



LEGAL NOTICE

**REQUEST FOR PROPOSAL
SEALED PROPOSAL 13-117**

For

Community Development Software

For

**ST. CHARLES COUNTY GOVERNMENT
ST. CHARLES, MISSOURI**

St. Charles County is seeking proposals for **Community Development Software**. The county reserves the right to terminate the contract for any violation, by the successful bidder, of any term or condition of the contract by giving thirty (30) days written notice stating the reasons therefore and giving the party time to remedy any deficiencies.

PROPOSAL INSTRUCTIONS

One original and one [1] signed copy of the proposal must be received in a sealed envelope plainly marked “ **Sealed Proposal 13-117 Community Development Software**” with the date and time of the proposal opening in the lower left corner of the envelope.

An authorized representative of the company/person submitting the proposal must sign the proposal, in blue ink.

Proposals must be submitted to the St. Charles County Finance Department, 201 North Second Street Room 541 St. Charles MO 63301 prior to **7/25/13 at 10:00 am**.

St. Charles County reserves the right to accept and/or reject any and all proposals.

Proposal results may be obtained by emailing a request to the St. Charles County Purchasing Manager at purchasing@sccmo.org, **no phone calls please**. Include the name and number of the proposal and date of the proposal opening when requesting the results. The time it takes for final proposal results to be made public depends on the complexity of the project and the cost of the project.

PROPOSAL INQUIRIES

Any questions or clarifications concerning this Request for Proposal must be submitted in writing via E-mail (preferred), mail or fax to:

Kurt Mandernach, Purchasing Manager
St. Charles County Government
Finance Department
201 North Second Street
St. Charles, Missouri 63301
Fax: (636)949-7589
purchasing@sccmo.org

Technical inquiries concerning the specifications should be made to:

Patty Steevens
St. Charles County Government
Information Systems
201 North Second St
St. Charles, Missouri 63301
Phone (636) 949-7900 Ext 4488
psteevens@sccmo.org

There will be a pre-bid meeting on 7/10/13 at 10:00 am at the St Charles County Administration Building, 201 North Second St, **Room 413**, St Charles, MO 63301.

- The request number and title shall be referenced on all correspondence.
- All questions must be received no later than **5:00 PM** on **07/19/2013**
- . Any question received after this deadline may not be answered.

Responses to questions/clarifications will be placed on the County's website <http://finance.sccmo.org/finance>. Check this website frequently for updates and any addendum that are issued.

Prohibited Communication

Contact with any representative, other than through the procedure outlined in the section titled "Bid (or Proposal) Inquiries", concerning this request is prohibited PRIOR TO BID (OR PROPOSAL) OPENING. Representative shall include, but not be limited to, all elected and appointed officials, and employees of St. Charles County and the Agencies within St. Charles County.

Any Offeror engaging in such prohibited communications prior to Bid (or Proposal) Opening may be disqualified at the sole discretion of St. Charles County.

TERMS AND CONDITIONS

- St. Charles County reserves the right to reject any and all proposals or parts of a proposal and waive technicalities, and to adjust quantities.
- All proposals will be considered final. No additions, deletions, corrections, or adjustments will be accepted after the time of proposal opening.
- All delivery costs or charges must be included in the F.O.B. destination proposal price.
- City, County and State of Missouri Sales Tax and Federal Taxes are not applicable to sales made to St. Charles County and must be excluded.
- The contract shall be effective for the approximate twelve (12) month period from the date of the notice of award.
- The electronic version of this bid/RFP is available upon request. The document was entered into WORD for Microsoft Windows. The Purchasing Office does not guarantee the completeness and accuracy of any information provided on the electronic version. Therefore, respondents are cautioned that the hard copy of this bid/RFP on file in the Purchasing Office governs in the event of a discrepancy between the information contained in or on the electronic version and that which is on the hard copy.
- Vendors are required to clearly identify any deviations from the specifications in this document.
- An authorized officer of the company submitting the proposal must sign all proposals, in blue ink.
- Vendors must submit two [2] signed copies of their proposal; one is to be an original and so marked.
- All prices and notations must be in blue ink or typewritten on the attached form. Mistakes must be crossed out, corrections typed adjacent and must be initialed in blue ink by the person signing the proposal.
- St. Charles County will not award any proposal to an individual or business having any outstanding amounts due from a prior Contract or business relationship with the County or who owes any amount(s) for delinquent Federal, State or Local taxes, fees and licenses.
- Sealed proposals received after the designated time of the receipt of the sealed proposals will be considered as "Void" and will not be opened.
- The successful firm is specifically denied the right of using in any form or medium the names of St. Charles County or any other public entity within the St. Charles County for public advertising unless express written permission is granted.
- All vendors must possess the necessary and appropriate business and/or professional licenses in their field.

- Award will be made to the low responsive, responsible vendor, or to the offeror whose proposal is most advantageous to the County, price and other factors considered. When payments are to be made to the County, award will be made to the most advantageous offer.
- County reserves the right to accept any item or group of items offered, unless the vendor qualifies his proposal by specific limitations. The proposal can be on an "all or none" basis if wording in the proposal so states and if all items solicited are included in the proposal.
- When applicable, provide unit prices and extension prices. Where there is disagreement in the unit and extension prices, the unit price shall govern.

