



# **Request for Proposals**

**For**

# **Community Development Software**



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## **Section 1: General Information**

### **Request For Proposals (RFP) – Community Development Software**

THE ABOVE DESCRIPTION MUST APPEAR ON ALL PROPOSALS AND RELATED CORRESPONDENCE. **THIS IS NOT AN ORDER.**

PROPOSALS MUST BE <u>RECEIVED</u> NO LATER THAN: <b>Friday, August 19, 2022, at 5:00 pm (MST)</b>	RFP INITIATIVE: <b>Community Development Software</b>
<ul style="list-style-type: none"><li>• <b>All suppliers must respond in detail to each element of this RFP in order to be considered for contract award.</b></li><li>• <b>All proposals must be emailed to contact person at the address below.</b></li><li>• <b>If pricing has been requested, it must be emailed under separate cover and “Community Development Software RFP Confidential Pricing” as the subject line.</b></li></ul>	
SEND ALL CORRESPONDENCE TO THE CONTACT BELOW:	
<b>Jessica Fust, Building &amp; Facilities Manager</b> Email: <a href="mailto:fustj@billingsmt.gov">fustj@billingsmt.gov</a>	



## **Section 2: Objectives**

### **Introduction and Objectives**

This RFP is issued by City of Billings (City) for the purpose of obtaining information and pricing regarding a complete Community Development Software package that includes:

- Permitting
- Projects
- Code Enforcement
- Licensing
- All modules integrated with GIS for land records.
- Intuitive Online Citizen Access portal where citizens can easily apply, inquire, schedule, and pay for services online.
- Robust ePlan review module with preferred BlueBeam integration.
- Mobility software
- Available to outside agencies for reviews
- Integrate with the City's current Financial System and Enterprise Content Management solution

It is the intent of the City to review and assess the RFP responses to determine which proposal best meets the needs of the City.

Suppliers are expected to provide their best and most competitive proposal.

**Attachment E, the Intent to Respond form, must be completed and emailed at least two (2) days prior to the advertised RFP due date.**

## **Section 3: Information for Suppliers**

### **Disclaimer**

This RFP does not form or constitute a contractual document. The City shall not be liable for any loss, expense, damage or claim arising out of the advice given or not given or statements made or omitted to be made in connection with this RFP. The City also will not be responsible for any expenses which may be incurred in the preparation of this RFP. This RFP is not to be construed as a contract or commitment of any kind.

### **Instructions to Proposers**

#### **EXAMINATION OF DOCUMENTS**

Before submitting the proposals, the proposer shall:

- (a) Carefully examine the Standards and Specifications as well as all other attached documents;
- (b) Fully inform yourself of the existing conditions and limitations;



- (c) Include with the proposal sufficient information to cover all items required in the specifications.

#### PROPOSAL MODIFICATIONS

In addition to any other information and documentation requested in this RFP, any forms provided herein shall be included in the submitted proposal. Modifications, additions or changes to the terms and conditions of this request for proposals may be cause for rejection of the proposal. Proposals submitted without required forms may be rejected.

#### WITHDRAWAL OF PROPOSALS

Proposers may withdraw their proposal by written request at any time prior to the due date set for receiving proposals.

#### PRICES HONORED

By responding to this RFP, Proposer acknowledges that no contractual relationship with the Proposer exists until execution of the resulting contract following City Administration or City Council approval. Because contract approval can be delayed due to scheduling or unforeseen circumstances, the Proposer must honor their pricing and any other terms set forth in the proposal for at least ninety (90) days after the RFP due date.

The prices established from this RFP may be extended to other political subdivisions within the State of Montana solely at the vendor's discretion.

#### CERTIFICATION

The proposer certifies that the proposal has been arrived at independently and has been submitted without any collusion designed to limit competition. The proposer further certifies that the materials, products, services and/or goods offered herein meet all requirements of the stated specifications and are equal in quality, value and performance with highest quality, nationally advertised brand and/or trade names.

The successful proposer will be required to purchase a City business license and complete the new vendor forms in order to be eligible for payment.

