

**Request for Proposals
#5202**

***LAND MANAGEMENT
CENTRAL PERMITTING
SYSTEM***

Proposals are due by
Tuesday, 9/23/2014, 5:00 PM

NOTICE TO BIDDERS

The County of Orange proposes to purchase the following:

LAND MANAGEMENT CENTRAL PERMITTING SYSTEM

Pursuant to the General Statutes of North Carolina, Chapter N.C.G.S. 143-129.8, Orange County will receive sealed proposals until 5:00 PM, September 23, 2014, in the office of the Purchasing Agent, 200 S. Cameron Street, Hillsborough, North Carolina 27278.

Specifications are available at the above address Monday through Friday, 8:00 A.M. to 5:00 P.M. or, by phoning 919-245-2651 or on the County website at <http://www.co.orange.nc.us/purchasing/bids.asp>.

The Orange County Board of Commissioners reserves the right to reject any and or all proposals and to accept the best overall proposal.

DAVID E CANNELL
PURCHASING AGENT

REQUEST FOR PROPOSALS

LAND MANAGEMENT CENTRAL PERMITTING SYSTEM

Orange County ("The County") is evaluating new software to satisfy its planning/development, permitting, inspections, code enforcement, licensing/registration, and parcel/address application needs.

- This RFP is being issued pursuant to N.C.G.S. 143-129.8 Purchase of Information Technology Goods and Services. A copy of this general statute can be found here: <http://orangecountync.gov/purchasing/143.129.8.asp>
- HB786 imposes E-Verify requirements on contractors who enter into certain contracts with state agencies and local governments. The legislation specifically prohibits governmental units from entering into certain contracts "unless the contractor and the contractor's subcontractors comply with the requirements of Article 2 of Chapter 64 of the General Statutes." (Article 2 of Chapter 64 establishes North Carolina's E-Verify requirements for private employers). It is important to note that the verification requirement applies to subcontractors as well as contractors. The new laws specifically prohibit governmental units from entering into contracts with contractors who have not (or their subs have not) complied with E-Verify requirements. **Complete the E-Verify affidavit**, and include it with your submittal. Electronic version is acceptable.
- Proposal response instructions are contained in **Sections 4, 8, and 9** of the *Request for Proposals* (RFP) document.
- The proposal should include all costs associated with training, implementation, hardware specifications, interface estimates, file conversion assistance, custom modification estimates, annual maintenance, and support.
- Direct **Intent to propose notification** to **David Cannell, Purchasing Agent**, by e-mail at Dcannell@orangecountync.gov no later than **Monday, August 25, 2014**. Note: Only those vendors that have expressed intent to propose will receive further addendums and or copies of vendor questions and answers.
- Direct **Questions** related to this RFP to **David Cannell, Purchasing Agent**, by e-mail at Dcannell@orangecountync.gov no later than **Tuesday, September 2, 2014**.
- Please **submit** your proposal by **Tuesday, September 23, 2014** – electronically and in hard copy. Detailed instructions are provided in **Section 9**.

Thank you for your participation. We look forward to reviewing your proposal.

Sincerely,

David Cannell
Purchasing Agent

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1. PROJECT OBJECTIVES AND BACKGROUND

OVERVIEW

Orange County, North Carolina (“the County”) is seeking proposals from qualified firms for software and implementation services for migrating and enhancing the existing Central Permitting System (CPS) including processes and data, to a robust software platform that takes advantage of current technologies to support storage, workflow, access and integration. The new system is referred to in this document as the Land Management Central Permitting System (LMCPS). The system will enable the County to centrally receive, process, manage and report on permitting and inspections, including planning inspections and permits, subdivision inspections and permits, building inspections and permits, trade inspections, well construction inspections, well permits, septic inspections and permits, erosion control permits, stormwater inspections and permits and recyclable materials permits. It will enable the County to manage and report on fees for these permits and inspections.

The system will provide a central portal through which all stakeholders (internal and external to the County) will access status information of past and present actions taken on a parcel. It will offer citizens and developers alike a unified approach to maneuvering what can seem to be a complicated process, and allow Orange County to “speak with one voice.”

This Request for Proposals includes the purchase, installation, integration, training, project management and implementation of the system. The County expects a solution that will be completed within 18 months of the contract date.

PROJECT OBJECTIVES

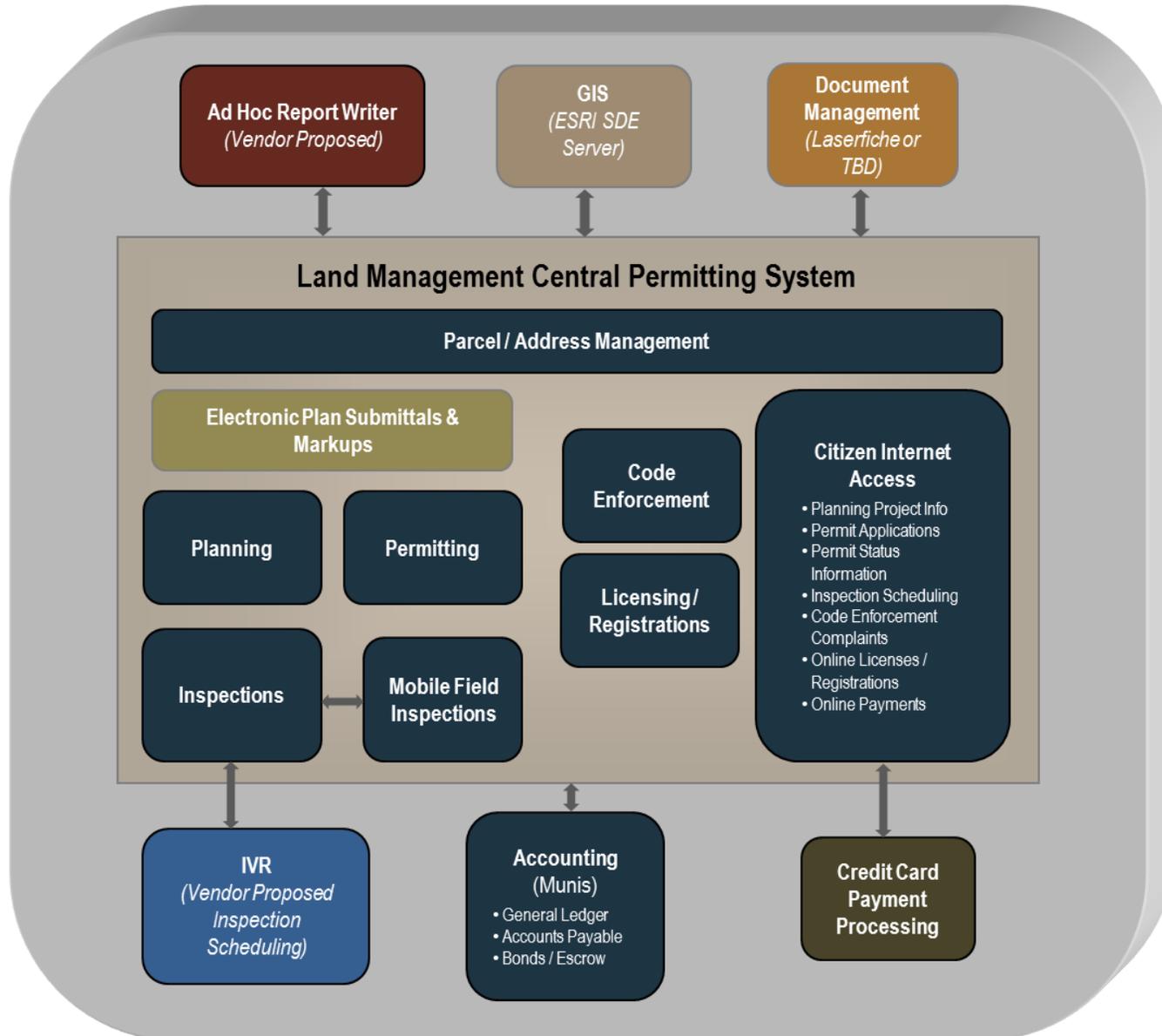
Orange County currently provides services for planning projects, permits, inspections, code enforcement and licensing/registrations, through the use of Accela PermitsPlus.

The objectives for this project are to:

- Improve customer relations
- Reduce manual processes and increase productivity
- Reduce paper and paper-oriented processes
- Improve integration between applications and other systems
- Improve ability of citizens and customers to interact and do business with and in the County
- Take advantage of newer technology

The overall objective of the system is to **integrate the Orange County Central Planning and Permitting process into a streamlined system that is managed by staff and seen from the customer perspective as one project, one final approval, one-source solution for direction and status.** This process includes all supporting activities, processes, and data, including applications, inspections, staff certifications, regulations, and events involved in permitting and inspections. The County also seeks to promote face-to-face and web-based communication with the overall process.

ORANGE COUNTY FUTURE LAND MANAGEMENT CENTRAL PERMITTING SYSTEM NEEDS



SYSTEM FUNCTIONALITY REQUIREMENTS

Land Management Central Permitting System

- Planning/Development Projects
 - ◆ Planning Projects Online – Public Project Information
- Permits
 - ◆ Permits Online – Applications, Payments and Public Permit Information
- Inspections
 - ◆ Inspections Online – Scheduling and Status Information
 - ◆ Mobile Inspections
- Code Enforcement
 - ◆ Code Enforcement Online – Citizen Complaint Tracking
- Licensing and Registrations
 - ◆ Licensing Online – Applications, Renewals and Payments
- Parcel/Address Management
- Electronic Plan Submittal and Review Markups
- Cashiering
- Ad hoc Report Writing
- Mobile Field Computing

Key Integration/Interfaces

- GIS – ESRI SDE Server
- EDMS (Laserfiche or To Be Determined)
- IVR (Interactive Voice Response for Inspection Scheduling)
- Credit Card Payment Processing
- Accounting
 - ◆ General Ledger
 - ◆ Account Payable (refunds)
 - ◆ Bond / Escrow Tracking

GUIDING PRINCIPLES

The proposed solution should support the following high-level objectives.

- Support core values of service which are to promote stable and quality development while protecting the environment.
- Provide clear and timely information gathering and information dissemination of project status to the customer.
- Provide a streamlined processing environment with all tasks integrated into the system.
- Continue to support new and modified regulations while maintaining legacy data.
- Enforce a single active site plan across permitting disciplines, the sharing of basic project information among several processes/disciplines, and notification of any change(s) in the information.
- Ensure no disconnect in the definition and use of overlapping data items.
- Acquire customer data from data entered during normal business processes with no re-entry of common data.
- Identify technology integration to support streamlined and efficient application and approval processes, process and data integrity, process monitoring and milestones.
- Support web-based customer and workflow transparency.
- Support a strong data sharing platform for integration with other systems in key departments, such as Finance and Tax Administration.
- Mitigate unnecessary wait or hold time.
- Support timely and automated internal and external communication.
- Promote use and evaluation of metrics.
- Consider available staff resources, knowledgebase and efficient application of area expertise.
- Simplify collection, reporting and reconciliation of fees.
- Support non-loss migration of existing data and dependencies to any new data storage format or technology.
- Provide supporting infrastructure which complies with Information Technologies policy and procedures pertaining to licensing, support, technical platform and security.

COUNTY BACKGROUND

Orange County is located in the North Carolina piedmont between The Research Triangle Park and the Triad cities of Greensboro, Winston-Salem and High Point. It is in the top quarter of North Carolina counties based on population, with over 135,000 citizens and an estimated ten-year growth rate of over 15%, and a mid-range land size of approximately 400 square miles. There are three incorporated municipalities located primarily in the County: Hillsborough, which is the County seat, the Town of Chapel Hill, which is the home of the University of North Carolina, and Carrboro. Parts of the City of Mebane and the City of Durham are also located in Orange County.

For more information about Orange County, please visit the County website at www.orangecountync.gov with the Future Land Use Map found at <http://www.co.orange.nc.us/planning/documents/FLUM.pdf>

CURRENT SYSTEM AND PROCESSES BACKGROUND

The current cross-departmental, automated central permitting system (CPS) was developed approximately 12 years ago, based on a vision and mission of a truly centralized permitting system. The processes and data were migrated from a flat-file mainframe environment to the Accela PermitsPlus application and database server software. The success of the current system is a result of staff dedication and knowledge-base. However, there are challenges to providing a successful ongoing centralized and consolidated view of permitting functions which have, in general, been the result of disparate processes and capabilities across the different internal organizations that maintain those processes with the current technology and support infrastructure. These challenges have become more pronounced as processes have changed, system integration points have been added, technology expectations have expanded, and supporting staff have retired or been promoted. This has led to an increased tendency to bypass the system thereby affecting process efficiency, as well as data availability and reliability.

This project seeks to overcome the current challenges as well as solve technology needs and take advantage of technology opportunities that have become industry expectations in business processing and customer support. Although there is currently no end of life announced by the vendor for PermitsPlus, there are no longer any major enhancements to support these technology expectations.

The CPS lacks the feature of a central application into which information, approvals, and statuses exchange between the various permit types. The key element of the replacement system will be a central project application that will serve both the client in tracking the project status, as well as the agency or agencies that rely on the project information that it holds.

The County seeks to migrate existing PermitsPlus processes, automate several manual processes, and improve and re-identify the processes and integration points through the implementation of the proposed system.

REVIEW TEAM

The County has assembled a multi-departmental team to manage the requirements definition, product evaluation and purchase of the software solution that represents all business processes related to the permitting functions. The Information Technologies (IT) department is coordinating this team and providing County-side project management representing the executive stakeholders, which represent the end user departments involved.

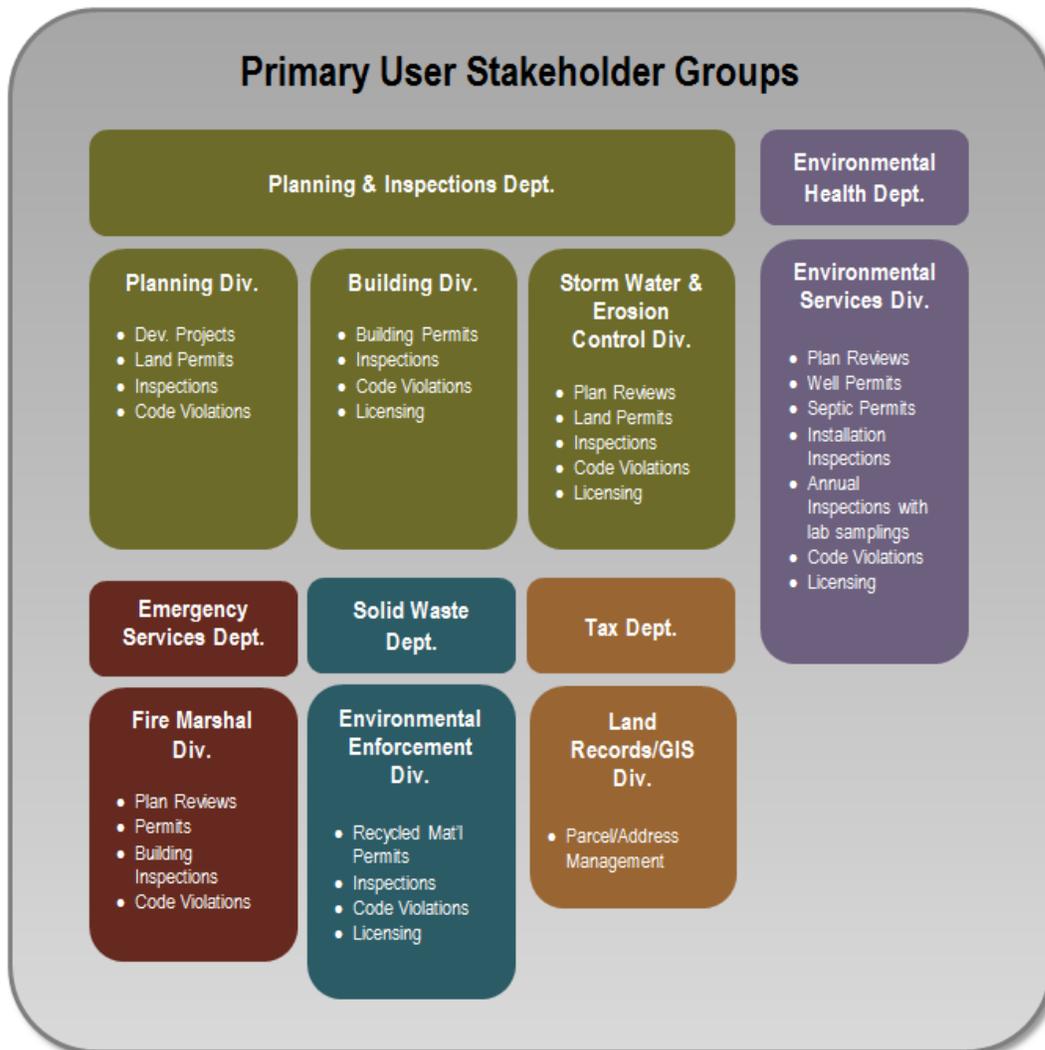
PROJECT STAKEHOLDERS

There are multiple County business units whose primary activities are involved in the property development process, and the LMCPS will be used daily by a significant portion of their staff. The primary County users of the system include:

- The Planning Department which includes Current Planning (development and subdivision of parcels), Stormwater and Erosion Control, and Building Inspections (building permit and construction activities), and
- The Health Department’s Environmental Services Division (evaluation of soil, septic system permits and well permits).

There are several secondary stakeholder departments that require information exchange with the LMCPS including the County Tax Office, Land Records, Finance, Fire Safety, and Solid Waste. The planning and building inspections agencies in the municipal jurisdictions do not currently exchange project-specific data directly with the CPS, with the exception of the Town of Hillsborough. See Table 11 in Section 5 “Volumes and Users” for an estimate of the number of users of the system in each department, including those who may require mobile access.

The following diagram illustrates stakeholder departments and activities.



CURRENT ENVIRONMENT

Jurisdictional Functions

Orange County staff are responsible (jurisdictionally approved) to process some planning and permit types within municipal boundaries as described. We may grant some limited municipal employees inquiry/reporting capabilities and/or plan review only access, but the Municipalities will not be processing their own projects, permits, cases or collecting fees on the County's LMCPs.

Municipalities rely on the CPS to provide transparency of processes, documents, data and status, with a type of role-based portal access. The LMCPs should provide the capability to support collaborative electronic planning reviews of County jurisdiction projects and permits by some municipalities. The LMCPs must also support current flat file data transfer for municipalities that do not have direct access to the system, similar to the transfer and synchronization of GIS data between jurisdictions. The LMCPs must be setup/configured to provide automatic email notification triggered off of certain data entry or process step completions.

Planning & Inspections Department

The Planning and Inspections Department seeks to serve the citizens of Orange County by implementing adopted land use, environmental, and building policies and standards through a system of regulations to promote stable and quality development while protecting the environment.

The following table provides an estimate of the type and yearly volume of data processed by the current system for the Planning & Inspections Department.

Type of Data	Projected Average
Applications	5000
Permits	4000
Work Orders (Inspections)	20,000
Licenses (CAED)	10,000
Scanned Construction Plans	12,000 pages
Scanned Documents/emails	6,000 pages
Scanned Engineering Documents	15,000 pages

Table 1. Planning & Inspections Yearly Data Volume Projections

Planning & Zoning

The Current Planning Division of the Orange County Planning & Inspections Department is responsible for the administration, interpretation, and enforcement of the County's land use management program as embodied within the Unified Development Ordinance (UDO). See <http://orangecountync.gov/planning/Ordinances.asp>.

This responsibility covers properties located outside of municipal boundaries, established extraterritorial jurisdictional boundaries, and any delineated transition area where there is an

existing joint planning agreement between the County and a participating municipality where the County has transferred development authority.

The administration of the land use management program includes coordinating the review of development projects with other divisions within the Department, most notably Erosion Control/Stormwater Management and Building, to ensure compliance with applicable regulations.

The Division provides the following services:

- The administration, interpretation, permitting, inspection, and enforcement of land use regulations, including, but not limited to zoning, subdivision, flood damage prevention, and adequate public facilities. This task includes the periodic revision of existing, and development of new, land use regulations.
- Process, review, approve, and issue permits authorizing land disturbing activity consistent with local regulations (i.e. Special Use Permits, Zoning Compliance Permits, subdivision applications, letters of map amendment, etc.).
- Coordinate the review and issuance of land development permits with Orange County Inspections, Erosion Control, Environmental Health, and other county agencies to ensure the adherence and enforcement of local and State development regulations.
- Serve as a source of information for the general public concerning development policies and land use issues. This task includes the holding and coordination of public outreach and educational meetings and 'open houses' to inform local residents of the various impacts of the County's planning program.
- Coordinate infrastructure improvements (water/sewer provision, landscaping, proposed street patterns, open space networks, etc.) during the development process.
- Promote environmental stewardship within development projects through the enforcement of existing land use regulations and subdivision standards requiring the preservation of environmentally sensitive areas (i.e. streams, floodplains, steep slopes, etc.) as common open space.

One of the main challenges that the Planning Division has with the CPS is that there is no mechanism to identify, track and store information at the subdivision level as a project. The LMCPs must provide a mechanism to not only identify and manage data and processes tied to a subdivision, but must also support the ability to apply relevant processes based on subdivision type as a part of a project from beginning to end. This also requires that the LMCPs support the association of parcels to corresponding subdivisions, where applicable.

Managing bonds is an example of what Planning requires for supporting data and processes at the subdivision level. The Planning Division accepts and holds developer performance and maintenance guarantees as a component of the project in accordance with local development practice. Each guarantee instrument is managed according to the life of the instrument, and tracked for compliance. The current process for managing these accounts is manual, with a corresponding manual interface to Finance. An automated method is required in the LMCPs to track whether the infrastructure being guaranteed has been satisfactorily completed. An automated notice would be helpful to identify instruments that are scheduled to expire in order to provide adequate time to inspect, call, or replace the guarantee.

The Current Planning Division has a staff of four. Plan review activities are carried out on paper plan sets with paper copies scanned as a part of setting up the project in the CPS. The LMCPs must provide a mechanism to request and distribute additional plan review information from applicants, as well as support the tracking and storing of staff time spent on the review by both man-hours and duration.

Planning Activity Metrics	Peak Annual	Low Annual	Projected Annual
Land Use Permits	475	215	350
Zoning Compliance Permits (not involving building or other permit)	20	8	15
Special Uses	8	1	5
Variances	2	0	1
General Use Rezoning	4	0	2
Subdivision - Minor	40	15	30
Subdivision - Exempt ¹	30	N/A	30
Subdivision – Major	5	0	3
Zoning - Violations	45	22	30

Table 2. Planning Activity Metrics

Erosion Control / Stormwater

The Erosion Control / Stormwater Division of the Orange County Planning & Inspections Department is responsible for overseeing and maintaining environmental compliance of development within the Orange County jurisdiction outside of Town municipal boundaries. This includes enforcement of erosion control and/or stormwater regulations as stipulated in the UDO. A current staff allocation of three full-time employees ensures that Orange County operates as a locally-delegated program in accordance to State regulations as set forth by the North Carolina Department of Environment and Natural Resources (NCDENR).

The County supports the Erosion Control review and inspection functions within municipal boundaries, but the municipalities maintain independent stormwater functions.

The Division provides four main services to the citizens of Orange County and they are as follows:

Erosion Control

- Review and approve erosion control plans.
- Issue land disturbance permits.
- Inspect and monitor construction sites.
- Investigate citizen concerns.

Stormwater

- Review and approve stormwater management plans.
- Inspect and monitor stormwater best management practices (BMPs).
- Oversee issuance of related building permits.

Stream Buffers

- Conduct surface water identifications.
- Modify County GIS overlay.
- Review and approve stream buffer impacts.

¹ Exempt subdivisions are not necessarily tracked given the fact they represent 'unregulated activity' per State law.

- Oversee buffer restoration planning.

Watershed Initiatives

- Provide insight on jurisdictional development review committees.
- Develop and implement the Falls Lake Stormwater Management Program.
- Develop and implement the Jordan Lake Stormwater Management Program.

The Division collects GPS points when completing Surface Water ID's for County stream buffer determinations and when locating/tracking permanent Stormwater BMP's on completed construction sites. These points are loaded into the County GIS database and should be available for reference in the CPS.

Building

The Building Division of the Planning Department administers the North Carolina State Building Codes which include Commercial Building, Residential Building, Plumbing, Mechanical, Fuel Gas, Electrical, Rehab Code, Accessibility and Administration Codes. Building Inspections has the lead responsibility for all permitting, plan review and inspections within the unincorporated areas of Orange County as well as Hillsborough town proper and its extraterritorial jurisdiction. There are currently twelve staff members that include: two Property Development Specialists, one Property Development Technician, one commercial Plans Reviewer/Chief Inspector, one Residential Plans Reviewer/Chief Inspector, one Chief Building Official/Division Director, and six Code Compliance Officers.

Current processes are dominantly automated by the utilization of the PermitsPlus software platform and the in-house-developed field inspections application, InspectPlus. These systems have been in active process for approximately eleven years, and Building Inspections has had the primary responsibility of supporting both systems.

All permits whether simple or complex are processed through the "Combo" permit activity which has the flexibility to tailor the data entry progression according to the type or occupancy of the permit. Typically, each type or occupancy has different business rules required that are automatically applied accordingly.

Building Inspections interacts and partners with several different departments/divisions across the County as well as the Town of Hillsborough. They include: Hillsborough Fire Marshal, Hillsborough Planning Department, Hillsborough Engineering, Orange County Environmental Health, Current Planning/Zoning, Erosion Control, Finance, Tax, Engineering, Addressing, Emergency Management, Fire Marshal, GIS, Economic Development and Solid Waste. Departments/Divisions that are part of the review process interact directly with the CPS for approval or conditions, while others, such as Economic Development, participate through meetings, such as the Pre-Development process meetings, to help speak to customers during the initial development process.

Inspectors use Lenovo X230 notebook computers running Windows 7 in the field and at their desk for all permit and inspection data entry and processing. Synchronization is batch processed at the end of the day, and new permit and inspection data is synchronized after hours, when the unit is automatically shut down. All inspection vehicles are equipped with portable thermal printers and correction notices are printed while still on jobsite. There are areas of the County that do not have Internet capability. The proposed system must preserve and improve remote access and as-real-time-as-possible data updates.

Permits and inspections Activity Metrics	Peak Annual	Low Annual	Projected Annual
Residential Plan Reviews	1050	700	900
Commercial Plan Reviews	525	225	500
Building Permits	1025	650	900
Trade Permits	3500	2400	3350
Building Inspections	8000	4800	7000
Electrical Inspections	4000	2600	3500
Mechanical Inspections	3200	2000	2600
Plumbing Inspections	3000	1500	2500
Pre-Development Meetings	30	5	25
Complaints	76	31	50

Table 3. Building Inspections Activity Metrics

Environment Services Division of the Health Department (EH)

EH is responsible for on-site Wastewater and Well (OSWW) Programs. It is important to note that all EH services are administered throughout the entire county which includes the incorporated towns. As a result, the data intersects that apply between EH and County offices should also be incorporated through this LMCPs between EH and the municipal partners.

The OSWW program provides development review, approval and denial of system sites, system design, regulatory permitting, inspections, monitoring visits, sampling, enforcement services, and education related to decentralized wastewater systems (septic systems) and water supplies (wells). The municipal and public water supply and sewer systems do not extend appreciably out into the unincorporated areas of Orange County. Development of these areas relies largely on privately-owned septic systems and water supply wells regulated by the County health department.

OSWW has a staff of nine plus one property development technician and a shared property development specialist with Building Inspections, who will utilize the LMCPs. At least three additional property development staff are expected to work in the system daily. Staff is currently equipped with Trimble handheld GPS units to collect points, but lack tablets and software to enter permit and inspection criteria while in the field. EH manages not only the permitting and development phases of property development, but also must monitor and track well water samples and inspection of septic systems into the future once the project is completed and the CO is issued. This necessitates the incorporation of automating ownership changes, address re-assignments, and parcel maintenance as these attributes change. The LMCPs must incorporate the identification of the various parcel features (wells/septic systems) by GIS coordinates to accommodate these updates.

The need to track program activities and to generate reports for the County and State is an important function of the LMCPs. Monthly activity reports broken down several levels by system type and permit type are required by the State. A mapped view from coordinates stored in GIS of the location of types of permit activities is critical in order to evaluate and report growth and activity in certain watersheds or jurisdictions based on these layers stored in GIS. Staff currently collects GPS coordinates of all newly constructed wells, soil testing location, and septic system components. The LMCPs should have the capability to relate these coordinates with the corresponding permit information. Water sampling data reported by the

State Laboratory of Public Health must be matched to the source of the sample and incorporated with well permit information and geospatially located in the GIS. Reporting activities tied to budget projections is also a requirement. The current system falls short in this tracking and reporting functionality.

An important objective of the proposed LMCPs is to support evolving business processes that are integrated with the overall land development process and that capture and manage not only data, but also the documents that are generated to meet statutory requirements. Standard reports, ad-hoc reports, graphic site plans, images, permit documents, inspection reports, location coordinates, and regulatory notices are all part of the documentation needs. In addition, the documents must be available online to the general public as well as to staff, preferably retrievable using GIS mapping services. The primary index used for the EH hard-copy files is the GIS-based property address and, for parcels without an address, the Parcel Identification Number (PIN) is used.

EH has several contractor types that must be managed within the system. A State certification is required as well as a local County registration. Both of these qualifications need to be verified and managed in the LMCPs, as well as contractor annual renewal fees and charges for educational sessions.

The OSWW program can be further broken down into septic systems and wells.

Septic and Wastewater

The wastewater program focuses on services related to privately-owned (usually small-scale) septic systems that rely on the soil to treat and dispose of sewage. Approximately 40% of the County relies on systems of this type as municipal community sewer systems are not available. The State Dept. of Health and Human Services (DHHS) delegates authority to staff to evaluate land for suitability, design, permit, inspect, and monitor these systems for use. In addition, the program incorporates monitoring inspections and status verification of a similar category of systems that are permitted by the State. These permits are integrally tied to the building permit and land development process. Statutes dictate that certain permits and approvals are required as prerequisites for other types of permits and approvals. The laws are subject to revision from time to time and the LMCPs must be developed and supported to respond to those changes in process in a timely manner.

In addition to the development aspect of EH permit management, there are important periodic monitoring inspections once the facilities are occupied. The LMCPs must allow for tracking and scheduling inspections, generating notices, receiving inspection data and storing images, sending out invoices and reports, handling the payments and tracking past due accounts, and sending reminder notices for delinquent accounts. In addition to this, the LMCPs must track Notices of Violations, incomplete notices and applications, and send email or notification to the applicant/owner and EH Specialist issuer. A variety of ad-hoc reports are needed to assure that inspection and payment requirements are being met. The system must capture contractors who serve as private operators for some of these systems and must also log in the reports submitted by the private operators.

The LMCPs Licensing Module may be appropriate for these processes, as they are annually renewed, provide notifications, and process a fee. However, we will rely on the software vendor's recommendations as to the best module to perform these functions.

Groundwater Protection & Wells

The well program focuses on services related to privately-owned wells. This program is primarily related to drinking water wells, but several other well types are included in the permitting requirements including irrigation wells, monitoring wells, and geothermal wells. The same State delegation of authority for staff applies here. The program performs activities related to evaluating sites, permitting, inspecting, repairing, abandoning, responding to complaints, and evaluating water quality through sampling.

The water-sampling program offers water quality sampling throughout the County for existing wells. In addition, all newly-constructed wells are sampled once they are approved for use. The water sample result data is available from the State lab, but in a format that is extremely difficult to assimilate into the current system. The LMCPs must be able to closely relate not only well location, but multiple water sample results (many-to-one), with up to 25 water quality parameters for each sample event. It must send notifications to the applicant of each status (e.g., Issued, Grouted, Abandoned, Incomplete, COC and Sampled), similar to an inspections result.

The LMCPs Licensing Module may be appropriate for these processes, as they are annually renewed, provide notifications, and process a fee. However, we will rely on the software vendor's recommendations as to the best module to perform these functions.