Employment of Unauthorized Aliens Prohibited (Missouri Revised Statutes Section 285.530)

As a condition for the award of any contract or grant in excess of five thousand dollars by St. Charles County to a business entity, the business entity shall, by sworn affidavit and provision of documentation**, affirm its enrollment and participation in a federal work authorization program (**E-Verify**) with respect to the employees working in connection with the contracted services. Every such business entity shall sign an affidavit affirming that it does not knowingly employ any person who is an unauthorized alien in connection with the contracted services. [RSMO 285.530 (2)]

An employer may enroll and participate in a federal work authorization program (**E-Verify**) and shall verify the employment eligibility of every employee in the employer's hire whose employment commences after the employer enrolls in a federal work authorization program. The employer shall retain a copy of the dated verification report received from the federal government. Any business entity that participates in such program shall have an affirmative defense that such business entity has not violated subsection 1 of this section. [RSMO 285.530 (4)]

Any entity contracting with St. Charles County shall only be required to provide the referenced affidavit on an annual basis. A copy of the affidavit is included in this bid request. Vendors may choose to send the required documentation using one of the following options:

- Send the notarized affidavit and E-Verify MOU signature page to: St. Charles County, Attn: Purchasing Manager, 201 N Second Street, Room 541, St. Charles, MO 63301 prior to responding to any solicitations; **OR**
- Send the notarized affidavit and E-Verify MOU signature page along with a bid solicitation response.

These documents will be kept on file. The notarized affidavit and E-Verify MOU signature page will remain current for **one year** from the date of the notarized affidavit.

**** PLEASE NOTE:**

Acceptable enrollment and participation documentation consists of a valid copy of the signature page of the E-Verify Memorandum of Understanding, completed and signed by the Contractor, and the Department of Homeland Security - Verification Division
The online address to enroll in the E-verify program is:

<https://e-verify.uscis.gov/enroll/StartPage.aspx?JS=YES>

Open Records

Any and all information contained in or submitted with the bid becomes a public record subject to the Missouri Sunshine Law when the bids are opened. If the bidder believes that any information contained in or submitted with the bid is protected from disclosure by the Missouri Sunshine Law, the bidder must clearly identify what information the bidder believes is so protected and must also clearly identify the legal basis therefor.

REQUEST FOR PROPOSAL

Community Development Software

St. Charles County Government Community Development is comprised of 32 full time employees that include inspectors, plan reviewers, planners, and clerical. Annually, approximately 21,500 inspections are scheduled, 3,500 permits are issued, 1109 land use permits issued, floodplain development permits issued, 175 reviews performed, and 3,800 code enforcement complaints handled.

Statement of Work

1 Purpose

St. Charles County Community Development seeks to acquire a comprehensive software program specifically designed to effectively and efficiently manage day-to-day operations of Community Development and to provide information to the public and/or customers. This Request for Proposal (RFP) states the overall scope of products and services desired and specific software functionality as well as required vendor qualifications.

The solution should seek to not only meet the current requirements of St. Charles County Community Development, but also allow for expansion to meet future needs. The solution must also be compatible with Windows XP and Windows 7 Professional client computers, as well as local and remote clients. All software must meet or exceed the majority of following specifications to be considered. Vendors are required to clearly identify any deviations from the following proposal specifications. Qualified technical support must be readily available.

2 General Information & Expectations

2.1 Reduce overall operational costs throughout Community Development.

2.2 The anticipated software needs and goals of this RFP include the following but is not limited:

- Automate and track work flow and services throughout the process
- Permit application
- Bonds
- Contractor's license
- Inspections

- Plan Review
- Scheduling
- Ticketing (violations)
- Planning and Zoning applications
- Ad hoc Reporting
- Property Maintenance
- Alerts
- Form templates (Microsoft Word)
- Billing
- Reporting
- Document Management (imaging)
- Customizable Reports
- Development Review
- Public On-line Application submittal
- Response Management
- Mobility/In-Field Usage via Tablets
- GIS
- Ability to create custom fields and menu's
- Accounts Receivable
- Importing Property owner and other information from our current systems

2.3 The County shall not be held responsible for any oral instructions. Any changes to this Request for Proposal (RFP) will be in the form of an addendum.

- 2.4 The County reserves the right to reject any or all responses, to waive any informality or irregularity in any response received, and to be the sole judge of the merits of the respective responses received.
- 2.5 The selected provider will be an integral member of the Project Team, consisting of the selected provider, representatives from the County and other consultants as required or designated.

3 Additional Terms and Conditions

3.1 Confidentiality

All correspondence, documentation and information provided in response to or because of this RFP may be reproduced for the purposes of reviewing the Respondent's submission to this RFP. If a portion of a Respondent's Response is to be held confidential, such provisions must be clearly identified in the Response. All correspondence, documentation and information of any kind, provided to any Respondent, in connection with or arising out of this RFP or the acceptance of any Response:

- a) Remains the property of the County
- b) Must be treated as confidential to the extent permitted by law
- c) Must not be used for any purpose other than for replying to this RFP or for fulfillment
- d) Must be returned upon request

3.2 Non-Disclosure Agreement

The County reserves the right to require any Respondent to enter into a non-disclosure agreement satisfactory to the County.

4 Proposal Preparation Instructions

4.1 Vendor's Understanding of the RFP

In responding to this RFP, the vendor accepts the full responsibility to understand the RFP in its entirety, and in detail, including making any inquiries to the County as necessary to gain such understanding.

