Town of Clifton Park

One Town Hall Plaza
Clifton Park, NY 12019

Request for Proposals (RFP)

Building and Planning Permit, Application and Inspection Software

Date Issued: July 26, 2021

Proposals Due by: August 31, 2021 – midnight (EDT)

Submit proposals to:

Teresa Brobston, Town Clerk
tbrobston@cliftonpark.org

The Town of Clifton Park, Planning, Building and Development Departments request proposals for the design, implementation, and maintenance of **a technology solution** that supports the Town of Clifton Park's plan review, permitting, and inspections processes.

Proposals must be received by the Town Clerk's Office at Tbrobston@cliftonpark.org by midnight on August 31, 2021. Please identify your proposal as "**Building and Planning Permit, Application and Inspection Software Update"** in the subject heading in your e-mail and include your proposal as a PDF attachment. Proposals must include all costs of the equipment, all components and installation, software and system monitoring, as well as training and any ancillary items directly associated with the system proposed.

Proposals will be considered based on price, migration cost for existing data, best value, ability to meet the needs of our basic requirements and having a single source for support.

The Town will select the proposal(s) that best meets its needs.

If you should have any questions on the bidding procedures, please contact the Town Clerk at (518)371-6681.

Scope of Work
Purpose

The Planning and Building and Development Departments of Town of Clifton Park, NY are requesting proposals for a new application, permitting and inspections solution with implementation services from qualified vendors to serve as our core business system. The proposed software will introduce a next-generation management solution capable of providing core tracking and workflow functionality to support, enhance, and simplify current processes through a user-friendly interface. Our goal is to promote efficiency, effectiveness, and transparency in the services provided to the Town and the development community.

The primary function of the solution will:

- Be able to manage workflows and records related to our permitting and plan review processes, performance of field inspections, and response to code enforcement issues regarding minimum housing and property complaints through an electronic platform.
- Accessible in a centralized location to both internal and external stakeholders
- Modernizing the support of residential services
- Fostering public self-service to apply, pay, check status online, and access historical information

The Planning and Building and Development Departments spends a significant amount of time supporting the existing software due to the Town's heavy reliance on it. The Town currently uses Municity Enterprise which is set to be phased out by the end of 2022. The software and supporting configuration used to facilitate the planning, permitting, inspections, zoning, and code enforcement processes within the Town is no longer able to support the needs of the department, nor the community with its current configuration.

Features that would benefit the Town:

- Integration of existing historical project data into a compatible program that can work with other existing programs such as Laserfiche. The Town updated to Laserfiche 10.3 in 2018. An alternative cost-efficient replacement may be considered.
- A highly configurable web-based application, permitting and inspections system accessible to approximately 16-20 users that can work in conjunction with existing server requirements
- Cloud based solutions with updates
- Intuitive Search Criteria
- Connections to Updated GIS data and possibly local County Parcel Map Viewers
- A platform that would have the ability to work across multiple hardware systems including portable devices
- Connection to State Licensing Boards for General, Mechanical, Plumbing, and Electrical Contractors
    - Ability to add other Boards as necessary (like refrigeration, landscaping, etc.)
- Connection to State Codes for quick reference
- Ability to run customizable reports such as financial reports, project specific reports, projects closed, stamped or pending, year-end project data, past due financials and creation of Planning Board and ZBA agendas
- Notification tool that will assist staff in managing their workflow and is easily customizable
- Inspections can be scheduled through the online system and contractors can view the results and correction items
- Options for a Public Portal to access completed project data that is controlled by Town Staff
- Accurate record keeping and possible automated disposal of records based on retention period (Including an option to mark certain files or permits as long-term storage or 'Do Not Dispose')
- Scalable for additional Departments to utilize programs

Procurement of the software and the services positions the Town to:

- Leverage newer technologies, embrace mobility, and maximize integrations for interoperability in a seamless overall experience
- Support the Town's effort to transition from other legacy system(s) through the expansion of certain system functionality and permit consolidation of desired systems
- Promote long-term sustainability of a highly utilized, comprehensive, and income generating solution for plan review and building inspections
- Accurately reflect the business process in use
- Potentially support other initiatives including but not limited to additional plan review, work order, and asset management
- Allow further consolidation of desired systems
- Encourage long-term sustainability through highly comprehensive and integrative nature of supported processes that impact internal staff, various departments within the Town and external contractors and stakeholders.

Limitations with current software include:

- Lack of or inability to support the Town's mobile workforce operations

- Unexpected loss of data
- Difficult to apply newly adopted regulatory requirements due to unintuitive back-end configuration
- Back-end application lacks automation with other operations, prohibiting a 360-degree view of a property
- Inefficient and dated operational workflows, requiring multiple workarounds with insufficient notification features
- Back-end application lacks integration with Geographic Information System
- Back-end application is cumbersome to facilitate automation of routine manual efforts
- Inability to customize reporting functions or create different types of reports to use

The purpose of this RFP is to solicit proposals for the most appropriate, readily available, third party permitting management system from a qualified vendor at a firm, fixed price including the purchase, installation, integration, migration of existing data, training, project management, implementation of services annual licensing, support and maintenance costs. The Town prefers to purchase from a vendor who has demonstrated long-term viability as an organization and a commitment to client success through ongoing technical support and consistent product enhancement. Additionally, the Town desires to work with a vendor that provides a proven and structured approach to implementation. In this case, implementation refers to all efforts required to provide a thorough and completely functional system including, planning, interfaces, software integration, testing, training, data migration, technical documentation, project management, change management handling, and post-implementation support.

