**Exhibit C Permitting Requirements**

**Document**

**(See electronic template for response;**

**submit as a separate Word document as Section 2)**

| **R = Required**  **I = Important**  **N = Nice to have**  **E = Explore** | | **City of SeaTac**  **Key Requirements - Permitting Software System** | |
| --- | --- | --- | --- |
|  | **Vendor Background** | |  |
|  | 1. **Company** | |  |
|  | * Company Name | |  |
|  | * Contact Person Name and Title | |  |
|  | * Contact Address, Phone, Email | |  |
|  | 1. **Company Information** | |  |
|  | * Public vs. Private | |  |
|  | * Year Founded | |  |
|  | * Revenue and Income: Current and Prior Year | |  |
|  | * Headquarter Office Location | |  |
|  | * Nearest regional office to SeaTac, WA | |  |
|  | 1. **Vendor Employee Counts** | |  |
|  | * Total | |  |
|  | * Product Development | |  |
|  | * Implementation | |  |
|  | * Support/Help Desk | |  |
|  | * Sales | |  |
|  | * Administration/Other | |  |
|  | 1. **Number of Customers for Proposed Application** | |  |
|  | * Total | |  |
|  | * Total in US | |  |
|  | * Total in the State of Washington | |  |
|  | 1. **Target Customer Profile** | |  |
|  | * Target Industries | |  |
|  | * Sizing – Users and/or Population | |  |
|  | 1. **Implementation Model: Direct or Partner** | |  |
|  | 1. **Version Schedule** | |  |
|  | * Current version and release date | |  |
|  | * Typical release schedule | |  |
|  | * Number of prior versions supported | |  |
|  | 1. **Support Desk** | |  |
|  | * Location | |  |
|  | * Hours of Support | |  |
|  | * Response Time – Guaranteed and Average | |  |
|  | **Modules/Functionality** | |  |
| **R** | 1. **Land Management** | |  |
| **R** | 1. **Permitting** | |  |
| **R** | 1. **Inspections** | |  |
| **R** | 1. **Code Enforcement** | |  |
| **R** | 1. **Reporting and Query Tools** | |  |
|  | **Pricing Summary – On Premises Deployment** | |  |
|  | 1. **Software License:**   **Permitting:** 25 Concurrent or 40 Named Users  **Mobile:** 10 Named Users (included in total Named above) | |  |
|  | 1. **Implementation:** Estimated total for installation, training, configuration, integration, etc. | |  |
|  | 1. **Annual Maintenance:** Indicate percent of software license (indicate if based on list cost or price paid) | |  |
|  | 1. **Other Costs:** 3rd party software, optional modules, etc. | |  |
|  | 1. **Total Year One Cost** | |  |
|  | 1. **Total Ten-Year Cost** | |  |
|  | **Pricing Summary – Cloud Deployment** | |  |
|  | 1. **Annual Software Subscription:**   **Permitting:** 20 Concurrent  **Mobile:** 15 Users | |  |
|  | 1. **Implementation:** Estimated total for installation, training, configuration, integration, etc. | |  |
|  | 1. **Annual Maintenance:** If not included in the subscription cost above | |  |
|  | 1. **Other Costs:** 3rd party software, hosting, optional modules, etc. | |  |
|  | 1. **Total Year One Cost** | |  |
|  | 1. **Total Ten-Year Cost** | |  |

| **Rating**  **R = Required**  **I = Important**  **N = Nice to have**  **E = Explore** | | **City of SeaTac**  **Key Requirements - Permitting Software System** | **Response – Rating and Comment** |
| --- | --- | --- | --- |
|  | **General** | |  |
| **R** | 1. Configurable role-based dashboards to present reports, tasks, notifications, etc. | |  |
| **R** | 1. Audit Trail with user, date, time stamp throughout all modules. Before/after history is Important. | |  |
| **R** | 1. User configurable menus, screens, fields and drop downs. | |  |
| **R** | 1. User-definable customizable fields on screen forms or tab. | |  |
| **I** | 1. Type-ahead features that fill in a field after typing the first few characters. | |  |
| **I** | 1. Field input masks to support uniform data entry into a field | |  |
| **R** | 1. Define mandatory fields for data entry on screen form, Web form, mobile device, etc. Hide unnecessary fields is Nice to Have. | |  |
| **R** | 1. View workload across departments, e.g. plan reviewers, inspectors, etc. | |  |
