

REQUEST FOR PROPOSALS

FOR THE PURCHASE AND IMPLEMENTATION OF AN ENTERPRISE BUILDING DEVELOPMENT SERVICE SYSTEM

RFP # 37-08/09

RFP DUE DATE: JULY 1, 2009 at 3:00 P.M.

Maria Estevez, Senior Procurement Specialist
PROCUREMENT DIVISION
1700 Convention Center Drive Miami Beach, FL 33139
mariaestevez@miamibeachfl.gov

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MIAMIBEACH



City of Miami Beach, 1700 Convention Center Drive, Miami Beach, Florida 33139, www.miamibeachfl.gov

PROCUREMENT DIVISION

Tel: 305-673-7490, Fax: 786-394-4002

PUBLIC NOTICE

FOR THE PURCHASE AND IMPLEMENTATION OF AN ENTERPRISE BUILDING DEVELOPMENT SERVICE SYSTEM

Request for Proposals (RFP) No. 37-08/09

Scope of Services

The City of Miami Beach ("the City") is soliciting proposals for an Enterprise Building Development Process System ("the System"). The System desired would be a turn-key system to provide a comprehensive application to automate the city's building permit management, certificate of use, fire inspections, project workflow tracking, code enforcement, license management, citizen access web portal, interactive voice response, mobile inspection management, e-government, and Geographic Information System (GIS) integration.

Sealed proposals will be received until **3:00 PM on July 1st, 2009** at the following address:

**City of Miami Beach
City Hall
Procurement Division - Third Floor
1700 Convention Center Drive
Miami Beach, Florida 33139**

ANY PROPOSAL RECEIVED AFTER 3:00 PM ON July 1st, 2009 WILL BE RETURNED TO THE PROPOSER UNOPENED. THE RESPONSIBILITY FOR SUBMITTING PROPOSALS BEFORE THE STATED TIME AND DATE IS SOLELY THE RESPONSIBILITY OF THE PROPOSER.

The City will not be responsible for delays caused by mail, courier service, including U.S. Mail, or any other occurrence.

A Pre-Proposal Submission Meeting is scheduled for June 5th, 2009, at 10:00 A.M. at the following address:

**City of Miami Beach
City Hall – Fourth Floor
1700 Convention Center Drive
City Manager's Small Conference Room
Miami Beach, Florida 33139**

The City of Miami Beach is using **BidSync**, a central bid notification system that provides bid notification services to interested vendors. BidSync allows vendors to register online and receive notification of bids, amendments and awards. Vendors with Internet access should review the registration options at the following website: www.bidsync.com

If you do not have Internet access, please call the BidSync's vendor support group at 801-765-9245.

The City of Miami Beach also utilizes **BidNet** for automatic notification of bid opportunities and document fulfillment. This system allows vendors to register online and receive notification of new bids, amendments and awards. Vendors with Internet access should review the registration options at the following website: www.govbids.com/scripts/southflorida/public/home1.asp. If you do not have Internet access, please call the **BidNet** support group at 800-677-1997 extension # 214.

The City of Miami Beach provides bid information on its website, please visit <http://web.miamibeachfl.gov/procurement/scroll.aspx?id=38686>

If you do not have Internet access, please call the RFP Depot's vendor support group at 801-765-9245. Attendance (in person or via telephone) to this Pre-Proposal submission meeting is encouraged and recommended as a source of information, but is not mandatory. Proposers interested in participating in the pre-Proposal submission meeting via telephone must follow these steps:

- (1) Dial the TELEPHONE NUMBER: 1-800-915-8704 (Toll-free North America)
- (2) Enter the MEETING NUMBER: *2659980* (note that number is preceded and followed by the star (*) key).

Proposers who are interested in participating via telephone, please send an e-mail to mariaestevez@miamibeachfl.gov expressing your intent to participate via telephone at least one business day in advance of the meeting.

THE CITY OF MIAMI BEACH RESERVES THE RIGHT TO ACCEPT ANY PROPOSAL DEEMED TO BE IN THE BEST INTEREST OF THE CITY OF MIAMI BEACH, OR WAIVE ANY INFORMALITY IN ANY PROPOSAL. THE CITY OF MIAMI BEACH MAY ALSO REJECT ANY AND ALL PROPOSALS.