Activity Measurements	Peak	Low	Norm
Existing System Authorizations	391	293	335
Improvement Permits	616	200	380
Construction Authorizations	404	221	302
Well Permits	412	234	280
Operation Permits	376	205	274
Operation Permits (repair)	123	70	90
WTMP	986	409	602
Well Completions	385	143	214
Water Samples	1190	1074	797
MHP Inspections	81	80	81

Table 4. Environmental Health Activity Metrics (Annual figures based on FY 2012/13 and the preceding six years)

Miscellaneous Programs

The LMCPs must also manage other EH activities, including:

Mobile Home Park Inspections – there are approximately 80 parks in the County that are billed annually. The same requirement applies regarding the ability to track past due accounts and send reminder notices for delinquent accounts. Staff visits each park annually to monitor environmental conditions. Wells are documented and sampled and the septic systems are monitored for failures. Problems are reported to the owner and corrective action must be tracked. The status of the park must be compliant before a Mobile Home Space Authorization is issued to locate or set up a mobile home in the park.

The LMCPs Licensing Module may be appropriate for these processes, as they are annually renewed, provide notifications, and process a fee. However, we will rely on the software vendor's recommendations as to the best module to perform these functions.

Tank Manufacturing Inspections – At the request of a septic tank manufacturer, EH provides inspection services at the point of manufacturer to test for tank quality. Tanks are marked as approved. A fee is charged to the manufacturer for this service, but there is no way in the CPS to connect a payment with an invoice number or an inspection, and requires that tank inspection bills are delivered at the time of inspection. The LMCPs should provide a way to connect a fee and payment with an invoice and inspection.

The LMCPs Licensing Module may be appropriate for these processes, as they are annually renewed, provide notifications, and process a fee. However, we will rely on the software vendor's recommendations as to the best module to perform these functions.

Complaint Response – EH staff responds to complaints that may be related to permit activities (regarding wells and septic systems) or may be completely unrelated to the typical program activities. The nature of the complaints may include living conditions, litter, sewer complaints, surface water, etc. Many of these are referred to other appropriate agencies with or without prior investigation. State and local reporting require that specific data points for complaint responses be tracked and reported. The LMCPs must provide automatic notification to the EH Specialist and Supervisor when the complaint status remains active.

Emergency Services Fire Marshal Division

The Orange County Emergency Services Fire Marshal Division is responsible for enforcing the North Carolina Fire Prevention Code, conducting fire inspections, reviewing plans for new building construction, fire/arson investigations, county fire department coordination, hazardous materials response, and SARA Title III reporting in the unincorporated areas of Orange County. The office operates during business hours for routine services, but is on-call 24 hours a day. Staff works with Orange County Planning and Inspections Department to review plans for major renovations or construction of facilities subject to the provisions of the NC Fire Prevention Code. The fire marshals in the respective municipalities conduct their own life safety inspections.

Three staff members are employed within this Division, with needs to eventually add staff in the near future. All staff members are assigned to Fire Prevention and have a regular role in the development process. During the planning phases of commercial development, staff attends predevelopment meetings and reviews the site plans and construction plans for building egress and ingress, water supply, sprinkler systems, fire alarm systems, hood systems, road access, hydrant locations and other life safety issues. All proposed life safety systems shall comply with rules and regulations promulgated by:

- National Fire Protection Association: www.nfpa.org
- North Carolina Department of Insurance, Office of State Fire Marshal: www.ncdoi.com/osfm International Code Council: www.iccsafe.org

Staff also performs inspections of life safety systems during construction as well as compliance inspections either annually, bi-annually, or tri-annually according to the State schedule for those inspections. These compliance inspections are tracked using Firehouse software version 7.1532 with an internal SQL Server database, which will be upgraded to a .net version with an iOS Firehouse Inspector application in the near term. The interface with the CPS is for new or remodeled construction. Inspections are scheduled and results reported using Firehouse. Approvals or problems are reported back to the CPS, either as an approval or as a comment in

the system. The overlap between systems is that the comment regarding any problem or incomplete inspection is duplicated in both systems. In addition, the Fire Marshal notifies Building Inspections by email of any problems that are identified as being pertinent to Building Inspections, which may or may not require further follow-up through the LMCPs. A goal of the LMCPs should be to eliminate duplicate data entry and make it accessible to all departments.

The Fire Marshal Division issues a variety of permits, with some being tied to construction/remodeling and some being tied to special use/operational permits. The LMCPs must provide an inspection point for the Fire Marshal Division for any building fire protection permit, including automatic notification of permit application for fire protection, accessibility of plans and core data accessible/pre-populated upon notification. This must be a stand-alone permit from other parts of the building permit, as the Fire Marshal is ultimately responsible for the inspection. The process must include contacting the Fire Marshal for rough-in and inspection, as well as final inspection, with no permit issued until all criteria have been met, such as the submittal of plans. The corresponding fee schedule is related to the inspection. Documentation of valid licenses, proper insurance, plans, and applicable fees must be submitted prior to permits being issued and plans being reviewed.

Environmental Enforcement Division of the Solid Waste Department

The Environmental Enforcement Division of the Solid Waste Department is responsible for approving and enforcing the Regulated Recyclable Materials Permit.

Construction and Demolition (C&D) debris is waste or excess material resulting from building new structures and from the remodeling, repair, demolition or deconstruction of existing buildings. C&D debris makes up about 1/3 of Orange County's total waste stream, or about 31,000 tons of waste per year.

The Orange County Regulated Recyclable Material Ordinance (see <http://orangecountync.gov/recycling/candd.asp>) requires the recycling of certain C&D materials: corrugated cardboard, clean wood (wood that has not been painted or treated) and scrap metal. The ordinance states that construction and demolition projects must have a waste management plan in place, waste haulers must be licensed, and that these requirements will be enforced.

The vast majority of time, the applicant gets and completes the Recyclable Materials Permit Application from the respective jurisdiction (Town of Chapel Hill, Town of Carrboro, Orange County Permits & Inspections). Occasionally someone will download the application from the County website and send it to Orange County Solid Waste directly. Because the Towns of Chapel Hill and Carrboro voluntarily participate in the Regulated Recyclable Materials Ordinance, they review and approve themselves, unless there is a demo involved, in which case they have the applicant contact the County in order to request a deconstruction assessment. OC Solid Waste handles all enforcement County-wide and in the Towns, as well.

For OC proper (and including the Town of Hillsborough), front-desk staff enter information into the CPS and review and approve all residential (unless there is a demo) and all commercial with a value of under \$30,000. In those instances in OC proper (and the Town of Hillsborough) where there is a demo (or commercial construction value > \$30,000), Solid Waste is notified via an e-mail, and will review and approve the permit in the CPS. The LMCPs must allow the reviewer to view documents that have been scanned into the system, make sure all information is provided and valid (e.g., a licensed hauler is being used) and support approval through the system. Solid Waste currently sends a notification via email of the approval, but would like to be able to trigger automatic notification in the LMCPs.

The towns of Chapel Hill and Carrboro, on behalf of the Orange County Solid Waste Management Department, charge a fee for review and processing of Regulated Materials Permits associated with all new building permits issued by the respective Inspections Department. The County must be able to track the number of permits issued. Solid Waste currently picks up hard copy permits weekly from the Towns, and receives a quarterly fee check and report of the number of permits issued. A workflow to enter permit information either from the permit copies or reports from the Towns is required in the LMCPs in order to provide a more granular reporting timeframe and association of the permit with the parcel.

Under the current system and operating procedure, the Regulated Recyclable Materials permit fees paid by the applicant in OC Proper (including the town of Hillsborough) are deposited directly into an account managed by Finance. Currently, only a user with access to the Munis system is able to track these fees. The LMCPs should provide Solid Waste with the ability to track these fees for more accurate budgeting.

Solid Waste requires the ability to generate reports from the related requests and approvals in order to use metrics to provide better service and more refined budget projections and updates. They also need the ability to retrieve building plans and core applicant information. Finally, they would like the ability to conduct mobile inspections with providing updates and even photos to the system while on-site, as well as tie-back to GIS to obtain information related to the geographic area of the site.

Finance Department

Throughout the life-cycle of a project, there are numerous fee collection points, with fees paid in person by cash, check or credit card. The new system must also process online payments.

The fee schedule for these collection points may change, new fees may be added, and existing fees eliminated, all based on effective date of the fee schedule. The ease of supporting additions and updates to the fee schedule is a key component of the new LMCPs.

The LMCPs must support the functionality for Finance to reconcile all monies collected by the County. The current reconciliation process includes a daily export of data from the CPS as an HTML file report to Finance. Staff members in Finance then manually process the records with the County's General Ledger system similar to the method used to process other payments in the County. The implementation of the LMCPs must support the current process of creating the required flat file to be exported and transmitted in the same manner as the current process. The County will consider the capability of the new system to provide integrated posting of daily collections to the County's General Ledger system.

The payment processing service provider ("Payment Service Provider") of the LMCPs will ensure that appropriate security measures, features, mechanisms and assurances are in place to safeguard the County's taxpayers and customers. Full compliance with current Payment Card Industry (PCI) standards and Visa compliance validation requirements and regulations will be required and verified as part of the proposal evaluation process, and quarterly and annually on an on-going basis. Compliance with the National Automated Clearinghouse Association (NACHA) is required only if the corresponding method of payment processing is expected, e.g., the use of bank routing code and account number. As part of the contract processing, the County will require the Payment Service Provider to sign a contract addendum acknowledging that the Payment Service Provider is responsible for the security of all cardholder data that the Payment Service Provider possesses. **In terms of all payment systems that are currently in use throughout the County, any processing or transmitting over the County network is masked and never with full account numbers accessible. The County**

does not store and does not plan to store any credit card information in its system at any time in any location. All credit card information is transferred directly to the Payment Service Provider either by online redirect or via the telephone line with pin pad and card swipe. **None of the County's reports or stored data received from the Payment Service Provider may include any credit/debit card numbers, bank account number, or any security codes.** The CPS handles credit card payments only via pin pad and card swipe. All other payments are via check or cash. The new system must also support online payments through a web interface, as well as the potential for IVR payments.

The LMCPs must be able to verify that payments have been made in order to proceed through the workflow associated with any process defined in the system. Resulting insufficient funds checks or rejected transactions should pause the process until the financial issue has been resolved. Daily reports for rejected bank and credit card transactions are also needed.

Tax Administration Department

The Tax Assessment and Land Records/GIS Divisions of the Tax Department are interfacing departments to the LMCPs and will be included in proposal review.

Tax Assessment

Construction activity adds value to properties, which the Tax Office needs to assess and add to the property tax rolls as quickly as possible. All permit activity is entered into the County's Computer Assisted Mass Appraisal (CAMA) system, AssessPro, via nightly flat file import from the CPS for unincorporated Orange County as well as the Town of Hillsborough, and manual data entry for all other municipalities.

The LMCPs must have the ability to accept property owner, street address, and Parcel Identification Number (PIN) as searchable key fields. Automated reports and data extractions of completed, modified, and voided permit values, as well as additional permit information, need to be supplied to the Tax Office on a regular basis for a specific timeframe. Reports and data extractions of partially complete permits and inspections involving these permits indicating the stage of completion (e.g. framing, electrical, final, etc.) need to be available for given timeframes as well.

Similarly, certain inspection approvals or failures (such as Well and Septic) may affect the value of properties, and the Tax Office should receive automated notification of such failures with adequate location data to automatically match to the associated real estate tax parcels.

Land Records/GIS

Land Records/GIS is responsible for maintaining property information used in public inquiry and legal research. Land Records/GIS uses public documents to create and maintain the official index of property ownership in the County and handles the geographic information systems for Orange County. Addresses are declared by the addressing authority for each jurisdiction. The Orange County Land Records department relies on the GIS system for PIN management for all un-incorporated Orange County addresses. Each jurisdiction is responsible for its own addressing and property identification/PIN management, including:

- Carrboro
- Chapel Hill
- Hillsborough
- Mebane

The municipalities (with the exception of Mebane) maintain a replicated GIS database of addresses for the county in a corresponding ESRI system such that there is a two-way sync of edits that occurs in as real-time as necessary. The County maintains addresses for Mebane based on paper submittals.

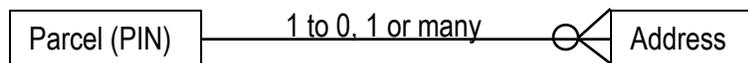
The Orange County PIMS system keeps track of PIN ancestry and descriptions of all documents associated with any given PIN. It also maintains the current owner and "as of January 1" owner for each year.

Some of the challenges accommodated in the CPS have to do with reconciling parcel identification with permitting and inspection activities. Every parcel in the County is assigned a PIN to identify a land area which can be displayed as a polygon via the GIS system. Each PIN is unique within the County and each PIN is associated with one parcel (polygon) to which one abstract (tax bill) is assigned.

In the County, an address is assigned to every metered location (e.g., a shed with a meter has its own address.) Therefore, not every address represents a habitable structure.

Environmental Health or Building Inspections requests an address on all new habitable structures, although EH would not be involved in permitting new structures in the County on municipal water and sewer (e.g., Churton Grove).

Note again that this is not necessarily how the municipalities handle addressing. A parcel in the County that does not have an electric meter will have a PIN but will not have an address. Moreover, a parcel with more than one metered source will have more than one address. Although anomalies occur and require review, it should never be the case that an address crosses more than one active PIN, but it may be associated to more than one PIN if an old PIN has been retired.



The County does not pre-address any parcels that do not have a meter, as per the County "Road Naming and Addressing Ordinance"

(<http://www.co.orange.nc.us/assessor/addressingordinanceinfo.asp>). This has made property identification to CPS a challenge in some instances. For example, if there are inspections being conducted on a parcel for feasibility and there is no electric at the time, there will be no address for identifying the inspector's location. The Environmental Health Improvement and Erosion Control Permits, for example, may or may not have an address if performed on unimproved property. Any activity or permit may be initiated without an address, but a PIN is required on all activities during the initiation process. Many activities, if not most, cannot proceed through the current workflow without verifying an existing address or receiving a new address.

The incorporated towns may, and do, pre-address parcels because they have not all adopted the "Road Naming and Addressing Ordinance." This has caused problems due to the creation of "temporary" addresses that need to be maintained, and corrections by the municipalities are difficult to track.

PINs may change for an address if the parcel is "split" into one or more child parcels, or merged with one or more other parcels to become a larger parcel. The original PIN is retired (status set to "retired") and the new PIN(s) hold a status of "Active." All of this PIN management handled in the PIN APP associates the correct address(es) to the correct PIN. PIN assignment and reconciling parent-child PIN relationships and status updates resulting from parcel splits and merges is not completed real-time, based on work volume and data validation requirements.

There are sometimes impacts to the permitting processes due to the disconnect between PIN and address assignment/reconciliation and permitting activities. The LMCPs must take this possible delay into consideration for establishing notifications and business rules for mitigating the impact on the permitting process.

In the majority of the cases, one permitting project is associated with one PIN. However, there are cases where a project covers multiple PINs. Conversely, each PIN may be associated with multiple projects. When the certificate of occupancy is issued for a building project, the Planning and Inspections Department maintains the PIN for the project as of the date of the CO. No further updates are required as any further Planning and Permitting projects require a new application and association with the current PIN for the parcel. However, the Environmental Health Department must maintain the correct association of the location of the well and septic for re-inspections, which is why, although the well and septic permits must be associated and related to the building permit, they should not be keyed off of the building permit or off of the PIN of the parcel that may change, but should be keyed off of the exact location of the well/septic. The exact location can be related to the current parcel PIN and address through interface with GIS.

Along these lines, all aerial maps are maintained by GIS and the LMCPs must provide integration to these aerials via its GIS viewer, as well as a routing through Google Maps. The County would also like this functionality via the Vendor’s Mobile Inspections functionality.

CURRENT ACTIVITIES

The following are activities that are currently supported either by the CPS or manual interface/processes. At a minimum, these activities must be supported. The following sub-sections will address additional expectations.

Activities to be supported by the LMCPs
Residential Construction Permits
Commercial Construction Permits
Inspection Request Scheduling
Inspection Results Posting
Inspection turndown Library
Fire Inspection Process & Result
Bi-annual School inspection Process & Result
Complaints / Inquiries
Pre-Development Process
Pre-Development Field Process/Visit
Inspection Level Assignment
Major Subdivisions
Minor Subdivisions
Exempt Subdivisions
Environmental Assessment A/EIS Permits
Home Occupation Process
Site Plan Review Process

Activities to be supported by the LMCPs
Zoning Atlas Amendment
EH Construction Authorization/Operation Permit
EH Improvement Permit
EH Mobile Home Park Inspection/Billing Process
EH WTMP Region/Billing Process
EH Well Permit
EH Existing System Authorization Process
Current Planning Sign Permit Process Tracking
Erosion Control Urban / Rural Disturbance Permit
Erosion Control Stormwater Management Plan / review / Track
EH Mobile Home Space Authorization
EH Water Sample Reg/Bill Process Tracking
Sewer Manhole Inspections
Misc. Receipts Processing
Zoning Enforcement Process Tracking
EH Complaints Process Tracking
Erosion Control Stream Call Process Tracking
Nightly Re-Inspection Fee Processing / Fees Applied
Solid Waste Regulated Recyclable Materials Permits
Nightly Parcel Situs Field Update / Modify
Board of Adjustment Project / Process
Special Use Permit Process / Review

Table 5. Activities supported by the CPS to also be supported by the LMCPs

CURRENT SYSTEMS TO BE REPLACED

The following sections describe current systems that need to be replaced in the LMCPs. The table in Section 6 “Conversions” addresses the data to be converted.

Permitting Software: Accela PermitsPlus / DB: SQL2000 / ~100,000 records

Orange County currently uses a system built on PermitsPlus with 50+ users within primarily two stakeholder departments. There has been over ten years of development with over 21,000 lines of script. Each step within the workflow process is gated to ensure compliance to a complex permitting and inspection process. Implemented business rules include checking construction values against contractor licenses, checking inspector levels against job classifications, and automatic emailing of process members who have attached custom or stock conditions to a permit when a final has been requested. Approvals are added ‘on the fly’ depending on which of the 58 different types of permit applications is being processed. Code cycles are assigned to each job depending on initialization date, and the associated turndown library code reference must correspond to the correct code cycle for each trade. There are 137 different types of documents that are also dynamically printed according to built-in script logic. There are

currently 187 different lookup tables and 131 user-defined lists referenced within 258 different scripts.

The CPS currently lacks the feature of a central application into which information, approvals, and statuses exchange between the various permit types, yielding what is perceived by some users as complicated and incomplete information transfer between systems.

Field Inspection Software: InspectPlus / DB: SQL2000 / ~100,000 records

The InspectPlus application is an in-house-developed application that was created with scripts using VB with uploads from the PermitsPlus database for going out to the field, and syncs with the data into the PermitsPlus database inspections module anytime the laptop is docked. It is also used to provide the customer with typed and referenced turndown information. It could work in real-time from the field if there were reliable connections throughout the County.

InspectPlus runs parallel to PermitsPlus and contains its own SQL database for all of its functionality and updates a minimal number (2 or 3) of PermitsPlus tables upon data synchronization. The software is written in Visual Basic 6 and is currently on version 4.5.6 from starting at 1.0 in 2003. Each laptop has the runtime SQL2000 locally and has both the InspectPlus and PermPlus databases. Please note that these are separate databases, and the PermitsPlus data structure has in no way been altered or changed to accommodate InspectPlus.

The application supports building inspections only. The functionality of this system must be provided and expanded in the LMCPS to support real-time connections, when available, as well as field inspections by other departments. It must also support multiple devices, including laptops and tablets/iPads. It must provide a view to both GIS aerial maps to have access to GIS layers on the map, as well as a routing to Google Maps or similar view for location and directions.

Legacy Permit Data: MS Access / ~25,000 records

Current legacy permit data needs to be converted as historical permit records.

Mobile Home Park Database: Excel

The Mobile Home Park listings, inspections assignments and results data used by Environmental Health is currently stored in Excel and needs to be incorporated into the new system, along with a consolidation of or interface to relating data with the Solid Waste and Tax Administration Departments.

Well Points Coordinates

There are currently almost 12,000 well coordinates being maintained by Environmental Health. With the incorporation of being able to key off of/identify a parcel based on coordinates, these well coordinates must be incorporated into the LMCPS in order to support well identification and post-occupancy inspections.

Data Import/Export

The current import process from Tax/Land Records is set up as a job on the server that can be run manually, but should be set as a scheduled and/or triggered job. The current export processes to Munis and the Tax Office are set up as jobs on the server that are executed

nightly. These processes need to be replaced by direct interface to source data, where possible, or as processes that are scheduled or triggered based on business rule definitions. Additional export processes are set up as emails.

The following is a chart of the current import/export processes. Refer also to Section 7 for RFP response requirements for integration/interface points.

Interface Name	One-Way or Two Way	Frequency	Description
Munis	One Way - Export	Nightly	Daily export of fee's paid from Accela to Munis Financial System. This export file is currently used to manually update the Munis Financial System.
Tax Office	One way - Export	Nightly	Daily export of permits issued to Patriot AssessPro system. This is an automatic import into the system.
Tax/Land Records	One way - Import	Nightly	Daily import and automatic notification of parcel changes and address assignments, re-assignments
Nightly Inspection Results Email	One way - Export	Nightly	Export email of inspection results and turndown items to permit holder and contractor of record
Nightly Permit Status Email	One way - Export	Nightly	Export email of approved status of permit to applicant
Weekly Permit Detail Report	One way - Export	Weekly	Export email of all permits and detail information to recipients on a weekly basis
Nightly Inspection Activity Supervisor Email	One Way - Export	Nightly	Export email to supervisor of inspections daily data matrix
Nightly Permit Activity Email	One Way - Export	Nightly	Export email to supervisors of permit activity for the day
Notifications for Open Conditions	One Way	Upon Final Inspection Request	Export email sent to set person or author of custom condition that job is ready to final out

Table 6. Current file or data import/export processes

Licensed Professional Data

The County requires the maintenance of lists of licensed professionals, including all address, phone and email information (i.e. contractors, engineers, etc.). This list must be searchable, and the system must prohibit creation of an application or issuance of a permit, with an associated licensed relationship, that does not hold appropriate registration/licensing required for the application process being initialized.

The system must store or directly interface to the following lists of licensed professionals:

System Name	Vendor	Database Type	# of LP Records
Building, electrical, plumbing, mechanical, and sprinkler contractors	State of NC	CSV	10,000
Septic Tank Contractors	Orange County	CSV	150
Well Contractors	Orange County	CSV	150
Recyclable Materials Haulers and Verification Tags	Orange County	Access	5400

Table 7. Licensed Professional Source Data

FUNCTIONALITY TO BE AUTOMATED

Complaint/Code Enforcement Tracking System:

An automated method of tracking complaints and violations is required in the LMCPs. Once a complaint/violation is created, a means of splitting or forwarding the complaint/violation needs to be included so that each department or function area can handle the complaint within their area while leaving the entire complaint/violation open until all areas have a resolution. For example: The Fire Marshal's Division performs an inspection of a facility and finds that the facility has added a new bathroom and completed electrical work with no permits. The Fire Marshal's Division would then generate the original complaint ticket. This one complaint could generate multiple spin-off complaints involving septic issues, environmental health issues, plumbing issues, building issues, and electrical issues that permits should have been obtained for prior to the work being completed. Each of these spin-off complaints would need its own complaint-tracking record that should be tied to the overall or original record. Several fields and drop down menus would need to be created to capture and track these issues.

Online Access

The County seeks to take advantage of current technology trends and expectations to provide online access (web-based and mobile applications) to citizens for application, payment, project status and results information.

A list of current County Online services can be found at <http://orangecountync.gov/OnlineServices/index.asp>. Current online offerings related to this RFP include:

- Searches of the PermitsPlus database for building permits, well permits and septic permits.
- Available applications for download.
- Online application for water testing. Note that this online application is an upcoming offering and will generate an email of the information that is sent to the County, but does not automatically insert any data into the CPS.

When interfacing with the system through an online interface, the County would like to provide integration with the GIS layers so that users are able to view the parcel of interest in a manner

similar to the map returned through an online search request, and provide the capability to click on the parcel of interest and to have core data, such as PIN, owner address, and other requested data automatically filled in on the online application. It is desired to show and provide proximity alerts for special and/or hazard zone areas. The County seeks to provide a project status interface that will allow a citizen to search for a project or permit and show status, inspection results, and next steps in the process, as well as to identify issues that may delay permit issuance. Citizens should be able to print reports, request and schedule inspections, flag missing information, upload plans, and print permits that have been issued.

IVR Access

The County does not currently provide an IVR system for inspection requests or permit/inspection status. This functionality is currently under evaluation for usefulness due to the fact that there are rural areas of the County that do not have wireless access and, therefore, would not be able to realize the efficiencies or transparency objectives of the online system.

The proposed system will be reviewed in terms of integration with and offerings for IVR based on the corresponding functional requirements, although implementation may be considered as a follow-on project. Project cost and timeframes should demonstrate including IVR as a part of initial development, and alternatively as a separate, follow-on project.

CURRENT SOFTWARE SYSTEMS FOR INTEGRATION

The County recognizes that there is not one software system that meets the needs and requirements of all department functions. In supporting the technology needs of specific departments, the County aims to procure software solutions that provide an integrated view of related systems. The LMCPS must interface with current County software systems as part of an integrated solution. Preference will be given to vendors with a solution that integrates well with the County's GIS and Revenue systems. Refer to Section 7 for RFP response requirements for integration/interface points.

The County Property Information Management System (PIMS) includes the CPS (with internal SQL Server database), GIS (with internal SQL Server database: geodatabase), Plat Tracker, Register of Deeds AMCAD system, the AssessPro CAMA system by Patriot (with internal SQL Server database), the IIS Collections System (NCPTS) and the Patriot-developed proprietary PIN Application (PIN APP). The CPS interfaces via flat files with GIS and AssessPro, and PIN APP processing indirectly via the updates to the AssessPro database.

There is currently a batch process with the Patriot AssessPro system for updating current CPS parcel PINs on a daily basis, and updating addresses and street information three times a week. Parcel ownership is updated in GIS for reference by PermitsPlus.

GIS

The County has a centralized Geographic Information Services (GIS) unit in the Land Records Division of the Tax Department to manage a mature GIS system with an internal SQL Server database and many layers of available geospatial data. (See available interactive services at <http://orangecountync.gov/assessor/LandRecords.asp>).

The County GIS is used for a variety of mapping and analysis, and supports users in most departments within the organization via online or desktop applications, as well as citizens of the

County via online access. There is real time synchronization of GIS data between Orange County GIS, Chapel Hill GIS, Hillsborough GIS, and Carrboro GIS (OC currently provides this service for Mebane) for all streets and addresses. The County publishes an ArcGIS Web service which allows the towns to synchronize their addressing data (addresses and streets) with the county’s SDE Transportation geodatabase to maintain currency.

The County uses ESRI ArcGIS 10.X desktop and ArcGIS Server products. The geospatial database is housed in an MS SQL Server database. The County’s internal and external GIS viewing applications are built on the ArcGIS Server platform. Map and image services are available or can be made available for all GIS layers.

All departments involved in permitting and inspections depend on easy access to information within the GIS system to carry out their day-to-day business, and will likely depend even greater on this data with an improved mobile inspections capability.

Additionally, Environmental Health and Erosion Control/Stormwater Management collect GPS coordinates of permitted facilities such as well, septic, and stormwater devices that are uploaded into the GIS database and must be available through the CPS. Environmental Health uses GPS positioning handhelds for capturing coordinates based on the service, including soil evaluation (soil points), well grout or well head (well point) or septic final (septic point). The GPS data is checked out of GIS prior to going out to perform the service, and then checked back in later in the day or the next day. When it is checked in, the file is corrected in ArcPad and uploaded to Orange County ArcView. Since GLONASS satellites are used, it may be necessary to wait until the next day to check in the file.

There are currently processes in place to replicate the required GIS data into the existing system via nightly batch processes for the following GIS data types:

GIS Data Type	Approximate # of Records/Items
Parcels	60,000 active parcels
Addresses (6 jurisdictions)	69,000
Streets	4,000 containing 10,700 street segments
Well data points	12,000

Table 8. Replicated GIS data in the current CPS

The County seeks to take advantage of relational database efficiencies in storage and access with a strong preference for products that do not require export of data from the GIS database into stand-alone files. Therefore, the new system must minimize data replication with more direct interface to GIS mapping.

AssessPro CAMA System

The County Computer Assisted Mass Appraisal (CAMA) system is built on AssessPro by Patriot with an internal SQL Server database. The CPS must access new ownership information through the proprietary PIN Application (PIN App) system and AssessPro. The current system provides permit information to the Tax Office and receives new parcel identifications for permitting. Certain project and parcel fields entered in the CPS must be validated real-time against the most current County CAMA data.

Also, certain inspection approvals or failures may affect the value of properties, and the Tax Office would like to receive automated notification of such failures, keyed so as to automatically relate the information to the associated real estate tax schedule.

Revision to the County Use Code tables must be carefully coordinated with the Tax Administration Department. Although the current interface to the CAMA system is limited to permit and inspection data for taxing purposes, a robust system would provide an opportunity to integrate further processes.

It is important to note that although the process for updating the CAMA system is a flat file batch process, it is transparently perceived to the CAMA users as a direct update to the system only for unincorporated Orange County and the Town of Hillsborough. The County appraisers manually update the CAMA system with data for the other incorporated jurisdictions of Chapel Hill, Carrboro and Mebane.

MUNIS

Orange County's financial system is MUNIS by Tyler Technologies with an internal SQL Server database. MUNIS is used to reconcile all payments collected, credited, and returned for the entire County. The LMCPS must initially maintain the flat file report generation process that is currently in place and expected by the Finance Department. However, the proposal should include details of how the product would be able to interface with MUNIS for direct SQL-to-SQL update and indicate the level of integration available, either as standard functionality, API, scripting, etc., and whether it would be available in real-time or batch.

The LMCPS must be able to report to Finance on the tracking of payments and fees billed, and must provide ease of management of updates and additions to ledger account codes for proper reporting.

Payment Systems

The County currently employs cash and card swipe payment methods with the current system. The proposal must include the payment service providers that are integrated with the system. The County currently integrates with PlugNPay and Virtual Merchant as payment gateways to Elavon for other systems. Indicate if there is a Payment Service Provider that is proposed that is an integral part of the software being proposed provided that the Payment Service Provider meets all of the requirements of this RFP. Substantiation of PCI DSS compliance and a copy of the SSAE 16 SOC 1 Type 2 report for the Service Provider should be submitted with this proposal. It has not yet been determined whether or not the County will apply the convenience fee model rather than absorbing card fees for customers that choose to pay with a credit card. PCI compliant and industry-accepted communication must be provided to advise the customer of the specific type of security provided for the credit card transaction.

The systems, software, processes and partners must adhere to the stringent requirements of the national cardholder Information Security Program (CISP) and maintain full PCI compliance throughout the life of the contract with the county. This ensures that all cardholder data is protected from those not directly involved in the processing of a payment.

Orange County will have the authority to audit the Payment Service Provider's database records associated with County transactions at any point during the contract, and will notify the Payment Service Provider of the request in writing at least 48 hours prior to the request to access records. There should not be any cost associated with making the data available for the County's audit purposes.

E-Mail and Calendaring

The County's email and calendaring platform is Microsoft Exchange with Microsoft Outlook client access, and the LMCPS must interface with Outlook for messaging and scheduling.

Active Directory

The County uses MS Active Directory (AD) to authenticate and authorize users for access to the network. The LMCPS should be AD-integrated in order to eliminate the need for County users to have a separate password and authentication for the CPS.

TECHNICAL INFRASTRUCTURE/ENVIRONMENT

The County seeks to procure the best system to meet the stated business needs and requirements according to defined infrastructure and technology standards and policies. The intent of IT policies is to:

- Provide a stable and reliable computing environment in which Orange County departments can efficiently serve the public
- Ensure public data is protected and managed efficiently to reduce maintenance costs in supporting the computing environment

The County will evaluate and consider premise-based, vendor-hosted or Software-as-a-Service cloud-based solutions. Premise-based solutions should fit into the environment described below, with justification provided for any deviation. Vendors providing a cloud-based solution are required to complete the **Cloud Service Questionnaire** (Appendix K).