| **R** | 1. Rules-based multi-level (concurrent, sequential, by permit type, department, etc.). Bi-directional is Important. | |  |
| **R** | 1. Digital signatures for reviews, approvals, etc. | |  |
| **R** | 1. Action or date-triggered alerts, flags and notifications. | |  |
| **R** | 1. Global record repository – single data entry updates across all records, modules, and departments. | |  |
| **R** | 1. Generate letters, mailing labels, emails, ~~faxes~~, consolidated communications, etc. from the system. | |  |
| **R** | 1. Configurable forms tools to create electronic permit applications, permit templates, etc. | |  |
| **I** | 1. Ability to lock down historical fields as “read-only” (e.g. district, build date, original square feet, etc.). | |  |
| **R** | 1. MS Office Integration with Word and Excel (mail merge, letters, data extraction, reporting, etc.). | |  |
| **N** | 1. Spell checking to the field level, e.g. data entry, notes, etc. | |  |
| **I** | 1. Microsoft Outlook integration e.g. email generation, calendaring of fire inspections, etc. Describe functions supported. | |  |
| **R** | 1. Washington State Environmental Policy Act data (SEPA): filing date, level of review, contracted studies, notes, documents, etc. | |  |
|  | **Technology** | | **Response - Rating and Comment** |
| **R** | 1. Run on VMWare virtual server environment (on-premises). | |  |
| **R** | 1. MS SQL Server 2016 or higher (if on-premises). | |  |
|  | * Database: List % of installs by database | |  |
|  | * Platform: List % of installs by platform | |  |
| **I** | 1. Web-enabled or Web-based architecture | |  |
| **R** | 1. Compatibility with Microsoft Always On VPN for mobile devices. | |  |
| **R** | 1. Preference for on-premises, with hosted/Cloud option. If hosted AWS preferred. | |  |
| **R** | 1. Support digital signatures on permits, inspection forms, code violations, etc. Describe hardware required for remote users. | |  |
| **R** | 1. Role-level security capability. | |  |
| **R** | 1. Single sign-on via MS Active Directory, federated ADFS. | |  |
| **R** | 1. Multifactor authentication. | |  |
| **R** | 1. List integration technologies. Preference is for API’s. | |  |
| **R** | 1. Integration/Interface with the following solutions. Describe experience and method proposed. | |  |
| **E** | * Tyler Cashiering – Centralized cashiering (future) | |  |
| **N** | * Cityworks – Asset and Work Management | |  |
| **I** | * BLS – Washington State Business Licensing System (contractor license verification) | |  |
| **R** | * GeoCortex – GIS map viewer | |  |
| **R** | * Esri ArcGIS Enterprise 10.7.1 – On-Premises GIS | |  |
| **R** | * ArcGIS Online – Cloud-based GIS | |  |
| **R** | * Tyler Eden – Financials | |  |
| **R** | * OnBase – Central document management, bi-directional preferred. | |  |
| **R** | * MyBuildingPermits.com (MBP) – online permitting portal | |  |
| **E** | * MS Teams – Citywide workforce collaboration tool | |  |
| **R** | 1. Bi-directional Esri GIS integration across all modules. Briefly describe the degree of Esri GIS integration. | |  |
| **R** | 1. Scan and attach PDF, JPEG, TIF, DWG, and MS Office (e.g. Word, Excel) files to records throughout all modules. | |  |
| **R** | 1. Describe Web/Portal functions supported for internal and external users, e.g. one-stop-shop to apply, submit plans, payments, schedule inspections, look up parcel data, submit complaints, zoning check, receive status notifications, etc. | |  |
| **R** | 1. Define content that is posted to citizen porta, its format, if the format is native or needs to be created by GIS, any limitation/restrictions/licensing issues that would limit sharing information through a GIS created viewer. | |  |
| **N** | 1. Describe any built-in workforce collaboration capabilities across departments, e.g. instant messaging, etc. and any limitations as noted in #59. | |  |
| **R** | 1. Describe functions supported by the use of mobile technologies for Permitting, Inspections and Code Enforcement. | |  |