YOU ARE HEREBY ADVISED THAT THIS REQUEST FOR PROPOSALS IS SUBJECT TO THE FOLLOWING ORDINANCES/RESOLUTIONS, WHICH MAY BE FOUND ON THE CITY OF MIAMI BEACH WEBSITE: <http://web.miamibeachfl.gov/procurement/scroll.aspx?id=38686>

- CONE OF SILENCE -- ORDINANCE NO. 2002-3378
- CODE OF BUSINESS ETHICS -- RESOLUTION NO. 2000-23879.
- DEBARMENT PROCEEDINGS -- ORDINANCE NO. 2000-3234.
- PROTEST PROCEDURES -- ORDINANCE NO. 2002-3344.
- LOBBYIST REGISTRATION AND DISCLOSURE OF FEES -- ORDINANCE NO. 2002-3363.
- CAMPAIGN CONTRIBUTIONS BY VENDORS - ORDINANCE NO. 2003-3389.
- REQUIREMENT FOR CITY CONTRACTORS TO PROVIDE EQUAL BENEFITS FOR DOMESTIC PARTNERS - ORDINANCE NO. 2005-3494

Sincerely,



Gus Lopez, CPPO
Procurement Director



MIAMIBEACH

City of Miami Beach, 1700 Convention Center Drive, Miami Beach, Florida 33139, www.miamibeachfl.gov

PROCUREMENT Division
Tel: 305.673.7490 Fax: 786394.4002

RFP No. 37-08/09

<i>NOTICE TO PROSPECTIVE PROPOSERS</i>

If not submitting a proposal at this time, please detach this sheet from the RFP documents, complete the information requested, and return to the address listed above.

NO PROPOSAL SUBMITTED FOR REASON(S) CHECKED AND/OR INDICATED:

- _____ Not responding due to workload issues.
- _____ Not responding due to minimum experience requirements.
- _____ Not responding due to specifications/scope of services.
- _____ Not responding due to timely payment issues.
- _____ OTHER. (Please specify) _____
-

We do_____ do not_____ want to be retained on your mailing list for future proposals for the type or product and/or service.

Signature: _____

Title: _____

Company: _____

Note: Failure to respond, either by submitting a proposal or this completed form, may result in your company being removed from the City's bid list.



City of Miami Beach, 1700 Convention Center Drive, Miami Beach, Florida 33139, www.miamibeachfl.gov

PROCUREMENT DIVISION
Tel: 305-673-7490, Fax: 305-673-7851

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SECTION I - OVERVIEW AND PROPOSAL PROCEDURES:

A. INTRODUCTION / BACKGROUND

The City of Miami Beach (“the City”) has been utilizing Permits Plus, an Accela, Inc. legacy product as the main software to support the building development process and related functions. Permits Plus does not currently interface with the existing computer systems in the City and does not provide a complete solution for the City of Miami Beach. The Permit Plus system is utilized by many departments in the City, but it principally includes the following departments:

- Building;
- Planning;
- Fire;
- Public Works;
- Code Compliance;
- Finance – Business Tax Receipts; and
- City Clerk.

The City has wanted to replace the current system for several years. This project has been presented to the Information Technology (Steering Committee) on March 26, 2008, June 5, 2008 and October 15, 2008. The Committee recommended hiring a consultant to develop the system requirement and issuing an RFP to replace the current software being used to support the Building Department development process.

Additionally, in the recently completed audit by Watson Rice, the Steering Committee stressed the importance of replacing Permits Plus to enhance the security and internal controls related to all phases of the building development process, and to improve the efficient and effective management of the departments.

The City is requesting proposals for an enterprise Building Development Process System (“the System”). The System desired would be a turn-key system to provide a comprehensive application to automate the city’s building permit management, certificate of use, fire inspections, project workflow tracking, code enforcement, license management, citizen access web portal, interactive voice response, mobile inspection management, e-government, and GIS integration.

The purpose of integrating the departments responsible for the Development Review process functions is to improve customer service and the efficiency of the City’s various departments pursuant to the City’s Strategic Plan.

The System is required to encompass all the processes involved in building permitting, inspections, plans examination, contractor licensing, code enforcement, zoning, comprehensive planning, land development, permitting portion of public works engineering, fire prevention, city clerk’s office, Special Master and business licensing. It should also make information, more accessible to the public through web-based technology; allow online submissions to all the City’s various agencies’ applications and to populate each application with existing data from City established data resources.

The preferred software package should require minimal customization in order to meet the needs of the City. The System should allow for further configuration by City IT staff to accommodate new advances in the industry and/or changes driven by new state codes and City ordinances that affect the business processes and procedures beyond the initial implementation by the Proposer.