4.2 Good Faith Statement

All information provided by the County in this RFP is offered in good faith. Individual items are subject to change at any time. The County makes no certification that any item is without error. The County is not responsible or liable for any use of the information or for any resulting claims.

5 Method of Award

5.1 Formal Presentation

The purpose of this RFP is to identify those suppliers that have the interest, capability, and financial strength to supply the County with a software solution identified in the Statement of Work. The County will evaluate each Proposal based upon the criteria listed below and upon the competence, compliance, format, and enterprise applicability demonstrated by the Proposal.

5.1.a Evaluation Criteria (no weighting is implied by order of listing):

- General information about your organization including a description of the firm, organizational chart, and relevant firm experience.
- Responses to the specifications and other requirements detailed in sections 6, 7 and 8 below, including:
 - Functional Specifications
 - Vendor Commitment
 - Training
 - Support
 - Vendor qualifications and references
 - Experience with government entities
 - Cost estimates, integration with existing systems and length of contract

5.2 Selection and Notification

Based upon its evaluation of the Proposals in accordance with section 5.1.a, the County will select finalists for a Short List for the project. The Short List firms may meet with the County for interviews. The purpose of the interview is to expand upon the information provided in the Proposal, not to repeat information already provided. The interview may include a site visit by County staff. Those firms selected for the Short List will be provided additional instruction by the County. Those firms not selected from the County will not be notified.

Following any interviews, the County will determine a ranking for each Short List firm in accordance with the criteria discussed in section 5.1.a. Consideration will be given to both the written Proposal and any oral presentations or interviews. No other factors or criteria will be considered.

The highest ranked firm will be recommended to the Finance Director and Director of Administration for contract award. The County will enter into negotiations with the selected firm and execute a contract upon completion of negotiations and approval by the County Executive. If the County is unsuccessful in negotiating a contract with the highest-ranked firm, it may then negotiate with the next-highest ranked firm until a contract is executed, or it may elect to terminate the selection process. If the County does not find a suitable vendor within the RFP process, the County is not obligated to award the project to any vendor.

6 Functional Specifications for Community Development Software

Complete the following section by placing an X in the Yes or No column to indicate whether the proposed software meets the stated requirement.

Yes = Vendor's software fully meets the described requirement

No = Vendor's software does not meet the described requirement

All "No" responses shall be explained on the exception sheet included in the proposal packet; please provide an explanation whether the requirement can be met in the future with the proposed software and if there is a cost associated.

6.1 General System Requirements

6.1 General System Requirements				
Item	Requirements	Yes	No	Comments
1.	Does your software support the simultaneous usage of the software by dozens of users assuming the hardware it runs on is capable of such volume?			
2.	What's your smallest and largest implementation in terms of the number of users (database size, etc.) and are there additional charges to increase in size?			
3.	Does your software have any known functional issues with any antivirus solution? If yes, describe in detail.			

6.1 General System Requirements

4.	Does your software interfere with the operation of standard Microsoft applications (Word, Excel, and Outlook), Internet Explorer, Windows Operating Systems and or Windows Server Operating Systems?			
5.	Does your software support touch screen hardware and PDF editing software such as "Blue Beam" allow for the mark up of drawings?			
6.	Does your software have a dashboard for inspectors to view all inspections assigned to them and the results of those inspections?			
7.	Does your software use GIS information to automatically route an inspection based on a geographic area?			
8.	Does your software 'lock up' or disable a user input or access during transactions or when executing queries to external system databases or interfaces?			
9.	The system should provide a supervisor review approval before submittal. Does your software provide this scenario?			
10.	Does the software have options for the users to operate the system using function keys and/or mouse point-and-click operations?			

6.1 General System Requirements

11.	Can the vendor create templates for narrative fields on any screen?			
12.	Does the system include narrative fields of virtually unlimited length?			
13.	Does the system provide spell check for narratives?			
14.	Does the system provide cut, copy and paste functions?			
15.	Does the system provide voice to text? If yes, which software and version.			
16.	Can users search on any field on any screen in any order within the system?			
17.	Can users search with wildcard characters?			
18.	Can users search multiple criteria within the same table or search combined criteria across multiple tables?			
19.	Can the system display a list of all records matching the system criteria?			
20.	Can address records be accessed from all modules without the need to reenter search criteria?			
21.	Can a user view all associated information based on an address search? (i.e. permits, violations)			

6.1 General System Requirements

22.	What information can users capture regarding an address in the main record besides the basic name and address information? Please list in detail.			
23.	Can users enter and view alerts for any address in the system?			
24.	Does the system provide a dashboard for users to access recent activity on a particular address, by division or all divisions?			
25.	Does the system have checklists for various processes (i.e. inspections, plan review etc.)?			
26.	Does the system offer the capability to enter text (unlimited number of characters) into a notes section?			
27.	Does the system detect duplicate entries?			
28.	Does your system offer linking to favorite websites directly?			
29.	Does the system automatically notify users when assignments have been updated or new tasks have been assigned to them?			
30.	Can users link historical information on a record?			
31.	Can users view and update pre-existing information about an address?			

6.1 General System Requirements

32.	During any data entry if interrupted can you continue later without losing data?			
33.	Can the system automatically compute the billing amount for predefined items (i.e. permits, license)?			
34.	Can the system calculate expiration dates based on predefined criteria (i.e. inspections)?			
35.	Does the system provide standard templates (i.e. receipts, notifications etc.)?			
36.	Does the system provide a reporting tool for adhoc reports?			

