

ADDENDUM NO. 3

Barnstable County Purchasing Division
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TO: All Bidders of Record

SUBJ: The County of Barnstable, on behalf of the Cape Cod Commission and its member towns and Nantucket is seeking proposals for Permit, License and Inspection Software and Related Services.

ADDENDUM NO. 3

The following are questions submitted by potential bidders and the responses to the questions:

1. For the Pilot Projects (3 sites), can you identify the number of users by each functional area below?
 - a. Permitting (**53 -- In Addendum 2 the response was that with caveats based on the RFP response functionality and pricing - 65 Permit and License users license will be used the pilot sites.**)
 - b. Licensing (**12**)
 - c. Mobile Office (Inspectors) (**39**)

Response 1a-1b: The County had not initially broken out the user licenses between Permits and Licenses since for example Fire, Health and Building departments participate in the signoffs for both Permits and Licenses (i.e. Business and Entertainment Licenses). If pricing is different for Permit and License modules, then the bidder should provide per user pricing for each type of module along with minimum licenses or blocks of licenses that must be purchased. For example, must licenses be purchased in 5 user license increments? Also the bidder should indicate if a user has a “Permit” user license, will they also need a separate user license for the “Licensing” or any other modules different from the sample pricing breakout structure supplied in the RFP? The County has assumed there may be extra fees for the Mobile Inspector’s licenses – the bidder should indicate if there are different fees for inspectors related to Permits vs. inspectors that are related to Licenses and if the Inspectors must have a separate license for both. For example, will a Municipality’s Building Mobile Inspector that must sign off on a License also need to pay for a separate License to be able to sign off on a Permit?

Response 1c: Subject to change, the initial view is that 39 named users would be eventually implemented for the pilots. The number of licenses purchased will depend on pricing and functionality.

2. There are many permit and license types as well as other forms and outputs in Attachment F Tab 02 Forms/Outputs of the Requirements Spreadsheet. It seems as if the County is expecting all of the Critical and as many High and Medium items in the Requirements spreadsheet to be implemented for the 3 Pilot Sites by December 31st, 2012. This seems like a high number of workflows to be implemented in that short time. If a vendor feels that this would be a high risk project based on the high number of workflows, integrations, etc.

being requested, can the vendor suggest an alternate project plan? The suggestion is based on many previous successful projects of similar size and scope.

Response: As indicated in the RFP The County is looking for a solution provider that has...:

- previously implemented a regional solution,
- has previously implemented similar workflows either on a regional basis or on a single site basis,
- has the resources either through internal staff and/or experienced 3rd party implementation partners to take a Swat Team approach to implementation,
- has the resources to work with multiple towns and multiple departments within towns in parallel to facilitate an implementation,
- has best practice templates available as part of system implementation and/or can copy configurations from other clients based on the Critical items,
- has remote meeting capabilities or can use The County's WebEx remote meeting capabilities to maximize the work vs. travel ratio,
- has solutions that can be implemented via configuration changes rather than core system changes,
- has solutions that are configurable by municipalities so that additional forms, processes and outputs can be copied from a similar template to be used for other process which will allow for municipal staff to supplement vendor staff

The County has a SharePoint site that the chosen bidder's staff and partners will have access to that will have the Forms, Rules, Rates and Outputs for each pilot. In addition, as many "as is" and "to be" process flows that can be generated before the solution provider is ready to begin the project will be on the SharePoint project server. Where possible The County will have also consolidated as many forms and outputs as possible.

The County can discuss with the vendor implementation strategies for High, Medium and Low priority items to determine the best way to implement these solutions. The County will also work with the vendor to identify the benefits for the first implementation of using the vendor's best practice templates / workflows. The County has requested a list of best practice templates / workflows already available to the bidder either cataloged by the vendor or available by copying these processes from existing clients.

The Grant commitment is to prove the viability of this type of solution to the region and the rest of the state. At a minimum, this commitment is to implement for at least one Municipality – Beach/Disposal, Animal (Dog) and Business Licenses as well as Residential Building, Commercial Building, Health and Fire Permits and Inspections. There must be at least two other municipalities that also implement some functionality on the system to form a regional solution. **The minimum would be to have implemented as many Critical functions available from the winning bidder in each of the functional areas listed above as possible. Bidders must clearly indicate how many of these Critical functions will be implemented and in how many of the three pilot towns.**

The quality and speed of a 3 Municipal pilot for the implementation of critical items will indicate to this and other regions how quickly this type of solution can be deployed.

3. Please list which permits and licenses have renewals associated to them.

Response: A list of permits and licenses that involve or can involve renewals are listed with their priorities in Attachment A to Addendum 03. Key pilot renewal activities are related to Business, Beach, Disposal and Dog Licenses.

