Provides for continuous backup of data and transactions such that the City will not suffer data loss in the event of a disaster or catastrophic failure |  |  |
|  | Provides for scheduled, periodic backup of live data to the test/ training environment |  |  |
|  | In the event of a disaster or catastrophic failure, informs the City:   * Within one hour * The scale and quantity of the data loss * What Proposer has done to recover the data and mitigate any effect of the data loss * What corrective action Proposer has taken to prevent future data loss |  |  |
|  | Single Sign on/ Azure AD integration using SAML /MFA |  |  |
|  | Provide proof of Cybersecurity Best Practices (Center for Internet Security) |  |  |
|  | The City owns all its data. The service provider will not access the data except as needed to do the work of the contract. |  |  |
|  | The provider will not erase the City’s data in the event of suspension or when the contract is terminated. In the event of termination, the service provider will implement an orderly return of City data. |  |  |
|  | The provider implemented controls related to systems to include but not limited to: systems and application resilience (consistent emphasis on security, fully documented features, change and version management, data backup, continuity, and restoration), logical access management, and unauthorized traffic |  |  |

## Data Access Security and Breaches

| **#** | **Requirement** | **Response Code** | **Response / Comments** |
| --- | --- | --- | --- |
|  | Maintains audit logging to record access activity:   * Login/logout attempts by user and workstation. * User submitted transactions. * Initiated processes. * System overrides * Additions, changes, or deletes to application-maintained data |  |  |
|  | Upon discovery or reasonable belief of any data breach, notifies the City by the fastest means available, and in writing within 24 hours. Notification should include:   * The nature of the breach * The data accessed, used, or disclosed. * The person(s) who accessed, used, disclosed, and/or received data (if known) * What has been done to quarantine and mitigate the breach * What corrective actions has been taken to prevent future breaches |  |  |
|  | Provides daily updates regarding findings and actions performed until the breach has been effectively resolved to the City’s satisfaction |  |  |
|  | Provides a report containing the results of the investigation of the breach |  |  |
|  | Provider will notify the City of any legal requests that might require access to the City’s data. |  |  |
|  | In the event of termination, the service provider ill destroy data using a NIST-approved method when requested by the city. |  |  |
|  | Provide the ability for the city has the ability to export its data whenever needed. |  |  |
|  | The provider has established, implemented and maintains security written procedures, practices and internal controls appropriate to information technology service providers (Providers Data Security Guide) to protect City data from unauthorized access, destruction, use, modification, or disclosure. |  |  |