B. RFP TIMETABLE

The anticipated schedule for this RFP and contract approval is as follows:

RFP Issued	May 18, 2009
Pre-proposal submission meeting	June 5th, 2009
Deadline for receipt of questions	June 24th, 2009
Deadline for receipt of Proposals	July 1 st , 2009 at 3:00 P.M.
Evaluation Committee meeting	July/August 2009
Commission approval authorizing negotiations	September 2009
Contract negotiations	September 2009
Projected contract start date	October 2009

C. PROPOSALS SUBMISSION

An original and ten (10) copies of complete proposals must be received no later than 3:00 p.m. on July 1st, 2009, at the following address:

**City of Miami Beach
City Hall
Procurement Division -- Third Floor
1700 Convention Center Drive
Miami Beach, Florida 33139**

The original and all copies must be submitted to the Procurement Division in a sealed envelope or container stating on the outside the Proposer's name, address, telephone number, RFP number and title, and due date. **No facsimile, electronic, or e-mail responses will be considered.**

The responsibility for submitting a response to this RFP to the Procurement Division on or before the stated time and date will be solely and strictly that of the Proposer. The City will in no way be responsible for delays caused by the U.S. Post Office or caused by any other entity or by any occurrence. Responses received after the RFP due date and time will not be accepted and will not be considered.

D. Requirement for City Contractors to Provide Equal Benefits for Domestic Partners (the "Ordinance")

Proposers are advised that this RFP and any contract awarded pursuant to this procurement process shall be subject to the applicable provisions of Ordinance No. 2005-3494, entitled "Requirement for City Contractors to Provide Equal Benefits for Domestic Partners (the "Ordinance")." The Ordinance applies to all employees of a Contractor who works within the city limits of the City of Miami Beach, Florida, and the Contractor's employees located in the United States, but outside of the City of Miami Beach limits, who are directly performing work on the contract within the City of Miami Beach.

All Proposers shall complete and return, with their proposal, the "Declaration: Non-discrimination in Contracts and Benefits" form contained herein. The City shall not enter into any contract unless the Proposers certifies that such firm does not discriminate in the provision of Benefits between employees with Domestic Partners and employees with spouses and/or between the Domestic Partners and spouses of such employees.

Contractors may also comply with the Ordinance by providing an employee with the Cash Equivalent of such Benefit or Benefits, if the City Manager or his designee determines that:

- a. The Contractor shall complete and return the "Reasonable Measures Application" contained herein, and the Cash Equivalent proposed; AND.

- b. The Contractor shall complete and return the "Substantial Compliance Authorization Form" contained herein.

It is important to note that Contractors are considered in compliance if Contractor provides benefits neither to employees' spouses nor to employees' Domestic Partners.

E. PRE-PROPOSAL SUBMISSION MEETING

A Pre-Proposal submission meeting is scheduled for **June 5th, 2009 at 10:00 A.M.** at the following address:

**City of Miami Beach
City Hall – Fourth Floor
City Manager's Small Conference Room
1700 Convention Center Drive
Miami Beach, Florida 33139**

Attendance (in person or via telephone) is encouraged and recommended as a source of information, but is not mandatory. Proposers interested in participating in the pre-RFP submission meeting via telephone must follow these steps:

- (1) Dial the TELEPHONE NUMBER: 1-800-915-8704 (Toll-free North America)
- (2) Enter the MEETING NUMBER: *2659980* (note that number is preceded and followed by the star (*) key).

Proposers who are interested in participating via telephone, please send an e-mail to the contact person listed below, expressing your intent to participate via telephone.

F. CONTACT PERSON/ADDITIONAL INFORMATION/ADDENDA

The contact person for this RFP is **Maria Estevez** at phone: 305-673-7234; fax: 786-393-4002; or e-mail: **mestevez@miamibeachfl.gov**. Communications between a proposer, bidder, lobbyist and/or consultant and the Procurement Division are ***limited to matters of process or procedure***.

Requests for additional information or clarifications must be made **in writing** to the Procurement Division. Facsimile or e-mail requests are acceptable. Please send all questions to mestevez@miamibeachfl.gov and a copy to guslopez@miamibeachfl.gov and City Clerk's Office RobertParcher@miamibeachfl.gov no later than the date specified in the RFP timetable.