4. Please provide a list of the exact reports and form/letters expected for generation for the 3 Pilot Sites.

Responses: To be assembled, verified and issued under a separate addendum. This approach is being taken to get other responses to the bidders as soon as possible. The outputs are listed in AttachF but will be separated and provided in a separate exhibit.

5. Can the \$500k Grant Money be carried over to a follow-up project after the initial 12/31/1012 Pilot Site Project is completed? For example, if the 3 Pilot Sites cost less than \$500k, can the remaining funds be used for a future phase?

Response: No, the State Grant funded aspects of the project must be completed by 12/31/2012 with the potential of a brief extension. Invoices for all licenses, services, maintenance for one (1) year and hosting for one (1) year must be provided to The County by 12/31/2012. The actual payment of the last invoice will be based on verifying the results of the delivery and can be made up until April 1, 2013 which is when the contract with the State ends. The Grant may pay the upfront cost of user licenses and maintenance required to be reimbursed by the Municipalities. To be fair to the Municipalities that signed onto the Grant but are not pilots, the pilot municipalities will reimburse the project for their user licenses, user license maintenance and inspector hardware purchases. The Municipal funds used to reimburse the upfront project costs will be put in The County ePermit/eLicense enterprise fund. These funds will not have an expend by date and will only be used for this project. In addition, the local regionalization fund contributions by the Cape Cod Commission can be expended up until 12/31/2012. The sustainability of the project is based on each Municipality paying for the quantity of user licenses they need and by the group of Municipalities paying a share of the common infrastructure maintenance. As indicated in the RFP the project will allow for other Municipalities including prepaying their need for user licenses to participate in the project for the initial delivery as long as their Forms, Rules and Rates are compatible with one of the Pilots and the vendor has the ability to copy configurations to facilitate implementation. As cost is one of the factors to be considered by The County when making the award, bidders that can deliver as many Critical, High, Medium and Low priority items as possible in the 3 Pilot Sites for less than \$500k would be viewed more favorably.

6. Based on the response to the data conversion question that was answered by the County, is it correct that there will be 4 historical data conversions for the pilot?
 - a. GeoTMS (3)
 - b. Homegrown Access Database Solutions (1)

Response: Correct, the main Permit, Licensing and Inspection system are listed above with occurrences of spreadsheets and other smaller systems.

7. In Attachment I Cost Proposal there are many integrations listed as well as an open-ended number of possible integrations listed.
- a. Can the County validate the integration list below and if not correct provide a list of exact Integrations that must be included in the Pilot, if any? Can the County also describe the nature of each integration, one-way, two-way, real time or batch, etc.?
- i. Financial (One way from financial system to vendor solutions for delinquent tax and residency verifications see 1.033, can be real-time or batch. One way import of revenue information from vendor solution to financial system, see 10.008 this may be an on demand or a scheduled file export from the vendor system with an import into the financial management system using the financial management system's import capability)
 1. Munis (**of the potential pilots 4 use Munis**)
 2. Data National (**1 potential pilot uses Data National**)
 3. Vadar (**0**)
 - ii. EDMS/Document Management System (**Two way, real-time is desired but is to be worked out with the Vendor**)
 1. Laserfische (**3 potential pilots use LaserFiche**)
 - iii. Address, Parcel and Owner (**One way synch from the Assessing system to the Vendor solution, batch or real-time via WebConnect or ODBC is possible. Similar to GIS the region may be able to assemble a single database for this one way synch for the pilots.**)
 1. Vision (**2-3 depending on how quickly one potential pilot moves from Vision to PK**)
 2. Patriot (**0**)
 3. PK (**2-3 see note for Vision**)
 - iv. Other (**One way batch from State systems to the Vendor system is probably the most appropriate option for 1-3 below for the Pilot.**)
 1. State Contractor Registration Database (**1 – for the State of Massachusetts – one interface for the entire State to the solution. There will be a periodic data extract and/or interface that is being discussed with the State. A prototype file structure is available.**)
 2. State Workers Compensation Verification Database (**1 – Same as above.**)
 3. Alcoholic Beverage Control Commission (**1 – Same as above except the discussions with the State have not begun. This has a medium level priority for the Pilots.**)

Response: See above, in addition to the interfaces listed, the interface to the States Department of Environmental Protection (eDEP) is also in the RFP and has the similar characteristics to the above and is listed as a medium priority for pilot implementation. The potential option is that the

Municipalities might actually push the data collected into the State system rather than receiving this information. For priorities other than Critical we still want feedback from the Bidders on whether they can accomplish what might be future deliverables.

8. Will there be a standard online payment engine used by all municipalities for Citizen Access? If so will it be PayPal? If not, can you list the Payment engines that will be used for the 3 Pilot sites?

Response: We are looking for recommendations based on the relationships with the Vendor and different payment solutions; we will also want to know if these solutions are on state contract. The County would like to negotiate favorable terms by using its combined buying power for this application if the providers are acceptable.