| **R** | 1. Support mobile devices running iOS (iPads, iPhones) for internal users. *Prefer external citizen mobile apps to be platform agnostic.* | |  |
| **R** | **Land Management** | | **Response - Rating and Comment** |
| **R** | 1. Central Property Record that includes references to Assessor Parcel Number (APN), project, permit, GIS coordinate, parcel, multiple parcels, area, boundary, etc. | |  |
| **R** | 1. Access unlimited GIS layers (200+) across all modules including zoning, land use, infrastructure, districts, boundaries, etc. | |  |
| **R** | 1. Launch a GIS query from permitting system, e.g. view development history, properties that touch flood area, critical areas, etc. with ability to save and refresh queries as needed. | |  |
| **R** | 1. Import parcel, addressing and land use data from external or internal sources, e.g. county, real estate, CMMS, etc. Identify source, date last updated, etc. | |  |
| **R** | 1. Capture City’s legal address plus associated internal addresses to a property (temporary, permanent, billing, permitting, parcel, etc.). | |  |
| **E** | 1. Mailing address verification through USPS database. | |  |
| **R** | 1. Convert temporary address record to final address and retain same record using unique identifier that remains with parcel. | |  |
| **R** | 1. Capture parcel history including parcel changes, e.g. lot line adjustments, street name changes, subdivisions, zoning, date modified, editor, etc. | |  |
| **R** | 1. Record and retain parcel genealogy: dates, parcel changes, street name changes, subdivisions, APN changes, CCRs, mitigations, building additions, remodels, structures (original + new), floor, suite/unit, base square footage, gross square footage, etc. | |  |
| **R** | 1. Attach a permit to a line, point, or polygon on a map. | |  |
| **I** | 1. Click on a parcel in GIS; drill into permitting system to see permitting and code activity, records, attachments, etc. or to initiate an activity, e.g. create a permit application, inspection, etc. | |  |
| **I** | 1. Explain addressing model. Preferably a hierarchical structure; parcel/building/floor/unit/suite, etc. including other structures. | |  |
| **I** | 1. Google Earth integration for street level views, directions, etc. | |  |
| **R** | **Permitting** | | **Response - Rating and Comment** |
| **R** | 1. Unlimited permit categories (e.g. Public Works, Planning, Building, Fire, etc.). | |  |
| **R** | 1. Single view of all activities across permit categories for a parcel, project, etc. | |  |
| **R** | 1. Unlimited permit types and sub-types: building (residential, commercial), plumbing, electrical, re-roof, sign, flood plain, clearing and grading, zoning variances, fire sprinkler, etc. | |  |
| **R** | 1. Right of Way permits with various sub-types such as annual lease permits, signs, subgrade work, utilities, etc. | |  |
| **R** | 1. Combination permits – building, mechanical, plumbing, etc. | |  |
| **I** | 1. Capture project and sub-project number on a permit. | |  |
| **R** | 1. Capture multiple contacts and addresses for each permit e.g. property address, owner, contractor, architect, etc. | |  |
| **I** | 1. Capture contact management data and activities including calls, emails, attachments, notes, user, date and time stamp, etc. | |  |
| **I** | 1. Department-specific views of permit data or parameter search by permit case type. | |  |
| **R** | 1. Add a technology fee as a % of select permit fees to invoices for some permit types, e.g. building, electrical, but not Right of Way. | |  |
| **R** | 1. Mass update annual permit fees by %; exempt some fee types. | |  |
| **N** | 1. What-if modeling of fees with increase or decrease by %. | |  |
| **R** | 1. Define flat fees or calculated fees based on valuation of work to be performed by permit type. | |  |
| **R** | 1. Select applicable permit fees from drop down menu. | |  |
| **R** | 1. Accumulate franchise Right of Way permit fees to a utility; send to financial system for consolidated monthly billing. | |  |