The Procurement Division will issue replies to inquiries and any other corrections or amendments, as it deems necessary, in written addenda issued prior to the deadline for responding to the RFP. Proposers should not rely on representations, statements, or explanations, other than those made in this RFP or in any written addendum to this RFP. **Proposers should verify with the Procurement Division prior to submitting a proposal that all addenda have been received.**

Proposers are advised that oral communications between the Proposer, or their representatives, and the Mayor or City Commissioners and their respective staff, or members of the City's administrative staff (to include the City Manager and his staff), or evaluation committee members, is prohibited.

G. MODIFICATION/WITHDRAWALS OF PROPOSALS

A Proposer may submit a modified proposal to replace all or any portion of a previously submitted proposal up until the proposal due date and time. Modifications received after the proposal due date and time will not be considered.

Proposals shall be irrevocable until contract award unless withdrawn in writing prior to the proposal due date or after expiration of **120** calendar days from the opening of Proposals without a contract award. Letters of withdrawal received after the proposal due date and before said expiration date and letters of withdrawal received after contract award will not be considered.

H. RFP POSTPONEMENT/CANCELLATION/REJECTION

The City may, at its sole and absolute discretion, reject any and all, or parts of any and all, Proposals; re-advertise this RFP; postpone or cancel, at any time, this RFP process; or waive any irregularities in this RFP, or in any Proposals received as a result of this RFP.

I. COSTS INCURRED BY PROPOSERS

All expenses involved with the preparation and submission of Proposals to the City, or any work performed in connection therewith, shall be the sole responsibility of the Proposer(s) and shall not be reimbursed by the City.

J. EXCEPTIONS TO RFP

Proposers must clearly indicate any exceptions they wish to take to any of the terms in this RFP, and outline what alternative is being offered; which exceptions and alternatives shall be included and clearly delineated in proposers' submittal response. The City, at its sole and absolute discretion, may accept or reject the exceptions. In cases in which exceptions are rejected, the City shall require the Proposer to comply with the particular term and/or condition of the RFP which proposer takes exception to (as said term and/or condition was originally set forth on the RFP).

K. SUNSHINE LAW

Proposers are hereby notified that all proposals, including with or without limitation any and all information and documentation submitted will be available for public inspection after opening of Proposals, in compliance with Chapter 286, Florida Statutes, (the Florida "Government in the Sunshine Law").

L. NEGOTIATIONS

The City may award a contract on the basis of initial offers received, without discussion, or may require Proposers to give oral presentations based on their Proposals. The City reserves the right to enter into further negotiations with the top-ranked Proposer, (following authorization of negotiations by the City). No Proposer shall have any rights in the subject project or property or against the City arising from such negotiations. Notwithstanding the proceeding, the City is in no way obligated to enter into a contract with the top-ranked and/or successful proposer, in the event the parties are unable to negotiate a contract.

M. PROTEST PROCEDURE

Proposers that are not selected may protest any recommendation for selection of award in accordance with the proceedings established pursuant to City of Miami Beach Ordinance No. 2002-3344. **Protest(s) not timely made pursuant to the requirements of Ordinance No. 2002-3344 shall be barred.**

N. RULES; REGULATIONS; LICENSING REQUIREMENTS

Proposers are expected to be familiar with, and comply with, all Federal, State, County, and City laws, ordinances, codes, and regulations that may in any way affect the services offered, including without limitation the Americans with Disabilities Act, Title VII of the Civil Rights Act, the EEOC Uniform Guidelines, and all EEO regulations and guidelines. Ignorance of the law(s) on the part of the Proposer will in no way relieve it from responsibility for compliance.

O. DEFAULT

Failure or refusal of a Proposer to execute a contract following award by the City Commission, or untimely withdrawal of a proposal before such award is made and approved, may result in forfeiture of that portion of any surety required as liquidated damages to the City. Where surety is not required, such failure may result in a claim for damages by the City and may be grounds for removing the Proposer from the City's vendor list.

P. CONFLICT OF INTEREST

All Proposers must disclose, with in their proposal, the name(s) of any officer, director, agent, or immediate family member (spouse, parent, sibling, and child) who is also an employee of the City of Miami Beach. Further, all Proposers must disclose the name of any City employee who owns, either directly or indirectly, an interest of ten (10%) percent or more in the Proposer entity or any of its affiliates.