6.2 Security**6.2 Security**

Item	Requirements	Yes	No	Comments
1.	Does your software contain security features?			
2.	Does your software enforce username and password checking before the user can begin using the software?			
3.	Does the proposed software have the capability of authentication using Active Directory?			
4.	Can users be assigned to a group where each group is then assigned specific privilege?			

6.2 Security

Item	Requirements	Yes	No	Comments
5.	Does your system recognize administrator or super-users that can administer the security routines?			
6.	Is every log in and log out of the system recorded in an audit log?			
7.	Does the system allow for security functions to be performed online in real time?			
8.	Does the system automatically sign off a user after a specific predetermined time of inactivity?			
9.	Can user access be defined per screen, record, field, and function (view, add, modify, delete etc.)? Please list each available.			
10.	Can users be members of more than one group at the same time?			
11.	Does your system support an unlimited number of users?			
12.	Does your system include audit trails of all database changes?			
13.	Does your system support keeping audit logs indefinitely? Is this option configurable to administrators/super-users?			
14.	Are you PCI compliant? If yes, please provide PCI certificate. If no, who is your third party vendor and are they PCI compliant? Please provide name, location and certificate.			

6.2 Security

Item	Requirements	Yes	No	Comments
15.	Does your system support running client software in a terminal services environment?			
16.	Is Microsoft Windows your systems preferred operating system for workstations and servers?			

6.3 Server**6.3 Server**

Item	Requirements	Yes	No	Comments
1.	Server Function: SQL, IIS, Application or Batch			
2.	What is your latest supported OS (operating system)?			
3.	Is your software SQL based (Microsoft SQL 2008 R2 or higher)?			
4.	Processor recommendations			
5.	RAM recommendations			
6.	Storage size recommendations			
7.	Can the application be virtualized?			

6.3 Server

Item	Requirements	Yes	No	Comments
8.	The software application on the server must run as a service using a dedicated service account; and not under a system account. The application must not run in a disk operating system (DOS) window or under a user account left logged into the server. Is your software designed as stated above?			
9.	Will there be additional hardware required?			
10.	Is the application a thick client or a web interface?			
11.	What is the licensing structure?			
12.	Will the application run on 32 bit or 64 bit Windows?			
13.	Will any credit card holder data be stored on site?			
14.	Does the software have any special requirements?			

6.4 Database**6.4 Database**

Item	Requirements	Yes	No	Comments
1.	Is the data stored in the cloud? If so, additional questions will need to be answered.			
2.	Who owns the data stored in the application? (if vendor hosts)			
3.	What are your policies for protecting our data? (if vendor hosts)			

6.4 Database

Item	Requirements	Yes	No	Comments
4.	Do you offer tools to automate importing and exporting of data (add, deletes, and changes)?			
5.	Does your database enforce referential integrity?			

6.5 Workstation**6.5 Workstation**

Item	Requirements	Yes	No	Comments
1.	Does your software support desktop computers, laptops, iPads and or equivalent tablets?			
2.	If thick client, what is the latest desktop OS the application will run on?			
3.	If web interface, what are your supported browsers and versions?			
4.	Does the application require Java and if so what version?			
5.	Does the application require Silverlight and if so what version?			
6.	What type of connections will be required for desktop PC's (i.e. ODBC)?			
7.	Does the application have Adobe or Flash dependencies?			
8.	For non-thin-client workstations do you offer minimum specifications for those workstations?			

6.6 Disaster Recovery

6.6 Disaster Recovery				
Item	Requirements	Yes	No	Comments
1.	Can you offer recommendations for backup policies and procedures to our IT staff?			
2.	In the event of a disaster recovery, What services do you provide in helping your clients restore the application/system?			
3.	If Cloud based; Do you have a disaster recovery plan? If yes, please describe in detail.			

6.7 Integration – Assessor, GIS and Financial Data

6.7 Integration — Assessor, GIS and Financial Data				
Item	Requirements	Yes	No	Comments
1.	Does your software allow us to import data from our current systems with the initial Implementation in order for us to keep historical information?			
2.	Does your software allow on-going automated data imports and exports?			
3.	Does your software interface with mapping products that support ESRI formats, Arc coverage's, Geocoded databases, Arc ADE layers and Digital Aerial photography?			
4.	Does the vendor offer web based citizen access modules to provide citizens with interactive web services?			

6.8 Integration – Microsoft Office

6.8 Integration — Microsoft Office				
Item	Requirements	Yes	No	Comments
1.	Does your software integrate with Microsoft Office components?			
2.	Does your software integrate with Microsoft Word to allow authorized users to do such things as perform mail merge functions, create forms, checklists, receipts, etc.?			
3.	Does your software support double byte characters?			
4.	Is virtually every field in your system available for auto-insertion into a Microsoft Word document?			
5.	Can complex 'template' spreadsheets be pre-created where output is imported into the spreadsheet, totals, graphs, etc. can be automatically computed and created based on the data exported from the system?			
6.	Does your software integrate with Microsoft Outlook?			
7.	If your software integrates with Microsoft Outlook, can emails be sent from within your system?			
8.	If your software integrates with Microsoft Outlook, can users schedule multiple emails be sent automatically based on report output data?			