Orange County has a modern technology environment and the following aspects of the County's technology infrastructure should position the County to support the technical operations of the proposed system. The vendor must identify any areas of the response where County's current infrastructure would not support the proposed system.

Server Operating System

The County standard is currently Windows 2008 Server R2 running on a Citrix XenServer virtual server platform. The current PermitsPlus system is running on a SQLServer 2000, which will be retired upon migration to the LMCPS.

Database

The considered products must be developed based on an integrated relational database using Microsoft SQL, specifically SQL 2008 R2 with consideration for SQL 2012 in the future. A published database schema must be provided to allow integration and reporting by County staff, as well as to meet established State documentation requirements as outlined in the "Sunshine Law" (reference <http://www.ncdoj.gov/getdoc/ef04d580-eee7-4cfe-b2ec-06c26a6f95b9/AG-open-government-booklet-4-8-08.aspx> and <http://www.ncdcr.gov/archives/ForGovernment.aspx>).

Client Operating System

Currently, Orange County supports over 1200 PCs, and is using Windows 7 on all desktops both physical and virtual. Please note if the proposed solution will run in a Citrix XenApp environment, i.e., served virtually via a Windows Server 2008 R2 64 bit hosted desktop solution.

Network

- An enterprise network that links 38 County facilities
- 90+ network servers
- 100+ network switches
- Local LAN PCs connect to the network using Fast Ethernet (100 Mb).
- Wide area connections between major buildings utilize 1 GB, 100Mb and 10Mb fiber Metro Ethernet connections.
- Smaller sites utilize 15Mb x 2 Mb cable modem connections.
- Virtual Private Network (VPN) for employees and business partners.
- 62 Public Wireless Access Points supporting 802.11g wireless.

Mobile Computer and BYOD

Building Inspections uses Lenovo X230 notebook computers in the field. Fire Marshal staff use Panasonic Toughbook CF-19s. The county also supports Lenovo X230T touch screen tablets for Emergency Services units, although not directly related to the CPS system. We are interested in both real time mobile applications as well as asynchronous applications due to limited or no wireless access in certain extended rural areas of the County.

Document Management

The County does not currently have an enterprise document management solution in place. SharePoint is being evaluated, and there are document storage and indexing products in use, including Laserfiche and Starpoint.

Reporting Tools

Standard reporting tools, such as Crystal and SQL Reporting Services should be supported. The LMCPS must provide the ability to integrate SQL Server Reporting Services (SSRS) into the application for documents and statistical reporting needs.

Commercial Off-the-Shelf (COTS) Software

Although the County currently supports numerous purchased commercial products and custom-developed applications, a product that implements the majority of the stated business requirements with minimal customizations is expected. The County will not consider a fully-customized solution. The implementation recommendation should include areas of possible changes to current functional processes in order to take advantage of COTS-level system functionality based on industry standards.

Vendors who demonstrate currently-available products with capabilities that meet the requirements will be given preference to those proposing to develop custom software in the solution, or modules that are proposed for future deployment. The County intends to implement a minimum amount of customizations in the software. Any requirement met by a

customization to the proposed system must be accompanied with the cost for the stated customization.

The County strongly prefers a product that can demonstrate that the majority of routine changes can be completed by the business users rather than requiring technical staff assistance or coding changes. The proposed system should also be easily extendable to additional processes and groups within the County or municipalities interfacing with the County.

2. PROCESS AND SCHEDULE

The process is for Orange County to review the proposals, evaluate the vendor solutions, and finalize a project scope of work. Using subsequent interviews, additional demonstrations, reference checks, and/or site visits, Orange County will then make a final decision.

The following is the current targeted timeline:

Selection Process Step	Target Date(s)
Release and issuance of the Request for proposal (RFP)	August 18, 2014
Submission of Intent to Propose (email)	August 25, 2014
Submission of questions (email)	September 2, 2014
Date for answering questions (email)	September 5, 2014
Proposal due	September 23, 2014
Proposal evaluations	September/October
Demonstrations	October/November
Begin Contract Negotiations Process	November/December

3. EVALUATION CRITERIA

Evaluation Criteria

The County reserves the right to select the Vendor which best meets the overall needs of Orange County, based primarily on the following criteria (not listed in any order of importance):

- The overall capability to provide the required software features and capabilities
- The flexibility of the application software, including the availability of tools to allow the novice user to “drill down and across” and perform Ad Hoc analysis and reporting
- The amount of Vendor support that will be available for installation, conversion, training, ongoing modifications, and software support
- The total costs of the solution over a ten-year period, including direct and indirect costs
- The Vendor's performance record to date in meeting the requirements of their existing customers, including the availability of users similar to the County to allow reference investigation
- The expandability of the proposed solution, including the ease of upgrading the proposed solution by adding components to accommodate future needs
- Adherence to the requested Information specifications, thoroughness of the Proposal, as well as the overall format of the presentation
- The financial stability, longevity, and strength of the Vendor
- Corporate direction (potential organizational/industry restructurings, mergers, acquisitions, etc.)
- Future technology direction (major changes in architecture, database, platforms, languages, etc.)
- The internal controls provided within the solution which prevent unauthorized access to data and provide adequate audit trails
- The capability to perform required conversions of existing data files
- The seamless integration of the various system modules and ability to meet the interface/integration requirements noted in this RFP
- Ease and intuitive use of software interface (for both internal staff and Web customers)
- Availability and ease of use of mobile and online applications

4. SPECIFIC RESPONSE REQUIREMENTS

Specific Response Requirements

Include the following items in the order listed below (and indexed in the same manner) in your response to this Request for Proposal (RFP).

During the needs assessment phase of the project, key issues were discussed regarding alternate information management solutions. Following is a list of specific concerns of the County. Please respond to each issue in detail regarding how the proposed solution will satisfy each concern.

PROGRAMMING LANGUAGES

Please provide information on all programming languages used for each required application.

OPERATING SYSTEMS

Please provide a description of the server and desktop operating systems used by your products.

DATABASE

The County expects the information system to be based on a very stable and flexible relational database standard. The County prefers MS SQL. Please briefly describe the relational database platforms available in the use of your products.

USER INTERFACE CONFIGURATIONS

The County desires to move forward with advancing technologies and therefore prefers a thin-client architecture or browser user interface (BUI). Screen-scraping technology configurations will not be considered. Please describe your client architecture.

REPORTING CAPABILITIES

Please provide information on overall system/solution reporting capabilities (e.g., canned reports, Ad Hoc reporting, executive dashboard, etc.).

DOCUMENT MANAGEMENT CAPABILITIES

Please provide information on your document management capabilities and options, including integration to third-party EDMS solutions. Please provide information on all EDMS solutions with which your product can interface.

SHAREPOINT INTEGRATION/FUNCTIONALITY

Please provide information regarding any integration, functionality or direction that your company has or is pursuing related to SharePoint.

WORKFLOW CAPABILITIES

Please provide information on your solution's workflow capabilities. Describe the integration level with all systems. If you have no workflow capabilities, please indicate.

APPLICATION SECURITY

Please describe application and user security features/capabilities. Indicate any special security features (e.g., user security, function security, file security, field level security, etc.) provided by the software.

APPLICATION SOFTWARE

Please complete the Feature/Function Specifications Listing contained in the electronic file provided with the **RFP Section 8 (Appendix A)**.

The proposed software should demonstrate an online, integrated method of processing the noted application modules and allow for immediate update of all information. Access to information in either summary or detail should be obtained easily and intuitively with minimal manual entry.

For each application software module proposed, indicate whether your organization developed the module, or if the module is available as a result of a third-party relationship that has been established with another vendor.

In addition to the required and optional software information requested in **Section 8**, provide general information on other application modules not requested in this RFP that may be of interest or benefit to the County.

SOFTWARE CUSTOMIZATION AND ENHANCEMENTS

Please provide information regarding the capability to provide the County with software customizations, including all applicable rates. In addition, include information on periodic system enhancements and updates.

LICENSING MODEL

Please describe your licensing models (e.g., concurrent user, named user, revenue, transaction volumes, etc.) and provide examples.

HARDWARE REQUIREMENTS

Please provide all hardware specifications including servers, workstations, and other equipment. Include estimated costs (if applicable) in **Section 8 (Appendix G)**.

INTEGRATION/INTERFACE CAPABILITIES

The County expects to expand its integration and interfaces with key systems. Please describe any current capabilities, partnerships, or future considerations for the following types of applications/systems that have been described in this RFP, including:

- GIS
- EDMS
- IVR
- Credit Card Payment Processing
- Electronic Plan Submittals and Mark-Up Solutions

COST CONSIDERATIONS

Initial one-time costs for hardware (if applicable), implementation, training, software, travel and related costs, etc., must be included with the price proposal. See electronic price proposal form **Section 8 (Appendices G and J)**.

Recurring annual costs should be described in the proposal, clearly stating what is included (e.g., application upgrades, state and/or federal reporting requirements, hours of support, etc.), **Section 8 (Appendices G and J)**. The County prefers unlimited telephone support. If 24/7 telephone support is available, price proposals should clearly indicate total recurring costs for that support option. If after-hours support is only available at an hourly rate, this should clearly be indicated.

The objective is to have **no hidden/unexpected costs**.

MOBILE FIELD COMPUTING

Please describe your solution's mobile field computing options including full application access through wireless VPN connectivity (i.e., no vendor software required), mobile field application for use with laptops, or mobile field applications with use of tablets (e.g., iPads). Additionally, please provide information on your systems "store-and-go" type functionality, so if a user is out of cellular range, they can still work off-line and the system will auto-sync when a cellular connection is restored.

PARCEL & ADDRESS GENEALOGY

Please provide an explanation how your system tracks both parcel and address genealogy for all historical and future parcel splits and combinations without losing the connection/record information as a parcel becomes a parent or child.

IMPORT/EXPORT FUNCTIONALITY

Please explain and provide information if your system has user-friendly tools and/or wizards that will allow the County import mass data to populate data fields, as well as export data in a file format for another systems without having write a custom coded interface.

TELEPHONE AND OTHER SUPPORT

Please describe all support services available from your company in **Section 8 (Appendix B)**. Specifically address the following issues:

- Normal hours of availability
- Website support information
- Online chat
- Remote system access capabilities
- Access via toll-free 800 number
- Costs
- Quality Assurance Program(s)
- Other support services
- Service-Level Agreements (SLA) – response time, escalation processes, and other metrics

IMPLEMENTATION METHODOLOGY

- Please describe your implementation methodology, with milestones and timeframe. **Include a preliminary implementation schedule** for all applications, including the required time for system and application training, program testing, and conversion. Please include how you expect to sequence the installation of the various applications.
- Orange County anticipates electronic data conversions, depending on cost. Please include estimated range of costs for data conversions for each application, if available, and a description of data that would be typically converted.

TRAINING AND EDUCATION

Please provide your consulting and training options, including classroom (on-site and off-site), online (group and self-paced), training videos, and manuals. Include training for all required staff and users.

PROJECT MANAGEMENT

Orange County will provide a designated project manager and expects the Vendor to do the same. Please include recommended Vendor project management costs (**Section 8, Appendix G**) in the proposal and describe, in detail, services to be provided. The County reserves the right to accept or reject changes in Vendor project management personnel.

CUSTOMER IMPLEMENTATION RESPONSIBILITIES

Please describe and/or provide a list of the typical customers' implementation responsibilities.

SUBCONTRACTOR AND THIRD-PARTY RELATIONSHIPS

Please describe any subcontractor relationships and/or third-party providers that will be used for this implementation.

Note: If a Vendor chooses to bring in and team with a third-party vendor/partner to address some requirements, this must be clearly stated in the response. Be specific when describing applications and

the third-party vendor/partner solution provider. Third-party vendor/partners will be required to demonstrate their portion of the application solution along with all other required information being provided by the prime Vendor.

EXAMPLE USER AND TECHNICAL MANUALS

Please provide the following:

- Example Application User Manual
- Example Application User Online Documentation
- Example Technical User Manual
- Example Technical User Online Documentation
- Example Training Syllabus
- Example Section of a Detailed Implementation Project Schedule

VENDOR/RESELLER INFORMATION

Please provide all information related to your company as requested in the RFP **Section 8 (Appendices)**. In addition, specifically address the following issues:

- Describe your research-and-development approach and process.
- If you are a Software Reseller/Partner, please provide the same company, customer demographics, and reference information for your specific company in addition to the software Vendor's information (see **Section 8, Appendices B, C, D, and E**).
- Technology direction
- Please describe short-, medium-, and long-term direction regarding major changes in architecture, database, platforms, languages, etc.

CORPORATE STRUCTURE CHANGES

Please explain whether there are any known circumstances, such as major organizational restructuring, mergers, and/or acquisition plans/considerations that are under consideration.

EXAMPLE CONTRACT

Please provide example/boilerplate contract(s) that will be used to negotiate the proposed solution.

USER GROUPS

Provide information regarding organized user groups, including frequency and location of user group meetings. Also, indicate who conducts the meetings and who is responsible for establishing user group meeting agendas.

REFERENCES AND USER BASE

Please provide references for a minimum of ten (10) completed projects of similar scope and nature to Orange County, preferably within the same region and within the last three (3) years.

A reference worksheet is provided in **Section 8 (Appendix E)**.

Please provide total number of customers (Software Provider and Reseller, if applicable) for the applications according to demographic request worksheet provided in **Section 8 (Appendix D)**.

Additionally, please provide an organization name list of all active customers within the state of North Carolina. Contact information is not necessary.

Lastly, please provide the **number** of new customers (original go-lives) implementing the proposed applications in each of the last three (3) years.

5. VOLUMES AND USERS

The table below summarizes the estimated volumes of transactions associated with the application processing requirements.

VOLUMES INFORMATION

Volume Description	Estimated Volumes (Annual or Quantity)
Planning projects	436
Permits	4,563
Inspections	16,692
Code Enforcement	80
Parcels	60,000

Table 9. Transaction Volumes

USER PROFILES

System Users	Quantity
Estimated Concurrent Users Max	37
Estimated Concurrent Users Avg.	23
Total user IDs	56
Mobile field users (included with total user ID's)	41

Table 10. User Profile Summary

Department / Organization	Total # of Users	Plan-ning	Permit-ting	Inspec-tions	Code Enforcement	Licens-ing & Regis-tration	Parcel / Addr-s Mgmt	GIS Viewer	Cashier-ing	Ad-hoc Report-ing	# of Users Requir-ing Mobile Access
Planning, Building & Inspections	21	5RW 13R	13RW 5R	13RW 5R	13RW 5R	13RW 5R	18R	18R	18R	7RW 11R	15
Environmental Health	14	14 RW	14 RW	14 RW	14RW	14RW	6RW 8R	14R	14R	8RW 6R	12
Stormwater/Erosion Control	4	4 RW	4 RW	4 RW	4 RW	4 RW	4 R	4 R	4 R	4 RW	4
Tax Office	5	5 R	5 R	5 R						5 R	0
GIS/Land Records	3						3RW	1I		3R	1
Fire Marshal	3	3R	3RW	3RW	3RW		3R	3R		3R	3
Solid Waste	2	2RW	2RW	2RW	2RW	2RW	2R	2R	2R	2RW	2
Other Non-County Reviewers and Approvers (e.g., contract engineers, development consultants, municipalities)	4	4RW	4RW	4RW	3RW	2RW	2RW	4R		4RW	4
TOTALS	56	29RW 21R	40RW 10R	40RW 10R	39RW 5R	35RW 5R	11RW 35R	45R 1I	38R	25RW 28RW	41

Table 11. Estimated Initial System Users by Module and Type

Legend:

- RW : Read/Write Access
- R : Read-only Access
- I: Integration point only

6. CONVERSIONS

The table below summarizes the estimated records and preliminary conversion requirements.

CONVERSION INFORMATION

Application/Information	Data Source	
	Records Quantity	Data Source
Active planning projects	385	PermitsPlus
Active zoning inspections	136	PermitsPlus
Active enforcement actions (code and zoning)	1900	PermitsPlus
Active permit applications and projects	22,428	PermitsPlus
Active license master records	10,300	PermitsPlus
Licensed haulers and verification tags	5000	Access
Historical planning	650	PermitsPlus
Historical permit records	62,000	PermitsPlus
Historical inspections	210,514	PermitsPlus
Historical zoning inspections	4000	PermitsPlus
Historical code and zoning enforcement cases	809	PermitsPlus
Parcel records	60,000	AssessPro
Addresses	69,000	GIS
Legacy System Records (Not PermitsPlus)	25,000 permits, 141,645 inspections	Access
Well Points Coordinates	12,000	GIS
Mobile Home Park	200	Excel

Table 12. Data Conversion Summary

7. INTEGRATIONS / INTERFACES

For all current systems integration, the response to the RFP should note:

- The vendor's background with integrating with the related system.
- Internal structures that affect how interfaces are developed and maintained.
- For current flat file exports, how the flat file and batch process would be maintained and automated to replicate the current process on the receiving end.
- How data exchange between systems can be accomplished in order to take advantage of SQL-to-SQL processing and real-time updates.
- Corresponding development and support/maintenance responsibilities for the interface junctions.

Interface / Integration	Description	Direction	System	Platform/ Database	Frequency	Initial Volume
General Ledger	Daily export of fee's paid from PermitsPlus to Finance via emailed HTM file/report. This export file is currently used to manually update the Munis Financial System. Access to payment information is required in the LMCPs in order to track payments outside of County processes for permitted activities, e.g., municipalities that have collected payment for review and processing of regulated materials permits.	Export	Munis, Tyler Technologies	SQL	Nightly	15 G/L accounts
Computer Assisted Mass Appraisal (CAMA)	Nightly flat file import for unincorporated Orange County and the Town of Hillsborough. Daily export of permits issued and inspection results to load. Certain project and parcel fields entered in the CPS must be validated real-time against the most current County CAMA data.	Export and Import	AssessPro, Patriot Properties	SQL	Nightly	60,000 records
GIS	Nightly flat file import and automatic notification of parcel changes and address (re)assignments.	Import	ArcGIS SDE Server, ESRI	SQL	Nightly	69,000 records
Credit Card Payment Processing	The County currently employs PlugNPay as well as Virtual Merchant payment gateways.	Bi-directional information exchange	Elavon	Card swipe machines and web interface	Real-time payments processed nightly.	30 transactions per day
Email and Calendaring	Current email exports are described in the Data Import/Export Section of this document. The LMCPs must provide interface for email, and scheduling must interface with Outlook.	Bi-directional	Microsoft Exchange w/ Outlook client access.	Microsoft	Real-time	100 emails
Authentication	AD is used to authenticate and authorize users for access to the network. The LMCPs should be AD-integrated.	N/A	MS Active Directory (AD)	Microsoft	Real-time	50 users

Table 13. Integration / Interface Summary

8. VENDOR ELECTRONIC RESPONSE FILE

The multi-tab Excel spreadsheet files and Word fillable form contain all appendices listed below. Appendices must be filled-in and submitted using these electronic forms, and must also be printed and included in your proposal.

Orange County NC LMCPs RFP 5202 Appendix A.xls

Appendix A Feature/Function Worksheet Tabs

Orange County NC LMCPs RFP 5202 Appendices B-J.xls

Appendix B Vendor Profile

Appendix C Vendor Financial Information

Appendix D Vendor Customer Base

Appendix E Vendor References

Appendix F Vendor General System

Appendix G Project Costs

Appendix H Interface

Appendix I Conversion

Appendix J Modification Costs

Orange County NC LMCPs RFP 5202 Appendix K.docx

(Optional. Required if cloud-based solution is recommended)

Appendix K Cloud Services Questionnaire

9. PROPOSAL INSTRUCTIONS

GENERAL PROPOSAL INSTRUCTIONS

Software features, functions, and capability information should also be submitted electronically using the forms and instructions contained in the RFP.

- Direct **Intent to propose notification** to **David Cannell, Purchasing Agent**, by e-mail at Dcannell@orangecountync.gov no later than **Monday, August 25, 2014**. Note: Only those vendors that have expressed intent to propose will receive further addendums and or copies of vendor questions and answers.
- Direct **Questions** related to this RFP to **David Cannell, Purchasing Agent**, by e-mail at Dcannell@orangecountync.gov no later than **Tuesday, September 2, 2014**.
- Complete the **E-Verify Affidavit**, and include it with your submittal.
- Complete the **Proposal Execution Form** and include it with your submittal.
- Proposal response instructions are contained in **Sections 4, 8, and 9** of the *Request for Proposals* (RFP) document.
- **Section 8** of the RFP contains vendor information worksheets. Please complete these worksheets using the electronic forms (Excel format) and as directed in the RFP instructions.
- Effort has been made to keep the RFP and feature/function specs as brief as possible.
- The proposal should include all costs associated with training, implementation, hardware specifications, interface estimates, file conversion assistance, custom modification estimates, annual maintenance, and support.
- Please **submit your proposal** by **Tuesday, September 23, 2014** – electronically and in hard copy, as follows:

Electronic: In Microsoft Word or PDF and Excel format emailed to Dcannell@orangecountync.gov

Printed: Twelve (12) copies sent to:

**David Cannell
Purchasing Agent
Orange County
200 S. Cameron Street
(P.O. Box 8181 for USPS)
Hillsborough, NC 27278**

Requests for extension of the submission date will not be granted. Vendors submitting proposals should allow for normal mail or delivery time to ensure timely receipt of their Proposal.

Responses to the *Specific Proposal Requirements* identified in **Section 4** MUST be completed and indexed appropriately. In addition, all forms and checklists identified in **Section 8** MUST also be included in your hard copy response. Failure to include any of the requested information within your proposal may result in rejection/disqualification.

REGISTRATION

Proposal packets may be picked up at the Orange County Purchasing Department from 8:00 a.m. until 4:30 p.m., Monday through Friday, on the Web at <http://www.co.orange.nc.us/purchasing/bids.asp>, or may be received by contacting **David Cannell, Purchasing Agent**, by e-mail at Dcannell@orangecountync.gov. The County will maintain a registration list of all vendors requesting the RFP. Any questions concerning the legal bid process, technical aspects or scope of proposal must be submitted in writing to the attention of this contact person.

If it becomes necessary to revise any part of this RFP, written revisions and/or addenda will be sent to all registered vendors.

COMMUNICATIONS PROHIBITED

From the issuance date of this RFP, until an actual contract is awarded to a vendor, no communications concerning the RFP may transpire between any vendor which expects to submit a Proposal and any employee of Orange County who is in any way involved in the development of the RFP or the selection of the solution.

The exceptions to this prohibition are as follows:

- Communications provided through the submission of written questions, which will be shared with all registered Vendors
- Submitting a Proposal

PROPOSAL FORMAT

Proposals should be made in accordance with the RFP format provided herein, with all blank spaces in the Appendices properly filled in. Numbers shall be stated in whole dollars.

Please provide the following sections, as a minimum:

- **Executive Summary**
- **Understanding of Project Objectives**
- **Specific Proposal Requirements** (see *Section 4*)
- **Exceptions taken to any RFP requirement**
- **Remaining Appendices not included in another section**

Proposals shall be addressed as indicated. All proposals must be signed by a duly authorized official representing the Vendor using the **Proposal Execution Form**. Proposals that contain omissions, erasures, alterations, or additions not called for, conditional or alternate proposals unless called for, or irregularities of any kind, may be rejected or disqualified.

No negotiations, decisions, or actions shall be executed by the Vendor as a result of any discussions with any of the County officials, employees, and/or consultant. Only those transactions provided in written form from the County may be considered binding. Also, Orange County will only honor transactions from vendors which are written and signed using the **Proposal Execution Form**.

The County reserves the right to terminate the selection process at any time and to reject any or all proposals. The contract will be awarded to the Vendor whose overall qualifications best meet the requirements of the County.

Costs incurred in the preparation of this Proposal are to be borne by the Vendor, and Orange County will not contribute in any way to the costs of the preparation. Any costs associated with Proposal review interviews will be the responsibility of the Vendor.

The contents of each Vendor's Proposal to Orange County—including technical specifications for hardware and software, purchase and lease prices, and hardware and software maintenance fees—shall remain valid for a minimum of 120 calendar days from the Proposal due date.

All Proposals must include copies of all example contracts for hardware (if applicable), systems software, application software, hardware maintenance (if applicable), and software support. Please note that all contracts will be subject to negotiation between the County and the selected vendor.

Please note that the final contract may not include all the applications or all the equipment listed in this Request for Proposal.

This Request for Proposal and the selected Vendor's Proposal, including all representations, warranties and commitments contained in the Proposal and related correspondence shall be contractual obligations included in the written final contract for services, equipment and software.

Orange County intends to award a contract to a single vendor for all core applications. Vendors are allowed to provide a proposal that includes subcontractors, but the County intends to enter into a single agreement with one Vendor acting as a Prime contractor. The Prime contractor will be responsible for the timeliness, quality, and deliverables provided by any subcontractors under the Prime contractor's agreement.

PREPARATION OF PROPOSAL

Proposals must be made in strict accordance with the *Request for Proposals* format outlined herein. Dollar amounts shall be stated in whole dollars.

Proposals shall be addressed as indicated in **Section 9** of this RFP. All proposals must be signed by an authorized official using the **Proposal Execution Form**. Proposals that contain omissions, erasures, alterations, or additions not called for, conditional or alternate bids unless called for, or irregularities of any kind, may be rejected.

Modification of proposals will be acceptable only if delivered in writing to the Contact Person prior to the submission deadline. Should the vendor find discrepancies in or omissions from the Request for Proposal or should be in doubt as to their meaning, they shall at once notify Orange County Purchasing Department who will send a written instruction/clarification to all vendors. The vendor will be responsible for any oral instructions. If the Proposal and specifications are found to disagree after the contract is awarded, Orange County shall judge as to which was intended.

All Proposals submitted shall become the property of Orange County to use, or at its option, return. All Proposals and associated documents will be considered to be public information and will be open for inspection to interested parties unless identified as proprietary. Orange County will make the determination as to whether the Vendor has adequately demonstrated the information is proprietary.

PROPOSAL CHECK-LIST

- Intent to Propose Notification** no later than **Monday, August 25, 2014.**
- Submission of Questions** no later than **Tuesday, September 2, 2014.**
- Proposal** by **Tuesday, September 23, 2014** – electronically and in hard copy
- E-Verify affidavit**
- Proposal Execution Form**
- Executive Summary**
- Understanding of Project Objectives**
- Exceptions taken to any RFP requirement**
- RFP Section 4 Responses** indexed appropriately
- Appendix A** Feature/Function Worksheet Tabs
- Appendix B** Vendor Profile
- Appendix C** Vendor Financial Information
- Appendix D** Vendor Customer Base
- Appendix E** Vendor References
- Appendix F** Vendor General System
- Appendix G** Project Costs
- Appendix H** Interface
- Appendix I** Conversion
- Appendix J** Modification Costs
- Appendix K** Cloud Services Questionnaire (Required only if cloud-based solution is recommended)
- Remaining Appendices not included in another section**
- Example Contracts** for hardware (if applicable), systems software, application software, hardware maintenance (if applicable), and software support

E-VERIFY AFFIDAVIT

LAND MANAGEMENT CENTRAL PERMITTING SYSTEM

STATE OF NORTH CAROLINA
ORANGE COUNTY

I, _____(the individual attesting below), being duly authorized by and on behalf of _____ (the entity bidding on project hereinafter "Employer") after first being duly sworn hereby swears or affirms as follows:

1. Employer understands that E-Verify is the federal E-Verify program operated by the United States Department of Homeland Security and other federal agencies, or any successor or equivalent program used to verify the work authorization of newly hired employees pursuant to federal law in accordance with NCGS §64-25(5).
2. Employer understands that Employers Must Use E-Verify. Each employer, after hiring an employee to work in the United States, shall verify the work authorization of the employee through E-Verify in accordance with NCGS§64-26(a).
3. Employer is a person, business entity, or other organization that transacts business in this State and that employs 25 or more employees in this State. (mark Yes or No)
 - a. YES _____, or
 - b. NO _____
4. Employer's subcontractors comply with E-Verify, and if Employer is the winning bidder on this project Employer will ensure compliance with E-Verify by any subcontractors subsequently hired by Employer. This ____ day of _____, 2014.

Signature of Affiant
Print or Type Name: _____

State of North Carolina Orange County

Signed and sworn to (or affirmed) before me, this the ____ day of _____, 2014.

My Commission Expires:

Notary Public

(Affix Official/Notarial Seal)

EXECUTION OF PROPOSAL

PROJECT NAME: **LAND MANAGEMENT CENTRAL PERMITTING SYSTEM**

SYSTEM PROPOSAL REQUEST NO. **5202**

THIS PAGE MUST BE FULLY EXECUTED AND SIGNED FOR THE PROPOSAL TO BE CONSIDERED.

The person executing the proposal, on behalf of the vendor, being first duly sworn, deposes and says that:

- (1) He or she is fully informed regarding the preparation and contents of the attached Proposal and of all pertinent circumstances regarding such Proposal;
- (2) Neither he/she, nor any official, agent or employee of the vendor has entered into any agreement, participated in any collusion, or otherwise taken any action which is in restraint of free competition in connection with this proposal; and

SIGNATURE OF PROPOSER _____

(Print full name of corporation)

(Address - County- State - Zip Code)

Attest _____
(Secretary/Assistant Secretary)

By: _____
President/Vice President/Assistant Vice President)

Printed: _____

Title: _____

CORPORATE SEAL:

Federal ID. or Social Security Number _____

NOTE - AFFIDAVIT MUST BE NOTARIZED

Subscribed and sworn to before me this _____ day of ____,2014

Title My Commission Expires _____

10. DISCLOSURES & CONTRACTUAL REQUIREMENTS EXAMPLES

Please note that any exceptions to the following requirements, as well as other sections of this Request for Proposals, should be addressed in a separate section of the Vendor's proposal.

TYPE OF CONTRACT

The desired contract structure is one under which the Vendor designs, develops, implements and is solely responsible for the execution of the project and contract requirements. The contract is subject to review and approval as to form by the Orange County attorney who is the legal representative of Orange County.

The contract shall incorporate the terms, conditions and requirements of the RFP, the Vendor's Proposal, and all other terms that may be reached.

BULLETINS AND ADDENDA

Any bulletins or addenda to the Proposal specifications issued during the period between issuance of the RFP and receipt of proposals are to be considered covered in the Proposal and, in awarding a contract, they will become a part thereof. Receipt of bulletins or addenda shall be acknowledged by the Vendor in the Proposal.

AVAILABILITY OF FUNDS

This RFP is conditional upon the availability of federal, state, or local funds that are appropriated or allocated for payment of the proposed purchase. If, during any stage of this RFP process, funds are not allocated and available for the proposed purchase, the RFP process will be canceled. Orange County will notify all known vendors at the earliest possible time if this occurs. Orange County is under no obligation to compensate vendor for any expenses incurred as a result of the RFP process.

REJECTION OF PROPOSALS

Proposals that are not prepared in accordance with these instructions to vendors may be rejected or disqualified. If not rejected, Orange County may demand correction of any deficiency and accept the corrected Proposal upon compliance with these instructions to proposing vendors.

ACCEPTANCE AND REJECTION OF A PROPOSAL

Orange County reserves the right to:

1. Award a Proposal received on the basis of individual items, or on the entire list of items
2. Reject any or all Proposals, or any part thereof
3. Waive any informality in the Proposals
4. Demand correction of any deficiency and accept the deficiently-prepared Proposal upon compliance with these instructions

Proposals submitted are offers only and the decision to accept or reject is a function of quality, reliability, capability, reputation, and expertise of the bidders.

The contract for this entire project will be awarded to the respondent deemed the best overall proposal as determined by the evaluation criteria in **Section 3** of this RFP. The County reserves the following rights (in addition to those accorded to Orange County by policy and statutory laws):

1. The right to negotiate with one or more vendors to arrive at a final selection.
2. The right to negotiate all Proposal elements to ensure the best possible consideration be afforded to all parties concerned (this includes the right to approve or disapprove subcontractors proposed after the award).
3. The right to reject any and all Proposals, to consider alternatives, to waive any minor irregularities and technicalities, and to re-solicit Proposals.
4. The right to award the contract to a vendor who submits the best overall Proposal (N.C.G.S. 143-129.8).