| **R** | 1. Rules-based retroactive fee calculations: Use grandfathered fees for permitting up to July 1; apply revised fee structure after that date. Track fee history. | |  |
| **R** | 1. Define if permit fees are collected up front, at issuance or combination, by case type/scope. | |  |
| **R** | 1. Update fee tables based on user-defined formulas, effective dates. | |  |
| **R** | 1. Electronically push updated fee tables and rules to MBP.com. | |  |
| **R** | 1. Retain fee changes and fee schedule history over multiple years. | |  |
| **I** | 1. Initiate an activity via embedded GIS parcel map e.g. launch a permit application, inspection, code compliance action, etc. | |  |
| **R** | 1. Define internal activities or checklist by permit type to ensure all data is gathered, fees collected, and steps followed for completion before Certificate of Occupancy and Permit close is allowed. | |  |
| **R** | 1. Central record ID number tied to land development or plan number, GPS coordinates, parcel, area, boundary, etc. | |  |
| **R** | 1. Accept a GPS coordinate for “address” in undeveloped or right-of-way (e.g. utilities, sign location, etc.). | |  |
| **R** | 1. Issue permits across multiple parcels e.g. condominium complex. | |  |
| **R** | 1. Online application submittal checklist controlled by permit type. | |  |
| **R** | 1. Review functionality to support permit pre-application process: review comments, schedule meetings, send correction letters, etc. | |  |
| **R** | 1. Date and time tracking for permit processing activities by department; calculate time for each step and in between. | |  |
| **R** | 1. Track billable man hours spent on permit activities, e.g. plan review, inspection, etc. | |  |
| **I** | 1. System zoning check based on permit type with alert at entry, or block if address is not zoned for business type. | |  |
| **R** | 1. Define rules-based workflow by permit type and sub-type; attach notes to review lines, attach supporting documents, etc. | |  |
| **I** | 1. Link to State of Washington BLS web site to verify contractor licensing as part of permit workflow. | |  |
| **R** | 1. Attach electronic documents, images, plans, etc. to a permit. | |  |
| **R** | 1. Provide alert and block specific permit release if unresolved issues e.g. no business license, expired license, outstanding unpaid fees, block electrical/not plumbing, etc. | |  |
| **R** | 1. Rules-based auto-expiration of permits by type, e.g. XX days from issue date, reissue date, days since last inspection, etc. | |  |
| **R** | 1. Alert or email notification when nearing permit expiration date (e.g. within 30 days); generate permit holder notification letter, launch email, send notification to customer portal, etc. | |  |
| **R** | 1. Produce mailers, notifications, etc. based on polygon on map or buffer/radius, e.g. 500 feet. | |  |
| **R** | 1. Manage all transactions related to developer deposits including initial deposit collected, draw down of deposit for transactions and repayment of deposit balance. | |  |
| **N** | 1. Track, manage and report on internal development projects that include a project, sub-project, multiple activities, multiple permits, multiple parcels or addresses, related work orders, etc. | |  |
| **E** | 1. Event permitting: manage multi-jurisdictional activities tied to an event, e.g. Saturday Market, including: pre-application, conditions of approval, permits required, approval workflows, status, fees collected, inspections, related complaints, code violations, street closures, signage, etc. | |  |
| **R** | 1. Link related permits. | |  |
| **R** | 1. Track and manage performance and surety bonds (Right of Way permits, short plats and subdivision development projects, etc.) including funds on deposit, fund type, applicable start and end dates, related inspections, notes, damages, draws, etc. | |  |
| **R** | 1. System-generated notification when bonds are nearing expiration. | |  |