#### INSURANCE:

##### Specific Insurance Requirements for Cyber/Data Information Security:

The successful Proposer shall purchase and maintain cyber/information security insurance coverage with combined single limits for each wrongful act of \$2,000,000 per occurrence to cover the unauthorized acquisition of personal information such as social security numbers, credit card numbers, financial account information, or other information that uniquely identifies an individual and may be of a sensitive nature in accordance with §2-6-1501, MCA through §2-6-1503, MCA.

If the Proposer maintains higher limits than the minimums shown above, the City requires and shall be entitled to coverage for the higher limits maintained by the Proposer. Any available insurance proceeds in excess of the specified minimum limits of insurance and coverage shall be available to the City.



Such insurance must cover, at a minimum, privacy notification costs, credit monitoring, forensics investigations, legal fees/costs, regulatory fines and penalties, and third party liability settlements or judgements as may be caused by any act, omission, or negligence of the Proposer's officers, agents, representatives, assigns or subcontractors.

Note: If occurrence coverage is unavailable or cost-prohibitive, the City will accept 'claims made' coverage providing the following conditions are met:

1. The retroactive date must be shown, and must be before the date of the contract or the beginning of contract work;
2. Insurance must be maintained and evidence of insurance must be provided for at least three (3) years after completion of the contract of work; and,
3. If coverage is canceled or non-renewed, and not replaced with another claims-made policy form with a retroactive date prior to the contract effective date, the Proposer must purchase "extended reporting" coverage for a minimum of three (3) years after completion of work.

#### SYSTEM SECURITY

Proposer shall ensure systems delivered are adequately secure. For purposes of this RFP, adequate security is defined to require compliance with federal and State of Montana security requirements and to ensure freedom from those conditions that may impair the City's use of its data and information technology or permit unauthorized access to the City's data or information technology.

The City has established control standards and policies that align with the NIST Cybersecurity Framework. The latest revision of NIST SP 800-53 is used for control adherence evaluation established after developing a security categorization utilizing FIPS PUB 199. Thus, Proposer shall provide reasonable proof, through independent audit reports, **security scans of operating systems, code or the technology environment provided**; that the proposed system meets or exceeds federal and State of Montana security requirements to ensure adequate security and privacy, confidentiality, integrity, and availability of the City's data and information technology.

Annual assurance statements shall be delivered to the Contract Liaison. Annual assurance statements must contain a detailed accounting of the security controls provided and must be in the form of a NIST Security Assessment Report or FedRAMP Security Assessment Report.

#### PROHIBITED ACTIVITIES AND SPOOFING

Licensors and its officers, employees, agents, subcontractors, and affiliated users, shall not violate or attempt to violate the security of the City or State of Montana's network or interfere or attempt to interfere with the systems, networks, authentication measures, servers or equipment, or with the use of or access to the network by any other user. Such prohibited activity includes (i) accessing or logging into a server where access is not authorized; (ii) unauthorized probing, scanning, or testing the security or vulnerability of the City or State's network or other systems; and (iii) attempting to portray itself as the City or State or an affiliate of the City or State or otherwise attempting to gain access, without authorization, via the network or systems to any account or information technology resource not belonging to Proposer or its officers, employees, agents, subcontractors, and affiliated users. Proposer shall not perform unauthorized spoofing or scanning of any kind, including user account identity. Systems shall not spoof the billings.mt.gov or mt.gov domains or engage in Email Spoofing. Email spoofing is the creation of email



messages with a forged sender address. For example, Email spoofing includes creating or sending emails using the City or State's domain.

#### DISPOSITION OF PROPOSALS

All materials submitted in response to this RFP become public records under Article II, Section 9 of the Montana Constitution and §§ 2-6-102 and may be distributed by written request pursuant to Montana's Constitutional Right to Know or Public Records Acts.

Information provided in response to this RFP will be held in confidence and will not be revealed or discussed with competitors prior to award of Contract by Council. However, one copy of each proposal submitted shall be retained for the official files of the Department and will become public record after award of the Contract. Fee or Price schedules submitted, but not reviewed by the City, do not become a public record and shall only be retained for official files.

Records and materials that are constitutionally protected from disclosure are not subject to the provisions of this section.