Q. COMPLIANCE WITH THE CITY'S LOBBYIST LAWS

All Proposers are expected to be or become familiar with all City of Miami Beach Lobbyist laws, as amended from time to time. Proposers shall ensure that all City of Miami Beach Lobbyist laws are complied with, and shall be subject to any and all sanctions, as prescribed herein, in cluding disqualification of their Proposals, in the event of such non-compliance.

R. PROPOSER'S RESPONSIBILITY

Before submitting a proposal, each Proposer shall be solely responsible for making any and all investigations and examinations, as it seems necessary, to ascertain all conditions and requirements affecting the full performance of the contract. Ignorance of such conditions and requirements, and/or failure to make such investigations and examinations, will not relieve the Proposer from any obligation to comply with every detail and with all provisions and requirements of the contract documents, and will not be accepted as a basis for any subsequent claim whatsoever for any monetary consideration on the part of the Proposer.

S. RELATIONSHIP TO THE CITY

It is the intent of the City, and proposers hereby acknowledge and agree, that the successful Proposer is considered to be an independent contractor and that neither the Proposer, nor the Proposer's employees, agents, and/or contractors, shall, under any circumstances, be considered employees or agents of the City.

T. PUBLIC ENTITY CRIME (PEC)

A person or affiliate who has been placed on the convicted vendor list following a conviction for public entity crimes may not submit a bid on a contract to provide any goods or services to a public entity, may not submit a bid on a contract with a public entity for the construction or repair of a public building or public work, may not submit bids on leases of real property to public entity, may not be awarded or perform work as a contractor, supplier, sub-contractor, or consultant under a contract with a public entity , and may not transact business with any public entity in excess of the threshold amount provided in Sec. 287.017, for CATEGORY TWO for a period of 36 months from the date of being placed on the convicted vendor list.

U. CONE OF SILENCE

Pursuant to Section 2-486 of the City Code (entitled "Cone of Silence") proposers are hereby advised that the Cone of Silence requirements listed herein shall apply.

V. DEBARMENT ORDINANCE

Proposers are hereby advised that this RFP is further subject to City of Miami Beach Ordinance No. 2000-3234 (Debarment Ordinance). Debarment may constitute grounds for termination of the contract, as well as, disqualification from consideration on any future City of Miami Beach RFP, RFQ, RFLI, or bid.

W. PROHIBITED CAMPAIGN CONTRIBUTIONS BY VENDORS

Pursuant to Section 38-6 of the City Code, no person who is a vendor to the City shall give a campaign contribution directly, or through a member of the person's immediate family, or through a political action committee, or through any other person, to a candidate, or to the campaign committee of a candidate, for the offices of mayor or commissioner. No candidate, or campaign committee of a candidate for the offices of mayor or commissioner, shall solicit or receive any campaign contribution from a person who is a vendor to the City, or through a member of the person's immediate family, or through a political action committee, or through any other person on behalf of the person. This prohibition applies to natural persons and to persons who hold a controlling financial interest in business entities.

X. CODE OF BUSINESS ETHICS

Pursuant to Resolution No.2000-23879 each person or entity that seeks to do business with the City shall adopt a Code of Business Ethics ("Code") and submit that Code to the Procurement Division with your bid/response or within five days upon receipt of request.

The Code shall, at a minimum, require your firm or you as a sole proprietor, to comply with all applicable governmental rules and regulations including, among others, the conflict of interest, lobbying and ethics provision of the City Code.

Y. AMERICAN WITH DISABILITIES ACT

Call 305-673-7490/VOICE to request material in accessible format; sign language interpreters (five days in advance when possible), or information on access for persons with disabilities. For more information on ADA compliance please call Robert Halfhill, Public Works Department, at 305-673-7631.

Z. ACCEPTANCE OF GIFTS, FAVORS, SERVICES

Proposers shall not offer any gratuities, favors, or anything of monetary value to any official, employee, or agent of the City, for the purpose of influencing consideration of this proposal.

Pursuant to Sec. 2-449 of the City Code, no officer or employee of the City shall accept any gift, favor or service that might reasonably tend improperly to influence him in the discharge of his official duties.

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SECTION A - INTRODUCTION

1) INTRODUCTION

The City of Miami Beach is looking for a comprehensive system that is required to provide:

- full integration between modules;
- single entry of information (with use in multiple modules);
- ease of use;
- on-line interactivity with customers for permits, licenses, payments, inquiries;
- real-time processing;
- customization of fields;
- ability to view increasing levels of account detail on screen;
- business intelligence reporting and analysis of data;
- customizable reporting;
- high level of security and access controlled at the role and field level;
- ability to manage performance measures and tracking through business intelligence capability;
- high degree of reliability; and
- long term stability, growth and state of the art innovativeness.