9. Is GIS included in the Pilot? If so:

Response: Yes

- a. Please confirm a list of GIS Technology used by each of the 3 Pilot Sites.

Response: The technologies include ArcGIS, ArcGIS Server, People GIS, shape and .CSV files. However, see below for the common interface to be used for the Pilot.

- b. Will there three different GIS Technologies?

Response: No, ArcGIS Server will be used for the pilots. For those pilot Municipalities that do not have ArcGIS server The County will put a copy onto ArcGIS server to be used to interface to this project. However, we would like to know the bidder's capabilities related to interfacing with different regional and possibly state implementations of GIS applications.

- c. Will the County be standardizing on a GIS platform? If so what platform and by when?

Response: Yes, for the pilot phase ArcGIS Server will be used by those towns wishing to implement GIS with their first deliverable. There are discussions about consolidating copies of town GIS data for all towns in the region onto one ArcGIS Server occurrence. As part of the RFP please respond to whether the solution can interface with multiple ArcGIS Server occurrences associated with the regional solution or whether all GIS data must be on one ArcGIS Server occurrence. For example, can the solution interface with multiple different ArcGIS Server systems maintained by different Municipalities?

- d. What is the expectation for work to be completed by the 12/31/2012 date? Are the 3 pilots supposed to be live by then?

Response: Yes, for those Towns that have ArcGIS Server or are willing to put a copy of their GIS data on The Counties ArcGIS Server platform those towns will be live with GIS on 12/31/2012.

10. Regarding RFP Page 6 with the paragraph at the bottom starting with "The contract resulting from the RFP shall expire December 31st, 2012. The county may choose to renew this contract up to two times for one year period."

- a. What is the initial contract going to consist of? Implementation for all 16 towns? Only the 3 pilot towns? Yearly SaaS pricing?

Response: The Contract as indicated in the RFP will be for putting in the infrastructure for all 16 towns in terms of the Servers/Hosting, etc.; however, the 12/31/2012 implementation is for the 3 pilot Municipalities. In addition, as indicated in addendum 2 the system is to be configurable and able to also allow for certain functions to be deployed for 2 additional towns.

- b. What would be renewed for year 2 or 3? What would be contracted after that? More towns? Services? Licenses?

Response: The County and the successful bidder will work out a maintenance agreement and an additional agreement to bring on additional Municipalities during the implementation of the Pilots. The contract will involve including more towns and additional licenses. The RFP requests that the Bidders provide examples of their typical contracts and/or statements of work.

11. When more towns are added after the 3 Pilot sites, will there be one or more separate contracts? How will adding future towns work contractually?

Response: The intent is to have one contract that covers all communities in The County.

12. If a vendor has both a SaaS pricing model (yearly subscription pricing) as well as Named User pricing model (Vendor Hosted Perpetual License Model), can the vendor propose both pricing options in its proposal?

Response: Yes, one of the many suggestions from our partners outside of the region was to add a note about requesting pricing options outside of the pricing structure included in the AttachI_Cost Proposal document. Please include different pricing options for evaluation.

13. Where will the funding come from for agencies added at a later time? For example, if an agency is added after 12/31/2012 and they need both licenses and some unique configuration work such as integrations, new permit types or license types, or new reports. Who will fund this additional work, the municipality themselves?

Response: The sustainability model discussion was begun in Question 5, the individual Municipalities will pay for their individual number of user licenses. The group of towns will be allocated a portion of the infrastructure maintenance fees. Maintenance dollars currently being used to pay for existing systems will be diverted to pay for the new solution. There is a possibility of additional State and Local regionalization funding to again subsidize one time expansion costs related to infrastructure changes and addition of new Municipalities.

14. We noticed that Yarmouth was responsible for a much of the development of the requirements. Has Yarmouth been working with a particular software company in the development of these specifications and is that company considered an incumbent in this process?

Response: No, the Yarmouth Request for Information process done in 2010/2011 involved looking at over 15 companies. The reason for the Request for Information process was to identify a solution that Yarmouth did not already have in place for its overall Permit, License and Inspection needs. That analysis concluded with a desire to pursue a regional approach and did not result in choosing a vendor. The region is going through a RFP process to identify the best solution for the entire region. Some of the requirements from the Yarmouth RFI process are included in the RFP. Those requirements were informed by the MARPA study mentioned in the RFP and other regional projects throughout the country. Other requirements also came from the Division of Professional Licensure's (DPL) RFQ released in January. The Main RFP document used a County procurement template, the contract was from a Cape Cod Commission template and many of the attachments came from the DPL's work. Revisions to the draft were made by the participating towns and the county.