6.9 Integration vs. Modular

6.9 Integration vs. Modular				
Item	Requirements	Yes	No	Comments
1.	Is the software a totally integrated system? (Application does not use one module for permits, another module for the licenses, and a third for planning etc.)			
2.	Is the vendor the sole developer of all routines, components, modules, etc.? (i.e. the vendor has not purchased software from other third parties and is dependent on those third parties for enhancements and problem fixes.)			
3.	Is the vendor's software as demonstrated sold as one complete package at one price? (i.e. software is not sold piecemeal where additional modules each have an additional cost.)			

6.10 Document Management

6.10 Document Management				
Item	Requirements	Yes	No	Comments
1.	Does the software have document management capabilities?			
2.	Can archived records be scanned into the system?			

6.10 Document Management

Item	Requirements	Yes	No	Comments
3.	Does the software support the automated importation of scanned images via bar code separator pages, file naming conventions, and/or web services?			
4.	Does the software store scanned images in their native file format?			
5.	Does the software support all major Microsoft Windows files formats such as .tif, .jpg and .pdf?			
6.	Does the software support digital photographs?			
7.	Does the software support the storage of sound files?			
8.	Does the software support the storage of video files?			
9.	Is the access of the document management files (i.e. scanned-in images and photographs) seamlessly integrated into the system? (i.e. the user does not have to manually start up another program to view document management files.)			
10.	Is there a path for unlimited growth of the number and size of document management files except for the natural limits imposed by hardware capacities?			

6.10 Document Management

Item	Requirements	Yes	No	Comments
11.	Are the document management files stored and organized separately such that backups and disaster recovery can be streamlined and implemented using common commercially available backup software?			
12.	Should we choose to discontinue and uninstall your application; will the document management files still be available for use?			
13.	Does the system provide a preview of the captured image prior to final acceptance?			
14.	Can users crop, center, rotate and or resize images?			

6.11 Alerts**6.11 Alerts**

Item	Requirements	Yes	No	Comments
1.	Can we customize alerts to be issued based on expired licenses?			
2.	Can we customize alerts to be issued based on missing values such as overdue inspection timeframes, expired permit notifications, and escrow disbursement deadlines?			
3.	Can alerts be group specific, meaning only certain groups can see or act upon specific alert types?			

6.11 Alerts

Item	Requirements	Yes	No	Comments
4.	Can an authorized staff member choose to ignore or cancel an alert?			
5.	Does your system track all alerts issued and the corresponding measures taken in support or denial of those alerts?			
6.	Can reports be created to track alerts issued and the outcome (if any) of those alerts?			
7.	Are alerts visible on all screens within the system?			
8.	Can users define the alert verbiage?			

6.12 Billing**6.12 Billing**

Item	Requirements	Yes	No	Comments
1.	Does your software support billing?			
2.	Does your software generate invoices and statements?			
3.	Can invoices or statements be emailed to the guarantor?			
4.	Can payments be recorded in your software?			
5.	Does your system support line item payment posting?			
6.	Does your software support the automatic posting of electronic remittance payments?			

6.12 Billing

Item	Requirements	Yes	No	Comments
7.	Does your software support the ability to enter adjustments or write-downs to specific line-item charges?			
8.	Does your software support fee schedules to ensure that all charges are billed at the proper rate?			
9.	Does your software support automatically updating re-inspection fees based on a failed inspection?			
10.	Does your software support contract schedules to ensure that all payments received are the proper amount?			
11.	Can the layout of statements and invoices be customized?			
12.	Does your system retain a copy (image) of every electronic file?			

6.13 Scheduling**6.13 Scheduling**

Item	Requirements	Yes	No	Comments
1.	Does your software include scheduling capabilities?			
2.	Does your scheduler support customizable appointment reason code lists?			
3.	Can appointment schedules be viewed in both a grid format and a list format?			

6.13 Scheduling

Item	Requirements	Yes	No	Comments
4.	Does the software have the ability to assign inspections to a specific inspector based on availability, inspection type and territory?			
5.	Can unlimited character comments be entered on appointments?			
6.	Does your scheduler allow periodic inspections to be automatically generated? (3 year, and 5 year basis)			
7.	Can users schedule any type of event?			
8.	Can users view future events and filter events on specific criteria?			

6.14 Customization

6.14 Customization				
Item	Requirements	Yes	No	Comments
1.	Is your system flexible and customizable by the user?			
2.	Does your system offer the ability for authorized users to templates?			
3.	Does your system offer the ability for authorized users to customize appointment reasons?			
4.	Does your system offer the ability for authorized users to customize categories of document management file types and descriptions?			
5.	Does your software support the customization of new definable fields and records (i.e. property records, violations etc. without ANY assistance or programming modifications by you the vendor whatsoever)?			
6.	If your software supports user definable fields and records, can those user defined records be fully integrated into the system such that they appear to be seamless to the end user?			
7.	If your software supports user definable fields and records, can data entry screens be customized using an integrated screen design tool?			

6.14 Customization

Item	Requirements	Yes	No	Comments
8.	Can the user definable fields include field types such as text, multi-line, date, numeric, monetary and other standard field types?			
9.	Can the user definable fields include computed fields that take values from other user definable fields (and/or system fields) and compute new values from existing fields?			
10.	Does the vendor offer customization services as well as training for the department in how-to-do customization of your system?			
11.	Can user definable fields and records be combined with system fields such as demographics, etc. on ad-hoc and system reports?			