2) BACKGROUND

The City of Miami Beach is currently utilizing Permits Plus, an Accela, Inc. legacy product, for all their building permit management requirements and Code Enforcement functions of different departments. Permits Plus does not currently interfaces with the existing computer systems in the City, nor provides a complete solution for the City of Miami Beach.

The Database utilized by the City is 64-bit SQL Enterprise (2005) leveraged in “a clustered environment”. The operating system in the server is Windows Server 2003 Enterprise and in the workstations is Windows XP with Service Pack 3 (SP3) and Windows VISTA. The web environment is Windows 2003 IIS, middle tier component behind a firewall where all database queries are executed. No database access directly from the external web server. Application must perform in a load balanced web environment.

3) BUSINESS OBJECTIVES

- A. The City desires to acquire a state-of-the-art system embracing best business practices.
- B. The proposed software and services should effect a transformation to industry best business practices, enabling the City’s workforce to be more efficient and improve customer services.
- C. The City seeks a vendor that will continually enhance the proposed software, via provision of upgrades and new version releases throughout the duration of the City’s use of the systems purchased, so as the continually reflect industry best practices and requirements for local governments.
- D. The City seeks a system that shall provide a common integrated repository for information to enable better integration of data on a citywide scale, and to improve the entire organization’s capacity to operate more efficiently and effectively.

- E. The City seeks a system that includes easy-to-use reporting tools that will enable end users to access information through a web browser on the desktop or field laptop.
- F. The City prefers software web-based modules integrated through a common database platform.

4) GENERAL IMPLEMENTATION REQUIREMENTS

A) IMPLEMENTATION VENDOR SELECTION

Once the City has completed the selection of the software it will determine if a separate project implementation team vendor is necessary.

B) PROJECT MANAGEMENT

The City will have one project manager for the implementation of the project. The City's Project manager will be the point of contact with the Proposer's project manager in all areas indicated in this RFP section. He/she will coordinate and resolve disputes and make decisions about any changes to the implementation plan or technical aspects of the system. He/she will also provide a liaison to the City department heads, and will assist in coordinating work between the User's group and the Proposer.

The Proposer must also name their project manager. This person must coordinate and authorize changes, and will be expected to expedite resolution of any problems or issues that cannot be immediately resolved by the on-site implementation staff. He/she must also carry out the following responsibilities: scheduling, supervision, inspection, and status reporting for the duration of the project.

The Proposer will submit resumes, references and previous experience on projects of similar scope and nature of the implementation team. Proposer is required to submit a list of successful and unsuccessful implementation systems including the Governmental Agency, Contact name, address and phone number.

Written status reports will be given at the end of the week to the City's Project Manager. These status reports will recap work done during the week and bring to our attention anything that may cause a delay in completing implementation as planned. Whenever requested by the City Project Manager, status reports in writing will be submitted.

C) CUTOVER REQUIREMENTS

1. Before cutover, all system components must be tested and the results of testing presented to the City project manager.
2. A cutover plan is required as part of the implementation plan, covering testing, the sequence and timing of cutover event, and a plan for restoring the existing system in case of a failure of the new system.
3. Proposer must have their personnel at City sites in order to ensure a smooth cutover process.

D) DISCOVERY PROCESS

The Proposer as part of the discovery process will be required to interview all the User Departments to verify the changes to process and systems for the successful implementations of each module.

These implementation requirements must be in the form of an implementation plan. This plan must:

1. Include a complete schedule of events in narrative and critical path chart form.
2. Clearly respond to all of the specifications in this RFP section, and state how each requirement will be met.
3. Be able to be used as a stand-alone document for use by the project managers and implementation staff.

E) SYSTEM AVAILABILITY

The system shall be considered "Available" for use only when all of the following conditions are met:

1. All hardware components have power applied and are operating correctly.
2. All operating system software is operating correctly.
3. All applications and functions are executing correctly.
4. All system users are able to access and execute the applications and functions that they are authorized to execute.

F) SYSTEM IMPLEMENTATION DOCUMENTATION

Several documents will be prepared that direct the implementation of this project. The Proposer shall describe these documents in their proposal and specify the number of each that will be delivered to the City. The delivery of certain key documents is expected to be indicated as milestone points on the Project Schedule.