The Proposer understands that, if selected, the City reserves the right to provide its opinion publicly and privately regarding the Proposer's performance.

#### QUESTIONS

Questions regarding the Request for Proposals contents must be sent to the contact person listed in Section 1 no later than 2 business days prior to due date for proposals. The City will make every effort to provide a written response within 2 business days. Whenever responses to inquiries would constitute a modification or addition to the original RFP, the reply will be made in the form of an addendum to the Request for Proposals, a copy of which will be posted on the City's website and forwarded to all Suppliers who have submitted an "Intent to Respond" form (Attachment E).

Supplier must submit their questions via email using the "Master Q & A" form found in **Attachment D**, and provide, at a minimum, the following:

- Supplier's name, requester, and appropriate contact information.
- The question, clearly stated.
- Specific reference to the applicable Request for Proposals section(s).

#### RFP Response Submission

Upon the submission of the RFP response, the supplier acknowledges that all information is accurate and complete.

**All proposals must be emailed to contact person listed in Section 1.**

- **All suppliers must respond in detail to each element of this RFP in order to be considered for contract award.**
- **All proposals must be emailed to contact person at the address below.**
- **If pricing has been requested, it must be emailed under separate cover and "Community Development Software RFP Confidential Pricing" as the subject line.**



## **Section 4: RFP Evaluation and Selection Processes**

### **Initial Evaluation**

Proposals received will undergo an initial review to determine:

- Compliance with instructions stated in the RFP
- Compliance with proposal submittal date

### **Phase II Evaluation**

The evaluation of supplier's proposals may include, but is not limited to, the following criteria:

- Perceived ability to meet the City of Billings requirements including security standards
- Experience of Supplier with Community Development Software
- Experience of Supplier with local municipality services and needs
- Experience Implementing a Citywide software solution in similar-sized municipalities
- Ability to provide integration to the City's existing software
- Qualifications of staff who would provide the implementation and training services
- Company's financial stability
- Capacity to assume new business
- Availability (timetable) for providing goods and/or services
- Breadth of services available
- Ongoing support
- Process Improvements
- Ability to Provide Training
- Compliance with the City of Billings Terms and Conditions
- In the event that the City of Billings has determined more than one vendor could meet the needs of the City, price could become an evaluation factor.

The City reserves the right to conduct interviews with all or some of the Proposers at any point during the evaluation process. However, the City may determine that interviews are not necessary. In the event interviews are conducted, information provided during the interview process shall be taken into consideration when evaluating firms using the above-stated criteria.

The City also reserves the right to make such additional investigation as it deems necessary to establish the competence and financial stability of any firm submitting a proposal.

### **Proposal Submission Requirements:**

To achieve a uniform review process and obtain the maximum degree of comparability, the proposals shall be organized in the manner specified below.

Proposal must contain:

- Title Page (1 Page)
  - Show the RFP project name, the name of your firm, address, telephone number(s), name of contact person, and date.
- Transmittal Letter (1 Page)
  - Identify the RFP project or contract for which proposal has been prepared.





- Briefly state your firm's understanding of the services to be performed and make a positive commitment to provide the services as specified.
  - Provide the name(s) of the person(s) authorized to make representations for your firm, their titles, address, and telephone numbers.
  - The letter of each proposal must be signed by a corporate officer or other individual who has the authority to bind the firm. The name and title of the individual(s) signing the proposal must be clearly shown immediately below the signature.
- Table of Contents
  - Clearly identify the materials by Section and Page Number.
- Proposal Narrative (Limited to 3 Pages)
  - Firm Experience
    - Detail the firm's experience in the same or similar areas of expertise, stability, and its adaptability to providing the required services.
    - Provide at least three references for which your firm has provided the same or similar services for other governmental entities. Include a point of contact, current telephone number, and a brief description of the services provided.
  - Project Team
    - Provide detailed information on the qualifications and relevant experience of the main project contacts for each phase of the project: pre-implementation, implementation, and customer service.
    - For each person assigned to a management or leadership role in this project, provide professional references with current telephone numbers.
    - Resumes should be included in an appendix, which detail their relevant experience. Performance on similar governmental agency projects should be noted.
  - Methodology and Approach
    - Provide detailed information on the firm's methodology in meeting the scope of work requirements and City's goals identified in Section 5. Describe overall approach to include special considerations, which may be envisioned in scoping, completing, and managing small tasks. Provide detailed information on the Project Team's role in scoping tasks with the City and working with key staff or task leaders.
- Question Responses
  - The Proposal shall fully answer all questions posed in Section 5: Scope of Work for all the modules.