Although the Town is requesting proposals for a complete solution, at its sole discretion, the Town may choose not to acquire all optional system components. The Town may also exercise the option to procure any or all third-party components directly, in addition or in lieu of any component identified within proposals. Our expectation is to have a fully executed solution within six to nine months of the contract date.

Background

The Town of Clifton Park is a municipal government located in Saratoga County, New York. Planning & Building & Development Services are broken into two departments that serve as a resource for homeowners, builders, and other development professionals. The departments handle site plan, subdivision, and special use permit applications, permits, inspections, and development review and inspection scheduling for all projects in Clifton Park. Staff reviews and issues permits for electric, mechanical, plumbing, and building activity consistent with the State of New York building codes as well as monitoring Stormwater management systems in line with state and federal guidelines.

Our departments can be divided into the following functions covering planning, zoning and building for residential and commercial projects:

- Permitting
- Inspections
- Plan Review and Approval (residential and commercial)
- Code Enforcement
- Administration
- Stormwater Management

Permitting

Staff manages the intake process for various types of permits the department issues and provides

insight to the public for any permitting or inspections requirements.
Duties include but are not limited to:

- Performing intake for all permits.
- Scheduling inspections and coordinating the schedule.
- Responding to inquiries regarding permitting requirements and providing information for State and local laws that regulate those requirements.
- Sending out neighborhood notifications for projects.

Inspectors

Staff conducts all the required building, electrical, mechanical, plumbing, gas, fire and residential zoning inspections.

Duties include but are not limited to:

- Provide inspection consultations to residents, applicants, and contractors
- Observe safety and security procedures, immediately reporting potentially unsafe conditions
- Document any areas of non-compliance, suggesting alternative methods when appropriate
- Notify staff when code enforcement violations are observed
- Issue stop-work notices for non-conforming building activities
- Utilize Town approved best practices related to the inspections, reporting, and resulting

Plan Review

Staff performs subdivision, Special Use Permit Site Plan and building plan review to ensure that any proposed work complies with all State and local laws and codes. Duties include but are not limited to:

- Work with applicant on plan review requirements
- Reviews and examines all residential and commercial projects including drawings, specifications, and supporting records to determine plan conformity
- Reviews Site Plans for all non-residential development projects
- Planner performs residential zoning plan review to confirm compliance the Town's subdivision of land within chapter 179 of the Town Code.
- Coordinate with staff to determine if additional permits and/or applications are required for the project
- Reviews building code, accessibility, electrical, plumbing, mechanical, use and occupancy classification, general building heights and area, construction type, foundation and other relevant plan information
- Review all plan revisions
  Provides consultations in planning, zoning, and development process, highlighting land and building code requirements impacting the project

Code Enforcement

Staff focus on complaints for minimum housing and property standards. They often facilitate a resolution for issues by working closely with the property owner and tenants. Duties include but are not limited to:

- Enforce the State and Town's Code of Ordinances (Unified Development Code)

- Integration with the State Fire Code
- Identify and report violations of Town Ordinances

- Respond to and investigate code violations complaints
- Contacts, informs, and issues warnings to residents of identified violations and compliance deadlines
- Follows-up on identified violations, ensuring compliance
- Issues Notice of Violations and follow-up letters on violations of select Town Ordinances
- Issue citations, as appropriate on violations of select Town Ordinances
- Assists resident in obtaining compliance with various ordinances and laws
- Maintain proper legal records and files concerning Code Enforcement

Minimum Evaluation Criteria

The Town reserves the privilege to select the Vendor which best meets the overall needs of the organization. The proposal evaluation will be based primarily on the following criteria (not listed in order of importance):

- Total Cost of Solution including annual costs
- Overall ability to provide the minimum feature and functional requirements
- Overall intuitiveness and flexibility of the solution configuration
- User-friendly internal and public-facing interface
- Expandability of the proposed solution
- Longevity strength of potential vendor
- Future technology direction including system design and database
- Vendor's performance record to date regarding project management
- Desired vendor support availability and reliability
- Vendor's adherence to the requested information and overall thoroughness of the proposal and presentations
- The Town may request a live demonstration from respondents based on a list of the top scored RFP respondent platforms selected by the RFP Review Committee

Offer and Acceptance

The selected company will submit a proposed contract to the Town.

All questions regarding this RFP can be submitted to the Town by e-mail only at mspringli@cliftonpark.org by August 14th. All answers to questions will be posted on the Town website; www.cliftonpark.org

Thank you for your prompt attention to this request.

NON-COLLUSIVE CERTIFICATION

(Pursuant to 103d of the General Municipal Law of the State of New York)

1. The Proposal herewith submitted has been arrived at by the proposer independently and has been submitted without collusion with any other vendor of materials, supplies or equipment of the type described in the Request for proposals; and

Company Name

Signature

Title

Date