If the vendor is selected as a finalist, Orange County will require the vendor to qualify himself or herself to Orange County by furnishing a financial statement showing assets and liabilities of the company or other financial information satisfactory to Orange County. This financial information must be current within 30 days of bid opening date and delivered to Orange County within one week of being notified as a finalist. Should Orange County determine that a finalist is not qualified by virtue of the above information furnished, said finalist will be so notified.

INSURANCE

If this Proposal is accepted, Vendor proposes and agrees that Vendor shall provide certificates and policies of insurance evidencing the minimum insurance coverage and limits set forth below. Such policies shall be in a form, and from companies, acceptable to Orange County. The insurance coverage and limits set forth below shall be deemed to be minimum coverage and limits and shall not be construed in any way as a limitation on Vendor's duty to carry adequate insurance or on Vendor's liability for losses or damages under this Proposal. Insurance coverage provided under any contract resulting from this Proposal shall include the provision for a 30-day advance notification to Orange County in event of cancellation of coverage or modification of any stipulated insurance coverage. Language that limits the responsibility of the insurance company to provide such notice shall not be acceptable.

The minimum insurance coverage and limits that shall be maintained at all times while providing, performing, or completing the Work are as follows:

Workers' Compensation and Employer's Liability

Limits shall not be less than:

1. Workers' Compensation
 - a. Statutory
2. Employer's Liability
 - a. \$500,000 each accident-injury
 - b. \$500,000 each employee-disease \$500,000 disease-policy

Such insurance shall evidence that coverage applies to the State of North Carolina

3. Comprehensive General Liability
 - a. Limits shall not be less than \$1,000,000 for Bodily Injury and Property Damage Combined Single Limit. Coverage is to be written on an "occurrence" basis.
 - b. Coverage to include:
 - i. Business Interruption
 - ii. Premises Operations
 - iii. Products/Completed Operations
 - iv. Independent Contractors and Subcontractors
 - v. Personal Injury (with Employment Exclusion deleted)
 - vi. Broad Form Property Damage Endorsement
 - vii. Contractual Liability

Contractual Liability coverage shall specifically include the indemnification set forth below.

RIGHTS TO SOURCE CODE

Orange County requires that the selected vendor keep a copy of the source code and related documentation in escrow. Should the selected program contractor or vendor cease to exist or their organization become financially insolvent, rights to the source code and all supporting documentation will pass to Orange County. The successful vendor shall include as part of the Contract Documents, a letter from the escrowing agency acknowledging their receipt of the code and providing information to the County as to how the County may access the code in the event it should become necessary.

INTENTION

The Vendor shall, unless otherwise specified, supply all installation, conversion, training, transportation, and incidentals necessary for the entire proper implementation of the selected solutions. In addition, the Vendor shall be responsible for the implementation in a most professional manner, a complete job and everything incidental thereto, as shown in the Proposal, stated in the specifications, or reasonably implied, all in accordance with the contract documents.

INDEMNIFICATION

The proposing Vendor agrees that it will hold harmless, defend, and indemnify the County, its officers, agents, volunteers, and employees from and against any and all claims, demands, costs, or liability, including attorney fees, arising out of or in any way connected with the proposing Vendors performance of, or failure to perform, the Work or any part thereof or caused in whole or in part by any act or omission of the Vendor, any of its subcontractors, anyone directly or indirectly employed by any of them or anyone for whose acts any of them may be liable, except to the extent caused by the active negligence, sole negligence, or willful misconduct of the County.

RIGHTS TO SUBMITTED MATERIALS

All proposals, responses, inquiries, or correspondences relating to or in reference to this RFP, and all reports, charts, displays and other documentation submitted by the Vendor shall become the property of Orange County when received. The County reserves the right to use the material or any ideas submitted in any proposal in response to the RFP.

VENDOR DEMONSTRATIONS

Vendors will be requested, at no cost to Orange County, to demonstrate the proposed software and hardware solutions at a mutually agreeable date and site.

ASSIGNMENT

It is mutually understood and agreed that the Proposal and any final contract will be binding upon the Vendor and its successors. Neither this RFP nor any final contract may be assigned by Vendor without the prior written consent of the County.

VENDOR'S REPRESENTATIONS AND WARRANTIES

In order for Orange County to accept this Proposal, Vendor hereby represents and warrants as follows:

Compliance with Laws. The Work, and all of its components, shall be provided, performed, and completed in compliance with, and Vendor agrees to be bound by, all applicable federal, state, and local laws, orders, rules, and regulations, as they may be modified or amended from time to time.

Qualified. Vendor has the requisite experience, ability, capital, facilities, organization, and staff to enable Vendor to perform the Work successfully and promptly and to commence and complete the Work within the proposed bid price and time frame proposed by the Vendor. In order for Orange County to accept a Proposal, each vendor, by submitting a proposal, thereby represents and warrants as follows:

Status of Vendor. Vendor will perform the Work in Vendor's own way and pursuant to any final contract as an independent contractor and in pursuit of Vendor's independent calling, and not as an employee of the County. The persons used by Vendor to provide the Work under any final contract will not be considered employees of the County for any purposes.

The payment made to Vendor pursuant to any final contract will be the full and complete compensation to which Vendor is entitled. The County will not make any federal or state tax withholdings on behalf of Vendor or its agents, employees, or subcontractors. The County will not pay any workers' compensation insurance, retirement contributions, or unemployment contributions on behalf of Vendor or its employees or subcontractors. Vendor agrees to indemnify and pay the County within thirty (30) days for any tax, retirement contribution, social security, overtime payment, unemployment payment or Workers' Compensation payment that the County may be required to make on behalf of Vendor or any agent, employee, or contractor of Vendor for work done under any final contract. At the County's election, the County may deduct the amounts paid pursuant to this section, from any balance owing to Vendor.

Vendor understands that its professional responsibility is solely to the County. Vendor warrants that it presently has no interest, present or contemplated, and will not acquire any direct or indirect interest that would conflict with its performance of any final contract. Vendor further warrants that neither Vendor, nor Vendor's agents, employees, subcontractors and vendors, have any ancillary real property, business interests, or income that will be affected by this RFP or final contract or, alternatively, that Vendor will file with the County an affidavit disclosing this interest. Vendor will not knowingly, and will take reasonable steps to ensure that it does not, employ a person having such an interest in the performance of a final contract. If after employment of a person, Vendor discovers that it has employed a person with a direct or indirect interest that would conflict with its performance of a final contract, Vendor will promptly disclose the relationship to the County and take such action as the County may direct to remedy the conflict.

Discrimination and Harassment Prohibited. Vendor will comply with all applicable local, state, and federal laws and regulations prohibiting discrimination and harassment.

Jurisdiction, Venue, and Governing Law. Any action at law or in equity brought for the purpose of enforcing a right or rights provided for by this RFP or final contract will be tried in a court of competent jurisdiction in Orange County, State of North Carolina, and Vendor and the County will waive all provisions of law providing for a change of venue in these proceedings to any other county. This RFP and any final contract will be governed by the laws of the State of North Carolina.

Waivers. The waiver by either the County or Vendor of any breach or violation of any term, covenant, or condition of this RFP or any final contract or of any provisions of any ordinance or law will not be deemed to be a waiver of such term, covenant, condition, ordinance or law. The subsequent acceptance by either party of any fee or other money which may become due hereunder will not be deemed to be a waiver of any preceding breach or violation by the other party of any term, covenant, or condition of this agreement or any applicable law.

Authority. The individuals executing this RFP and the instruments referenced in it on behalf of Vendor each represent and warrant that they have the legal power, right and actual authority to bind Vendor to the terms and conditions of this RFP.

COMPLIANCE WITH LAWS

Vendor will keep fully informed of federal, state, and local laws and ordinances and regulations which in any manner affect those employed by Vendor, or in any way affect the performance of the Work by Vendor. Vendor will at all times observe and comply with these laws, ordinances, and regulations and will be responsible for the compliance of the Work with all applicable laws, ordinances, and regulations.

QUALIFICATIONS

It is expected that the proposing Vendor has the requisite experience, ability, capital, facilities, organization, and staff to enable the proposing Vendor to perform the work successfully and promptly, and to commence and complete the work within the proposed price and time frame.

ACKNOWLEDGMENTS

By submitting a proposal, a proposing vendor acknowledges and agrees to each of the following:

Reliance

Orange County is relying on all warranties, representations, and statements made by the vendors in their proposals.

Reservations of Rights

Orange County reserves the right to reject any and all Proposals, reserves the right to reject the lowest priced Proposal, and reserves such other rights as are set forth in the instructions to proposing vendors.

Acceptance

If a vendor's proposal is accepted by the County, the vendor shall be bound by each and every term, condition and provision contained in the Request for Proposal, the vendor's Proposal and in the final contract to be negotiated between the selected vendor and the County.

Remedies

Each of the rights and remedies reserved to Orange County in this Request for Proposal shall be cumulative and additional to any other or further remedies provided in law or equity.

Severability

The provisions of this Request for Proposal shall be interpreted when possible to sustain their legality and enforceability as a whole. In the event any provision of this Request for Proposal shall be held invalid, illegal, or unenforceable by a court of competent jurisdiction, in whole or in part, neither the validity of the remaining part of such provision, nor the validity of any other provisions of this Request for Proposal shall be in any way affected thereby.

Amendments

No modification, addition, deletion, revision, alteration, or other change in this Request for Proposal shall be effective unless and until such change is reduced to writing and executed and delivered by Orange County to the prospective vendors.

Protest Procedures

Any potential, or actual, vendor objecting to the award of a contract resulting from the issuance of this RFP may file a protest of the award of the contract, or any other matter relating to the process of soliciting the Proposals. Such a protest must be filed in writing and contain a detailed statement of the legal and factual grounds for the protest, including copies of any relevant documents. All protests must be filed with the Orange County Purchasing Department PO Box 8181, Hillsborough, NC 27278. The protest shall be filed no later than 3:00 p.m. of the tenth (10th) day after notification of award.

Public Records

Vendors are advised that most documents in the possession of the Orange County are considered public records and subject to disclosure under the law.

CONTRACTUAL REQUIREMENTS

- All aspects of any contract apply equally to work performed by any and all subcontractors.
- The contractor, and any subcontractor(s), will not use or disclose any information made available to them for any purpose other than to fulfill the contractual duties specified in the RFP. The contractor, and any subcontractor(s), agrees to be bound by the same standards of confidentiality that apply to the employees of Orange County Department. Any violation of confidentiality will result in an immediate termination of the contract, and may result in legal action.
- By signing a contract with the Orange County, a vendor agrees that all necessary insurance is in effect.
- All contracts will require that the contractor maintain the confidentiality of information and records which state and federal laws, rules, and regulations require to be kept confidential.
- The Vendor agrees to accept full responsibility for payment of all unemployment compensation, contributions or reimbursements, insurance premiums, workers' compensation premiums, all income tax deductions, social security deductions and all other employee taxes and payroll accounting required for all employees.
- Vendor must verify maintenance of comprehensive liability insurance and agree to hold the Orange County harmless from all liabilities or claims caused or resulting from the vendor's obligation.
- North Carolina law prohibits any state agency or political subdivision from awarding a contract for goods, services, or construction to any person against whom a finding for recovery has been issued by the State, if that finding is unresolved.
- Effective for the State Fiscal Year 2007, any North Carolina organization that receives Federal or State financial assistance from a State agency is called a "subrecipient". Counties, as subrecipients of the state, must develop monitoring procedures to ensure that funds are appropriately spent by any subrecipients with whom they may contract to provide services. Accordingly, all contracts with the Orange County must contain certain certifications including, but not limited to, Certification Regarding Drug-Free Workplace Requirements, a Conflict of Interest Policy, Certification Regarding No Overdue Taxes, Certification Regarding Lobbying, Certification Regarding Debarment, Suspension, Ineligibility, and Voluntary Exclusion-Lower Tier Covered Transactions, and Certain Reporting and Auditing Requirements.

ETHICAL AND CONFLICT OF INTEREST REQUIREMENTS

- No contractor, or individual, company or organization seeking a contract shall promise or give to any Orange County employee any consideration of value that is of such character as to manifest a substantial and improper influence upon the employee with respect to his or her duties.
- No contractor or individual, company or organization seeking a contract shall solicit any Orange County employee to violate any of the conduct requirements for employees.
- Any contractor acting on behalf of Orange County shall refrain from activities, which could result in violations of ethics and/or conflicts of interest. Any contractor or potential contractor who violates the requirements and prohibitions defined here or found in North Carolina General Statute is subject to termination of the contract or refusal by the Orange County to enter into a contract.
- Orange County employees and contractors who violate local, state or federal laws may be prosecuted for criminal violations.
- Patent or Copyright Liabilities
- Vendor will protect, defend and hold free and harmless Orange County, its officers, employees, agents and Board of County Commissioners against all claims that any of the designs supplied hereunder infringes a U.S. patent or copyright. Vendor will pay all resulting costs, damages, and attorney's fees to defend Orange County against such claims. Orange County will promptly notify Vendor in writing of all claims, and Vendor will have control of the defense and all related settlement negotiations. If such claim has occurred, or is likely to occur, Orange County agrees to permit Vendor, at Vendor's option and expense, either to procure for the agency the right to continue using the designs or programming or to replace or modify the same so that they become non-infringing but still meet the requirements of the RFP.

CONFIDENTIALITY AND SECURITY

Representatives and/or agents of the vendor will be required to sign a confidentiality agreement prior to commencing work at Orange County. Any person engaging in any service for the agency requiring them to come into contact with confidential information will be required to hold confidential such data made available to them.

HOLD HARMLESS; INDEMNIFICATIONS

1. If this Proposal is accepted, Vendor proposes, and agrees, that Vendor shall indemnify, save harmless, and defend Orange County against all damages, liability, claims, losses, and expenses (including attorneys' fees) that may arise; or be alleged to have arisen, out of or in connection with Vendor's performance of, or failure to perform, the Work or any part thereof, or any failure to meet the representations and warranties set forth in this Proposal.
2. The successful vendor shall be required to indemnify and hold Orange County, the Orange County Board of Commissioners and Orange County staff, including its officers, employees, and its agents, harmless from any liability with respect to claims for damages as a result of bodily injury, sickness, disease, death or property damage arising or resulting from the bidders fulfilling his responsibilities according to the bid documents and subsequent contract.

3. The successful vendor shall indemnify and save harmless Orange County, the Orange County Board of Commissioners and Orange County staff, including its officers, agents or employees from any and all claims suits, losses, damages or expenses on account of injuries to or death of any or all persons or property damages sustained and caused by an act, omission, neglect or misconduct of said vendor.
4. Each successful vendor shall be required to provide insurance in accordance with Section 4.4 of this RFP.
5. Each successful vendor shall be required to provide proof of Workers Compensation Insurance in accordance with Section 4.4 of this RFP.
6. If subcontractors are employed, the successful vendor shall procure and maintain public bodily liability and public property damage insurance for and on behalf of the vendor for claims for damages arising out of acts of subcontractors for bodily injury and property damage in the same amounts as required for public bodily injury liability and public property damage. See Section 4.4 of this RFP.
7. Such insurance shall be acquired for and on behalf of the successful vendor and protecting the vendor from claims for damages for bodily injuries, including sickness or disease, death, and for care and loss of services as well as from claims for property damage including, but not limited to, loss of use which may arise from operations under the Contract, whether such operations be by the vendor or by anyone directly or indirectly employed by him. Property damage coverage as required shall be on the broad-form property-damage basis.
8. The vendor shall be held responsible for all accidents and shall indemnify and protect the Orange County and its representatives from all suits, claims and actions brought against it, and all costs for liability to which the Orange County may be put for any injury or alleged injury to the person or persons, or property of another resulting from negligence or carelessness in the performance of the work, or in carrying out the same or from any improper or inferior workmanship or inferior materials used.

PENALTIES

If this Proposal is accepted, Vendor proposes, and agrees, that Vendor shall be solely liable for any fines or civil penalties that are imposed by any governmental or quasi-governmental agency or body that may arise, or be alleged to have arisen, out of or in connection with Vendor's performance of, or failure to perform, the Work or any part thereof.

INTENTION

The Vendor shall, unless otherwise specified, supply all installation, conversion, training, transportation, and incidentals necessary for the entire proper implementation of the selected solutions. In addition, the Vendor shall be responsible for the implementation in a most professional manner, a complete job and everything incidental thereto, as shown in the Proposal, stated in the specifications, or reasonably implied there from, all in accordance with the contract documents.

NON-PERFORMANCE

The Orange County shall in writing to the successful vendor at any time during the continuance of the ensuing contract for the work specified in this RFP and prior to the date of the

acceptance of the work provided, have the right and power to declare the whole or any part of the ensuing contract forfeited for the violation of any of the conditions, terms, requirements or limitations contained in the contract, or if the performance of the contract is unnecessarily or unreasonably delayed, or if the successful vendor is not progressing with the work as fast as is necessary to insure the completion within the time specified as is required by the ensuing contract, or if the successful vendor is showing bad faith in carrying out the contract, or if the work is not completed within the time to which such completion may be extended as provided, or further, if the successful vendor shall fail or refuse to remedy or repair defective work or materials when so ordered. If the Orange County shall declare the contract forfeited, in whole or in part, such declaration of forfeiture shall in no way relieve or affect the liability of the successful vendor and his sureties for breach of any of the covenants and conditions of the contract.

Land Management Central Permitting System - Request for Proposal

Please input a "1" in the appropriate column to the right of the feature/function/capability statement. Further explanations, or information regarding 3rd party software and/or modification costs should also be provided in the comments column and Project Costs worksheet (Appendix G), if applicable. Each "non-title" row (?000) should have only one "1". **Blank rows will be scored as Not Available.**

Legend:										
Standard - Current	Available in current software release									
Standard - Next Release	Guaranteed available in next release of software									
Report Writer	Report Writer function through Standard Reports or Ad Hoc Report Writer									
3rd-Party Application	Please estimate general cost estimates in comments not a quote, unless available due to your resell arrangement.									
Custom Modification	Custom programming by vendor (not meant to be a set-up configuration that is standard process through implementation). Please estimate general costs in comments (not a quote).									
Not Available	Not available in current or next release; interfaced/integrated third-party application or through custom modification.									

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd-Party Application	Custom Modification	Not Available	Comments
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Planning									
Planning	1.000	GENERAL							
Planning	1.001	APPLICATION INTAKE - Maintain the following types of detail on each permit/project application (including but not limited to):							
Planning	1.002	▪ Type of application (e.g., Site plan, Building Permit, Storm Water/Erosion Control, Environmental Health, Fire Prevention)							
Planning	1.003	▪ Class of work (Census data, single family, multi family, commercial, etc.)							
Planning	1.004	▪ Start date							
Planning	1.005	▪ Complete date							
Planning	1.006	▪ Issue date							
Planning	1.007	▪ Application date							
Planning	1.008	▪ Review dates							
Planning	1.009	▪ Expiration dates							
Planning	1.010	▪ Approval dates							
Planning	1.011	▪ Property information							
Planning	1.012	▪ Text							
Planning	1.013	▪ Boolean and Number fields							
Planning	1.014	▪ Zoning							
Planning	1.015	▪ Occupancy type							
Planning	1.016	▪ Construction type							
Planning	1.017	▪ Inspection area							
Planning	1.018	TRACK APPLICATION - Provide for the tracking of "unlimited" Planning applications.							

Planning	1.019	PROJECT NUMBER - Need planning project numbers to include alpha/numeric capabilities with County-defined length, sequences, and segments.							
Planning	1.020	USER-DEFINED FIELDS - Provide for "unlimited" County defined fields based on project type. If limited, please explain in comments.							
Planning	1.021	PROJECT LOOK-UP - Provide the ability to access any project by:							
Planning	1.022	▪ Project number							
Planning	1.023	▪ Property address							
Planning	1.024	▪ Project description							
Planning	1.025	▪ Property parcel number							
Planning	1.026	▪ Name							
Planning	1.027	▪ Type of project							
Planning	1.028	▪ Parcel number(s)							
Planning	1.029	▪ Assigned Planner							
Planning	1.030	▪ Contractor License Numbers							
Planning	1.031	▪ Title							
Planning	1.032	▪ Free Form Name							
Planning	1.033	▪ User-defined lookup fields							
Planning	1.034	PLANNING PROJECT TYPES - Ability to define the following planning project types:							
Planning	1.035	▪ Land Use Permits							
Planning	1.036	▪ Stormwater And Erosion Control Inspections							
Planning	1.037	▪ Zoning Compliance Permits							
Planning	1.038	▪ Special Use Permit							
Planning	1.039	▪ Letters of Map Amendments							
Planning	1.040	▪ County Internal Capital Infrastructure Projects							
Planning	1.041	▪ Subdivision Major							
Planning	1.042	▪ Subdivision Exempt							
Planning	1.043	▪ Subdivision Minor							
Planning	1.044	▪ Variances							
Planning	1.045	PROJECT LOOK-UP - Ability to look-up project status to determine reviews/comments not completed by due dates.							
Planning	1.046	PROPERTY ASSOCIATION - Allow for an unlimited number of properties to be associated with an individual project or case number.							
Planning	1.047	ALERTS - Allow ability to <i>flag</i> entire projects or individual project conditions so as to <i>alert</i> or warn any personnel of a project or special condition at the time of permit application.							
Planning	1.048	ALERTS - Ability to add flags as needed by County personnel for any County-defined alert such: as stop work notices, permit holds, open code enforcement cases, overdue deposits, etc.							
Planning	1.049	REVIEW PROCESS HOLD - Ability to place a review on hold status to until further information is received either from developer or other departments.							

Planning	1.050	REVIEW PROCESS HOLD - OUTSTANDING CHECKS - Ability to auto stop a planning or permit application for outstanding bounced checks.								
Planning	1.051	PLAN APPLICATION - Ability for County to define planning project application requirements (e.g., steps, tasks, fields, etc.)								
Planning	1.052	PROJECT DESCRIPTION - Project Description shall include the ability to enter unlimited free form text to describe the property.								
Planning	1.053	PROJECT DESCRIPTIONS - Project Descriptions shall include the ability to capture the following data:								
Planning	1.054	▪ Existing and proposed use								
Planning	1.055	▪ Number of buildings, stories, units, rooms, bedrooms								
Planning	1.056	▪ Size (size of acreage, building height/square footage)								
Planning	1.057	MULTIPLE CONTACT TYPES - Ability for the county to record multiple individuals/names per application to include (but not limited to) Property Owner of Record, Authorized Agent (if different from Property Owner), and Applicant (if different from Property Owner), Developer, etc. Information captured to include name, address, multiple phone numbers, fax number, and e-mail addresses.								
Planning	1.058	EMAIL VALIDATION - Ability for a user to enter an email address twice in order to be validated for correctness.								
Planning	1.059	MULTIPLE RECIPIENT EMAILS - Ability for documents to be emailed to one or more contacts listed on the project or permit.								
Planning	1.060	CONTRACTOR DATABASE - Ability to select from Contractors/professionals database (e.g., Contractor, Architect, Engineer, Developer).								
Planning	1.061	PROJECT LOCATON DATA - Project Location data to include ability to capture Address, Zoning District, General Plan Description, Sub-Area, Assessor Parcel No., Tract No., Subdivision Name, and Lot No.								
Planning	1.062	DEPOSIT TRACKING - Ability to record and track deposits received and date of receipt.								
Planning	1.063	ADDITIONAL DEPOSITS - Ability for the County to take additional deposits during the entire planning application process, and track citizen credit balance or refund due.								
Planning	1.064	DEVELOPER AND PERMIT DEPOSIT TRACKING - Track deposits, payments, and balances by developer as well as by a single project.								
Planning	1.065	INQUIRY - Provide the capability to query acreage, parcel numbers, project/case numbers, etc.								
Planning	1.066	PERMIT INQUIRY - Ability to search on all permits by project.								
Planning	1.067	GIS MAP INQUIRY - Ability to plot geographic planning inquiries on the county's map.								
Planning	1.068	PLAN CHECK WORK FLOW REQUIREMENTS - Ability to set up different plan check requirements (e.g., commercial landscape development project, property rezone, full entitlement, etc.).								
Planning	1.069	ATTACHMENTS - Ability to attach documents, photos, and scanned documents for planning projects.								

Planning	1.070	CONDITIONS OF APPROVAL (COA)							
Planning	1.071	CHANGE COA - Ability to add, modify or delete conditions of approval during the project approval process.							
Planning	1.072	ACCUMULATE COMMENTS AND COA - Provide for electronic collection of department comments and conditions as review progresses.							
Planning	1.073	DELIMITED COMMENTS - Ability to create comment delimiters to allow staff to see only their relevant plan review comments (i.e., comments by department, division, specialty, etc.)							
Planning	1.074	PARCEL INQUIRY - Ability to tie all conditions of approval to the parcel inquiry screen.							
Planning	1.075	STANDARD COA - Provide a County-defined table of standard or recurring conditions that can be accessed and applied to a project during project processing, thereby eliminating the need to enter repetitive "boilerplate" conditions.							
Planning	1.076	PERMIT ISSUANCE RESTRICTIONS - Provide for restriction of permit approval until conditions or restrictions have been satisfied.							
Planning	1.077	FREE FORM COA - Ability for Engineering, Fire, Environmental Health, etc. to enter free-form comments on demand.							
Planning	1.078	COA DUE DATES - Ability to schedule due date for conditions of approval to be completed.							
Planning	1.079	PLAN CHECK LETTERS - Ability to generate editable plan check comment letters by combining all reviewer comments.							
Planning	1.080	PROJECT TRACKING AND ROUTING - WORKFLOW							
Planning	1.081	WORKFLOW - Need work flow capability to establish required planning process steps and prerequisite requirements (e.g. step 7 can only be done after step 5).							
Planning	1.082	WORKFLOW - Provide for the user-definition of application work flow within multiple departments and to external agencies based on the type of application.							
Planning	1.083	WORKFLOW EDITS - Ability to modify workflow and task requirements as needed.							
Planning	1.084	SUB-TASKS - Ability to set up multiple plan review steps and sub-tasks.							
Planning	1.085	ASSIGNEE STATUS - Ability to track task status, review comments, and completions by assignee.							
Planning	1.086	ELECTRONIC PLAN SUBMITTAL - Ability to receive plan submittals electronically.							
Planning	1.087	ELECTRONIC PLAN REVIEW - Capable of online plan review with ability to red-line markup plans and add comments.							
Planning	1.088	WORKFLOW ROUTING - Automatic routing of projects through various user-defined processes consisting of various review and approval functions.							

Planning	1.089	EXTERNAL PLAN REVIEWS - Ability to notify outside reviewing agencies when a plan review is necessary, and ability for agency to update information within the case, relative to the approvals and/or data each agency is responsible for (e.g. Town of Hillsborough Zoning, Fire or Utilities; Chapel Hill, Carrboro and Mebane).							
Planning	1.090	DEPARTMENT USER REVIEW ACCESS - Ability for fire department plan review sign-off user security restricted to fire marshal.							
Planning	1.091	PROJECT NUMBER CHANGE - Ability to change project number after initial application entered.							
Planning	1.092	SUB-PROJECTS - Ability to setup unlimited sub-projects within a single master project (e.g., multiple use projects - residential, commercial, multi-family).							

Planning	1.093	SCHEDULING							
Planning	1.094	MASTER CALENDAR - Ability to provide a master calendar with all participants included from all departments.							
Planning	1.095	FUTURE PLANNING CALENDAR - Ability to create future planning calendar (schedule of all future hearings/meetings by type and date).							
Planning	1.096	AUTO-DEFINE KEY DATE - Ability to calculate user-defined review and expiration dates for all project events automatically as part of the review process for a project.							
Planning	1.097	DATE OVERRIDES - Ability to manually override expiration dates.							
Planning	1.098	ASSOCIATE KEY DATE TO REVIEW STEP - Provide the ability to tie a key date calculation to a project review step (i.e., 14 day review, dept. review, Planning hearing, Commission meeting, etc.).							
Planning	1.099	AUTOMATIC RE-DATE UPON STEP COMPLETION - Provide an automatic date calculation for next step when a prerequisite review step is completed.							
Planning	1.100	An automated notice identifying instruments (e.g., letters of credit, bonds for set period of time, bonds on specific development projects) that are scheduled to expire in order to provide adequate time to inspect, call or replace the guarantee.							
Planning	1.101	FEES							
Planning	1.102	AUTO-CALCULATE FEES - Calculate standard planning fees using County-supplied criteria in a table structure and effective dates.							
Planning	1.103	FEES BY PERMIT OR PROJECT - Automatically compute charges based on permit or project type.							
Planning	1.104	DEVELOPER DEPOSITS - Track fee deposit/collections, receivables, balance due, and refunds.							
Planning	1.105	DEPOSIT REQUIREMENT ADJUSTMENTS - Ability to adjust deposit amounts at any time (discretionary).							
Planning	1.106	A/P REFUND REQUEST - Ability to generate an A/P refund request notice with general ledger accounts codes.							
Planning	1.107	DETAILED FEE STATUS - Detailed fees status should include the following:							
Planning	1.108	▪ Account Number							
Planning	1.109	▪ Description							
Planning	1.110	▪ Fee Type							
Planning	1.111	▪ Activity Type							
Planning	1.112	▪ Deposit Amount							
Planning	1.113	▪ Balance Due/Credit Balance							
Planning	1.114	FIXED AND VARIABLE FEES - Ability to set up fixed and variable fees.							
Planning	1.115	UNIT COST - Ability to set up flat fees per unit cost.							
Planning	1.116	BILLABLE TIME - Ability to track time by project, task, date, staff, etc., in order to generate hourly fees (i.e., \$XX per hour). Also have the ability to track and calculate different hourly rates by specific staff (i.e., base pay, taxes and benefits).							

Planning	1.117	FEES ON DEMAND - Ability to charge any or all fees by specific project requirements (e.g., create fees on demand).							
Planning	1.118	FIXED FEE PLUS UNIT COST - Ability to setup a fixed fee plus a unit cost times a number of units with a maximum limit amount							
Planning	1.119	FLAT FEE BY TIERED AREA - Ability to setup a Flat fee by tiered gross floor area							
Planning	1.120	FLAT FEE PLUS TIERED UNIT COST - Ability to setup a flat fee plus \$XXX per 10,000 square feet over 60,000 square feet							
Planning	1.121	SQUARE FOOT CALCULATIONS - Allow user-defined square footage calculations based on a user-defined table of square footage values.							
Planning	1.122	VALUATION FEES - Ability to set up fee by valuation of other data element (e.g., percent times another value, such as estimated construction costs).							
Planning	1.123	TIME AND MATERIAL PLUS FEE - Ability to track a XX% fee in addition to the hourly fees.							
Planning	1.124	FEES BY ACREAGE - Ability to calculate fees based on acreage.							
Planning	1.125	FEES BY STICKER - Ability to calculate fees based on the number of stickers issues.							
Planning	1.126	CONSULTANT FEES WITH MARK-UP - Ability to track and charge purchased fees and add mark-up (e.g., purchasing an Environmental Impact Report from a third-party consultant with a 30% mark-up.)							
Planning	1.127	MASS FEE CHANGES - Ability to mass change all fees xx% (inflationary) once per year without out having to change each individual fee.							
Planning	1.128	FEE EFFECTIVE DATES - Ability to change fees with effective dates.							
Planning	1.129	CONSULTANT FEES - Ability to track and charge purchased fees (e.g., purchasing an Environmental Impact Report from a third-party consultant/engineer).							
Planning	1.130	TIME TRACKING - Ability to track hourly time spent by task and calculate fees drawing down on deposit.							
Planning	1.131	MISCELLANEOUS FEES - Ability to calculate and track unlimited miscellaneous fees collected in conjunction with project.							
Planning	1.132	NON-PERMIT FEES - COLLECTIONS AND TRACKING - Ability to collect and track outstanding balances not associated with a project or building permit (e.g., EH re-inspections)							
Planning	1.133	WAIVE FEES- Ability to waive or override default fees.							
Planning	1.134	FEE OVERRIDE NOTES - System should allow only authorized override of standard fees and require an explanation field.							
Planning	1.135	FEE CHANGE NOTES - Ability to track notes for fees that are manually changed during project/process.							
Planning	1.136	FEES BY PROJECT TYPE - Ability for planning fees to be set up by project type.							
Planning	1.137	FEES BY TASK TYPE - Ability for planning fees to be set up by task type.							

