

City of San Rafael



Responses to Request for Proposal (RFP) Questions Permit Management System Replacement

Note: Responses to these questions may have been edited for clarity. In cases where the same question was asked by multiple vendors, the City provided the answer once.

Technical Questions:

- Could you please confirm how many licensed users are going to access the new Permit Management system? Could you please share the users breakdown by department?

We are approximating these user numbers based on our existing system and future needs.

Community Development	25-30
Public Works	15-20
Fire	20
Sanitation	5
Misc.	TBD

- Are there any additional integrations required besides ESRI ArcGIS, MarinMap, SAP Crystal Reports, MS Office, Single Sign-on, Camino, Building Eye, Tyler EDEN, Engineering Document Inventory database, HdL Prime, Authorize.net, Laserfiche? If yes, could you please share a list?

We have shared a list of the possible integrations in the RFP document. If additional integrations are needed moving forward, we can negotiate a cost for additional integrations.

- Does the City want to replace its existing Alchemy Document Management system?
Yes- we are open to hearing proposals from vendors for a unified document management system. We are also interested in recommendations for other document management systems we should consider that would integrate with the proposed vendor's systems.
- What document types City would like to store in the New document management system? Can you confirm the expected size of the new document management system?
MS Suite documents, PDF, and .TIF files from Alchemy (if conversion needed this can be included in data migration estimates). We cannot project the expected size of the current document management system, but we would like a system which could easily grow to accommodate our data needs.
- What kind of documents City is currently storing in the existing Document Management system in addition to historical permits?
Historical permits, historical plans, some correspondences, photos, and building code.
- What is the cleanliness of data on a scale of 1 to 10 with 10 being the cleanest?
The cleanliness of Trakit is a 9, and Alchemy is fairly well indexed, but we'd consider it a 7.
- Would the City like to replace their existing Adobe Acrobat Pro & Bluebeam Electronic Plan Review? Or just need an integration with them? If looking for replacement, then how many Users will need Electronic Plan review?
We are open to hearing proposals from vendors, but we are currently using Adobe Acrobat Pro (and some Bluebeam) for Electronic Plan Review. An ideal state is using only one solution for electronic plan review based on the recommendation of the vendor.
- Would you be open to learning more on an alternative for digital plan review software?
Yes
- Is the City currently using any virtual inspection solution? If yes, kindly share the name of the solution.
We currently do not have a virtual inspection solution.
- Which Data warehousing solution the City is currently using?
We are using Alchemy for historical documents and archived information. The City Clerk also uses Laserfiche for document management and that could be an alternative solution for hosting documents if those integrations are preferred.
- Would the City like to replace their existing Quadrant Cashiering & receipt accounting system? Or just need integration with the existing system?

The City will be replacing our ERP system in a separate project. The integration with our current payment processing system will be in this project scope of work.

- Would the City like the new cashiering solution to become the Customer Payment Portal for permitting?
We are open to hearing proposals from vendors, but our aim is to integrate with our current payment processing system.
- Would the City like to scan checks at the counter? Does the City have a multi-check scanning process in place for recording checks and invoices in batch? If not, should this be included in the response? What is the annual volume that the City would scan using this process?
We are open to hearing from vendors, but this is not something we are currently doing, nor is it a priority.
- Would the City like the cashiering solution to create an Image Cash letter (ICL) containing check images for deposit, and send it to your bank? If so, which bank?
We are open to hearing from vendors, but this is not something we are currently doing, nor is it a priority.
- For the current system, Is the data stored in a SQL Server database? Or what format is the data currently stored in?
Our existing data is SQL Server backed.
- Is there a specific E-signature integration that you are looking for or using?
We currently use Adobe for E-signatures.
- How many active workflows are you using now? Are some workflows identical for multiple permit types?
We have 10-15 workflows, and we've been creative with our legacy Trakit system to create some basic automations.
- How many reports are you using now and how many would you like to have?
We have at least 15 active report types that we're using monthly, but we have 50+ custom reports.
- Would you be open to learning about a PowerBi integration to help with actionable reports?
Yes, our Data team currently uses PowerBI for data visualization.
- Is your team able to build their own Crystal reports?
We do not have in-house resources on our team for Crystal reports. We've utilized a consultant to support Crystal reports.
- Do you have need for offline mobile app capabilities?

Yes. This is an important aspect of the project, as sometimes field inspectors go into areas with bad cell reception.