## **Section 5: Scope of Work**

Below is a general outline of the anticipated scope of work. However, the final scope of work will be negotiated with the successful proposer.

### **Goals for a Community Development software solution:**

The City of Billings is looking to replace its existing Community Development software. A separate RFP will be advertised for replacement of our CIS Utility billing software. We are informing vendors of this in case one vendor has both products. If this is the case, clearly document areas that would be shared between the two software solutions...ie: GIS which provides addresses/ownership/attributes can be shared between the two solutions.

The software must meet the following goals:

- Support and align with the Division Objectives for each Division served



- Be a long term solution
- Increase efficiency of City Staff
- Increase effectiveness of City Services
- Be user friendly for customers and staff
- Be easily configurable and dynamic as needs change
- Provide a positive user experience for customers
- Responsive customer service that partners with the City to solve problems

Describe in detail the overall functionality of the Community Development software:

- Does the software package offer a complete automated solution from citizen initiation to back-office software and mobile software to a final product that the citizen is able to easily access? Describe the process.
- The City requires a paperless system. Describe the software's workflow process for routing reviews and inspections. How is it configurable?
- GIS is an integral part of any new Community Development software for the City of Billings. Describe how the software is integrated with GIS.
  - Can GIS attributes merge into Community Development software? Our goal is to have one place to store common information needed by multiple departments.
- Is the software integrated with Microsoft Office for email and calendar functions? Are these functions available online as well? Describe the Microsoft Office integration with the software. Are emails customizable?
  - Does your software meet these requirements?
    - Ability to schedule/accept/track meeting requests in Outlook.
    - Ability to send emails and communicate through Outlook in program with Outlook plug-in.
    - Ability to attach emails and attachment files from Outlook directly into permit file with Outlook plug-in.
    - An inspection-scheduling feature to easily assign and schedule inspections between multiple inspectors and an option to be integrated with Outlook calendar.
- Does the software provide the ability to generate automatic emails and/or notifications to staff when plans are approved so they may instruct applicants to pay fees or whatever next steps may be?
- Do the individual modules "talk" to each other? For example: will the permit module know whether a contractor has an active Business License and stop the contractor from getting a permit? Can we view all cases, licenses, permits, and projects in a common area so a user knows what has happened on a particular property?
- The software needs the ability to set time limits and track time for application reviews and permit inspections. Does your program have the ability to log time spent for reviewing applications, plans and permits and completing inspections for each step in the process?



- The software needs to automatically update statuses as projects, cases, licenses, and permits work their way through the process. System should not enable work on a subsequent step until all current reviews are completed as defined by user. Describe how the software handles updating statuses.
- Applications can cross multiple parcels. Does your system allow multiple addresses to be entered on an application?
- Does your system utilize a common Cash Receipting function that is available for all modules?
- Does software include dashboard functionality for each module? Provide details on how dashboards work with your product.
- Access to data is important. What reporting capabilities does the software include and are reports customizable?

Describe in detail how the software interacts with customers through the use of a public portal:

- Describe what technology your public portal uses. Explain how you keep the technology current and protected from security threats.
- Describe the functions that a customer can accomplish using your public facing customer portal for each module.
  - Permits
  - Projects
  - Code Enforcement
  - Business Licensing
- Are property search and mapping capabilities included to make locating properties and identifying permits, projects, cases, and licenses easy for the public and our staff? Does your system use a “partial word” search and other advanced searching functions?
- Are administrators able to customize the look and configure messages within the customer portal?
- Does the project/permitting application process allow for a review/acceptance phase prior to creating a project record?
- Does the public portal allow for large file uploads? Please elaborate on file size and type capabilities. Does it accommodate single page and multipage files? Can we specify required naming conventions? Can the customer attach multiple files at a time?
- Are Automatic e-mail notifications generated as projects and permits progress? If so, does the program have the ability to have multiple contacts listed and select who gets emails based on the phase of the project (application, review, permit issuance, construction)?
- The City of Billings currently uses Invoice Cloud as our online payment processor for Accounts Receivable and Utility Billing. We would like to continue using Invoice Cloud for these services and add Community Development payments into this same payment processor, if possible.