6.15 Reporting**6.15 Reporting**

Item	Requirements	Yes	No	Comments
1.	Does the software include a fully-integrated report writer?			
2.	Is the integrated report writer designed and developed by your company? (i.e. report writer was not purchased from another company and is not an add-on report writer such as Crystal Reports.)			
3.	Is every field stored in the system a reportable field?			

6.15 Reporting

Item	Requirements	Yes	No	Comments
4.	Can report designs be created and stored for later use?			
5.	Can users create ad hoc reports using third party writers, such as Microsoft Office and Crystal reports?			
6.	Can reports be run at any time?			
7.	Can ad-hoc reports be created and run on-the-fly without the need to save a report definition?			
8.	Can users create and schedule reoccurring reports to run at a defined time and date on a regular basis?			
9.	Can report output be saved within the system for viewing at a later time?			
10.	Can users 'drill-down' on reports to the underlying records represented by the report output?			
11.	Can information on reports be exported to text files?			
12.	Can information on reports be printed?			
13.	Can numeric information on reports be graphed with an integrated graphing component?			
14.	Can information on reports be exported to Microsoft Excel?			
15.	Can information on reports be exported to Microsoft Word?			

6.15 Reporting

Item	Requirements	Yes	No	Comments
16.	Can management-by-exception reports be created by filtering report output on specific field values? (i.e. values greater or less than certain values, past due appointments, past due payments etc.)			
17.	Can summary reports be created that hide detail but display such things as how many properties with a specific "X" violation etc.?			
18.	Can output on reports be color-coded based on specific criteria to highlight items of interest?			
19.	Can report creation and execution be restricted by group and security clearance?			
20.	Can users generate a report identifying possible duplicate address records and information be merged into one record?			

7 Vendor Commitments

Implementation, Training and Customer Service

The Vendor must provide a high level of technical and business support. Some of the criteria to be included in this section of the proposal are as follows:

Installation/Implementation

The Vendor must describe what is entailed in the initial software installation process as well as any future installations (add-on purchases and or upgrades). All expectations and/or requirements of the County must be fully outlined in the proposal. An estimated installation time must be included in the proposal.

- Has the vendor ever failed to complete and implementation? If so, please describe in detail.
- Attach an implementation plan that outlines timeline, deliverables and milestones.

Training

The Vendor must describe the type of training that is provided and required with the initial software purchase and with any future application/module purchases and or upgrades thereafter. The training requirements must be clearly defined in the proposal and must identify the following:

- What is the location and method of training (e.g., phone, web or on-site at St. Charles County)?
- What is the length of the training provided?
- What key objectives are identified during the training program?
- Is there a limitation on the number of participants?
- What is required of end-users and system administrator(s)?
- Describe all training documentation and instructional support available.
- Who are the key individuals providing the training?
- What travel expenses (transportation, lodging and meal costs) are required?

Customer Service

The Vendor must describe the level of customer support that is provided with the initial software purchase and implementation. Any service plans that are available beyond this must also be outlined in the proposal. Describe in detail service and maintenance agreements. Include a copy of the Maintenance Agreement with this proposal. Customer support may include, but is not limited to the following:

- **Technical Support Services**

- Is there a cost for on-going technical support?
- What types of support (telephone, on-line, knowledgebase, etc.) are offered?
- What is the vendor's average support call duration?
- What is the vendor's average time to resolve issues?
- What is the vendor's first call resolution percentage?
- Does the vendor provide an on-line educational database? If so, please describe in detail.
- What are the hours of availability for each type of support?
- What are the Vendor's Service Level Agreements (SLAs)?
- What are the consequences of the Vendor's failure to meet SLAs?
- What are the problem reporting and escalation procedures?
- Is the Vendor's support staff employed directly by the Vendor?

- **Maintenance**

- Are there standard scheduled maintenance windows? If so, how often and what is the duration of down time?

References

Identify and describe at least three government entity references where you have implemented the proposed solution. Include the customer organization's name, address, contact name and title, email address and phone number. Also, include the installation date of the proposed solution.

Project Schedule

Provide an estimated time frame for the proposed work, including project milestones. The final project schedule will be developed between St. Charles County and the selected Vendor. Identify the project manager and his/her major project responsibilities. Provide resumes for members of the proposed project team.

7.1 Implementation

7.1 Implementation				
Item	Requirements	Yes	No	Comments
1.	Does the vendor supply staff on-site during the implementation phase of the software?			
2.	Will the vendor staff assist during off hour shifts during the implementation phase?			
3.	Will the vendor staff remain on-site during weekends and for two or more consecutive weeks if needed?			
4.	Will the vendor coordinate integration of the software, network/hardware staff and any other third party vendors?			
5.	If modifications are needed to the software during the implementation phase, will the vendor install new versions during this phase?			
6.	Prior to the implementation phase, will the vendor customize the database to accommodate our unique information (i.e. forms, permit codes, violation codes etc.)?			
7.	Can the vendor bring a computer network (servers, workstations, printers, scanners, etc.) to our site for initial training?			