| **R** | **Plan Review** | | **Response - Rating and Comment** |
| **R** | 1. Interface with Bluebeam review and markup systems; capture data from concurrent plan review with visibility to all markup, comments by reviewer, corrections, etc. to generate corrections or approval letter in permitting system. | |  |
| **R** | 1. Built-in electronic plan review and markup solution. Describe features/functions supported. | |  |
| **I** | 1. Plan version control features. | |  |
| **I** | 1. Review GIS property boundaries, zoning, land use restrictions, development mitigation, etc. while reviewing plans. | |  |
| **R** | 1. Rules-based workflow routing for plan approvals with visibility to approval queue (internal and external reviewers). | |  |
| **R** | 1. Support system dashboard/in-box notification of pending plan reviews and due dates. | |  |
| **R** | 1. Dashboard view of assigned tasks, notifications, status, etc. with drill down to conditions, reviewer comments, etc. | |  |
| **R** | 1. Track received date, due date, and date completed, hours spent in review with ability to assess flat fees or hourly fees as needed for plan review (public works permits only), etc. | |  |
| **R** | 1. Assign number of business hours/days for each review, estimate final review completion date, monitor and report on actual time against estimates, etc. | |  |
| **R** | 1. Generate and distribute individual or consolidated Plan Review Letters and conditions of approval to applicants. | |  |
| **I** | 1. Generate public hearing notices and signage including case number, applicant, location, SEPA determination, project description and GIS site map. | |  |
| **R** | 1. Create buffer zone mailing letters/notifications with links to site plans for public hearings. | |  |
| **R** | 1. Track and manage conditions on a parcel beyond related permit. | |  |
| **R** | **Inspections** | | **Response - Rating and Comment** |
| **R** | 1. Define multiple inspection types with sub-categories, number of inspections required by permit type, etc. | |  |
| **N** | 1. Generate checklist or check box of steps required and completed by permit and inspection type. | |  |
| **I** | 1. Describe available calendaring tools for inspection scheduling and lead times. Microsoft Outlook integration is Important. | |  |
| **R** | 1. Rules based workflow for inspections with ability to add optional steps, e.g. external fire inspection. | |  |
| **I** | 1. Schedule multiple inspections online in a single transaction. | |  |
| **R** | 1. Import inspection requests from MBP.com. | |  |
| **I** | 1. Available tools that flag duplicate inspection requests at time of entry, import from MBP.com, etc. | |  |
| **R** | 1. Flag residential permits that require fire inspection based on parameters, e.g. 3,600 square feet or greater, poor access, etc. | |  |
| **R** | 1. Capture and bill standard hours or actual (whichever is greater) for inspections on Right of Way permits. | |  |
| **I** | 1. Inspector routing and scheduling tools (a.m. and p.m.). | |  |
| **N** | 1. Inspection route optimization and ETA estimation, e.g. via Google Maps integration. | |  |
| **R** | 1. Group all inspections due at a site to allow multiple inspections in one visit (e.g. framing, plumbing, etc.). | |  |
| **R** | 1. View current plans, correction notices, inspections due, permit status, etc. on mobile device. | |  |
| **I** | 1. Customizable dropdowns to choose and populate correction notices with standard language, code descriptions, etc. | |  |
| **R** | 1. Capture unlimited inspector notes and comments. | |  |
| **R** | 1. Issue stop work order in the field, put hold on additional inspections until release. | |  |
| **I** | 1. Create additional inspections (referrals, re-inspections), permits or sub-permits on the fly during a mobile inspection. | |  |
| **R** | 1. Enter data remotely and store/sync via Wi-Fi (store and forward). | |  |
| **R** | 1. Controls to prevent future dating of inspection results. | |  |