- Does your software currently integrate with Invoice Cloud?
  - What do you currently use for your online payment processor?
- Once fees are paid, what is the process for the applicant to download the approved plans/documents for printing?
- Does your
- system provide the ability to manage/integrate agendas and meetings and provide online meeting capabilities for public hearings?
- Is the customer able to provide an eSignature if required when submitting applications?

Describe how your software provides for electronic plan review by addressing the following items. Your response must touch on all items identified, but respondents are encouraged to provide additional information if applicable:

- BlueBeam software sets the standard for plan review and collaboration and the City is committed to using BlueBeam as part of its solution. Is your permitting and workflow management solution able to fully integrate with BlueBeam? This will streamline the review process with the concurrent review capability and workflow. Please describe, in detail, how the software incorporates the use of BlueBeam.
- If your software is not integrated with BlueBeam, explain the measuring capabilities including the ability to measure curved paths and routes.
- Is an audit trail and version comparison for plan review included? We need the ability to pull the review layer from the previous and overlay or compare two plans to see changes.
- Does the plan review program have scheduling, tracking, and workflow capabilities?
- Does the plan review program allow for opening multiple sheets of a plan set and multiple plan sets concurrently from the program?
- Can this software solution automatically generate letters or emails from summary of correction items and send to applicant or edit and then send?
- Is an option to log time spent for reviewing and timeframe for each step in the process included?
- Does the project/permit status automatically change as the project moves through the process and review steps? Can automatic updates be sent if requested by the project contact?
- Please describe how the software, through use of an online portal easily facilitates the submission of revisions and new plan sheets to incorporate into the plan set.
- Does the software provide the ability to add an approval stamp to all sheets and 'flatten', or lock, image so mark-ups cannot be edited?



Describe how your software incorporates mobile features designed for field use, offsite inspections, reviews, and code violations:

- Does the mobile program give full access to our inspectors and enforcement officers in the field with a full-feature program made for mobile devices?
- Is the mobile application integrated with GIS? Explain.
- Is a 'disconnected mode' feature provided when data service is not available?
- Does the software time inspections to track workload?
- Are inspectors able to schedule inspections in the field from the mobile application?
- Should allow for multiple sorting options on workflow such as time, address or urgency.
- Should be integrated with outlook to send notice of approval, corrections, correction lists and finals to pertinent contractors and city personnel.
- Does the software generate correction items list to email to contractor/owner and save a copy in the permit file for anyone to reference?
- Are there 'voice to text' capabilities?
- Does the software include easy photo upload or the ability to take photos directly from application to add to an inspection record?
- Are attachments available to be viewed through mobile for all applications?
- What mobile devices are recommended and/or supported for staff using this application in the field? Include information about operating systems, screen size, touch screens, input devices, etc.

Permits:

- Permit records must be able to distinguish between multiple departments using the permit module. We currently issue Building, Planning, Engineering, and Utility permits through our Permitting system. Describe how this is accomplished in your system.
- System must be able to calculate fees based on multiple criteria. Explain how fees can be configured.
- The system should provide the ability to duplicate an existing permit application and all associated information to a new permit application at a different location (without manual rekeying of the data)
- System must have the ability a track and ensure contractors have appropriate licensing before allowing them to apply for permits. Describe how the software manages contractor information.



- System must be integrated with an ePlan review software. Our preference is BlueBeam integration. Please describe how the permit software integrates with an ePlan review software.
- Based on classification, permits must meet criteria before permits are issued including fees being paid and reviews completed. How is your system configured to allow permits to only be issued after meeting this criteria?
- System must allow for customized Permits. We currently issue permits from different departments based on permit classification. Describe the process to create customized permits.
- Does system allow for customized Certificate of Occupancy?
- Does your system track bonds? Can cash bonds be accepted and refunded through your system?