Yarmouth had a business relationship with a vendor that has a regional solution, but the last invoice for services from that vendor was 3/15/2007 and it was for Microsoft Access databases without online processing capabilities. This vendor, based on the RFP download list may submit a proposal. The intention is to replace these Access databases with the regional solution. Yarmouth also has a current relationship with a Financial Management solution provider that may provide a proposal based on the RFP download list. In addition, Yarmouth has a relationship with a solution provider that provides 4 separate niche solutions for Licenses and Permits and based on the RFP download may submit a proposal. Yarmouth does not feel that any vendor is an incumbent in this process and has not represented any of these vendors to be an incumbent to others in the region.

Elaine Davis
Chief Procurement Officer

Attachment A to Addendum 3

Item #	Forms	Priority
2.110	<u>Health Department - Licenses Provided to Customers</u>	
2.111	Animal License	Medium
2.112	Cabin License	Medium
2.113	Camp License	High
2.114	Common Victualler License	Critical
2.115	Continental Breakfast License	High
2.116	Disposal Installer License	High
2.117	Food Services License	Critical
2.118	Food Vending Machine License	Medium
2.119	Frozen Desert License	Medium
2.120	Funeral Director License	Critical
2.121	Inn holder B-B License	Critical
2.122	Lodging House License	Critical
2.123	Mobile Food Service License	High
2.124	Motel License	Critical
2.125	Non-Profit Food Service License	High
2.126	Poultry License	Medium
2.127	Refuse Collection License	High
2.128	Residential Kitchen License	High
2.129	Retail Food Ser > 25K Sq Ft	High
2.130	Retail Food Ser < 25K Sq Ft	High
2.131	Retail Food Ser > 50K Sq Ft	High
2.132	Sewage Collection License	High
2.133	Swimming Pool License	High
2.134	Tanning License	High
2.135	Tattooing Business License	Medium
2.136	Tattooing Practitioner License	Medium
2.138	Tobacco License	High
2.139	Trailer Park License	High
2.140	Whirlpool License	High
2.141	Wholesale Food Serv License	High
2.147	Rental Housing Registration / Inspection	Critical
2.148	<u>Fire Department - Applications / Permits</u>	
2.158	Tank Truck Inspection 527 CMR 14:03 (1)	High
2.160	Waste Oil Storage Tanks	High
2.162	Cutting & Welding Permit 527 CMR 39:04	Medium

Item #	Forms	Priority
2.165	Combustible Storage > 2,500 Cu. Ft. 527 CMR 10:03	High
2.169	Fumigation Operation 527 CMR10:06 (2)	Medium
2.170	Hazmat unattended 527 CMR 25:08	Medium
2.173	Storage of LPG 527 CMR 6:08 (2B)	Medium
2.174	Storage of Matches 527 CMR 10:18 (1b)	Medium
2.175	To Maintain an Existing / New Storage Tank Facility	High
2.176	Mechanical Rubbish Containers 527 CMR 34:03	Medium
2.178	Keeping of Smokeless Powder 527 CMR 13:04 (2a)	Medium
2.180	Flammable Fluid, Solid, Gas Storage 527 CMR 14:03 (1)	High
2.184	Community Response Team Certification	Medium
2.186	Grill Permit (charcoal / Gas - yearly)	Medium
2.191	Marine Fueling Permit	High
2.194	<u>License Department</u>	
2.195	Liquor -Annual and Seasonal Category	
2.196	Annual/Seasonal All-Alcoholic	Critical
2.197	Annual/Seasonal Wine & Malt	Critical
2.198	Annual Club	High
2.199	Annual General on Premise	High
2.200	Non Profit	High
2.201	Package Store	Critical
2.202	Annual/Seasonal Inn holder all Alcoholic	Critical
2.203	Annual/Seasonal Inn holder Wine & Malt	Critical
2.206	Entertainment/Misc. Category	
2.207	Annual Weekday Entertainment	Critical
2.208	Annual Sunday Entertainment	Critical
2.209	Amusement	Critical
2.210	Automatic Amusement	Critical
2.211	Bowling Alley	Medium
2.212	Christmas Tree Sales	Medium
2.213	Class I or II	Medium
2.214	House Moving	Medium
2.215	Misc. Permit/License	High
2.216	Mobile Vendor	Medium
2.217	Pool Tables	High
2.218	Transient Vendor	Medium
2.219	Hawker/Peddler	Medium
2.224	<u>Clerk Department</u>	

Item #	Forms	Priority
2.225	Animal License	Critical
2.251	Disposal Sticker	Critical
2.252	Beach Sticker	Critical
2.260	<u>Natural Resources - Applications</u>	
2.269	Boat Mooring	Medium
2.270	Marina Slip	Low
2.272	<u>Police Department</u>	
2.277	Parking Permits	Low
2.278	Taxi Permit	High
2.281	Tour Bus / Limo permit	Medium
2.282	State Licensing - Bingo/Beano, Tour Buses, Livery, Limos, Doing Business As, etc.	Low