| **R** | 1. Flag inspections as billable; generate invoices and process cash receipts or pass through to Eden financial system. | |  |
| **N** | 1. Track performance data, e.g. number of inspections, time spent on an inspection by type, by inspector, etc. | |  |
| **R** | 1. Option to launch workflow after final inspection and payment received to each department for approval to generate the Certificate of Occupancy. | |  |
| **I** | 1. Schedule and manage non-permitting related inspections, e.g. annual fire inspections, hazardous material inspections, etc. | |  |
| **R** | 1. Generate inspection reports that that includes total inspections by department, individual, amount billed, due date, date completed and total hours. | |  |
| **R** | **Code Enforcement** | | **Rating and Comment** |
| **R** | 1. Unlimited user-defined code case types, e.g. garbage, vehicle, tree cutting, zoning, etc. | |  |
| **R** | 1. Search and pull up records by case type. | |  |
| **R** | 1. Import citizen complaints from Cityworks, mobile app, or MBP.com system. | |  |
| **N** | 1. Notify complainant that complaint was received, actions taken, and status. | |  |
| **N** | 1. Assign priority based on complaint by type. | |  |
| **R** | 1. Track all notes, calls, emails, citations issued, etc. on owner record. | |  |
| **R** | 1. Centrally track interdepartmental staff notes, inspections, outcomes, accumulated hours and activities against a code case. | |  |
| **R** | 1. Create a code case on the fly via mobile device. | |  |
| **R** | 1. Dropdown code violation listing; select and populate citation. | |  |
| **N** | 1. Issue citations from mobile devices (assess fine, collect signatures, print, issue, upload to system, etc.). Prefer real time updates if connectivity. | |  |
| **I** | 1. Attach a series of pictures to a case, preferably from iPad or iPhone. Automatically store in case record. | |  |
| **R** | 1. Issue and track stop work orders related to a violation; trigger re-inspection of site after determined wait period, e.g. 14 days. | |  |
| **R** | 1. Schedule re-inspections and follow up tasks in the field by complaint type or defined interval, e.g. 14 day follow up. | |  |
| **R** | 1. Support generation of bill to violator for outside contractor clean up or other actions taken for non-compliance. | |  |
| **R** | 1. Enter multiple citations into a single complaint; consolidate multiple violations onto a single case letter. | |  |
| **I** | 1. Secure fields or tabs of confidential information based on roles for complaint or case including cases referred for legal action. | |  |
| **R** | 1. Flag repeat problem properties based on complaints or code cases initiated. | |  |
| **R** | 1. Flag case records with safety issues, e.g. hazardous materials, vicious dog, etc. | |  |
| **I** | 1. Generate complaint aging reports for public disclosure requests. | |  |
| **N** | 1. Reminder or report on case files to be closed according to retention schedule, e.g. open complaints held 3 years, Code Enforcement record 6 years, etc. | |  |
| **R** | **Reporting and Query Tools** | | **Rating and Comment** |
| **R** | 1. Describe available reporting tools (e.g. ad hoc, standard reports, 3rd party) and level of integration with all modules and application security settings. | |  |
| **R** | 1. Reporting across modules on all standard and user-defined fields, e.g. fees collected, value of property, date ranges, attributes, etc. | |  |
| **I** | 1. Generate reports that show unit counts, square footage counts, lot area, etc. for a defined period of time. | |  |
| **R** | 1. Date-range and parameter-based queries and reports. | |  |
| **R** | 1. User-level query tools that support wild card search, drop down lists or other methods to facilitate look-up (e.g. by parcel ID, owner name, applicant, permit number, partial address, contractor name, case, project #, etc.). | |  |
| **R** | 1. Drill down to source transactions from queries and reports. | |  |