#### Inspections

- Is a user able to schedule inspections online and send inspection requests to specific inspectors based on zones and qualifications, and/or to an 'in box' where inspections can be assigned by staff?
- Describe how your system schedules inspections. Can inspections be re-assigned?
- Is there a calendar scheduling option for inspections? Can we customize it to remove available inspection times when inspectors are out of the office?
- Can users make and edit inspection checklists as needed?
- Are customers or users notified by text or email of inspections scheduled, accepted, completed, etc?
- Can correction notices be automatically generated and emailed to users upon inspection completion?
- Is there a route mapping option to create the best route for inspectors?
- Can inspections be automatically assigned based on zone, qualifications, etc?
- Can inspections be automatically assigned to the same inspector that was there previously? Especially for re-inspections?

#### Projects:

- Does the system provide automated system to generate email, letter or text/SMS form notifications in mass? Example: Automatically send email to all stakeholders with results of public hearing.
- System must be integrated with an ePlan review software. Our preference is BlueBeam integration. Please describe how the permit software integrates with an ePlan review software.



- System must be able to calculate fees based on multiple criteria. Explain how fees can be configured.
- Projects can go through several different review processes. Can a group of review steps be added as needed during the review process? Provide details on how the reviews are configured and applied to project types.
- Describe the reporting options for the Projects module.

#### Licensing:

- System must be able to calculate fees based on multiple criteria. Explain how fees can be configured. Can penalties for late payments be applied?
- System must allow for customized notices and licenses. Describe the process to create customized forms for licensing.
- Based on classification, licenses must meet criteria before licenses are issued including fees being paid and reviews completed. How is your system configured to allow licenses to only be issued after meeting this criteria?
- Does renewal process create new license record based on current year license record?
- Describe the renewal process.
  - Can the business opt for emailed notices instead of paper notices?
  - Can the business complete a questionnaire online?
  - Is business notified through email or online the status of the renewal?
  - Can the business print license online once renewal is complete?
  - Can the business request vehicle permits online?
- Does system keep track of bonds held by businesses? Can expiration letters be sent to businesses based on expiration date?
- Describe the reporting options for the Licensing module.

#### Code Enforcement:

- Does the system have the ability to accommodate user-defined document templates for City-identified case types?
- Does the system have the ability to print notice letters or violation hangers in the field listing specific code violations, impending actions/dates, etc? Can these notices be electronically signed and printed from a mobile device? Can they be emailed?
- Describe the reporting options for the Code Enforcement module.

#### Describe the technical options available for the software platform:

- Solution Platform: Are you proposing an in-house hosted or cloud solution? For either solution, production and test environments are required.  
If in-house solution, then what are the server requirements for hosting your solution? (# of servers, types of servers, performance requirements, etc)



- What Operating Systems are required/supported?
- What are the estimated storage requirements?
- What is required to support the outward facing services?
- Cloud-Based Solution:
  - What are the optimal bandwidth recommendations for end-points running your solution?
  - Where is your cloud solution hosted?
  - Will our data remain on U.S. soil or possibly hosted in other countries?
  - How often are systems/services unavailable?
  - Who is responsible for maintaining the upgrades to your data information system, the server operating system(s), database maintenance, server health, security settings? In other words, do you offer a full SaaS hosted solution?
  - How would city IT staff access the database(s) for reporting and query purposes?
- Will the production data and all backups remain within the borders of the United States of America? If not, in what other countries will the cloud-hosted data and backups be stored?
- Provide information on your backup strategy, redundancies, and disaster/recovery
- What security measures and precautions are in place to protect our cloud-hosted data from a Cybersecurity attack such as ransomware?

Please describe system requirements:

- Does your software work in a Windows 10 environment?
- Is the system browser based or do endpoints require a client for your solution?
- Describe your software licensing model. Is your software licensed per workstation, per user, concurrent licensing, no separate licensing required, etc.?
- The City of Billings is requiring that software uses Microsoft SQL Server for its database. Does your software meet this requirement?
- How is the data on your system secured?
- Does your system collect and/or store any Personally Identifiable Information (PII)? If yes, what security measures are in place to protect this data?
- What versions of Microsoft Office suites do you recommend and/or support? MS Office 2016, MS Office 2019, O365 G1, O365 G3, other?