Planning	1.138	FEES BY SHEETS AND REVIEWS - Allow review fees to be calculated based on number of sheets submitted and number of reviews (e.g., \$X/lot for first review, no charge for second review, \$X/for third and subsequent reviews).							
Planning	1.139	RECEIPT OF AMOUNT AND PAYEE - Ability to print a receipt to whoever pays the fee (payee) for the amount of the specific fee and not a cumulative amount that has been paid for the project, in order to support any refund to the proper payer.							
Planning	1.140	REFUNDABLE BOND DEPOSITS - Ability to track refundable bond deposits (e.g., improvements, landscape, signs, etc.) including conditions and sign-offs for refund.							
Planning	1.141	BOND EXPIRATION ALERTS - Ability to automatically generate notifications/alerts of bond performance and maintenance expiration							
Planning	1.142	MULTIPLE TRUST ACCOUNTS - Ability to establish one or more trust accounts for a person or record (address, parcel, permit) within the system.							
Planning	1.143	DEVELOPMENT CREDITS - Capability of setting up accounting for various development agreements to track credits or reimbursements based on a parcel, a subdivision, or a geographical zone (e.g., Developer A may get \$10,000 worth of transportation credits that he can apply "first come first serve" for building permits. Each building permit may be \$8,000 each, but only \$1,000 of each permit is for transportation)							
Planning	1.144	INVOICES - Ability to print invoices showing detail/summary fees with totals paid, due, or credit balance.							

Planning	1.145	LETTERS							
Planning	1.146	UNLIMITED STANDARD NOTICES - Ability to set up "unlimited" standard notices by project, review step, hearing, etc.							
Planning	1.147	FLAG COMMENTS AND NOTES FOR INCLUSION - Ability for notices and letters to automatically incorporate field information, comments, notes, etc., as applicable.							
Planning	1.148	MEETING NOTIFICATION - Provide a method of automatically generating user-defined notification letters to property owners and others regarding projects and meetings associated with these projects, based on parcel selection (i.e., Public Hearing notices).							
Planning	1.149	PROPOSED CHANGE NOTIFICATION - Provide for automatic mail out notice to selected parcel owners and residents regarding proposed changes to related parcels by defined radius map, including buffer zone.							
Planning	1.150	EDITABLE NOTIFICATIONS - Ability for system to output County-editable notice letters.							
Planning	1.151	NOTIFICATION TRACKING - Ability for system to track all notices sent associated to each project.							
Planning	1.152	AREA/ VICINITY MAP - Automatically to generate area map to accompany notice above cartographic capabilities							
Planning	1.153	AD HOC ADDITION OF PARCEL TO NOTIFICATION LISTS - Ability to pick discretionary, impacted parcels to add to notification lists.							
Planning	1.154	CITIZEN ONLINE ACCESS							
Planning	1.155	NEXT STEPS - Ability to show next steps in the process, due dates and completion percentage.							
Planning	1.156	ISSUANCE ALERTS - Ability to identify/flag issues which may delay permit issuance.							
Planning	1.157	REPORT PRINTING - Ability for citizens to print reports published via the web, with control over access to certain types of reports.							
Planning	1.158	PERMIT PRINTING - Ability for citizens to print permits that have been issued.							
Planning	1.159	PLANNING PROJECT STATUS - Ability for Developers and public (contractors, applicants, etc.) to view status of a planning project online.							
Planning	1.160	CITIZEN ONLINE ACCESS - PARCEL MAPS - Ability for citizens to access project information status information including displaying the parcels on county GIS map							
Planning	1.161	INQUIRY & REPORTS							
Planning	1.162	USER QUERIES - Ability for users to create quick queries and reports from within the system (i.e., counts, status, fees, etc.).							
Planning	1.163	REPORTING PARAMETERS - Ability for reports to accept parameters such as a date range for a report.							
Planning	1.164	REPORT SCHEDULING AND DELIVERY - Ability to set up reports to be automatically delivered on a scheduled basis.							

Planning	1.165	SPELL CHECK - Provide spell checking for all reports and correspondence.							
Planning	1.166	VARIOUS SORT ORDERS - Provide reports of planning projects in various sort orders (by address, type of project, project number, planner assigned, dates, etc.)							
Planning	1.167	STAFF REPORTS - Ability to automatically generate user-defined staff reports and resolutions with the ability to edit before finalizing.							
Planning	1.168	STAFF REPORTS - Ability to setup template staff reports that will insert project conditions of approval and then allow for editing remaining report using MSWord or word editor.							
Planning	1.169	PROJECT STATUS REPORTS - Ability to produce project status reports by project type, due dates, planner staff, outstanding tasks, etc.							
Planning	1.170	MEETING DOCUMENTS - Provide a function for producing summary documents for a project from the comments and conditions entered during the project review without the user having to retype these comments and/or conditions.							
Planning	1.171	MEETING DOCUMENTS - Provide a method of producing meeting documents (such as agendas) for all projects scheduled for a particular meeting and date.							
Planning	1.172	MEETING DOCUMENTS - Meeting documents should have the capability of printing all previously entered comments and/or conditions as part of the individual project reviews.							
Planning	1.173	PLANNING ACTIVITY REPORTS - Ability to report planning activity by multiple activity types (e.g., property usage, affordable units, environmental documents, project types, etc.).							

Planning	1.174	INTEGRATION - INTERFACE							
Planning	1.175	INTEGRATION - MS WORD - Provide integration to MS Word processing for entry of comments, conditions and to produce project summary documents and notifications.							
Planning	1.176	INTEGRATION - MS OUTLOOK -Ability for the system to integrate with Microsoft Outlook for messaging and scheduling.							
Planning	1.177	INTEGRATION - PARCEL/ADDRESS MANAGEMENT - Parcel/Address Management module should provide property information for all properties associated with a project. County planning program to receive notification when related citizen inquiry received in CRM system.							
Planning	1.178	INTEGRATION - PERMITTING - Provide automatic linkage between general planning applications and associated permits.							
Planning	1.179	INTEGRATION - ELECTRONIC CONTENT MANAGEMENT SYSTEM - Must integrate with Electronic Content Management System (To Be Determined) .							
Planning	1.180	INTERFACE - GIS - User should have the ability to select Planning data and display that data on a map, interfacing to ESRI ArcGIS SDE Server.							
Planning	1.181	INTEGRATION - CASHIERING - Centralized Cashiering integrated with Planning for collecting all fees.							
Planning	1.182	INTEGRATION - GENERAL LEDGER - The Planning application must generate journal entries to the General Ledger for any invoices generated and revenues received, including all fees and credits.							
Planning	1.183	INTEGRATION - ACCOUNTS PAYABLE - Provide integration with accounts payable for deposit account refund payments.							
Planning	1.184	INTEGRATION - DOCUSIGN - Ability to integrate with DocuSign for digital signature capabilities.							

Land Management Central Permitting System - Request for Proposal

Please input a "1" in the appropriate column to the right of the feature/function/capability statement. Further explanations, or information regarding 3rd party software and/or modification costs should also be provided in the comments column and Project Costs worksheet (Appendix G), if applicable. Each "non-title" row (?000) should have only one "1". Blank rows will be scored as Not Available.

Legend:

Standard - Current	Available in current software release
Standard - Next Release	Guaranteed available in next release of software
Report Writer	Report Writer function through Standard Reports or Ad Hoc Report Writer
3rd-Party Application	Please estimate general cost estimates in comments not a quote, unless available due to your resell arrangement.
Custom Modification	Custom programming by vendor (not meant to be a set-up configuration that is standard process through implementation). Please estimate general costs in comments (not a quote).
Not Available	Not available in current or next release; interfaced/integrated third-party application or through custom modification.

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd-Party Application	Custom Modification	Not Available	Comments
Permitting									
Permitting	2.000	INTAKE							
Permitting	2.001	PERMIT INTAKE FIELDS - Ability to intake and maintain permit application using the following types of detail (including but not limited to):							
Permitting	2.002	▪ PIN							
Permitting	2.003	▪ Parcel Address							
Permitting	2.004	▪ Type of application (e.g., Site plan, Building Permit, Storm Water/Erosion Control, Environmental Health, Fire Prevention)							
Permitting	2.005	▪ Project Description							
Permitting	2.006	▪ Square Feet of Project							
Permitting	2.007	▪ Construction Type							
Permitting	2.008	▪ Assigned Inspector By Trade							
Permitting	2.009	▪ Assigned Planner							
Permitting	2.010	▪ Owner Information							
Permitting	2.011	▪ Property information							
Permitting	2.012	▪ Sub Contractor Information							
Permitting	2.013	▪ Business Name							
Permitting	2.014	▪ Township							
Permitting	2.015	▪ Sanitary System							
Permitting	2.016	▪ Water System							
Permitting	2.017	▪ Legal Description							
Permitting	2.018	▪ Project Valuation							

Permitting	2.019	▪ Class of work (Census data, single family, multi family, commercial, etc.)																	
Permitting	2.020	▪ Start date																	
Permitting	2.021	▪ Complete date																	
Permitting	2.022	▪ Issue date																	
Permitting	2.023	▪ Application date																	
Permitting	2.024	▪ Review dates																	
Permitting	2.025	▪ Expiration date																	
Permitting	2.026	▪ Approval dates																	
Permitting	2.027	▪ Text																	
Permitting	2.028	▪ Zoning																	
Permitting	2.029	▪ Occupancy type																	
Permitting	2.030	▪ Construction type																	
Permitting	2.031	▪ Inspection area																	
Permitting	2.032	PERMIT COPY - Ability to copy a permit for repetitive use.																	
Permitting	2.033	ONLINE PERMIT PRINTING - Ability to print submitted online permits for citizens at the time of permit application. NOTE: Would only apply to certain permits																	
Permitting	2.034	INFORMATION ASSOCIATIONS BY PERMIT - Ability to allow multiple items associated to with single permit (e.g., multiple addresses, parcels and/or owners on a single property).																	
Permitting	2.035	PERMIT INTAKE - MULTIPLE ADDRESSES OR PARCELS - Ability to initiate permit parameters to one or more addresses/parcels.																	

Permitting	2.036	GENERAL							
Permitting	2.037	USER-DEFINED FIELDS - Provide for "unlimited" County-defined fields based on permit type. If limited, please explain in comments.							
Permitting	2.038	REQUIRED FIELDS - Ability for County to determine which fields are required.							
Permitting	2.039	PERMIT APPLICATION CHECKLIST - Ability to create County-defined required checklists by permit type.							
Permitting	2.040	COUNTY-DEFINED PERMIT STATUS TYPES - AUTOMATED ASSIGNMENTS - Ability to automate status assignment throughout the process (e.g., active, inactive, hold, change, lock, etc.), with the ability to manually override to a particular status.							
Permitting	2.041	MULTIPLE CONTRACTORS PER PERMIT - Ability to track multiple contractors per permit and identify contractor responsible for certain aspects of construction or which is the prime contractor (e.g., who did the electrical, plumbing, etc.).							
Permitting	2.042	CONTRACTOR PERMIT TRACKING - Ability for permits to be tracked by contractor regardless of the permit applicant.							
Permitting	2.043	SEARCH - Allow for search and retrieval of a permit or application data using any combination of:							
Permitting	2.044	▪ Job Address							
Permitting	2.045	▪ Parcel number							
Permitting	2.046	▪ Lot number							
Permitting	2.047	▪ Associated names (applicant, property owner, contractor, architect)							
Permitting	2.048	▪ Associated mailing addresses (applicant, property owner, contractor, architect)							
Permitting	2.049	▪ Associated phone numbers (applicant, property owner, contractor, architect)							
Permitting	2.050	▪ Contractor State license no.							
Permitting	2.051	▪ Contractor County Registration no.							
Permitting	2.052	▪ Type of application							
Permitting	2.053	▪ Application date							
Permitting	2.054	▪ Permit issuance date							
Permitting	2.055	▪ Approval dates							
Permitting	2.056	▪ Expiration date							
Permitting	2.057	▪ Application status							
Permitting	2.058	▪ Responsible department							
Permitting	2.059	▪ Various Wild Card searches							
Permitting	2.060	▪ Partial word searches							
Permitting	2.061	▪ Ability to search by owner name or business common name and see all associated permits.							
Permitting	2.062	PARCEL AND ADDRESS VALIDATION - Ability to validate an address or parcel within the County's GIS database when initializing a new permit application or process.							
Permitting	2.063	TEMPORARY ADDRESS - Need ability to input a temporary address for non-existent address locations.							

Permitting	2.064	SECURITY - Ability to restrict access to create temporary/permanent address entries.																	
Permitting	2.065	PERMIT DATA - Allow for an unlimited number of names, addresses, and phone numbers to be entered for a permit application. If limited, please explain limitation in comments.																	
Permitting	2.066	COMBINATION PERMITS - Ability to setup combination permits (e.g., signs, plumbing, building, electrical, mechanical, pools, etc.) with separate requirements, fees and inspections.																	
Permitting	2.067	COPYING/CLONING PERMITS - Ability to copy/clone a permit (e.g., same home model in a subdivision).																	
Permitting	2.068	MISCELLANEOUS PERMIT TYPES - Provide simplified system for processing miscellaneous permit applications, such as:																	
Permitting	2.069	▪ Signs																	
Permitting	2.070	▪ Re-roof																	
Permitting	2.071	▪ Special Inspector																	
Permitting	2.072	▪ Transportation Permits																	
Permitting	2.073	▪ Encroachment into Public Right of Way																	
Permitting	2.074	▪ Water Heaters																	
Permitting	2.075	▪ Home Improvements																	
Permitting	2.076	▪ Sewer Connection																	
Permitting	2.077	NOTES TYPE AND DATE STAMP - Ability to add Notes and Comments throughout the permitting process, including Type and Date Stamp.																	
Permitting	2.078	UNLIMITED ALERTS - Ability to place unlimited number of Alerts per parcel.																	
Permitting	2.079	FLASH ALERTS - Ability to flash alerts by address (e.g., outstanding code enforcement violations).																	
Permitting	2.080	PROCESS HOLD - OUTSTANDING CHECKS - Ability to auto stop a permit application for outstanding bounced checks.																	
Permitting	2.081	ALERTS - Ability to add a County-defined flag for when a contractor does not hold appropriate registration/licensing applies for a particular permit application.																	
Permitting	2.082	CONTRACTOR DATA - Provide database for tracking contractor/architects/engineers/deputy inspectors information including:																	
Permitting	2.083	▪ Name																	
Permitting	2.084	▪ Address																	
Permitting	2.085	▪ Phone																	
Permitting	2.086	▪ Type of contractor																	
Permitting	2.087	▪ Registration Number																	
Permitting	2.088	▪ Fax number																	
Permitting	2.089	▪ Liability insurance carrier (name, expiration date)																	
Permitting	2.090	▪ Surety Company bond carrier																	
Permitting	2.091	▪ E-mail address																	
Permitting	2.092	▪ Mobile phone number																	
Permitting	2.093	▪ License/Registration expiration date																	

Permitting	2.094	▪ State license number																	
Permitting	2.095	▪ State contractor information and license types																	
Permitting	2.096	CONTRACTOR LICENSE AND INSURANCE VALIDATION - Ability to link contractor license and insurance information to permits in order to prevent the issuance of permits on expired license or insurance and to verify appropriate license type is valid for the scope of work within the requested permit for issuance.																	
Permitting	2.097	PERSON/ENTITY INFORMATION - Persons entered into database should be retrievable to populate person's information on future applications.																	
Permitting	2.098	UNLIMITED COMMENTS AND NOTES - Provide an area for unlimited free-form text comments and notes for each contractor.																	
Permitting	2.099	CONTRACTOR REQUIREMENTS - Perform automatic checking of user-defined contractor requirements for pulling a permit during permit processing.																	
Permitting	2.100	TRACK INSURANCE - Provide capability to track contractor and other vendor's insurance.																	
Permitting	2.101	TRACK INSURANCE - Ability to auto-generate letters to contractor that an updated insurance certificate is needed.																	
Permitting	2.102	MULTIPLE TRUST ACCOUNTS - Ability to establish one or more trust accounts for a person or record (address, parcel, permit) within the system.																	
Permitting	2.103	PERMIT STATUS TRACKING - Ability to inquiry on all open permits for a specific contractor(s) and view status and expiration dates																	
Permitting	2.104	PERMIT EXPIRATION - AUTOMATIC REMINDERS - Ability to automatically generate notifications for upcoming permits expirations.																	
Permitting	2.105	HISTORICAL PERMITS - Ability to Maintain a history on all permits issued including final certificates, final acceptance, and/or final approval letters.																	
Permitting	2.106	HISTORY - Ability to show all permit history by address when entering application information.																	
Permitting	2.107	CODE CYCLE EFFECTIVE DATES - Ability to have effective dates of standard code (i.e., x years code cycles) - Code cycles are assigned to each job depending on initialization date, and the associated turndown library code reference must correspond to the correct code cycle for each trade. North Carolina building and trade codes are updated to a new code every 3 to 6 years. From one code update to the next is referred to as a cycle.																	
Permitting	2.108	UTILITY AUTHORIZATIONS - Ability to email utility authorizations to power companies when proper approval or conditions are met to energize the electrical service, and maintain the history of all utility authorizations issued.																	

Permitting	2.109	INFRASTRUCTURE COMPLETION - An automated method of tracking whether an infrastructure being guaranteed has been satisfactorily completed. (e.g., installation of roads, sewer and water utility lines, etc. that have to be completed before a permit or certificate of occupancy can be issued)								
Permitting	2.110	INSTRUMENT EXPIRATIONS - An automated notice identifying instruments (e.g., letters of credit, bonds for set period of time, bonds on specific development projects, etc.) that are scheduled to expire in order to provide adequate time to inspect, call or replace the guarantee.								
Permitting	2.111	TIME TRACKING - The ability to track all time by project, task, phase, date and staff. E.g., support being able to report on how long a process was with Orange County processing, and how much time was spent waiting on the citizen or contractor, etc.								
Permitting	2.112	TIME TRACKING - DURATIONS - Ability for time tracking to exclude durations hold periods (e.g., citizen reviews, submittal periods, etc.)								

Permitting	2.113	FEES							
Permitting	2.114	UNLIMITED FEES AND TYPES - Provide for calculation of standard fees with effective dates using County-provided formulas or tables.							
Permitting	2.115	FFES BY PERMIT OR PROJECT - Automatically compute charges based on permit or project type.							
Permitting	2.116	PERMIT QUOTE CALCULATIONS - Ability to generate a permit quote based on a predefined formula (e.g. square footage and type of construction) with disclosure language.							
Permitting	2.117	PERMIT REQUEST ESTIMATES - Ability to save permit request information to estimate fees without creating a new permit application, then convert estimate to application records when citizen actually submits formal permit application (could be weeks or months later).							
Permitting	2.118	FEES AND CREDITS - Track fees charged, refunds, and credits issued by citizens, permits, parcel, project, etc.							
Permitting	2.119	FIXED FEES - Ability to set up fixed and variable fees with minimums.							
Permitting	2.120	FEES BY GALLONS - Ability to set up fees by gallon.							
Permitting	2.121	FLAT FEES AND UNIT COST - Ability to set up flat fees plus a per unit cost.							
Permitting	2.122	TIERED FEES AND UNIT COST - Ability to set up tiered fees by number of units.							
Permitting	2.123	VALUATION FEES - Ability to set up fee by valuation times unit charge per \$1,000.							
Permitting	2.124	VARIABLE FEES - Flat Base Fee plus unit cost per \$X,XXX over a base amount.							
Permitting	2.125	COUNTY-DEFINED UNIT TYPES - Ability to use County-defined unit types (e.g., square feet, acres, linear feet, permit fee totals, pages, hours, and lots)							
Permitting	2.126	HOURLY FEES - Ability to charge an hourly fee.							
Permitting	2.127	HOURLY RATE BY FEE TYPE - Ability to track an hourly rate billing by Fee Type							
Permitting	2.128	PERCENT OF BASE PERMIT FEE - Ability to charge a fee that is X% of the base permit fee (e.g., recycled material fee).							
Permitting	2.129	LOT FEES - Ability to charge a fee that is flat base amount plus a unit charge times the number of lots.							
Permitting	2.130	BUILDING CONSTRUCTION VALUATION - Allow for valuation calculations to be based on International Code Council building valuation data.							
Permitting	2.131	SQUARE FOOT CALCULATIONS - Allow user-defined square footage calculations based on a user-defined table of square footage values.							
Permitting	2.132	FIXED COST - Allow fixed cost on construction valuation based on square footage.							
Permitting	2.133	PERCENTAGE FEES - Ability to calculate fees as a percentage of building permit fee.							

Permitting	2.134	COST PLUS PERCENTAGE OF COST - Ability to calculate a fee by adding a cost plus XX% of the cost (e.g. Third party engineering firm performs plan review).									
Permitting	2.135	FEES BY SHEETS AND REVIEWS - Allow review fees to be calculated based on number of sheets submitted and number of reviews (e.g., \$X/lot for first review, no charge for second review, \$X/for third and subsequent reviews).									
Permitting	2.136										
Permitting	2.137	BILLABLE TIME - Ability to track task time by person and generate hourly fees due.									
Permitting	2.138	FEES ON DEMAND - Ability to charge any or all fees by specific project requirements (e.g., set up fees on demand).									
Permitting	2.139	MISCELLANEOUS FEES - Ability to calculate and track unlimited miscellaneous fees collected in conjunction with building permits.									
Permitting	2.140	NON-PERMIT FEES - COLLECTIONS AND TRACKING - Ability to collect and track outstanding balances not associated with a project or building permit (e.g., EH re-inspections)									
Permitting	2.141	WAIVE FEES - Ability to waive or override any standard/default fees by supervisor with proper security control.									
Permitting	2.142	MASS FEE CHANGES - Ability to mass change all fees by xx% (inflationary) once per year without out having to change each individual fee.									
Permitting	2.143	FEES SETTINGS FOR CANCELLED PERMITS - Ability to set fees as refundable or non-refundable should a permit be cancelled.									
Permitting	2.144	REFUNDABLE DEPOSITS - Ability to track deposits and refunds including conditions and sign-offs of refund, and maintain real-time permit fees balance.									
Planning	2.145	DEVELOPER AND PERMIT DEPOSIT TRACKING - Track deposits, payments, and balances by developer as well as by a single project.									
Permitting	2.146	PERMIT REVERSALS AND REFUNDS - Ability to void permits that have been issued, including fee reversal and refunds (NOTE: must comply with all requirements of the Munis general ledger interface).									
Permitting	2.147	A/P REFUND REQUEST - Ability to generate an A/P refund request notice with general ledger accounts codes.									
Permitting	2.148	DEVELOPMENT CREDITS - Capability of setting up accounting for various development agreements to track credits or reimbursements based on a parcel, a subdivision, or a geographical zone (e.g., Developer A may get \$10,000 worth of transportation credits that he can apply "first come first serve" for building permits. Each building permit may be \$8,000 each, but only \$1,000 of each permit is for transportation)									
Permitting	2.149	MULTIPLE PERMIT PAYMENTS - Ability to pay for multiple permits with single payments.									

Permitting	2.150	RECEIPT OF AMOUNT AND PAYEE - Ability to print a receipt to whoever pays the fee (payee) for the amount of the specific fee and not a cumulative amount that has been paid for the project, in order to support any refund to the proper payer.							
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Permitting	2.151	PERMITTING - FINANCIAL INFORMATION - Ability to maintain detailed financial information on each permit, including:																	
Permitting	2.152	▪ Permit Charge																	
Permitting	2.153	▪ Other Charges																	
Permitting	2.154	▪ Specialized Fees																	
Permitting	2.155	▪ Water Meters																	
Permitting	2.156	▪ Inspection Fees																	
Permitting	2.157	▪ Total Charge																	
Permitting	2.158	▪ Total Collected																	
Permitting	2.159	▪ Total Waived																	
Permitting	2.160	▪ General Ledger Account Codes																	
Permitting	2.161	ROUTING & WORKFLOW																	
Permitting	2.162	USER-DEFINED ROUTING - Allow user-defined process workflow routing based on type of work performed to multiple users/departments (e.g., specific staff, planning, environmental compliance, fire, police, county health, engineering, etc.).																	
Permitting	2.163	SIMULTANEOUS WORKFLOW STEPS - Ability to allow review steps to be performed simultaneously by multiple users/departments.																	
Permitting	2.164	PERMIT REVISIONS - Ability to revise permit applications during the permit review process.																	
Permitting	2.165	ADD CORRECTION ITEMS - Allow entry of plan correction items as part of plan review.																	
Planning	2.166	ELECTRONIC PLAN SUBMITTAL - Ability to receive plan submittals electronically.																	
Planning	2.167	ELECTRONIC PLAN REVIEW - Capable of online plan review with ability to red-line markup plans and add comments.																	
Permitting	2.168	WORKFLOW - Ability to pre-establish workflow and task requirements by permit type (reviews, plan checks, verifications, inspections, other agency approval requirements, etc.).																	
Permitting	2.169	WORKFLOW - Ability to modify workflow and task requirements as needed.																	
Permitting	2.170	EXTERNAL PLAN REVIEWS - Ability to notify outside reviewing agencies when a plan review is necessary, and ability for agency to update information within the case, relative to the approvals and/or data each agency is responsible for (e.g. Town of Hillsborough Zoning, Fire or Utilities; Chapel Hill, Carrboro and Mebane).																	
Permitting	2.171	DUE DATES - Ability for system to fill in due dates by task type (e.g., plan check reviews due within 10 days of submittal).																	
Permitting	2.172	PERFORMANCE STANDARDS TRACKING - Ability to distinguish different task due dates (i.e., input of application vs. acceptance) and set due dates accordingly. Each task should have a separate date associated to it in order to compile performance standards reports.																	
Permitting	2.173	MODIFY ROUTING - Routing can change for individual applications (steps added/deleted).																	

Permitting	2.174	APPROVALS - Do not allow permit to be issued until all required plan review steps are completed.									
Permitting	2.175	ASSIGN TASKS - Ability for departments to then assign tasks and re-assign to specific staff.									
Permitting	2.176	ASSIGN TASKS - Ability to either assign staff or leave task completion at the department level.									
Permitting	2.177	USER DASHBOARD - Provide a user specific dashboard with statistics and assignments.									
Permitting	2.178	AUTOMATIC REMINDERS - Ability to set automatic reminders/notifications based on plan review phases (e.g. preliminary plan review date, expected date of completion, etc.).									
Permitting	2.179	PERMIT APPROVAL - Ability to email online permit approvals to applicants									
Permitting	2.180	EMAIL CORRESPONDENCE - Ability to email an applicant to request missing data, generate permit reminders (i.e., issuance, pickup, etc.), provide corrections list, etc.									
Permitting	2.181	PERMIT APPLICATION TO INSPECTION - Ability to prompt an inspection from a permit application.									
Permitting	2.182	PROCESSING									
Permitting	2.183	PLAN POSSESSION - Ability to track which planners have been issued sets of plans.									
Permitting	2.184	CORRECTIONS LIST - Ability to generate a department specific or overall corrections list.									
Permitting	2.185	CITIZEN CORRECTIONS LIST - Ability for system to generate a corrections list (letter) for citizen.									
Permitting	2.186	MULTIPLE PERMITS PER SET OF APPROVAL STEPS/PLAN CHECK - Ability to setup one set of approval steps/plan checks for multiple permits (e.g., building, plumbing, electrical, mechanical, etc.).									
Permitting	2.187	NOTIFICATION LETTERS - Ability to generate 30 or 90 day expiration notification letter for a permit applicant.									
Permitting	2.188	NOTIFICATIONS WITH ATTACHMENTS - Ability for standard notifications/letters/permits, certificates, etc., to print with pre-determined attachments (batch or on-demand).									
Permitting	2.189	CALENDAR VIEW OF ASSIGNMENTS AND DUE DATES - Ability for users and supervisors to view their assignments and due dates by individual or department.									
Permitting	2.190	PERMITTING / ISSUANCE									
Permitting	2.191	FINAL INSPECTION NOTIFICATION - Ability to notify via queue or email when inspections are final approved for certificate of occupancy issuance.									
Permitting	2.192	PERMIT EXPIRATION DATES - Automatically calculate permit expiration date based on user parameters.									
Planning	2.193	DATE OVERRIDES - Ability to manually override expiration dates.									

Permitting	2.194	AUTO ADJUST EXPIRE DATE - Ability to auto adjust permit expiration date by XXX days from last inspection.																		
Permitting	2.195	FEES DUE ALERT - Provide an alert at Certificate of Occupancy issuance of any fees owed by the developer/owner/contractor.																		
Permitting	2.196	PRINT NOTES ON PERMIT - Allow notes from plan review and general application to be flagged to print on the permit.																		
Permitting	2.197	PRINT PLAN CHECK COMMENTS - Ability to print plan check comments on plan check review letter.																		
Permitting	2.198	FINAL EDITS - Perform editing prior to printing notices/letters for such items as all fees paid, all permits final, etc.																		
Permitting	2.199	PRINT CERTIFICATES - Allow County to define type of certificate to print (e.g., Certificate of Completion vs. Certificate of Occupancy).																		
Permitting	2.200	ABILITY TO BLOCK - Allow the ability to block certificates of completion or issuance of a final occupancy permit until all required sign-offs and inspections are completed.																		
Permitting	2.201	NOTIFICATION METHODS - Notification methods include:																		
Permitting	2.202	▪ E-mail																		
Permitting	2.203	▪ Fax																		
Permitting	2.204	▪ Web site updates on-line																		
Permitting	2.205	▪ Word-formatted letters																		
Permitting	2.206	PERMIT APPROVAL EMAIL - Ability for system to automatically email approved permits to contractors and owners.																		
Permitting	2.207	JURISDICTION PERMIT NOTIFICATIONS - Allow for email notifications of permits status (i.e. Expired, Approved, etc.), including email notifications to other jurisdictions of Septic System and Well Permit Status																		
Permitting	2.208	TAX ACCESSOR CO NOTIFICATION - Automatically issue a notification to the Tax Assessors office when the certificate of occupancy is issued																		
Permitting	2.209	MULTIPLE RECEIPIENT EMAILS - Ability for documents to be emailed to one or more contacts listed on the project or permit.																		
Permitting	2.210	GENERAL PERMITTING AND CONDITIONS OF APPROVAL																		
Permitting	2.211	UNLIMITED COMMENTS - Allow for entry of unlimited free-form notes and comments during the permit application and plan review processes.																		
Permitting	2.212	STANDARD COMMENTS - Allow for user-defined table of standard comments that can be accessed during plan review.																		
Permitting	2.213	CORRECTION NOTICE COMMENTS - Ability to combine all plan review comments and correction requirements into a single correction notice/letter.																		
Permitting	2.214	EDITABLE COMMENT REVIEW LETTERS - Ability to create editable comment/review letters segregated by department review comments.																		
Permitting	2.215	PLAN CHECK LETTERS - Ability to generate editable plan check comment letters by combining all reviewer comments.																		