7.1 Implementation

Item	Requirements	Yes	No	Comments
8.	Does the vendor offer a training database in addition to the production database?			
9.	Prior to the initial training, will the vendor perform an on-site "walk-through" and assessment, including interviews of key staff?			
10.	Will the vendor customize the training to meet the specific needs of our Community Development Associates?			
11.	Will the vendor customize training content by user group and include scenario-based training?			
12.	Does the vendor provide web based online step by step instructions on how to perform a task?			
13.	Does the vendor provide on-site coaching during the first 48 hours of "go live?"			
14.	Does the vendor employ a "train-the-trainer" model?			
15.	Is the vendor's training staff employed by the vendor? (i.e. the vendor does not out-source its training.)			
16.	Does the vendor offer training in customization routines so that our staff can perform the customization as opposed to the vendor's staff?			

7.2 Transition – Follow up Training and Customization

7.2 Transition – Follow Up Training & Customization				
Item	Requirements	Yes	No	Comments
1.	Does the vendor offer follow-up training after the implementation phase of the software?			
2.	Will the vendor perform follow-up training on-site at our facility?			
3.	Will the vendor perform follow-up training for as few as one or two individuals?			
4.	Does the vendor offer Internet-based follow-up training?			
5.	Does the vendor offer customization services after the implementation phase?			
6.	Does the vendor offer follow-up training in customization routines so that our staff can perform the customization as opposed to the vendor's staff?			

7.3 Transition – On-going Technical Support

7.3 Transition - On-Going Technical Support				
Item	Requirements	Yes	No	Comments
1.	Does the vendor offer 24/7 (24 hours per day, 7 days per week) telephone support via toll free phone number?			
2.	What is your guaranteed response time on support?			

7.3 Transition - On-Going Technical Support				
Item	Requirements	Yes	No	Comments
3.	Does the vendor have the capability to remotely 'view' our data?			

7.4 Transition – Version Upgrades

7.4 Transition - Version Upgrades				
Item	Requirements	Yes	No	Comments
1.	Does the vendor offer software version upgrades as part of the on-going maintenance fee?			
2.	Does the vendor include all enhancements to the software in the version upgrades?			
3.	Does the vendor include all problem fixes/patches to the software in the version upgrades?			
4.	Does the vendor provide version upgrades on a regular basis? If so, how frequently?			
5.	Does the vendor provide version upgrades on an as-needed basis?			
6.	Can the vendor install version upgrades remotely?			
7.	Can the vendor coordinate installation of version upgrades with the network/hardware vendor or staff?			
8.	Can our staff make recommendations for enhancements to the software?			

7.5 Transition – Version Services

7.5 Transition - Services				
Item	Requirements	Yes	No	Comments
1.	Do you offer any type of network/hardware services?			
2.	Can you coordinate network/hardware projects with our IS staff if requested to do so?			
3.	Can you supplement our IS staff if requested to do so?			
4.	Can you completely manage our IS needs if requested to do so?			

8 Cost Estimates

If you are confident that you can meet the requirements of the County in this project, please respond below and be sure to include all costs associated with implementation of the software and training of both users and technical personnel in the daily use, operation, and maintenance of the St Charles County Government Community Development Department. All estimated cost information should reflect an estimated five (5) year cost. Any costs associated with other products required to implement and efficiently operate the new software solution should be included in the exception sheet. Vendor shall provide cost estimates for both on-premise and hosted solutions when available. Any discounts for multi-year contracts must be provided in the exception sheet.

Cost Estimates

	Up Front Costs	Recurring Costs	Annual Costs					
	One Time	Monthly	Year 1	Year 2	Year 3	Year 4	Year 5	Total
Consulting Services								
Software Licensing								
User licensing								
View Only licensing								
Implementation								
Customization								
Report Writing								
Interface with Assessor (Thomson Reuters)								
Interface with GIS								
Interface Citizen Access								
Import of existing data to vendors application								
Enhancement Requests								
Ongoing Maintenance								
Ongoing Technical Support								
Ongoing Upgrades								
Hosting Services (per device, per month)								
Training								
Travel Costs (Transportation, Lodging and Meals)								
Monthly import and export of information								
Grand Total Per Year								

Exception Sheet

If the item(s) and/or services proposed in the response to this bid is in any way different from that contained in this proposal or bid, the bidder is responsible to clearly identify all such differences in the space provided below. Otherwise, it will be assumed that the bidder's offer is in total compliance with all aspects of the proposal or bid.

Below are the exceptions or differences to the stated specifications (attach additional sheets as needed):

Date: _____

Signature: _____

Title: _____

Company: _____

THIS FORM MUST BE COMPLETED AND ENCLOSED WITH THE PROPOSAL

Audit Clause for Contracts

Examination of Records

The Contractor's records must include, but not be limited to, accounting records (hard copy, as well as computer readable data), written policies and procedures, subcontractor files, indirect cost records, overhead allocation records, correspondence, instructions, drawings, receipts, vouchers, memoranda, and any other data relating to this contract shall be open to inspection and subject to audit and/or reproduction by the County Auditor, or a duly authorized representative from the County, at the County's expense. The contractor must preserve all such records for a period of three years, unless permission to destroy them is granted by the County, or for such longer period as may be required by law, after the final payment. Since the Contractor is not subject to the Missouri Sunshine Law (Chapter 610, RSMo), information regarding the Contractor's operations, obtained during audits, will be kept confidential.

The Contractor will require all subcontractors under this contract to comply with the provisions of this article by including the requirements listed above in written contracts with the subcontractors.