Describe how your software interfaces:

- The City of Billings currently uses CitySuite by Harris for its financial system. It is required that a Community Development software must interface all financial transactions to it including all payment, charge, and refund transactions. Describe how this process is identified and accomplished.





- Do you have built interfaces to other customers using CitySuite Financials, Accounts Payable for refunds, and CIS for Accounts Receivable?
- The City of Billings currently uses Questys as the enterprise content management system. Attachments that are stored in software need to automatically be stored in our document imaging solution as well. In addition, we need to be able to access these documents from the Permitting module. Describe how your software would integrate to it.
- The City of Billings is fully invested in GIS and expects a fully integrated GIS solution. If GIS is not directly integrated with Community Development software, explain how addressing, ownership, and parcel information from our existing ESRI addressing/parcel information would update/synchronize to the software.
- Provide costs for developing and maintaining needed interfaces to CitySuite and Questys.

Please describe product implementation:

- Project Management – Describe the implementation methodology including analysis, requirements definition, key milestone, system testing, system launch and the estimated duration of the project.
  - Key Project Team members should be listed in the proposal narrative and with accompanying resumes.
  - Occasionally, people do not work well together when expectations or methodology are not aligned for various reason. What is the escalation path if the City requests different team members for the project management or implementation team?
- City Roles and Responsibilities – Describe the resources needed from the City during installation, configuration, and testing.
- Training - Describe the training needed including the training format (online, classroom, instructor led, train the trainer) and time requirements for each type of training.
- Integration to other software systems - How does your company go about defining the interfaces required to meet our needs and providing a scope that includes initial and on-going costs for these interfaces?
- A test environment is required. Describe how your test environment functions and how frequently the test database is refreshed with production data.
- What is your anticipated timeline for implementation?

Conversion of current data into new solution:

Describe the process your company would go through to import our existing data into your proposed solution.

- Please let us know if your company has any experience in converting data from our existing Community Development Software from Harris into your proposed solution.



### Maintenance and Support

- Describe the support provided after the installation is complete for both an on premise and cloud-hosted solution
- What types of Customer Service are available (help desk/online submission of service request)
- Tell us about the Service Level Agreements/Response Times
- What options do we have for Problem Escalation?
- What are your Support Hours?
- How frequently does the software get updated?
- Are there release notes describing functional updates when a new release is provided?
- If custom interfaces are built to other software systems,
  - Does the Service Level Agreements/Response Times cover the custom interfaces?
  - Is there a charge for reviewing, testing, and possibly updating the interface when your solution is updated? Explain the process.
  - Is there a charge for reviewing, testing, and possibly updating the interface when the other solution is updated? Explain the process.
- What sets you apart from other Vendors?



## **ATTACHMENT A**

### **VALIDATION QUESTIONS FOR SUPPLIER**

#### **GENERAL INFORMATION**

- 1) Company Name  
Address:  
Contact Name:  
Contact Phone:  
Contact Email:  
Website/URL:
- 2) How many facilities/locations do you have in the U.S? Please list.
- 3) How many years has your company been doing business under this name?
- 4) Total Full-Time Employees.
- 5) Do you have Small Business Administration Status? If yes, can you provide documentation?
- 6) What are your standard payment terms?
- 7) References - Please attach a Word® document with all contact information for at least the following three references:
  - a) New Company (started doing business with them in the past 12 months)
  - b) Retained Company (have been doing business with them for 3 + years)
  - c) Former Company (contract terminated in the past 2 years)

#### **FUNCTIONALITY**

- 1) Can you provide specific insurance requirements listed above?
- 2) A certificate of insurance must be provided prior to signing the contract, commencing on the day contract begins. Are you willing to comply with these requirements?
- 3) You must instruct your insurance broker/carrier to notify the City should your coverage change. Are you willing to do this?
- 4) The successful proposer will be required to purchase a City business license and complete the new vendor forms in order to be eligible for payment. Are you willing to do this?