Permitting	2.216	SPECIAL CONDITIONS - Ability to note any restrictions or special conditions established by reviewing departments as a prerequisite within the permit process.									
Permitting	2.217	CONDITIONS OF APPROVAL - Ability to apply project-specific conditions of approval to each address within that project.									
Permitting	2.218	CONDITIONS OF APPROVAL - Ability to set up standard conditions of approval by permit type.									
Permitting	2.219	CONDITIONS OF APPROVAL - Ability for system to force all conditions of approval to be met and checked off before user is allowed to mark a task complete.									
Permitting	2.220	CONDITIONS OF APPROVAL - Track conditions of approval revisions (who, what, when).									
Permitting	2.221	CONDITIONS OF APPROVAL - Allow conditions of approval to be entered and maintained by multiple departments.									
Permitting	2.222	CONDITIONS OF APPROVAL - Allow conditions of approval "completed" check box.									
Permitting	2.223	CONDITIONS OF APPROVAL - Allow conditions of approval "reviewed" check box.									
Permitting	2.224	CONDITIONS OF APPROVAL - Track conditions of approval "completed by whom".									
Permitting	2.225	CONDITIONS OF APPROVAL - Track conditions of approval "reviewed by whom".									
Permitting	2.226	CONDITIONS OF APPROVAL - Track conditions of approval completed by "date and time".									
Permitting	2.227	CONDITIONS OF APPROVAL - Track conditions of approval "reviewed" by date and time.									
Permitting	2.228	DIGITAL SIGNATURE FOR CONDITION FORM - Ability to have citizen sign permit condition form with digital signature pad at the counter.									
Permitting	2.229	ATTACHMENTS - Ability to attach files, e-mails, etc., to the permit record.									
Permitting	2.230	ATTACHMENTS - Ability to attach files, e-mails, etc., to a specific task or review step.									
Permitting	2.231	CITIZEN ONLINE ACCESS									
Permitting	2.232	PERMIT APPLICATIONS - Ability for citizens to apply for permits via Internet in real time, but require County verification before actual permit approval and issuance. NOTE: Will be limited to certain permits.									
Permitting	2.233	DIAGRAMS - Ability to submit a diagram(s) with an online permit application.									
Permitting	2.234	VIEW STATUS - Ability for citizens to view status of permit applications via the Internet.									
Permitting	2.235	VIEW PERMIT STATUS - IVR - Ability for citizens to obtain status of permit applications via the IVR									
Permitting	2.236	ONLINE PAYMENTS - Ability for citizens to pay permit application fees via Internet in real time.									

Permitting	2.237	NEXT STEPS - Ability to show next steps in the process, due dates and completion percentage.											
Permitting	2.238	ISSUANCE ALERTS - Ability to identify/flag issues which may delay permit issuance.											
Permitting	2.239	PERMIT PRINTING - Ability for citizens to print permits that have been issued.											
Permitting	2.240	REPORT PRINTING - Ability for citizens to print reports published via the web, with control over access to certain types of reports.											
Permitting	2.241	INSPECTION RESULTS - Ability for citizens to view permit inspections results.											
Permitting	2.242	DOCUMENT RETRIEVAL - Ability for citizens to retrieve scanned documents (e.g., EH well and septic information).											
Permitting	2.243	PERMITTING REPORTS											
Permitting	2.244	USER QUERIES - Ability for users to create quick queries and reports from within the system (i.e., counts, status, fees, etc.).											
Permitting	2.245	REPORTING PARAMETERS - Ability for reports to accept parameters such as a date range for a report.											
Permitting	2.246	REPORT SCHEDULING AND DELIVERY - Ability to set up reports to be automatically delivered on a scheduled basis.											
Permitting	2.247	MONTHLY REPORT SUBTOTALS - Ability to generate monthly permit type reports with subtotal and total options.											
Permitting	2.248	STATISTICAL REPORTS - Statistical reports of permits issued by a user-defined date range.											
Permitting	2.249	STATISTICAL REPORTS - Statistical reports of the types of applications submitted by user-defined date range.											
Permitting	2.250	STATISTICAL REPORTS - Statistical reports of types of inspections performed by user-defined date range.											
Permitting	2.251	STATISTICAL REPORTS - Statistical reports of inspector activity by user-defined date range.											
Permitting	2.252	STATISTICAL REPORTS - Statistical reports of plan review processing, including numbers of applications processed, average days to process, etc.											
Permitting	2.253	WORK-IN-PROGRESS REPORTING - Ability to report on work-in-progress of a permit (i.e., % complete, % build out statistics, annual valuation, etc.)											
Permitting	2.254	OPEN TRUST/DEPOSIT REPORT - Reports of open bonds/deposits and associated activity.											
Permitting	2.255	PERMIT EXPIRATION REPORT - Ability to provide a report of permits that are ready to expire, and the ability to automate a process for notifications.											
Permitting	2.256	PLAN CORRECTION REPORT - Produce a plan correction listing on-demand.											
Permitting	2.257	PLAN CHECK AGING REPORT - Produce a plan check aging report with in and due dates by reviewer.											
Permitting	2.258	PERMIT FEE REPORT - Provides permit fee reports by daily receipts.											

Permitting	2.259	TIME PERIOD REPORTS - Provide reports by any time period (e.g., specific date to specific date).																		
Permitting	2.260	PDF FORMAT - Ability to save reports in PDF format.																		
Permitting	2.261	SUMMARY REPORT - Ability to generate a summary of applied and issued permits per month, comparing current month to same time previous year, year to date permits, and annual totals																		
Permitting	2.262	REVENUE EXPENSES REPORT - Monthly revenue/expense report (fees minus contract review/inspections costs)																		
Permitting	2.263	PUBLISH REPORTS ON WEBSITE - Ability to publish reports to website (e.g., monthly list of permits issued).																		
Permitting	2.264	HIERARCHICAL DATA LEVELS - Allow for data fields to populate from the associated hierarchical levels (e.g., Display associated permits for a subdivision project with status and balances due, in order to determine percent build-out statistics. Also ability to pull down stipulations of approvals required on permits from subdivisions.)																		
Permitting	2.265	INTEGRATION - INTERFACE																		
Permitting	2.266	INTEGRATION - MS WORD - Ability to integrate to MS Word processing to generate an applicant letter containing application information, comments, and conditions.																		
Permitting	2.267	INTEGRATION - MS OUTLOOK -Ability for the system to integrate with Microsoft Outlook for messaging and scheduling.																		
Permitting	2.268	INTEGRATION - STATE LICENSES BOARD - Integrate permit application and process to the NC State License board for contract inquiries (e.g. contractor licenses, insurance, bond, etc.). NOTE: Integration should go beyond the State Licenses Board home page.																		
Permitting	2.269	INTEGRATION - STATE LICENSES BOARD - Ability to extract contractor information from the state licenses board and populate fields in permit modules.																		
Permitting	2.270	INTEGRATION - CASH RECEIPTS - Cash receipts should validate permit number, account number, fees, penalty amounts, and update citizen balance.																		
Permitting	2.271	INTEGRATION- PLANNING - Provide communication of conditions and other pertinent information from planning and zoning projects related to permit property locations.																		
Permitting	2.272	INTEGRATION - PARCEL/ADDRESS MANAGEMENT - The parcel/address management application should provide address, parcel, owner, and zoning information to the permit system.																		
Permitting	2.273	INTEGRATION - ELECTRONIC CONTENT MANAGEMENT SYSTEM - Must integrate with Electronic Content Management System (To Be Determined) .																		
Permitting	2.274	INTEGRATION - GENERAL LEDGER - The permits application must generate journal entries to the general ledger for any invoices generated and revenues received, including all fees and credits.																		
Permitting	2.275	INTERFACE - GIS - Interface to GIS mapping products that support ESRI formats. Specifically: ESRI ArcGIS SDE Server																		

Permitting	2.276	INTEGRATION - PERMIT EXPORT - Ability to export a flat file to CAMA with permit and valuation data upon issuance of a certificate of occupancy.									
Permitting	2.277	INTEGRATION - GIS - COORDINATES - Ability to generate a map view from coordinates stored in GIS of the location of types of permit activities									
Permitting	2.278	INTEGRATION - INSPECTIONS - Ability to automatically update the permitting module for inspections that are scheduled, rescheduled or canceled.									
Permitting	2.279	PERMITTING PROCESS TRACKING - Ability to monitor the permit process as it relates to a development or subdivision.									
Permitting	2.280	BATCH PERMIT PROCESSING - Ability to combine or batch several permits into a mass update for processing as well as payment.									

Land Management Central Permitting System - Request for Proposal

Please input a "1" in the appropriate column to the right of the feature/function/capability statement. Further explanations, or information regarding 3rd party software and/or modification costs should also be provided in the comments column and Project Costs worksheet (Appendix G), if applicable. Each "non-title" row (?000) should have only one "1". Blank rows will be scored as Not Available.

Legend:

Standard - Current	Available in current software release
Standard - Next Release	Guaranteed available in next release of software
Report Writer	Report Writer function through Standard Reports or Ad Hoc Report Writer
3rd-Party Application	Please estimate general cost estimates in comments not a quote, unless available due to your resell arrangement.
Custom Modification	Custom programming by vendor (not meant to be a set-up configuration that is standard process through implementation). Please estimate general costs in comments (not a quote).
Not Available	Not available in current or next release; interfaced/integrated third-party application or through custom modification.

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd-Party Application	Custom Modification	Not Available	Comments
Inspections									
Inspections	3.000	GENERAL							
Inspections	3.001	USER-DEFINED FIELDS - Provide for "unlimited" County-defined fields based on inspection type. If limited, please explain in comments.							
Inspections	3.002	UNLIMITED INSPECTIONS - Allow for an unlimited number of inspections on each application.							
Inspections	3.003	INSPECTION FIELDS - Ability to maintain the following minimal fields on each inspection: <ul style="list-style-type: none"> ▪ Type (e.g., mechanical, electrical, plumbing, excavation, etc.) ▪ Description ▪ Date and time ▪ Inspector ▪ Results ▪ Status ▪ Violations ▪ Comments ▪ Next Inspection date ▪ Inspection frequency for reoccurring inspections. 							
Inspections	3.004	INSPECTION NOTICES - Ability to automatically generate inspection notices (i.e., first notices, second notices, renewals, etc.).							

Inspections	3.005	PROCESS HOLD - OUTSTANDING CHECKS - Ability to auto stop an inspection for outstanding bounced checks.																	
Inspections	3.006	MULTIYEAR INSPECTIONS NOTICES - Ability to generate multi-year inspection notices (i.e., 1, 3, 5 year notices).																	
Inspections	3.007	HISTORICAL INSPECTION REQUEST PRINTING - Ability to print inspection request with history																	
Inspections	3.008	SCHEDULING REQUESTS																	
Inspections	3.009	VALIDATE INSPECTION REQUEST - System to check whether an inspection request is valid (e.g., required or previously completed).																	
Inspections	3.010	SCHEDULING ERROR CHECKS - Perform user-defined error checking (with ability to override) during inspection scheduling to ensure the following:																	
Inspections	3.011	▪ Valid contractor license																	
Inspections	3.012	▪ Inspections are being performed in the proper sequence																	
Inspections	3.013	▪ Type of inspection requested is valid for the permit																	
Inspections	3.014	▪ All required fees have been paid																	
Inspections	3.015	▪ Permit has not expired																	
Inspections	3.016	▪ Permit has not been placed on hold																	
Inspections	3.017	ONLINE INSPECTION SCHEDULE CHECK - Allow citizens to view/check their scheduled inspection window online.																	
Inspections	3.018	ONLINE INSPECTION STATUS CHECK - Allow citizens to check the status (pass/fail) of an inspection from the Internet in real time.																	
Inspections	3.019	INSPECTORS WORK QUEUE - Ability for inspectors to work from a screen showing only their assigned inspections (i.e., queue).																	
Inspections	3.020	STOP WORK ORDER - Ability to issue stop work order (e.g., prevent other inspections, permits, etc.) on any open permit.																	
Inspections	3.021	INSPECTION HOLD STATUS - Ability to put project on hold if additional inspection or re-inspection fees are due.																	
Inspections	3.022	INSPECTION MILESTONES - Ability to delineate certain inspection milestones.																	
Inspections	3.023	UNAPPROVED CONDITIONS TO BLOCK PERMIT ISSUANCE - Ability to set up some types of conditions to be changed to unapproved during project construction to block additional permits from being issued until condition is re-inspected and removed (e.g., job site safety issues, construction sign, fencing, straw rolls requirement, etc.)																	
Inspections	3.024	INSPECTION CONFIRMATION NUMBER - Generate inspection confirmation number.																	
Inspections	3.025	ATTACHMENTS - Ability to scan and/or attach files to the inspection record.																	
Inspections	3.026	INSPECTION SEQUENCES - Allow for the setup of user-defined inspections sequences for each application based on the type of work.																	
Inspections	3.027	ALTER INSPECTION SEQUENCES - Ability to alter inspection sequences for individual permits as required.																	

Inspections	3.028	CHECKLISTS - Ability to generate an inspection checklist for each inspection type.																		
Inspections	3.029	CHECKLISTS - ITEM STATUS - Ability to print inspection checklists and track status on the individual items related to the checklist.																		
Inspections	3.030	STANDARD COMMENTS - Allow commonly-used inspection comments with comment code numbers in a user-defined standard comments file, organized by inspection type, that can be accessed during results entry.																		
Inspections	3.031	INSPECTION RESULTS COMMENTS / NOTES - Allow unlimited additional inspection notes, free text comments or result comments to be entered during inspection results entry.																		
Inspections	3.032	REQUIRED INSPECTION NOTES - Ability to require reason code and notes for rejected inspections.																		
Inspections	3.033	FAILURE REASONS BY INSPECTION TYPE - Ability for inspector to provide multiple inspection failure reason codes by inspection types (e.g., mechanical, electrical, plumbing, excavation, etc.)																		
Inspections	3.034	INSPECTION REQUEST EDITS - Ability to edit a completed inspection request																		
Inspections	3.035	FAILURE INFORMATION SEARCH - Ability to search failure information for inspections results																		
Inspections	3.036	INSPECTION RESULTS EMAIL - Ability for system to automatically email a permit holder and associated contractor inspection results and any non-approvals.																		
Inspections	3.037	NEXT STEPS - Ability to show next steps in the process, due dates and completion percentage.																		
Inspections	3.038	UNLIMITED PUNCH LIST - Ability to setup unlimited inspection punch list fields by inspection type.																		
Inspections	3.039	FREE-FORM PUNCH LIST COMMENTS - Ability to enter unlimited inspector comments (free form punch list).																		
Inspections	3.040	SPELL CHECK ENTRIES - Ability to utilize spell check for data entry (i.e., comments, results, notes, etc.)																		
Inspections	3.041	ASSOCIATE STANDARD COMMENTS TO INSPECTION TYPE - Ability for comments or inspection to be specific to the type of inspection being done.																		
Inspections	3.042	NOTICE OF VIOLATION - Ability to track inspection violations and generate notification letters by type of violation.																		
Inspections	3.043	IVR INSPECTION SCHEDULING																		
Inspections	3.044	SCHEDULING CONSTRAINTS - Ability to place citizen inspection scheduling constraints (i.e., outstanding fees, expiration dates, status, wrong inspection for type of permit, proper sequence of inspections, etc.)																		
Inspections	3.045	SCHEDULING REQUEST - Ability to schedule an inspection request through an IVR system.																		
Inspections	3.046	CALL TRANSFERS - Ability to handle call transfer routines during normal business hours and outside of normal business hours.																		

Inspections	3.047	CALL STATISTICS REPORTING - Ability to report statistics and other call volume and reports from the system based on individual line usage.																		
Inspections	3.048	CALL FORWARDING - Ability to be forwarded to a main line for assistance if the caller desires (i.e. press 0 for a real person).																		
Inspections	3.049	INSPECTION REQUESTS - SCHEDULING CONSTRAINTS - Ability to allow a citizen to schedule an inspection request for up to 5 days in advance.																		
Inspections	3.050	MULTIPLE INSPECTION REQUESTS BY PERMIT - Ability to handle multiple inspection requests for a single permit without requiring re-entry of the permit number, address or date.																		
Inspections	3.051	INSPECTION SCHEDULING PARAMETERS - Ability to place parameters on inspection scheduling (i.e., time of day for the following working day, limits on calendars due to availability of inspectors, outstanding holds or conditions on a permit, etc.).																		
Inspections	3.052	RESCHEDULING AND CANCELLATIONS - Ability for citizens to cancel or reschedule an inspection. NOTE: Must apply cut off time rules																		
Inspections	3.053	CONFIRMATION NUMBERS - Ability to provide citizens with a confirmation number for a successfully scheduled inspection(s).																		
Inspections	3.054	INSPECTION RESULTS - Ability for citizens to retrieve inspection results																		
Inspections	3.055	INSPECTION CODES - Ability for citizen to select type of inspection should the citizen not know the exact inspection number.																		
Inspections	3.056	PENDING FEES AT SCHEDULING - Ability to accept payment for re-inspection fees if outstanding at the time of scheduling.																		
Inspections	3.057	INSPECTION RESULTING - EMAILING OPTION - Citizen can request that inspection results be received via registered email address.																		
Inspections	3.058	INSPECTION RESULTING - FAXING OPTION - Citizen can request that inspection results be received via fax																		
Inspections	3.059	OUTBOUND NOTIFICATIONS - Ability to automate outbound notifications (e.g., results to a contractor/owner, expiration notices, utility notifications, etc.)																		
Inspections	3.060	MULTI-LANGUAGE IVR - SPANISH - Ability to support IVR services in Spanish.																		
Inspections	3.061	OUTBOUND NOTIFICATIONS - SUPPORT - Ability for the IVR system to support analog, digital and VoIP integration for inbound and outbound calls.																		
Inspections	3.062	ONLINE INSPECTION SCHEDULING																		
Inspections	3.063	SCHEDULING CONSTRAINTS - Ability to place citizen inspection scheduling constraints (i.e., outstanding fees, expiration dates, status, wrong inspection for type of permit, etc.)																		
Inspections	3.064	SCHEDULING REQUEST - Ability to schedule an inspection request through a citizen online access portal.																		

Inspections	3.065	INSPECTION REQUESTS - SCHEDULING CONSTRAINTS - Ability to allow a citizen to schedule an inspection request for up to 5 days in advance.																		
Inspections	3.066	MULTIPLE INSPECTION REQUESTS BY PERMIT - Ability to handle multiple inspection requests for a single permit without requiring re-entry of the permit number, address or date.																		
Inspections	3.067	INSPECTION SCHEDULING PARAMETERS - Ability to place parameters on inspection scheduling (i.e., time of day for the following working day, limits on calendars due to availability of inspectors, outstanding holds or conditions on a permit, etc.).																		
Inspections	3.068	RESCHEDULING AND CANCELLATIONS - Ability for citizens to cancel or reschedule an inspection. NOTE: Must apply cut off time rules																		
Inspections	3.069	CONFIRMATION NUMBERS - Ability to provide citizens with a confirmation number for a successfully scheduled inspection(s).																		
Inspections	3.070	INSPECTION RESULTS - Ability for citizens to retrieve inspection results																		
Inspections	3.071	INSPECTION CODES - Ability for citizen to select type of inspection should the citizen not know the exact inspection number.																		
Inspections	3.072	PENDING FEES AT SCHEDULING - Ability to accept payment for re-inspection fees if outstanding at the time of scheduling.																		
Inspections	3.073	INSPECTION RESULTING - EMAILING OPTION - Citizen can request that inspection results be received via registered email address.																		
Inspections	3.074	INSPECTION RESULTING - FAXING OPTION - Citizen can request that inspection results be received via fax																		
Inspections	3.075	OUTBOUND NOTIFICATIONS - Ability to automate outbound notifications (e.g., results to a contractor/owner, expiration notices, utility notifications, etc.)																		
Inspections	3.076	ASSIGNMENTS																		
Inspections	3.077	MULTIPLE PERMIT INSPECTORS - Ability to support multiple inspectors for a given permit.																		
Inspections	3.078	INSPECTION GROUPS - Allow multiple inspection groups and types within each group (Building, Zoning, Environment Health, Engineering, etc.).																		
Inspections	3.079	PRE-ASSIGN INSPECTORS BY CERTIFICATIONS - Ability to pre-assign inspections based on inspector certifications.																		
Inspections	3.080	PRE-ASSIGN INSPECTORS BY PREVIOUS INSPECTOR - Ability to pre-assign inspections based on previous inspector.																		
Inspections	3.081	PRE-ASSIGN INSPECTORS TO PROJECTS - Ability to pre-assign inspectors to projects.																		
Inspections	3.082	PRE-ASSIGN INSPECTORS TO PERMITS - Ability to pre-assign inspectors to permits.																		
Inspections	3.083	PRE-ASSIGN BY TYPE - Ability to assign inspections to inspector by type of request (building, plumbing, engineering, etc.).																		

Inspections	3.084	PRE-ASSIGN INSPECTORS BY DEPARTMENT - Ability to pre-assign inspectors by departments (e.g., fire inspections to be auto-assigned to the fire marshal, etc.)																		
Inspections	3.085	DEPARTMENT INSPECTION REQUIREMENTS - Ability to selectively default and distinguish between the various departments and their inspection requirements																		
Inspections	3.086	INSPECTION ASSIGNMENT SECURITY - Ability to configure security to control proper inspection assignments (e.g. authenticate inspector credentials for an inspection prior to allowing inspection assignment to be completed).																		
Inspections	3.087	APPROVALS - Do not allow inspections to be scheduled without proper approvals.																		
Inspections	3.088	FINAL INSPECTION APPROVAL - Ability to disallow final inspection to be scheduled if all other approvals are not completed and fees paid.																		
Inspections	3.089	FINAL INSPECTION NOTIFICATION - Ability to notify via queue or email when inspections are final approved for certificate of occupancy issuance.																		
Inspections	3.090	APPROVED INSPECTION NOTIFICATION - Ability for system to automatically notify contractors and owners of approved inspection.																		
Inspections	3.091	INSPECTION REASSIGNMENT - Provide a method of automatically reassigning an inspector's scheduled inspections for such situations as an inspector calling in sick, vacation, meetings, etc.																		
Inspections	3.092	INSPECTION RESCHEDULING - Ability to automatically reschedule follow up inspections in intervals of XX days, with the ability to manually override.																		
Inspections	3.093	PERIODIC INSPECTIONS - Certain periodic inspections are required that are not tied to a building permit (Mobile Home Parks and Tank Manufacturing inspections.)																		
Inspections	3.094	OVERRIDE ASSIGNMENT - Allow specified users to override the automatic assignment.																		
Inspections	3.095	OVERDUE ROLLOVER - Ability for inspections assignment to roll-over uncompleted inspections to the next day's schedule.																		
Inspections	3.096	SCHEDULING - Ability for system to cut off daily inspection scheduling at "X:XX" time each day.																		
Inspections	3.097	HALF HOUR INSPECTION WINDOW - Ability to schedule an inspection into a half hour time window.																		
Inspections	3.098	INSPECTION STATUS UPDATES - Automatic update in the permitting system for inspections that are scheduled, rescheduled or canceled so that the customer view of the activity is the same.																		
Inspections	3.099	TIME TRACKING - Ability to track the hours and minutes spent on each on-site inspection																		
Inspections	3.100	SCHEDULE NEXT DATE - Ability to schedule next inspection date for project or case inspections.																		

Inspections	3.101	PERMIT EXPIRATION DATE UPDATES - Ability for system to automatically update the permit expiration date based on valid inspections.							
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Inspections	3.102	FEES											
Inspections	3.103	INVOICING - Ability to allow for invoicing of fees and annual inspections (e.g., mobile home park, waste water treatment, nutrient runoff inspection, etc.)											
Inspections	3.104	RE-INSPECTION FEES - Ability to manually apply a discretionary re-inspection fee after X number of inspections of the same type											
Inspections	3.105	AUTOMATED RE-INSPECTION FEE - Ability for a re-inspection fee to be automatically applied when a re-inspection is scheduled.											
Inspections	3.106	OVERRIDE RE-INSPECTION FEES - Allow user-defined re-inspection fees to be overridden by specified users.											
Inspections	3.107	NON-PERMIT FEES AND INSPECTIONS - Ability to track and schedule non-permit annual inspections and fees.											
Inspections	3.108	FEE EFFECTIVE DATES - Ability to change fees with effective dates.											
Inspections	3.109	REPORTING											
Inspections	3.110	USER QUERIES - Ability for users to create quick queries and reports from within the system (i.e., counts, status, fees, etc.).											
Inspections	3.111	REPORTING PARAMETERS - Ability for reports to accept parameters such as a date range for a report.											
Inspections	3.112	REPORT SCHEDULING AND DELIVERY - Ability to set up reports to be automatically delivered on a scheduled basis.											
Inspections	3.113	INSPECTION INQUIRIES - Ability to report and filter inspections by the following fields:											
Inspections	3.114	▪ Permit Number											
Inspections	3.115	▪ Assigned Inspector											
Inspections	3.116	▪ Address											
Inspections	3.117	▪ Inspection Type											
Inspections	3.118	▪ Permit Holder											
Inspections	3.119	▪ Township											
Inspections	3.120	▪ Complete/Incomplete											
Inspections	3.121	INSPECTION - DASHBOARD REPORTING - Ability to generate graphical illustrations of inspections by inspector, type, township, or by trade.											

Inspections	3.122	MOBILE FIELD INSPECTIONS								
Inspections	3.123	MOBILE OFFLINE STORE-AND-GO - Ability for system to work offline when in an area with no cellular coverage and automatically re-sync when back in cell coverage ("store-and-go") without user intervention.								
Inspections	3.124	MOBILE INFORMATION RETRIEVAL - Access to permit data, documents and related property information from a mobile unit while in the field.								
Inspections	3.125	GIS INFORMATION DRILLDOWN - Ability to access inspection requests and historical records via in-field GIS mapping services.								
Inspections	3.126	PLAN REVIEW NOTES - The ability to view plan review notes in the field for use during an inspection.								
Inspections	3.127	FIELD INSPECTIONS - Ability to add inspections to a list that is retrievable by an inspector already in the field.								
Inspections	3.128	ADD INSPECTION TYPES IN FIELD - As an example, an inspection is scheduled for framing, but while they are at the site, they are also ready to have electrical and plumbing inspections as well. There should be the ability to add these additional inspection types and post results in the field.								
Inspections	3.129	MOBILE PHOTO / DOCUMENT ATTACHING - Allow inspectors in the field to attach photos and documents to an inspection record in real-time using a laptops or other hand held devices such as smartphones or tablets.								
Inspections	3.130	MOBILE RESULTING - Allow inspectors in the field to result inspections in real-time using a laptop or other hand held devices such as tablets (e.g., iPads OR Windows based tablets).								
Inspections	3.131	WIRELESS MOBILE PRINTING - Ability to print inspection results and comments, on location, using a mobile tablet or laptop to a wireless printer.								
Inspections	3.132	WATER SAMPLE TESTING - Ability to capture multiple water sample testing results per well location. NOTE: Up to 25 water quality parameters for each sample event must be matched to the source of the sample and associated with the well and the parcel.								
Inspections	3.133	INSPECTION AUTO-ROUTING - Auto-routing capabilities within the mobile product, providing maps from the field.								

Inspections	3.134	INTEGRATION									
Inspections	3.135	INTEGRATION - PLANNING - Integrate in real time to Planning to schedule inspections and update inspection results to the planning project.									
Inspections	3.136	INTEGRATION - PERMITTING - Integrate in real time to Permitting to schedule inspections and update inspection results to the permit.									
Inspections	3.137	INTEGRATION - CODE ENFORCEMENT - Integrate in real time to Code Enforcement to schedule inspections and update inspection results to the case.									
Inspections	3.138	INTEGRATION - LICENSING - Integrate in real time to Licensing to schedule inspections and update inspection results to the license.									
Inspections	3.139	INTEGRATION - PARCEL/ADDRESS MANAGEMENT - Integrate in real time to Parcel/Address Management to retrieve historical information on inspections performed on the parcel or address.									
Inspections	3.140	INTEGRATION - OUTLOOK - Ability for the system to integrate with Microsoft Outlook for messaging and scheduling.									
Inspections	3.141	INSPECTION LOCATIONS - MAP PRINTING - Ability to print a map over a specific time period for locations of scheduled inspections									
Inspections	3.142	INTEGRATION - CASHIERING - Integrate in real time to Cashiering for annual inspections payment processing.									

Land Management Central Permitting System - Request for Proposal

Please input a "1" in the appropriate column to the right of the feature/function/capability statement. Further explanations, or information regarding 3rd party software and/or modification costs should also be provided in the comments column and Project Costs worksheet (Appendix G), if applicable. Each "non-title" row (?000) should have only one "1". **Blank rows will be scored as Not Available.**

Legend:

Standard - Current	Available in current software release
Standard - Next Release	Guaranteed available in next release of software
Report Writer	Report Writer function through Standard Reports or Ad Hoc Report Writer
3rd-Party Application	Please estimate general cost estimates in comments not a quote, unless available due to your resell arrangement.
Custom Modification	Custom programming by vendor (not meant to be a set-up configuration that is standard process through implementation). Please estimate general costs in comments (not a quote).
Not Available	Not available in current or next release; interfaced/integrated third-party application or through custom modification.

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd-Party Application	Custom Modification	Not Available	Comments
Code Enforcement									
Code Enforcement	4.000	CASE INTAKE							
Code Enforcement	4.001	ONLINE WEB ACCESS - Allow for Citizens to submit violation complaints via Internet							
Code Enforcement	4.002	USER-DEFINED FIELDS - Provide for "unlimited" county defined fields by case type. If limited, please explain in comments.							
Code Enforcement	4.003	INTAKE FIELDS - Intake complaint form should include:							
Code Enforcement	4.004	▪ Parcel ID							
Code Enforcement	4.005	▪ Address or location of complaint							
Code Enforcement	4.006	▪ Names of party making complaint							
Code Enforcement	4.007	▪ Phone numbers of party making complaint							
Code Enforcement	4.008	▪ Email of party making complaint							
Code Enforcement	4.009	▪ Nature of violation							
Code Enforcement	4.010	▪ Date of complaint							
Code Enforcement	4.011	▪ Time of complaint							
Code Enforcement	4.012	▪ Method of submission (e.g. Phone, Mail, E-Mail, In Person)							
Code Enforcement	4.013	▪ Code enforcement officer assigned							
Code Enforcement	4.014	▪ Violation address:							
Code Enforcement	4.015	▪ Owner information							
Code Enforcement	4.016	▪ Tenant information							
Code Enforcement	4.017	▪ Business management information							
Code Enforcement	4.018	▪ Property Owner/Tenant notifications (e.g. Site visit, phone call, second notice)							

Code Enforcement	4.019	REQUIRED FIELDS - Ability for County to determine which fields are required.																		
Code Enforcement	4.020	INTAKE FLAG - Ability to flag upon intake, if existing open Code Enforcement case(s) exist.																		
Code Enforcement	4.021	PREVENT DUPLICATES - Ability for system to identify duplicate complaints and prevent a separate case from being opened.																		
Code Enforcement	4.022	CASE MERGING - Ability to merge duplicate cases already created.																		
Code Enforcement	4.023	CASE ASSOCIATIONS - Ability to associate multiple complaints to a single case.																		
Code Enforcement	4.024	AUTO-ASSIGN COMPLAINT - Ability to auto-assign complaint by area, type, or specific user.																		
Code Enforcement	4.025	CASE MANAGEMENT																		
Code Enforcement	4.026	CASE STATUS - Ability to define numerous different status codes (i.e., new, pending, resolved, inspecting, etc.) and be able to retrieve and print a report on cases matching a particular status.																		
Code Enforcement	4.027	CASE TYPES - Ability to define the following case types:																		
Code Enforcement	4.028	▪ illegal burning																		
Code Enforcement	4.029	▪ Garbage Littering																		
Code Enforcement	4.030	▪ Recycled Material (i.e., demolition, construction)																		
Code Enforcement	4.031	▪ illegal hauling of materials																		
Code Enforcement	4.032	▪ Sewage violations (i.e., burning or dumping solid waste)																		
Code Enforcement	4.033	▪ Zoning violations																		
Code Enforcement	4.034	▪ Land use violations																		
Code Enforcement	4.035	▪ Junk vehicles																		
Code Enforcement	4.036	▪ illegal landfill																		
Code Enforcement	4.037	▪ Occupancy use																		
Code Enforcement	4.038	▪ illegal Development																		
Code Enforcement	4.039	▪ Inconsistent development																		
Code Enforcement	4.040	▪ Removal of protected vegetation																		
Code Enforcement	4.041	▪ Signs without permits																		
Code Enforcement	4.042	WORKFLOW BY CASE TYPES - Allow user to define case types with County-defined sequence of actions, inspections, fees, and due dates for each type.																		
Code Enforcement	4.043	WORKFLOW EDITS - Ability to modify workflow and task requirements as needed.																		
Code Enforcement	4.044	FOLLOW-UP TASK ASSIGNMENT - Ability for system to auto-assign follow-up tasks based upon assigned case officer or task type (e.g., follow-up inspections on specific dates).																		
Code Enforcement	4.045	CASE CHRONOLOGY - Ability to track all case chronology through narrative notes and type of action.																		
Code Enforcement	4.046	DUE DATES - Ability for system to fill in due dates by task based upon case type.																		
Code Enforcement	4.047	DUE DATES - Ability for case officer to override due dates.																		
Code Enforcement	4.048	CASE SEARCH - Ability to locate a case by case number, violation type, address, owner, parcel number, etc.																		