- Are you currently a Microsoft 365 email client? If so, would the City like to integrate Microsoft outlook and SSO?
Yes, we are fully invested in Microsoft tools and would appreciate any integrations with SSO/Teams/Outlooks/etc.
- Are you using HdL for financial software?
We use Eden for our ERP financial software. We use HdL Prime for business licenses.
- How many years or records are you looking to migrate?
We have 23 years of records in our existing Trakit, and have actively been using the current system since 2005.
- Approximately how many records will need to be imported?
We don't have that information offhand, but it's many years of records.
- Is the future GIS that you are building going to be based on ESRI online?
Yes. We are invested in the ESRI online platform.
- Are you live with SolarApp+?
We would like to use SolarApp+ but cannot yet until we are in a modern system.
- Will in-flight records need to be imported and resumed in the new system or will in-flight records be completed in the old system and migrated later?
We are open to hearing recommendations from vendors and are flexible as long as the applications are not impacted.

Project Management Questions:

- What is the average number of permits processed each year?
Approximately 4500 annually.
- What is the average number of planning applications processed each year?
Approximately 400.
- What is the average number of inspections conducted each year?
Approximately 3,500 are scheduled annually across all divisions/departments through our current permit tracking system.
- What is the average number of code enforcement cases each year?
Approximately 450.
- What is the average number of business licenses each year?

This question is out of scope for the Permit Management Project.

- Of the number of permits issued, Can the City confirm what percentage requires plan review?

Approximately 45% of building permits need building staff review, with the number being higher if we include all plan sets that techs need to review for completeness. All plans submitted to Planning require plan review, usually by multiple divisions and departments.

- Can you please share the list of Permit types, Permit subtypes, and Inspection types?
We have 28 Permit types, 53 Permit Subtypes, and 118 Inspection types. At least 10 of those inspection types are used to create a workflow, they are not actual inspections.

List of Permit Type

- Cannabis
 - Special Events Permit
 - Sewer Permit
 - Encroachment Permit
 - Grading Permits
 - Transportation Permit
 - Pre-Application
 - Design Review
 - Use Permit
 - Lot Line Adjustments
 - Variance
 - Sign Review
 - Accessory Dwelling Unit
 - Building
 - Construction Fire
 - Demo
 - Electric
 - Fire
 - General Permit Requiring Plan Review
 - Generator
 - Massage Registration
 - Mechanical
 - Mechanical Commercial
 - Mechanical Residential
 - Miscellaneous
 - Operational Fire
 - Plumbing
 - Pool
- Does the City prefer End User Training or Train the Trainer approach?

We would like vendors to present what they think is the best approach for training staff on a new solution.

- What languages would the City like the new Permit system to support?
We would like a system that could support multiple languages, and plan to seek a recommendation from City Management.
- Is there a current super user for Trakit internally? Someone that would be SME for new platform?
Yes, we have a few super users, however we'd like to build competencies for all of our key staff.
- Is there a specific vendor that you are using for virtual inspections? Or looking at?
We are not using virtual inspections.
- How many form letters do you currently have or foresee needing?
We have 40 that we use on a regular basis, but we'd like to build competencies among our staff to make new letters.
- How many outside consultants will require permissions greater than that of applicant or read only?
Approximately 10.
- How many web forms would need to be professionally configured into the system that do not result in a permit (plan review only)?
We will need more information to respond to this question.
- How many web forms would need to be professionally configured into the system that results in a permit?
We will need more information to respond to this question.
- Is business and contractor licensing part of the scope of this project?
No, licensing is not in the scope of this project. However, we would like to integrate with a verification of State licensing.
- Is the City open to using alternative payment processors other than authorize.net?
We are open to hearing proposals, but our aim is to integrate with our existing financial systems. We also possibly have an upcoming ERP project which would address payment processing.
- Can the City elaborate on the requirement "automations for interdepartmental communications"? Are you looking for automated emails or something else?
Our aim as an organization is to use a 'digital approach' to any of our work and automate workflows as much as possible.

- In Section 3.3, are you asking what Project Management experience each firm has? Or are you asking how much experience the project management team has in digital branding, meeting usability standards, meeting language standards and meeting ADA requirements?

In Section 3.3, we are asking firms to describe their background with user experience within multiple aspects of project management.

Misc. Questions:

- What is your desired timeline for going live?
We have no desired timeline; however, we'd like the project to begin in the late Summer, early Fall 2023.
- What is your budget for the project?
Our proposed budget FY 2023-2024 is \$300,000. We also have time-bound access to grant funding, which is why we'd like the project to begin ASAP. We also understand this may be a multi-year project and are committed both financial and personnel resources to complete this project.
- Can companies outside of the USA apply?
Any vendor may apply, but our preference is for a commercially available, native cloud-based Permit Management solution.
- Do meetings need to be in-person?
No, meetings can be remote.
- Can tasks be performed outside of the USA?
Yes.
- Can proposals be submitted via e-mail?
Yes – proposals should be submitted to DigitalBids@cityofsanrafael.org
- Can the City confirm the timings for the RFP Questions & RFP Proposal submission as only dates are mentioned in the RFP document?
Please refer to the published RFP for timelines.