#### **QUALITY AND SERVICE**

- 1) Do you have a quality assurance program? If yes, please attach a copy.
- 2) Are your employees required to take a mandatory drug test?

#### **LEGAL ISSUES**

- 1) Are there any pending lawsuits against your company? If yes, please explain.



## ATTACHMENT B

### PRICE MATRIX

(to be sent with proposal under separate email cover)

<u>Project Name</u>	<u>Upfront (1<sup>st</sup> year costs)</u>	<u>On-going Costs</u>
Software License		
Cloud Hosting		
Interfaces		
Implementation		
Training		
Maintenance		
Other (describe):		

Please provide additional information on any areas that will impact our upfront and on-going costs. Feel free to use additional pages if necessary to clearly explain your pricing.

I/We acknowledge \_\_\_\_\_ addendum.

#

\_\_\_\_\_  
Company Name

\_\_\_\_\_  
Date

\_\_\_\_\_  
Contact Name (please print)

\_\_\_\_\_  
Title

\_\_\_\_\_  
Signature of Contact Position

**By signing the above, I certify that I am authorized by the Company named above to respond to this request.**



## ATTACHMENT C

### CONDITIONS AND NON-COLLUSION FORM

To receive consideration, this form must be signed in full by a responsible, authorized agent, officer, employee or representative of your firm.

#### CONDITIONS AND NON-COLLUSION AGREEMENT

We have read and agree to the conditions and stipulations contained herein and to the Standard Terms and Conditions contained on the attached.

We further agree to furnish the services specified at the prices stated herein, to be delivered to the location and on that date set forth herein.

In signing this proposal, you also certify that you have not, either directly or indirectly, entered into any agreement or participated in any collusion or otherwise taken any action in restraint of free competition; that no attempt has been made to induce any other person or firm to submit or not to submit a proposal; that this proposal has been independently arrived at without collusion with any other proposer, competitor or potential competitor; that this proposal has not been knowingly disclosed prior to the due date and time to any other proposer or competitor; that the above statement is accurate under penalty of perjury.

\_\_\_\_\_  
Legal Name of Firm/Corporation

\_\_\_\_\_  
Authorized Signature

\_\_\_\_\_  
Address

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
City/State/Zip

\_\_\_\_\_  
Title

\_\_\_\_\_  
Date

\_\_\_\_\_  
Telephone Number

**By signing the above, I certify that I am authorized by the Company named above to respond to this request.**



## ATTACHMENT D

### MASTER Q & A FORM

#### PROJECT: Community Development Software

<b>Master Q&amp;A</b>	Any questions regarding this Request for Proposals should be submitted according to the process outlined below. The City will make every effort to answer within two (2) days of receiving the questions.
<b>Q&amp;A Process</b>	<ol style="list-style-type: none"> <li>1. Prepare questions or concerns on the template provided.</li> <li>2. Complete the table in full, providing a date for each question and a section of the RFP to reference (if applicable).</li> <li>3. Submit the completed form via email to <a href="mailto:fusti@billingsmt.gov">fusti@billingsmt.gov</a> . Attach associated documents as necessary.</li> </ol> <p>Please contact <u>Jessica Fust, Building &amp; Facilities Manager</u>, with any questions regarding this process.</p>

Questions from: \_\_\_\_\_ Company: \_\_\_\_\_

Email Address: \_\_\_\_\_

#	Date	Reference Section	Question or Comment	City Response
1				
2				
3				
4				





## ATTACHMENT F

### PROPOSER CONTACT INFORMATION

#### ***A. Company Contacts***

Primary Contact Person (Name):	
Title/Function:	
Address	
Business Hours Phone:	
Fax:	
Internet E-mail Address:	
Name of Person Responding to Request:	
Title/Function:	
Address:	
Phone:	
Fax:	
Internet E-mail Address:	

#### ***B. General Company and Financial Information***

Company Name:	
Headquarters Address:	
City, State, ZIP	
Headquarters Phone:	
Headquarters FAX:	
Company Owned By:	
Percent % Ownership:	
Years In Business	
Name of CIO	
Name of CEO/President:	