Code Enforcement	4.049	NAME SEARCH - Provide ability to locate a case by any of the names associated with the case.																		
Code Enforcement	4.050	CASE CONTACTS - Ability to track unlimited number and category of contacts per case (e.g., owners, business owner, tenant, property manager, reporting party, etc.).																		
Code Enforcement	4.051	TRACKING CRITERIA - Provide capability to track case-related events by date, time, status, and code enforcement officer, etc.																		
Code Enforcement	4.052	MULTIPLE VIOLATIONS PER CASE - Allow multiple violations to be associated with a single case.																		
Code Enforcement	4.053	MULTIPLE VIOLATION NOTIFICATIONS - Ability to notify multiple users/departments of certain types of code violations																		
Code Enforcement	4.054	ACTIONS WITH EFFECTIVE DATES - Allow user to define violation related actions with effective dates.																		
Code Enforcement	4.055	RESOLUTION EFFECTIVE DATES - Allow user to define number of days for resolution with effective dates by violation type.																		
Code Enforcement	4.056	DISPOSITION VIOLATION - Provide capability to assign a user-defined disposition to each violation.																		
Code Enforcement	4.057	STANDARD COMMENTS - Ability to set up standard violation comments by violation type.																		
Code Enforcement	4.058	UNLIMITED FREE-FORM NARRATIVE NOTES - Provide ability to enter unlimited, free-form notes per violation.																		
Code Enforcement	4.059	DATE AND TIME STAMP NARRATIVE NOTES - Ability to date and time stamp each set of notes by user.																		
Code Enforcement	4.060	UNLIMITED INSPECTION FREE-FORM TEXT - Allow unlimited free-form text per inspection level.																		
Code Enforcement	4.061	LOCATION ALERTS - Ability to provide on-screen alerts when dealing with certain addresses (e.g., problem property information, hazardous materials on property, dangerous dog, etc.).																		
Code Enforcement	4.062	VIOLATION NOTIFICATIONS - Provide user-defined violation notification to multiple responsible parties (e.g., owners, property manager and/or occupants).																		
Code Enforcement	4.063	FOLLOW-UP INSPECTIONS - Establish user-defined follow-up inspection program to ensure corrections are made.																		
Code Enforcement	4.064	FOLLOW-UP PENDING ACTIONS - Provide automatic follow-up of pending actions based on date due.																		
Code Enforcement	4.065	WAIVE FEES - Ability to manually override default fees and apply additional fees as needed.																		
Code Enforcement	4.066	FEE EFFECTIVE DATES - Ability to change fees with effective dates.																		
Code Enforcement	4.067	NEXT STEPS - Ability to show/report next steps in the process, due dates and completion percentage for online and IVR public access.																		
Code Enforcement	4.068	RE-INSPECTION SCHEDULING - Ability to automatically reschedule follow up inspections in intervals of XX days, with the ability to manually override.																		
Code Enforcement	4.069	ANNUAL INSPECTIONS - Ability to perform annual code inspections.																		

Code Enforcement	4.070	DAILY FEES - Ability to assess penalties on a per daily basis until violation is resolved											
Code Enforcement	4.071	PERMIT HOLD - Place a hold on property to prevent permit issuance or use without code enforcement case resolution.											
Code Enforcement	4.072	COURT EVIDENCE FORMAT - Provide court-accepted evidentiary rules and trail for violation notices, free-form notes, and all attachments.											
Code Enforcement	4.073	TRACK HISTORY - Ability to track complete case history, including adjudication and judgment information.											
Code Enforcement	4.074	TIME TRACKING - Ability to track time by case, task, or event.											
Code Enforcement	4.075	LOCK CASE NOTES AND COMMENTS - Ability to prevent changes to prior case information, including notes and comments.											
Code Enforcement	4.076	HISTORY BY PARCEL AND ADDRESS - Provide history of code violations by parcel and address.											
Code Enforcement	4.077	HISTORY BY PERSON/ENTITY - Provide code violation history by person/entity.											

Code Enforcement	4.078	REPORTING AND PRINTING									
Code Enforcement	4.079	USER QUERIES - Ability for users to create quick queries and reports from within the system (i.e., counts, status, fees, etc.).									
Code Enforcement	4.080	REPORTING PARAMETERS - Ability for reports to accept parameters such as a date range for a report.									
Code Enforcement	4.081	REPORT SCHEDULING AND DELIVERY - Ability to set up reports to be automatically delivered on a scheduled basis.									
Code Enforcement	4.082	NOTIFICATIONS LETTERS - Ability to merge case data with template notification letters.									
Code Enforcement	4.083	USER DEFINED NOTIFICATIONS - Allow user to define formats for correspondence, notifications, letters, etc., by type of violation (without vendor customization).									
Code Enforcement	4.084	USER-DEFINED CORRESPONDENCE/NOTICE FORM LAYOUT - Print notifications on forms created in Microsoft Word or other user-defined form layout (e.g., door hangers)									
Code Enforcement	4.085	EDITABLE CORRESPONDENCE/NOTICATIONS - Utilizing forms created in Microsoft Word or other user-defined form layout, allow user to edit standard forms (e.g. notifications, correspondence, etc.)									
Code Enforcement	4.086	CASE INVESTIGATIVE REPORT - Ability to run a standard investigation report (or modify a standard report with Ad Hoc tools) that will include: master case information, complaint description, reporting party information, property information, party-complained-of information, business-complained-of information, revenue, referral information, and all chronological narrative notes.									
Code Enforcement	4.087	WIRELESS PRINTING - Ability to print, on location, from wireless printers.									
Code Enforcement	4.088	ATTACHMENTS - Ability to attach any file type (Word, Excel, .wav, digital, photo, etc.) to a case file, and allow for photos to be attached with a time stamp.									
Code Enforcement	4.089	PRINT ATTACHMENTS - Ability to automatically print attached photos with violation notices, letters, and citations.									

Code Enforcement	4.090	GENERAL SYSTEM TECHNOLOGY																	
Code Enforcement	4.091	SPELL CHECKING NARRATIVE NOTES - Provide spell checking capabilities for all narrative notes and forms/letter editors.																	
Code Enforcement	4.092	MS WORD - Utilize current versions of Microsoft Word as notice, letter, and citation editor.																	
Code Enforcement	4.093	MOBILE ACCESS - Ability to use mobile computers in the field with real-time access to the data base for code enforcement officers.																	
Code Enforcement	4.094	MOBILE OFFLINE STORE-AND-GO - Ability for system to work offline when in an area with no cellular coverage and automatically re-sync when back in cell coverage ("store-and-go") without user intervention.																	
Code Enforcement	4.095	SECURITY - Ability to restrict write access to Code Enforcement case by user and group.																	
Code Enforcement	4.096	SECURITY - Ability to restrict read access of Code Enforcement case by case type.																	
Code Enforcement	4.097	FIELD LEVEL SECURITY RESTRICTIONS - Ability to restrict specific fields or group of fields to specific users (e.g., driver's license, numbers, birth dates, etc.).																	
Code Enforcement	4.098	INTEGRATION																	
Code Enforcement	4.099	PERMITTING - Provide ability to flag parcels with code violations to notify building permits system at permit application entry.																	
Code Enforcement	4.100	PERMITTING - Ability to put permit process on hold if a code violation warrants such action.																	
Code Enforcement	4.101	PLANNING - Ability to put a planning/entitlement project on hold if a code violation warrants such action.																	
Code Enforcement	4.102	PARCEL/ADDRESS MANAGEMENT - The Parcel/Address Management application should provide address, parcel, owner, zoning, and other information to the Code Enforcement system.																	
Code Enforcement	4.103	MOBILE APPLICATION - Ability to use mobile devices, such as an iPad, windows tablet and/or laptop, with full application access.																	
Code Enforcement	4.104	MOBILE APPLICATION - Ability to attach photos from mobile device, such as an iPad, mobile tablet and/or laptop, with full application access.																	
Code Enforcement	4.105	INTERFACE - GIS - User should have the ability to select Code Enforcement data and display that data on a map, interfacing to ArcGIS SDE Server, including all open cases and required inspections.																	
Code Enforcement	4.106	INTEGRATION - ELECTRONIC CONTENT MANAGEMENT SYSTEM - Must integrate with Electronic Content Management System (To Be Determined) .																	
Code Enforcement	4.107	INTEGRATION - MS OUTLOOK -Ability for the system to integrate with Microsoft Outlook for messaging and scheduling.																	

Land Management Central Permitting System - Request for Proposal

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3rd-Party Application	Please estimate general cost estimates in comments not a quote, unless available due to your resell arrangement.
Custom Modification	Custom programming by vendor (not meant to be a set-up configuration that is standard process through implementation). Please estimate general costs in comments (not a quote).
Not Available	Not available in current or next release; interfaced/integrated third-party application or through custom modification.

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd-Party Application	Custom Modification	Not Available	Comments
Licensing/Registration									
Licensing/Registration	5.000	LICENSING/REGISTRATION							
Licensing/Registration	5.001	MASTER RECORD - Provide a Licenses/Registration Master Record with a minimum of the following data elements:							
Licensing/Registration	5.002	▪ License number							
Licensing/Registration	5.003	▪ Customer Account - system-wide master number (e.g., License., Cash Rcpts, A/R, etc.)							
Licensing/Registration	5.004	▪ License/Registration type							
Licensing/Registration	5.005	▪ Parcel number							
Licensing/Registration	5.006	▪ Business name							
Licensing/Registration	5.007	▪ FEIN #							
Licensing/Registration	5.008	▪ Business address							
Licensing/Registration	5.009	▪ Billing address							
Licensing/Registration	5.010	▪ Manager name							
Licensing/Registration	5.011	▪ Bill-To name							
Licensing/Registration	5.012	▪ Bill-To phone number							
Licensing/Registration	5.013	▪ Bill-To fax							
Licensing/Registration	5.014	▪ Business phone							
Licensing/Registration	5.015	▪ Emergency name							
Licensing/Registration	5.016	▪ Emergency phone number							
Licensing/Registration	5.017	▪ E-mail address							
Licensing/Registration	5.018	▪ Website address							
Licensing/Registration	5.019	▪ Mailing address							
Licensing/Registration	5.020	▪ Owner name							

Licensing/Registration	5.061	WORKFLOW - Ability to pre-establish workflow and task requirements																		
Licensing/Registration	5.062	WORKFLOW EDITS - Ability to modify workflow and task requirements as needed.																		
Licensing/Registration	5.063	NEXT STEPS - Ability to show/report next steps in the process, due dates and completion percentage for online and IVR public access.																		
Licensing/Registration	5.064	INSPECTION RESCHEDULING - Ability to automatically reschedule follow up inspections in intervals of XX days, with the ability to manually override.																		
Licensing/Registration	5.065	LATE FEE WAIVER - Ability to allow a one time late fee waiver.																		
Licensing/Registration	5.066	PENALTIES - Ability to apply a XX% per month penalty for a past due invoice up to a maximum of XX% of the base license fee.																		
Licensing/Registration	5.067	ADJUSTMENTS - Ability to limit a user's adjustment authority without a supervisor override.																		
Licensing/Registration	5.068	INVOICING/PAYMENT HISTORY - Ability to generate license/registration invoices and track payment history (e.g., bills, payments, partial payments, overpayments, refund amounts, penalties, inspection fees etc.).																		
Licensing/Registration	5.069	USER-DEFINED PRINT FORMATS - Ability to user-define print formats for licenses/certificate and renewal forms by type of license																		
Licensing/Registration	5.070	USER-DEFINED CORRESPONDENCE/NOTICE FORM LAYOUT - Print licenses and renewal notices on forms created in Microsoft Word or other user-defined form layout.																		
Licensing/Registration	5.071	LICENSE/REGISTRATION RENEWALS - Ability to automatically renew all "active" accounts regardless if they have past due balances or non-payment in a prior or previous years.																		
Licensing/Registration	5.072	LICENSE/REGISTRATION EXPIRATION DATE BY TYPE - Ability for annual license/registration expiration date to be January 1st or an anniversary date depending on the type of license/registration.																		
Licensing/Registration	5.073	RENEWALS & REMINDERS - Provide automatic generation of renewal notices and reminder letters.																		
Licensing/Registration	5.074	PRIOR BALANCE - Show prior balance on renewal notices.																		
Licensing/Registration	5.075	DELINQUENT LISTING - Provide on-demand listing of delinquent accounts and delinquency notices. Notice should be user-defined and editable.																		
Licensing/Registration	5.076	DELINQUENCY NOTICES - Ability to setup multiple delinquency notices.																		
Licensing/Registration	5.077	MAIL MERGE - Ability to generate a variety of letters to entities or persons and merge the billing information into the letter.																		
Licensing/Registration	5.078	PREVENT DUPLICATE PAYMENTS - Prevent acceptance of duplicate payments.																		
Licensing/Registration	5.079	SEARCH CRITERIA - Provide online search/query by license number, owner name, location, or business corporate officer's name, etc. Provide partial name capability on business name and owner name.																		

Licensing/Registration	5.080	ATTACHMENTS - Ability to scan documents and attach them to the entity or person; and/or to the license/registration record.																		
Licensing/Registration	5.081	NEW ONLINE LICENSE - Ability to receive a new license/registration application on-line via the website.																		
Licensing/Registration	5.082	WEB ACCESS - Complete routine tasks over the Internet associated with licenses or registrations, such as complete new applications or register online, search for license, renew, and submit payments online.																		
Licensing/Registration	5.083	CITIZEN ONLINE ACCESS - Ability for the public to view license status information online																		
Licensing/Registration	5.084	MASTER ACCOUNT COMMENTS - Provide unlimited free-form text.																		
Licensing/Registration	5.085	COMMENTS HISTORY BY TYPE - Provide ability to track comment/note history by type, user, and date.																		
Licensing/Registration	5.086	FIELD LEVEL SECURITY RESTRICTIONS - Ability to restrict specific fields or group of fields to specific users (e.g., driver's license, numbers, birth dates, etc.).																		
Licensing/Registration	5.087	REPORTING & INQUIRIES																		
Licensing/Registration	5.088	USER QUERIES - Ability for users to create quick queries and reports from within the system (i.e., counts, status, fees, etc.).																		
Licensing/Registration	5.089	REPORTING PARAMETERS - Ability for reports to accept parameters such as a date range for a report.																		
Licensing/Registration	5.090	REPORT SCHEDULING AND DELIVERY - Ability to set up reports to be automatically delivered on a scheduled basis.																		
Licensing/Registration	5.091	PAST DUE REPORT - Ability to produce a past-due or collections report.																		
Licensing/Registration	5.092	HISTORICAL REPORTING - System must be able to generate reports by year and specified periods.																		
Licensing/Registration	5.093	INTEGRATION & INTERFACES																		
Licensing/Registration	5.094	GENERAL LEDGER - Ability to interface to general ledger for posting of receivables and cash entries to proper accounts.																		
Licensing/Registration	5.095	CASHIERING - Ability to interface to cash receipts system to validate accounts and update license/registration or receipts.																		
Licensing/Registration	5.096	REFUNDS - Provide ability to generate refund checks for overpayment of license or tax. Refunds to be processed through interface to accounts payable (Munis)																		
Licensing/Registration	5.097	PARCEL/ADDRESS MANAGEMENT - Ability to integrate with land management database to retrieve address/parcel information.																		
Licensing/Registration	5.098	INTEGRATION - MS OUTLOOK -Ability for the system to integrate with Microsoft Outlook for messaging and scheduling.																		
Licensing/Registration	5.099	GIS - Ability to interface to GIS mapping products that support ESRI formats, including ArcGIS SDE Server.																		

Land Management Central Permitting System - Request for Proposal

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Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd-Party Application	Custom Modification	Not Available
Parcel/Address Management		Parcel/Address Management						
Parcel / Address Management	6.000	GENERAL						
Parcel / Address Management	6.001	PARCEL SEARCH FIELDS - Ability to search parcels by the following fields:						
Parcel / Address Management	6.002	▪ PIN						
Parcel / Address Management	6.003	▪ Status						
Parcel / Address Management	6.004	▪ Owner Name						
Parcel / Address Management	6.005	▪ Owner Address						
Parcel / Address Management	6.006	▪ Situs Address						
Parcel / Address Management	6.007	▪ Parcel jurisdiction						
Parcel / Address Management	6.008	▪ GIS mapping						
Parcel / Address Management	6.009	▪ Google Maps						
Parcel / Address Management	6.010	▪ Historical Permits						
Parcel / Address Management	6.011	PARCEL AND LOCATIONS - Ability to track and relate all location information (e.g., parcel numbers, addresses, and locations with or without addresses/parcel numbers, previous (old) parcels/addresses, etc.).						
Parcel / Address Management	6.012	NON-ADDRESS LOCATIONS - Ability to setup location identifications for parcels without addresses (vacant lots, intersections, road sections, easements without addresses, HOA lots without addresses, etc.).						
Parcel / Address Management	6.013	GEOGRAPHIC DATABASE - Provide a geographic database of parcel, occupancy, and land use with "unlimited" County-defined fields and attributes.						

Parcel / Address Management	6.014	SITE USE CODES - Ability to setup Site (land) Use Codes.							
Parcel / Address Management	6.015	COMMON PARCEL/ADDRESS INFORMATION TO ALL APPLICATIONS - Provide for one table structure to provide parcel/address information across all modules.							
Parcel / Address Management	6.016	ADDRESS SELECTION - Provide capability to select valid address and street names from a database (i.e., no free-form address entry).							
Parcel / Address Management	6.017	CHANGE ADDRESS ACCESS - Ability to restrict address and parcel number field changes to specific users.							
Parcel / Address Management	6.018	PARCEL/ADDRESS CHANGES - OPEN PERMITS - Ability to automatically generate triggers when parcel numbers or addresses with open permits are changed.							
Parcel / Address Management	6.019	MULTIPLE ADDRESSES PER PARCEL - Provide for multiple addresses per parcel.							
Parcel / Address Management	6.020	MULTIPLE PARCELS PER ADDRESSES - Provide for multiple parcels per address.							
Parcel / Address Management	6.021	MULTIPLE PARCELS WITH BOUNDARIES - Provide for the definition of parcels within multiple specific boundaries (i.e., commission districts, fire districts, School District, Flood Plain, Tract, CUP, PD, Spec. Plan, etc.).							
Parcel / Address Management	6.022	ZONING INFORMATION - Provide for the inclusion of zoning information by parcel.							
Parcel / Address Management	6.023	GENERAL PLAN INFORMATION - Ability to include multiple land use designations per parcel.							
Parcel / Address Management	6.024	X-Y-Z COORDINATES BY PARCEL - Provide for the storage of X-Y-Z coordinates by parcel.							
Parcel / Address Management	6.025	LEGAL PARCEL INFORMATION - Provide for the inclusion of legal description for each parcel.							
Parcel / Address Management	6.026	CHANGE CONTROL OF IMPORTED PARCEL INFORMATION - Provide a change control process for updates from the County Assessor or GIS and maintain this as an audit trail.							
Parcel / Address Management	6.027	TRACK ADDRESS/PARCEL HISTORY - Provide for tracking address/parcel history, including effective dates.							
Parcel / Address Management	6.028	TRACKING OF PARCEL SPLIT OR CONSOLIDATIONS - Ability to track genealogy of parcels and history of parcel splits or parcel consolidations.							
Parcel / Address Management	6.029	ADDRESS GENEALOGY - Ability to maintain genealogy of an address and its history.							
Parcel / Address Management	6.030	ATTACHED PHOTOS, IMAGES, DRAWINGS, DOCUMENTS TO PARCEL - Provide capability to attach photos, images of final plan drawings, documents, etc., to a parcel database record.							
Parcel / Address Management	6.031	MAP DISPLAY - Ability to select and display parcel data on a map. Provide capability to do spatial updates and analysis.							
Parcel / Address Management	6.032	MAP DISPLAY - Ability to create vicinity notification maps (e.g., 500 ft. buffers) including exportable addressee list to Excel.							
Parcel / Address Management	6.033	PROPERTY CONTACTS - Ability to maintain multiple property contact types with related field data (e.g., name, address, etc., for owners, HOAs, authorized agents, tenants, etc.).							

Parcel / Address Management	6.034	UNLIMITED OWNERS - Ability to define unlimited number of owners.							
Parcel / Address Management	6.035	UNLIMITED OWNERS - MAILING ADDRESSES - Ability to define unlimited number of owner mailing addresses.							
Parcel / Address Management	6.036	SITUS ADDRESS - Ability for system to separate Situs address from mailing and owner addresses.							
Parcel / Address Management	6.037	LAST NAME FIELD LENGTH - Ability for last-name field to have a minimum of 100 characters.							
Parcel / Address Management	6.038	HISTORICAL OWNER INFORMATION - Ability to maintain historical ownership information with effective dates.							
Parcel / Address Management	6.039	HISTORICAL TENANT INFORMATION - Ability to maintain historical tenant information with effective dates.							
Parcel / Address Management	6.040	PROPERTY TYPE ALERTS - Ability for system to alert users that a property is in special zones when viewing property information (e.g., flood plain, liquefaction, high-fire zones, earthquake faults, redevelopment areas, special housing, special plan areas, stream buffers, etc.).							
Parcel / Address Management	6.041	STREAM BUFFER ALERT - Ability to generate an on-screen alert if a parcel has a stream that requires a stream buffer.							
Parcel / Address Management	6.042	PUBLIC SEWER AVAILABILITY - Ability to generate a flag if a parcel is able to access the public sewer system.							
Parcel / Address Management	6.043	JURISDICTION DATA - Ability to define jurisdiction-specific (specific municipality versus county) data for all parcels and addresses.							

Parcel / Address Management	6.044	INTEGRATION - INTERFACE							
Parcel / Address Management	6.045	IMPORT OF COUNTY OR OTHER PARCEL INFORMATION - Provide for the establishment and periodic update of County Assessor's database (Assess Pro).							
Parcel / Address Management	6.046	INTERFACE - CITIZEN ONLINE ACCESS - Ability for the citizens to retrieve parcels and addresses on a map (using ArcGIS mapping services) and view parcel and address information.							
Parcel / Address Management	6.047	INTEGRATION - CAMA SYSTEM - The system must automatically validate entered Parcel Identification Numbers against the County CAMA system.							
Parcel / Address Management	6.048	INTERFACE - PLANNING - Parcel Management should provide address, parcel, owner, zoning information, and other location data to Planning application.							
Parcel / Address Management	6.049	INTERFACE - CODE ENFORCEMENT - Parcel Management should provide address, parcel, owner, zoning information, and other location data to Code Enforcement application.							
Parcel / Address Management	6.050	INTERFACE - PERMITS - Parcel Management should provide address, parcel, owner, zoning information, and other location data to the Permits application.							
Parcel / Address Management	6.051	INTERFACE - LICENSES - Parcel Management should provide address, parcel, owner, zoning information, and other location data to the License application.							
Parcel / Address Management	6.052	PARCEL ALERTS TO OTHER MODULES - Ability for County-defined parcel alerts to popup or display in other LMCPs modules (e.g., open code enforcement case, flood zone, environmental sensitive property, deed restrictions, etc).							
Parcel / Address Management	6.053	PARCEL AND SUB-DIVISION ASSOCIATIONS - Ability to support the association of parcels to corresponding sub-division.							
Parcel / Address Management	6.054	ALERT - ADDRESS FOR EXISTING PERMIT - Automatic triggers when parcels or addresses go inactive and there are existing permits.							

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GIS Integration									
GIS Integration	7.000	ESRI GIS INTEGRATION							
GIS Integration	7.001	INTERFACE - GIS - Interface to GIS mapping products that support ESRI formats, using ArcGIS SDE Server.							
GIS Integration	7.002	INTERFACE - GIS - Ability to find any parcel on a map by address or parcel number and drill down to all related information, flags, permits, documents, photos, conditions, GIS layers, etc.							
GIS Integration	7.003	INTERFACE - GIS AERIAL MAPS - Ability to access GIS aerial maps from the GIS database							
GIS Integration	7.004	INTERFACE - GIS AERIAL MAPS - Ability to access GIS aerial maps from the field.							
GIS Integration	7.005	GIS - SATELLITE LAYER - Ability to use a satellite layer for viewing GIS map with LMCPs data.							
GIS Integration	7.006	PARCEL/OTHER MODULE INFORMATION FROM MAP - Provides ability to select parcel or group of parcels from GIS map and drill-down to parcel or activity information (e.g., any parcel data elements and other module information such as permits, projects, code cases, etc.).							
GIS Integration	7.007	VIEW MASTER RECORD LOCATION INFORMATION ON MAP - Ability to pull up map view of location from application/module master record (e.g., planning project, permit, inspection, code enforcement case, etc.).							

GIS Integration	7.008	VIEWING ACTIVITY ON MAP - Provide the ability to display locations on the GIS viewer by activity type/status (e.g., permits by status [open/closed, type], planning project, code cases [open/closed, type], etc.).																		
GIS Integration	7.009	GIS MAP - DRILL DOWN - Ability to drill into permits, projects, cases, licenses, and inspections from GIS map viewer.																		
GIS Integration	7.010	GIS MEASUREMENT & BUFFER TOOLS - Allow for measurement tools and/or buffer capabilities interfaced with the GIS mapping service.																		
GIS Integration	7.011	RADIUS SEARCHES - Ability to perform searches within a radius; buffering a parcel or area.																		
GIS Integration	7.012	PROXIMITY ALERTS - Ability for system to alert users of proximity alerts for special and/or hazard zone area upon application creation, with the ability to stop the creation process.																		
GIS Integration	7.013	LOCATION SEARCHES - Provides ability to search for locations by anything on the map: an address, a location, a name, an intersection, etc.																		
GIS Integration	7.014	QUERYING DATABASE ATTRIBUTES - Provides ability to print user-defined maps showing any queried parcel attributes in database.																		
GIS Integration	7.015	POSITIONING COORDINATES - Provides location fields to identify the actual parcel/locations/wells through the use of Geographical Positioning coordinates and Process Control Location IDs.																		
GIS Integration	7.016	DISPLAY MAP - Ability to color code parcels on map by permit activity.																		
GIS Integration	7.017	GIS MAPPING - DEVELOPMENTS - Ability to track development ID's with GIS mapping, in order to track the routing and timeline of the information, particularly the acceptance of Design plans, delivery of as-builts and infrastructure dedication.																		
GIS Integration	7.018	GIS DATABASE - MASTER ADDRESSING - Ability to use the GIS as the Addressing Master Database																		
GIS Integration	7.019	INTEGRATION - ADDRESS IMPORT/EXPORT - CHANGE DETECTION AND UPDATES - Import and Export of addressing information to the LMCPS Parcel/Address module including change detection and update of existing information.																		
GIS Integration	7.020	BI-DIRECTIONAL INTERFACING - The interface between the GIS and other vendor modules should be bi-directional. The ability to query, view, and interact with location data with a spatial location and display them in a GIS viewer.																		
GIS Integration	7.021	GIS DATA SYNCHRONIZATION - Provides ability to synchronize any changes from GIS to update related parcel/location data from vendor modules.																		

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Cashiering									
Cashiering	8.000	GENERAL CASH RECEIPTS GENERAL FEATURES							
Cashiering	8.001	CASH RECEIPT TYPES - Ability to define unlimited fields for different type of cash receipts/payments.							
Cashiering	8.002	USER-DEFINED PAYMENT CODES - Provide for the user definition of Payment Types and Tender Method(s).							
Cashiering	8.003	MISCELLANEOUS RECEIPTS - Ability to process and receipt fees for miscellaneous items (i.e., books, maps, etc.).							
Cashiering	8.004	RECEIPT PRINTING - Provide the ability to print receipt from a PC that is not a cash register.							
Cashiering	8.005	MULTIPLE CASH ACCOUNTS - Allow receipts to be recorded into multiple general ledger accounts.							
Cashiering	8.006	CASH RECEIPTS INQUIRY - Allow inquiry of Cash Receipts by each of the following: <ul style="list-style-type: none"> ▪ Customer Account Number ▪ Name ▪ Address ▪ Receipt Number ▪ Payment Date ▪ General Ledger account number ▪ Check Number and/or Payment Amount 							

Cashiering	8.007	ACCESS TO ACCOUNT INFORMATION - Provide inquiry access to and validation of customer account information from all integrated modules.									
Cashiering	8.008	CASH RECEIPTS JOURNAL - Provide for the ability to print Cash Receipts Journal by cashier and by totals. Include: <ul style="list-style-type: none"> ▪ Bank Account ▪ General Ledger Account Number ▪ Payment Type ▪ Customer Account ▪ Permit ▪ Agreement ▪ Date ▪ Time ▪ Dollar Amount ▪ Description 									
Cashiering	8.009	INVOICE TYPES - Ability to collect payments for unlimited records (e.g. multiple permits).									
Cashiering	8.010	WORKFLOW HOLDS - Ability to verify that payments have been made in order to proceed through the workflow associated with any process defined in the system (e.g., insufficient funds checks, rejected transactions, etc. should pause the process until resolved.)									
Cashiering	8.011	FRONT COUNTER CASHIERING									
Cashiering	8.012	CASH DATA ENTRY DEFAULT OVERRIDES - Ability to override the system-displayed default amount during cash receipts entry.									
Cashiering	8.013	OVERRIDE G/L CODE - Ability to enter or override a default general ledger code at time of receipt.									
Cashiering	8.014	ADDITIONAL LEDGER CODES - Ability to add additional ledger accounts to a cash receipt.									
Cashiering	8.015	LEDGER CODE UPDATES AND REPORTING - Ability to manage updates and additions to ledger account codes for proper reporting.									
Cashiering	8.016	MIX RECEIPT OF TENDERS - Ability to process split or mixed tendering situations.									
Cashiering	8.017	TENDER TYPE SUPPORT - Ability to enter, track separately, and simultaneously process the following tendering situations: cash, check, credit/debit card, and money orders.									
Cashiering	8.018	ACCOUNT CREDIT BALANCE - Ability for Cash Receipting to handle customer accounts that have a credit balance.									
Cashiering	8.019	TENDER TYPE ALERT - Ability to flag person/entities and addresses as cash or credit card only (no checks).									
Cashiering	8.020	DAILY DECLINED TRANSACTIONS - Ability to generate daily reports for rejected bank and credit card transactions.									
Cashiering	8.021	NSF CHECK MANAGEMENT - Ability to block check acceptance by customer with bad check history.									
Cashiering	8.022	DATETIME TRANSACTION STAMP - Ability to capture the transaction time of day on each transaction.									