Vendor Information

Company Name: _____

Business Address: _____

Business Hours: _____

Phone: _____ Fax: _____

Email address: _____

Contact Person: _____

Authorized Signature: _____

(Indicates acceptance of all bid terms and conditions)

Date: _____

AFFIDAVIT OF WORK AUTHORIZATION

The bidder/contractor who meets the section 285.525, RSMo definition of a business entity must complete and return the following Affidavit of Work Authorization.

Comes now _____ (Name of Business Entity Authorized Representative) as
_____(Position/Title) first being duly sworn on my oath, affirm
_____(Business Entity Name) is enrolled
and will continue to participate in the E-Verify federal work authorization program with respect to
employees hired after enrollment in the program who are proposed to work in connection with the
services related to contract(s) with the County for the duration of the contract(s), if awarded in
accordance with subsection 2 of section 285.530, RSMo. I also affirm that _____
_____(Business Entity Name) does not and will not knowingly
employ a person who is an unauthorized alien in connection with the contracted services provided to
the contract(s) for the duration of the contract(s), if awarded.

In Affirmation thereof, the facts stated above are true and correct. (The undersigned understands
that false statements made in this filing are subject to the penalties provided under section 575.040,
RSMo.)

Authorized Representative's Signature

Printed Name

Title

Date

E-Mail Address

Subscribed and sworn to before me this _____ of _____. I am
(DAY) (MONTH, YEAR)

commissioned as a notary public within the County of _____, State of
(NAME OF COUNTY)

_____, and my commission expires on _____.
(NAME OF STATE) (DATE)

Signature of Notary

Date

American Made:

In accordance with the Domestic Product Procurement Act (hereinafter referred to as the Buy American Act) RSMo 34.350-34.359, the bidder is advised that any goods purchased or leased by any public agency where the purchase, lease or contract involves the expenditure of twenty-five thousand dollars (\$25,000) or more, shall be manufactured or produced in the United States. Section 34.350.2(1) of that Act specifies that the term “public agency” includes all political subdivisions of the State of Missouri, which definition includes counties.

The requirements of the Buy American Act shall not apply if other exceptions to the Buy American mandate in RSMo 34.353 are met.

If the bidder claims there is only one line of the good manufactured or produced in the United States, RSMo 34.353 (2), or that one of the exceptions of RSMo 34.353 (3) applies, the Department Head or Elected Official bears the burden of certification as required prior to the award of a contract.

In accordance with the Buy American Act, the bidder must provide proof of compliance with RSMo 34.353. Therefore the bidder should complete and return Exhibit A, certification regarding proof of compliance, with the bid. This document must be satisfactorily completed prior to an award of a contract.

EXHIBIT A

**ST. CHARLES COUNTY
DOMESTIC PRODUCTS PROCUREMENT ACT (BUY AMERICAN)**

The Missouri Domestic Products Procurement Act (34.350-34.359 RSMo) requires that for all bids with a value of \$25,000 or more, the goods or commodities purchased by any public agency (which definition includes all political subdivisions of the State, including counties) or used or supplied in the construction, alteration, repair, or maintenance of any public works must be **manufactured or produced** in the United States. As defined in 34.350 RSMo, United States means the United States of America, the District of Columbia, and all territories and possessions subject to the jurisdiction of the United States. The law also requires that the bidder must provide proof of compliance. **Note: In general, if an import tariff is applied to an item, it does not qualify for the Buy American preference. In addition, Most Favored Nation status does not allow application of the preference.**

Section A – All Products Are Manufactured or Produced In U.S.

If all products bid qualify as domestic products under Missouri law, complete only Section A.

I hereby certify that all products qualify as domestic, that the information provided is true and correct, and complies with all provisions of Sections 34.350-34.359 RSMo. I understand that any misrepresentation herein constitutes the commission of a class A misdemeanor pursuant to Section 34.355 of the Revised Statutes of Missouri.
SIGNATURE
COMPANY NAME

If Section A is completed, do not complete Section B.

Section B – Only One Product Line or No Products Are Manufactured or Produced In U.S.

If only one product line or no products are manufactured or produced in the U.S. complete only section B.

I hereby certify that there is only one product line or no product manufactured or produced in the U.S., that the information provided is true and correct, and complies with all provisions of Sections 34.350-34.359 RSMo. I understand that any misrepresentation herein constitutes the commission of a class A misdemeanor pursuant to Section 34.355 of the Revised Statutes of Missouri.
SIGNATURE
COMPANY NAME

Section C – Products May Qualify Because of Qualifying Treaty

If some or all products bid qualify for domestic status because of a trade treaty, etc., then the bidder must identify each product, country and qualifying treaty, etc. below. **The bidder must list ALL products which are or may qualify as domestic below.** If more space is needed, please copy this form and submit as an attachment.

BID ITEM NUMBER(S)	COUNTRY WHERE MANUFACTURED OR PRODUCED	QUALIFYING TREATY, LAW, AGREEMENT, OR REGULATION

SECTION C

I hereby certify that the specific items listed above are domestic, that the information provided is true and correct, and complies with all provisions of Sections 34.350-34.359 RSMo. I understand that any misrepresentation herein constitutes the commission of a class A misdemeanor pursuant to Section 34.355 of the Revised Statutes of Missouri.
SIGNATURE
COMPANY NAME