Cashiering	8.023	CUSTOMER INTERNET PAYMENTS - Provide for customer payment via the Internet.																		
Cashiering	8.024	ATTACH FILES/DOCUMENTS - Provide the ability to attach files or scanned documents to the cash receipt record.																		
Cashiering	8.025	CASH RECEIPT CORRECTIONS - Ability to correct cash receipts made in error before posting the batch.																		
Cashiering	8.026	PAYMENT ADJUSTMENTS - Ability to make positive or negative payment adjustments due to user errors.																		
Cashiering	8.027	REVERSALS - Ability to reverse a payment/renewal mistake before the cashiering payment batch is posted.																		
Cashiering	8.028	END OF DAY PROCESSING - Allow for end-of-day processing at any time, print a bank deposit slip and a summary report, and initiate following day's business.																		
Cashiering	8.029	PENDING POST AND END OF THE DAY POST - Provide ability to "pending post" to all modules' customer accounts during the day. Provide ability to permanently post customer record information at the end of the day with default general ledger codes.																		
Cashiering	8.030	INQUIRY & REPORTS																		
Cashiering	8.031	USER QUERIES - Ability for users to create quick queries and reports from within the system (i.e., counts, status, fees, etc.).																		
Cashiering	8.032	PAYMENT TRACKING - Ability to maintain on-line tracking of payments and fees billed, by permit, by payment type, by customer, by agreement, etc.																		
Cashiering	8.033	DAILY REVENUE REPORTS - Ability to print a daily revenue report																		
Cashiering	8.034	REPORTING PARAMETERS - Ability for reports to accept parameters such as a date range for a report.																		
Cashiering	8.035	REPORT SCHEDULING AND DELIVERY - Ability to set up reports to be automatically delivered on a scheduled basis.																		
Cashiering	8.036	AUDIT TRAIL OF CASH RECEIPTS - Ability to produce a full audit trail of cash entries and error corrections.																		
Cashiering	8.037	BALANCING REPORT - Provide for a report at end of day to assist with bank reconciliation and generate a bank deposit.																		
Cashiering	8.038	SSAE 16 REPORTS - Ability to generate SSAE 16 Type 2 Reports for compliance with AICPA attestation standards.																		
Cashiering	8.039	PCI COMPLIANCE - Application is subject to the payment card information data security standard (PCI-DSS). If not, please describe how payment card transactions are handled and what information is stored to allow reconciliation of payment card transactions.																		
Cashiering	8.040	PCI COMPLIANCE - Application has been certified as meeting the Payment Application Data Security Standard (PA-DSS) by a Payment Application Qualified Security Assessor (PA-QSA). If not, please state when the vendor expects certification to be completed.																		

Cashiering	8.041	PAYMENT INFORMATION SECURITY- Ability for none of the County's reports or stored data received from the Payment Service Provider to include any credit/debit card numbers, bank account numbers or any security codes.							
Cashiering	8.042	CARDHOLDER INFORMATION SECURITY PROGRAM (CISP) -The systems, software, processes and partners adhere to the requirements of the national cardholder Information Security Program (CISP).							

Cashiering	8.043	INTEGRATION								
Cashiering	8.044	INTEGRATION - CREDIT CARD PROCESSING - Ability to Interface with Elavon Credit Card Payment Processing.								
Cashiering	8.045	INTEGRATION - TYLER MUNIS - Allow one-way integration with County's centralized financial system (Munis) to automatically generate journal entries to the general ledger and ensure balancing and non-duplicate transaction posting for all cash receipt/payment								
Cashiering	8.046	INTEGRATION - TYLER MUNIS - SQL - Interface with MUNIS for real-time or batch SQL updates.								
Cashiering	8.047	INTEGRATION - LICENSING - Provide ability to receive and post cash receipt transactions from Licensing/Registrations.								
Cashiering	8.048	INTEGRATION - ELECTRONIC CONTENT MANAGEMENT SYSTEM - Must integrate with Electronic Content Management System (To Be Determined) .								
Cashiering	8.049	INTEGRATION - PERMITTING - Integrate in real time to Permitting for payment processing.								
Cashiering	8.050	INTEGRATION - PLANNING - Integrate in real time to Planning for payment processing.								
Cashiering	8.051	INTEGRATION - CODE ENFORCEMENT - Integrate in real time to Code Enforcement for payment processing.								
Cashiering	8.052	INTEGRATION - INSPECTIONS - Integrate in real time to Inspections for annual inspections payment processing.								
Cashiering	8.053	RECEIPT OF AMOUNT AND PAYEE - Ability to print a receipt to whoever pays the fee (payee) for the amount of the specific fee and not a cumulative amount that has been paid for the project, in order to support any refund to the proper payer.								
Cashiering	8.054	NON-PERMIT FEES - COLLECTIONS AND TRACKING - Ability to collect and track outstanding balances not associated with a project or building permit (e.g., EH re-inspections)								

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Ad Hoc Reporting									
Ad Hoc Reporting	9.000	AD HOC REPORTING GENERAL FEATURES							
Ad Hoc Reporting	9.001	USER QUERIES - Ability for users to create quick queries and reports from within the system (i.e., counts, status, fees, etc.).							
Ad Hoc Reporting	9.002	REPORTING PARAMETERS - Ability for reports to accept parameters such as a date range for a report.							
Ad Hoc Reporting	9.003	REPORT SCHEDULING AND DELIVERY - Ability to set up reports to be automatically delivered on a scheduled basis.							
Ad Hoc Reporting	9.004	REPORT WRITER PERFORMANCE - Capability to process report writer requests at any time throughout the processing day, without impacting system performance.							
Ad Hoc Reporting	9.005	REPORT WRITER PERFORMANCE - Provide the added ability to download to multiple file types including Microsoft Access, Word, and Excel. Please elaborate on other compatible file formats.							
Ad Hoc Reporting	9.006	REPORT WRITER OPERATIONS - Provide the ability to support menu-driven report scheduling options.							
Ad Hoc Reporting	9.007	REPORT WRITER OPERATIONS - Capability to generate error messages with a description of corrective actions.							
Ad Hoc Reporting	9.008	REPORT WRITER HELP - Capability to support on-line instructions "help".							

Ad Hoc Reporting	9.009	REPORT WRITER DATA DICTIONARY IDENTIFICATION - Capability to reference specific data items by field descriptive name (i.e., data dictionary field names and user-screen field names are the same).																		
Ad Hoc Reporting	9.010	REPORT WRITER DATA DICTIONARY IDENTIFICATION - Capability to reference an Entity Relational Diagram (ERD) with field level data values and acronyms.																		
Ad Hoc Reporting	9.011	REPORT RETENTION - Ability to save and maintain report specifications for periodic use.																		
Ad Hoc Reporting	9.012	REPORT PROMPTING - Ability to display report prompts, with sort and extraction selection options.																		
Ad Hoc Reporting	9.013	REPORT SORTING AND TOTALING OPTIONS - Capability to choose various sorting options and report totaling options with appropriate sub-totaling based on selected sort option.																		
Ad Hoc Reporting	9.014	REPORT SELECTION OPTIONS - Capability to query on any element of a transaction history file including the type of transaction and the process that originated the transaction.																		
Ad Hoc Reporting	9.015	REPORT FILE SELECTION OPTIONS - Ability to report on any user defined field.																		
Ad Hoc Reporting	9.016	REPORT FILE REFRESHING - Capability to store and recall items whose values are derived from other values in the data files.																		
Ad Hoc Reporting	9.017	REPORT COLUMN DEFINITION - Capability to support default or special column headings.																		
Ad Hoc Reporting	9.018	REPORT EDIT WORD DEFINITION - Capability to support unique field editing (currency, symbol, commas, decimal places, etc.) on specific data items.																		
Ad Hoc Reporting	9.019	REPORT OUTPUT SELECTION - Ability to support user specification of the output media (printer, file, or screen).																		
Ad Hoc Reporting	9.020	PRODUCE MULTIPLE REPORT COPIES - Capability to generate multiple report copies automatically.																		
Ad Hoc Reporting	9.021	REPORT CONDITIONING OPTIONS - The following report writing capabilities need to include the ability to arithmetically calculate functions:																		
Ad Hoc Reporting	9.022	▪ Capability to generate reports using "include and exclude" statements.																		
Ad Hoc Reporting	9.023	▪ Capability to generate reports using "and" and "or" statements																		
Ad Hoc Reporting	9.024	▪ Capability to generate reports using "equal to", "less than" and "greater than" statements.																		
Ad Hoc Reporting	9.025	▪ Capability to use an "if-then-else" sequence within one query.																		
Ad Hoc Reporting	9.026	REPORT FIELD SELECTION OPTIONS - Capability to combine the use of multiple fields for selection options from more than one database table related to one query.																		
Ad Hoc Reporting	9.027	APPEND FIELD VALUES - Capability to "append" data or field values to an existing field.																		
Ad Hoc Reporting	9.028	REPORT EXTRACTION OPTIONS 1 - Capability to "extract" specific data or contents within a field.																		

Ad Hoc Reporting	9.029	REPORT EXTRACTION OPTIONS 2 - Capability to combine the use of multiple values for a specified field for selection options.																		
Ad Hoc Reporting	9.030	REPORT SORTING OPTIONS - Capability to support major and minor sort options.																		
Ad Hoc Reporting	9.031	REPORT SUBTOTALS - Capability to support subtotal and total options by field.																		
Ad Hoc Reporting	9.032	MATCHING RECORDS - Capability to support a matching record option for use with multiple database tables within one query.																		
Ad Hoc Reporting	9.033	ARITHMETIC FUNCTIONS - Capability to support the use of arithmetic: "addition", "subtraction", "multiplication", and "division" calculations of queried data in the report design.																		
Ad Hoc Reporting	9.034	BASIC STATISTICAL FUNCTIONS - Capability to support mean and standard deviations and ability to build cross tabulations.																		
Ad Hoc Reporting	9.035	ELECTRONICALLY FILE REPORTS - Electronically file reports for subsequent user access (e.g., on an internal intranet page or dashboard), and the ability to notify users that scheduled reports have been run and are available for electronic access.																		
Ad Hoc Reporting	9.036	REPORT SCHEDULING AND DISTRIBUTION - Provide report scheduling along with email distribution for recipients.																		
Ad Hoc Reporting	9.037	DISPLAY PRINTER QUEUES PRIOR TO PRINTING - View or print reports, as an option.																		
Ad Hoc Reporting	9.038	REPORT IDENTIFICATIONS - All reports should contain organization name, report title, column heading descriptions, processing date, sequentially numbered pages, and subtotals at each level break as appropriate.																		
Ad Hoc Reporting	9.039	REPORT FORMAT - Ability to save reports in PDF, Microsoft Word, and Microsoft Excel Format.																		
Ad Hoc Reporting	9.040	REPORT PUBLISHING FORMATS - Ability to publish reports in formats including PDF, MS Word or MS Excel.																		
Ad Hoc Reporting	9.041	PDF FOLDERS - Ability to setup auto save folders by type of report when using a pdf writer tool.																		
Ad Hoc Reporting	9.042	SAVE REPORT SETTINGS - Ability to save report settings as a specific report name attached to a user-defined report menu.																		
Ad Hoc Reporting	9.043	INTEGRATION - SQL SERVER REPORTING SERVICES - Ability to integrate SSRS Reporting Services into the Application for documents and statistical reporting needs.																		
Ad Hoc Reporting	9.044	ON-SCREEN REPORTING - Ability to preview a report on the screen, prior to printing.																		
Ad Hoc Reporting	9.045	ACTIVITY ANALYSIS - Ability to analyze metrics in the data, such as identify trends in workloads, activities, permits, etc.																		

Land Management Central Permitting System - RFP Feature/Function Specifications

Please input a "1" in the appropriate column to the right of the feature/function/capability statement. Further explanations, or information regarding 3rd party software and/or modification costs should also be provided in the comments column and Project Costs worksheet (Appendix G), if applicable. Each "non-title" row (?000) should have only one "1". Blank rows will be scored as Not Available.

Legend:

Standard - Current	Available in current software release
Standard - Next Release	Guaranteed available in next release of software
Report Writer	Report Writer function through Standard Reports or Ad Hoc Report Writer
3rd-Party Application	Please estimate general cost estimates in comments not a quote, unless available due to your resell arrangement.
Custom Modification	Custom programming by vendor (not meant to be a set-up configuration that is standard process through implementation). Please estimate general costs in comments (not a quote).
Not Available	Not available in current or next release; interfaced/integrated third-party application or through custom modification.

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd-Party Application	Custom Modification	Not Available	Comments
General System & Security									
Gen Sys & Security	10.000	GENERAL SYSTEM & SECURITY							
Gen Sys & Security	10.001	GENERAL SECURITY FEATURES - Provide password security by:							
Gen Sys & Security	10.002	▪ Application							
Gen Sys & Security	10.003	▪ Menu item/function within application							
Gen Sys & Security	10.004	▪ Field level							
Gen Sys & Security	10.005	HIDDEN FIELD TRIGGERS - Ability to make fields view only and/or hidden, based on conditional statements, if desired (i.e., if the value of a drop down equals 'Other', allow a field called 'Other Description' to show, and make that field a required field; otherwise, hide the field.)							
Gen Sys & Security	10.006	KEY VALUE AUTHORIZED CHANGES - Ability to apply changes to be key values such as PINs, based on security (i.e., supervisor authorized override)							
Gen Sys & Security	10.007	ROLE/USER SECURITY SETTINGS - Ability for application security to be designed based on roles and single individual users.							
Gen Sys & Security	10.008	RECORD SEARCH - Ability to inquire on a single record directly by key or field search.							
Gen Sys & Security	10.009	SINGLE SIGN-ON - ACTIVE DIRECTORY - Support of Single Sign-on and Active Directory.							
Gen Sys & Security	10.010	SECURITY ACCESS AUDIT TRAIL - Maintain the date of last password change for each user.							
Gen Sys & Security	10.011	PASSWORD RECOVERY - Provide users self-password recovery capability.							

Gen Sys & Security	10.012	RESTRICT SECURITY ACCESS OF SELECTED TRANSACTIONS - Restrict entry of certain transactions by password.																		
Gen Sys & Security	10.013	PASSWORD ENCRYPTION - Provide password encryption.																		
Gen Sys & Security	10.014	CREATE SECURITY PROFILE BY COPYING EXISTING PROFILE - Allow creation of new user rights by copying another user's right levels and modifying.																		
Gen Sys & Security	10.015	SECURITY ACCESS - Ability to update and inquire online into any master file record, provided user has the proper authorization.																		
Gen Sys & Security	10.016	SECURITY ACCESS CONTROL - Assign view only access to specific user profiles.																		
Gen Sys & Security	10.017	MAINTAIN AUDIT TRAILS - Maintain audit trails including changed by, changed date, and record (print or file) of changes.																		
Gen Sys & Security	10.018	MULTI-USER ENVIRONMENTS - Operate in a multi-user environment so record locking will be required to maintain the integrity of the data.																		
Gen Sys & Security	10.019	MULTI-USER ENVIRONMENTS - Ability to prevent any master file record from being deleted if that record is referenced in any other file.																		
Gen Sys & Security	10.020	WINDOWS SQL ENVIRONMENT - System must be Windows, SQL compatible (SQL 2008 R2, 2012) and browser-based.																		
Gen Sys & Security	10.021	TESTING ENVIROMENT - Ability to establish test/demo environment with structured version control and full configuration management access and capability.																		
Gen Sys & Security	10.022	WEB 508 COMPLIANCE - Ability for Web applications to be section 508 compliant for browsing with assistive technologies.																		
Gen Sys & Security	10.023	TROUBLESHOOTING HELP - Provide a help/search function for troubleshooting with an extensive knowledgebase available.																		
Gen Sys & Security	10.024	VIRTUALIZATION - Ability for application to be virtualized, even if not on Production side.																		
Gen Sys & Security	10.025	MULTIPLE APPLICATION WINDOWS - Support multiple windows open at one time (not limited to modal window).																		
Gen Sys & Security	10.026	FORWAD/BACKWARD NAVIGATION - Ability to navigate through records or files on a screen in forward or backward directions.																		
Gen Sys & Security	10.027	ADJUSTABLE ONLINE COLOR SCHEMES - Online capabilities with similar colors and headers as County website.																		
Gen Sys & Security	10.028	ON-SCREEN REPORTING - Ability to preview a report on the screen, prior to printing.																		
Gen Sys & Security	10.029	REPORT PUBLISHING FORMATS - Ability to publish reports in formats including PDF, MS Word or MS Excel.																		
Gen Sys & Security	10.030	USER DASHBOARDS - Ability to incorporate real-time individual user dashboard capability to display dynamic charts and graphs.																		
Gen Sys & Security	10.031	DEPARTMENT/DIVISION SCREENS - Ability to customize screens for different departments/divisions.																		
Gen Sys & Security	10.032	DOWNLOAD APPLICATION DATA THROUGH DESKTOP APPLICATIONS - Download to or access application data through desktop productivity tools such as spreadsheets, word processors, or report writers.																		

Gen Sys & Security	10.033	SYSTEM BACKUP UTILITIES AND PROCESSES - Provide backup utilities enabling the backup of individual items, application databases or the entire system.										
Gen Sys & Security	10.034	VENDOR SUPPORT ACCESS TO CLIENT - Provide electronic connection. Vendor can connect to computer server for diagnosis and resolution of software problems.										
Gen Sys & Security	10.035	TABULAR CONFIGURATION STRUCTURE - Ability to configure and set up of variable features, such as fees and user-defined data types, in a table-driven manner as opposed to code-driven.										
Gen Sys & Security	10.036	COUNTY CONFIGURATION CHANGES - Ability to perform configurations, parameter settings, and configuration changes such as annual fee schedule changes, data fields, and processing without the involvement of the vendor.										
Gen Sys & Security	10.037	ONLINE DOCUMENTS - Ability for documents to be available online to the staff and general public.										
Gen Sys & Security	10.038	ONLINE TRAINING DOCUMENTATION - Online access to printable training materials and other support documentation.										
Gen Sys & Security	10.039	CUSTOMIZED FEATURES DOCUMENTATION - Provide features to assist with the documentation of the customized system, and specific documentation of the customized system where the company provided the customization.										
Gen Sys & Security	10.040	EMAIL INTEGRATION - Sending emails from system utilizing standard SMTP protocols.										
Gen Sys & Security	10.041	INTEGRATION - MS OUTLOOK - Ability for the system to integrate with Microsoft Outlook for messaging and scheduling.										

Appendix B
VENDOR PROFILE

Vendor Name: _____

SOFTWARE VENDOR INFORMATION

Company Name
Street Address
City, State, Zip code
Telephone Number
Primary Contact
Secondary Contact (if applicable)

RESELLER INFORMATION (if applicable)

Company Name
Street Address
City, State, Zip code
Telephone Number
Primary Contact
Secondary Contact (if applicable)

SOFTWARE SUPPORT

Location of Application Software
Support Personnel
Number of Application Software
Support Personnel
Support Hours (designate time
zone)
Guaranteed Response Time
Average Response Time
Average Resolution Time
800 Number Access

SOFTWARE SUPPORT (if applicable)

Location of Application Software
Support Personnel
Number of Application Software
Support Personnel
Support Hours (designate time
zone)
Guaranteed Response Time
Average Response Time
Average Resolution Time
800 Number Access

Appendix C
VENDOR PROFILE / FINANCIAL INFORMATION

Vendor Name: _____

VENDOR INFORMATION

RESELLER INFORMATION (if applicable)

Vendor Name
Number of Years in Business
Total Number of Employees
Organization Classification (Private, Public, Other)

Reseller Name
Number of Years in Business
Total Number of Employees
Organization Classification (Private, Public, Other)

VENDOR FINANCIAL INFORMATION

RESELLER FINANCIAL INFORMATION (if applicable)

Annual Revenue
Percent of Annual Revenue Allocated to R & D
Percent of Annual Revenue Generated from New Sales
Percent of Annual Revenue from Annual Recurring Income

Annual Revenue
Percent of Annual Revenue Allocated to R & D
Percent of Annual Revenue Generated from New Sales
Percent of Annual Revenue from Annual Recurring Income

Appendix D
VENDOR CUSTOMER BASE

Vendor Name: _____

Note: If you are a VAR, please provide the same information for your specific company in addition to the software vendor's information.

Table with 3 columns: BY THE FOLLOWING CRITERIA, NUMBER OF CUSTOMERS (Not Installs), and NUMBER OF North Carolina CUSTOMERS (Not Installs). Rows include categories like Total - All Customers, Total Counties, and various population-based and service-based criteria.

Appendix E
VENDOR/RESELLER REFERENCES

Vendor Name: _____

Note: If you are a Reseller/VAR, clearly indicate which references are for your specific company.

	Customer Name	Contact Name	Phone Number	Population	Installation Date	APPLICATIONS (please list)
1)						
2)						
3)						
4)						
5)						
6)						
7)						
8)						
9)						
10)						

Note: Please use application code legend if necessary.

Appendix F
VENDOR GENERAL SYSTEM INFORMATION

Vendor Name: _____

GENERAL QUESTIONS

	Yes	No
Will you agree to incorporate RFP and your proposal into the contract?	_____	_____
Will you hold prices firm for 120 days from proposal due date?	_____	_____
Is the source code held in escrow at a third-party institution? If yes, please identify the third party. If not, will you agree to providing such a service? Explain:	_____	_____

Will support fees include upgrades to meet all State and Federal mandated changes (e.g., payroll issues, reports, calculations)?	_____	_____
Will application software license be a license in perpetuity?	_____	_____

SYSTEM SUPPORT INFORMATION

	Yes	No
Can one Vendor install all application software? If not, please explain.	_____	_____
Can one Vendor support all application software? If not, please explain.	_____	_____
Can the vendor connect remotely to system for diagnostics and/or support? Is there an associated cost?	_____	_____
Is there a WEB site for application software customer updates?	_____	_____
Can the WEB site be used to communicate support issues and downloads?	_____	_____
Is there an application software Users' Group?	_____	_____

Appendix F
VENDOR GENERAL SYSTEM INFORMATION

Vendor Name: _____

SOFTWARE APPLICATION INFORMATION

On what platforms/operating systems will the application software run? Include any client operating system restrictions or additional connectivity requirements.

Respond:

What year was the current platform version of the proposed software released?

Respond:

Did you develop the original software or was it purchased? If developed by you, what is the current release and when was it originally developed? If purchased, identify the company from whom you acquired the software.

Respond:

What database configuration is being proposed? (Preference towards MS SQL) If you are proposing third-party software in addition to yours, what database configuration is being proposed for their system?

Respond:

What database options are available? (Preference towards MS SQL)

Respond:

Please describe the software upgrade policy and process.

Respond:

Please describe the software patch delivery policy and process.

Respond:

Appendix G
PROJECT COST ESTIMATES

Vendor Name: _____

NOTES & INSTRUCTIONS

Supplemental Pricing in your company's standard format can be provided separately.
 However, even if you provide supplemental pricing, this project costs worksheet must be completed for summary evaluation purposes.
 Additional rows and/or descriptions can be added if necessary.
 If an item is included elsewhere, please say included.
 DO NOT delete any rows or change any formulas.

One-Time Costs **PRICE**

Software License Fees	\$ -
Training Fees	\$ -
Project Management	
Installation/Implementation Fees	
Modifications/Enhancements Estimates (see Appendix J)	\$ -
Report & Inquiry Development	
Interface Development Estimates (see Appendix H)	\$ -
Conversion Assistance (see Appendix I)	\$ -
Other (Please List as needed)	
Hardware/System Software (estimates, if applicable)	
System Hardware	
System Software	
Installation (if applicable)	
Other Costs (Please List)	
Travel & Related Expenses	
Taxes	
	\$ -

Annual Recurring Costs

Application Annual Maintenance/Support	\$ -
(24/7 Telephone Support (Yes/No))	
Hardware/Systems Software Maintenance (if applicable)	
Other Recurring Costs (Please List)	
	\$ -

Appendix G
PROJECT COST ESTIMATES
Detailed Software Application Pricing and Information

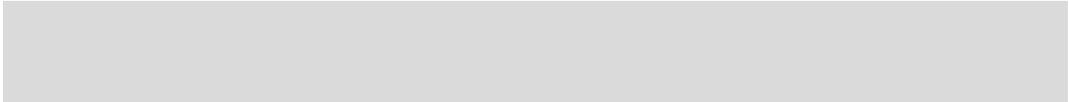
Vendor Application Name	Unit/Per Seat License Fee	License Fees	Training/Implementation			Annual Support
			Total Days	Total Visits	Total Training Costs	
<i>(Please List Applications/Modules - Add Rows as Necessary)</i>						
Planning						
Permitting						
Inspections						
Mobile Field Inspections						
Code Enforcement						
Licensing/Registrations						
Parcel/Address Management						
Cashiering/Payment Processing						
On-line Planning Project Information						
On-line Permits						
On-line Inspections						
On-line Code Enforcement						
On-line Licenses/Registartions						
GIS Integration (ESRI ArcGIS SDE Server)						
EDMS Interface						
Credit Card Payment Processing						
Electronic Plan Submittals						
Electronic Review Markups						
Ad hoc Report Writer						
IVR (Inspection Scheduling)						
Others (Please List)						
Sub-Totals			\$ - 0.0	0.0	\$ -	\$ -

Appendix G
PROJECT COST ESTIMATES

Vendor Application Name	Unit/Per Seat License Fee	License Fees	Training			Annual Support
			Total Days	Total Visits	Total Training Costs	

Optional Applications/Modules:

(Please List Applications/Modules - Add Rows as Necessary)



Sub-Totals

	\$ -	0.0	0.0	\$ -	\$ -
--	------	-----	-----	------	------

NOTES

- 1) Indicate how license fees are calculated (e.g., concurrent users, user ID's, processor size, etc.). Provide number of user licenses if applicable, and additional user license cost if required.
- 2) Please describe additional future license fees if applicable (e.g., change in users, processor size, etc.).
- 3) Optional pricing for above one time costs should be clearly identified (e.g., different project management service levels).
- 4) Describe number of days/hours included with project management AND training costs above.
- 5) Describe in detail what is included with conversion estimates.
- 6) Describe how travel and related expense estimates were calculated.
- 7) Describe additional costs required for optional applications (e.g., hardware, training, project management, etc.)
- 8) Clearly indicate third party software.
- 9) Please attach server sizing/configuration documentation.

Appendix H
INTEGRATION / INTERFACE COSTS

Vendor Name: _____

Interfaces	Low Estimate	High Estimate	Vendor Comments/ Suggestions
<i>See Section 7 Table 13 in the RFP narrative for further detail</i>			
Building Permits			
NC State Contractors Lic Board (validate licensee info.)			
Cashiering			
Credit Card Payment Processing			
GIS			
ESRI ArcGIS SDE Server			
EDMS			
Software (To Be Determined)			
Accounting (Tyler Munis):			
General Ledger			
Other			
County Assessor's CAMA			
E-Mail and Calendaring (Microsoft Outlook)			
Active Directory			
	\$ -	\$ -	

NOTES

For all current systems integration, the response to the RFP should note:

- The vendor's background with integrating with the related system.
- Internal structures that affect how interfaces are developed and maintained.
- For current flat file exports, how the flat file and batch process would be maintained and automated to replicate the current process on the receiving end.
- How data exchange between systems can be accomplished in order to take advantage of SQL-to-SQL processing and real-time updates.
- Corresponding development and support/maintenance responsibilities for the interface junctions.

Appendix I
CONVERSION COSTS

Vendor Name: _____

Conversions	Low Estimate	High Estimate	Vendor Comments/ Suggestions
<i>See Section 6 Table 12 in the RFP narrative for further detail</i>			
Active planning projects			
Active zoning inspections			
Active enforcement actions (code and zoning)			
Active permit applications and projects			
Active license master records			
Licensed haulers and verification tags			
Historical planning			
Historical permit records			
Historical inspections			
Historical zoning inspections			
Historical code and zoning enforcement cases			
Parcel records			
Addresses			
Legacy System Records (Not PermitsPlus)			
Well Points Coordinates			
Mobile Home Park			
	\$ -	\$ -	

Appendix K Cloud Service Questionnaire

This questionnaire is to be used to assess security and legal issues surrounding cloud services under consideration for Orange County. For this questionnaire, cloud services are any services requiring storage of County data outside the County network or provision of computing resources outside of the County network.

Vendor under consideration: [Click here to enter text.](#)

Solution under consideration: [Click here to enter text.](#)

Department(s) served: [Click here to enter text.](#)

1. Who owns the data created by County personnel using this service?

[Click here to enter text.](#)

2. Does the Cloud contractually allow the County to access and retrieve its data at the County's discretion?

[Choose an item.](#)

If No, Explain: [Click here to enter text.](#)

3. Is the Cloud provider contractually obligated to dispose, return or retrieve data in the event of contract termination?

[Choose an item.](#)

If No, Explain: [Click here to enter text.](#)

4. Upon such provision of data, is the Cloud provider obligated to specify data format and all information necessary for data extraction?

[Choose an item.](#)

If No, Explain: [Click here to enter text.](#)

5. Is the Cloud provider obligated to destroy all copies of County data, at the County's request?

[Choose an item.](#)

If No, Explain: [Click here to enter text.](#)

6. What are the Cloud provider's obligation to the County in the event of confirmed or suspected data breaches?

[Click here to enter text.](#)

7. Is the Cloud provider obligated to inform the County of all locations in which the data is stored (including backups) and to continually keep the County informed of any changes to those locations?

Choose an item.

If No, Explain: [Click here to enter text.](#)

8. What are the Cloud provider's contractual obligations with respect to litigation holds on County data?

[Click here to enter text.](#)

9. What are the Cloud provider's contractual prohibitions on disclosing data to individuals, groups or organizations making record requests, unless so directed by an authorized County official?

[Click here to enter text.](#)

10. Does the contract obligate the Cloud provider to allow third-party audits and/or certifications related to infrastructure and security, including penetration testing and vulnerability assessment, as requested by the County?

Choose an item.

If No, Explain: [Click here to enter text.](#)

11. Does the contract obligate the Cloud provider to allow third party onsite inspections of the Cloud provider's infrastructure and security practices on a specified basis?

Choose an item.

If No, Explain: [Click here to enter text.](#)

12. Does the contract obligate the Cloud provider to provide security documentation upon request by the County?

Choose an item.

If No, Explain: [Click here to enter text.](#)

13. Does the contract obligate the Cloud provider to supply the County with the provider's performance records, including access to daily and weekly service quality statistics?

Choose an item.

If No, Explain: [Click here to enter text.](#)

14. Explain the contractually obligated service level parameters, minimum levels, specific remedies and penalties for non-compliance for:

1) Uptime [Click here to enter text.](#)

2) Performance and response time: [Click here to enter text.](#)

3) Error correction time: [Click here to enter text.](#)

4) infrastructure and security: [Click here to enter text.](#)

15. Does the contractually defined Service Level Agreement define pertinent terms such as downtime, scheduled downtime, etc...?

Choose an item.

If No, Explain: [Click here to enter text.](#)

16. Does the contract specify minimum disaster recovery and business continuity requirements, including penalties for non-compliance, as discovered through onsite inspections, audits or actual disasters?

Choose an item.

If No, Explain: [Click here to enter text.](#)

17. Does the contract require the cloud vendor to notify the County of any outsourced functionality and its provider?

Choose an item.

If No, Explain: [Click here to enter text.](#)

18. What are the contractually required notification period for the County or the cloud vendor for termination of the cloud services?

[Click here to enter text.](#)

19. Describe how the County's data will be stored, managed and archived.

[Click here to enter text.](#)

20. Will the County's data be stored and managed on a storage system with other data?

Choose an item.

If Yes, Explain: [Click here to enter text.](#)

21. At what architectural point in the provider's cloud facility will the County's data be physically connected to networking equipment with non-County data?

[Click here to enter text.](#)

22. What are the cloud provider's information security policies?

[Click here to enter text.](#)

23. What are the cloud provider's incident management and reporting policies?

[Click here to enter text.](#)

24. What is the process by which the cloud provider updates policies and informs customers?

[Click here to enter text.](#)

25. What is the basic architecture of the cloud provider's network security? (overall design,

zones, filters, firewalls, VLANs, protocols, standards)

[Click here to enter text.](#)

26. What security measures does the cloud provider use in data storage, transit and use?

[Click here to enter text.](#)

27. What encryption technologies does the cloud provider use in data management?

[Click here to enter text.](#)

28. How are access rights managed by the cloud provider for their employees, contractors and other persons?

[Click here to enter text.](#)

29. What methods does the cloud provider use to destroy information, when so authorized?

[Click here to enter text.](#)

30. What is the cloud provider's patch management policy/methods?

[Click here to enter text.](#)

31. How does the cloud provider defend against malware, including but not limited to viruses, bots, spyware, spam, phishing and pharming?

[Click here to enter text.](#)

32. What system hardening strategies are employed by the cloud provider?

[Click here to enter text.](#)

33. How does the cloud provider perform security testing, including logging, correlation, intrusion detection, intrusion prevention, file integrity monitoring, time synchronization, security assessments, penetration testing?

[Click here to enter text.](#)

34. What technologies and methods does the cloud vendor provide for strong authentication?

[Click here to enter text.](#)

35. Provide any other comments and explanations:

[Click here to enter text.](#)