System implementation documents should include the following:

- (1) Detailed Site Preparation Plan
- (2) Detailed Functional System Design Documents
- (3) Detailed Implementation Plan
- (4) Detailed Training Plan
- (5) Detailed System Test Plan and Procedures
- (6) Detailed Project Plan using Visio diagrams

SECTION B - CONTRACT AWARD AND EXECUTION

The City reserves the right to make an award without further discussion of the proposal submitted. The City shall not be bound or in any way obligated until both parties have executed a vendor contract. The City also reserves the right to delay contract award and/or not to make a contract award.

1. TURN-KEY PROJECT

The City is seeking a turnkey implementation of the software contemplated by this RFP. The Vendor shall provide all labor, equipment, materials, supplies, transportation and services necessary for, or reasonably incidental to, the complete performance of any agreement resulting from this RFP. Vendor must include in its price all design, engineering, system and application database development (including in-depth user interviews for user feature Configurations), integration, data conversion, delivery, installation, testing, training and warranty costs associated with all elements of the proposed system.

2. FINAL ACCEPTANCE

The City of Miami Beach will determine the final acceptance of the system upon:

- Successful testing,
- Satisfactory system performance
- Receipt of documentation, and
- Completion of all required training.

The City of Miami Beach will make full acceptance of the system and all related deliverables when satisfactory quantitative and qualitative (as described in the Request for Proposal) have been met, documentation delivery requirements have been satisfied, and all required training has been completed.

Prior to the final system acceptance the system shall remain fully operations for 120 consecutive days for all features, functions and customizations. If the system fails to perform successfully, it shall be the responsibility of the vendor to prove to the City of Miami Beach staff that the problem is an operational issue vs. a system enhancement.

The systems' acceptance will be in writing and defined by the City.

3. DATA CONVERSION and DATA ANALYSIS

The City of Miami Beach currently utilizes the Permit Plus software from Accela for its Building Permit System and Code Enforcement functions as well as the functions required of the different User departments. This section includes requirements for the conversion of legacy data currently used in the Permits Plus and InForum Gold (Eden) systems. Data is currently maintained in Microsoft SQL database.

Data Analysis:

The Vendor will be required to perform an analysis of the existing (historical and current) data on the legacy systems to determine the methodology for data conversion, data migration, and data scrubbing. The legacy and other systems that require data to be converted or migrated include:

- Permits Plus database
- InForum Gold(Eden) systems for its Business Tax Receipt Module and Side Walk Café Permits
- Work Station files: Microsoft Access, Microsoft Excel, word processing files, etc.

Proposers responding to the RFP must describe the data conversion methodology assuming that minimal support would be provided by City of Miami Beach. The data conversion methodology is required to address the following:

- Analyze and provide a plan for the conversion, scrubbing, migration, and quality assurance of the legacy data.
- Provide utilities, programs, and software to perform the data conversion, data scrubbing, and data migration.
- Provide a test plan to test the data conversion, data scrubbing, and data migration process.
- Perform the data conversion, data scrubbing, and data migration.
- Perform data validation/Quality Assurance (Q/A) of converted data.
- Data operability: make sure migrated data will be able to operate on the new system.
- Provide adequate documentation detailing the proposed data migration methodology.
- Develop scripts to load data from other systems on a regular basis.

Because there are 30 years of data in the Permits Plus system the Proposer will base the estimate for the data conversion of the permits plus database on a fixed amount of historical data and active or current data. The active or current data consist of 54 active data compositions described in Attachment "I". The historical data consists of 204 historical data compositions described in Attachment "II".

In addition, the Proposer will provide rates for data conversion. The purpose of providing data conversion rates is to give the City the flexibility of adding or removing from the scope of the base estimate for data conversion described above, depending on the outcome of the Vendors data analysis the final amount for data conversion will be adjusted up or down after data analysis is completed.

4. TRAINING

The proposer's training programs shall be designed and conducted to provide complete familiarization in applicable system operation for selected City management, operational, and technical personnel.

The system should be equipped with a production environment and a separate training environment and testing environment that can simulate actual operating conditions for all functions using a training database.

All training shall be conducted at the City of Miami Beach offices using City of Miami Beach platform. Training shall include, at a minimum;

- End user training including report creation (number of employees to be determined by the City of Miami Beach)
- System administrator training (Approximately six employees to be determined by the City of Miami Beach)
- The proposal must include training programs designed and conducted to provide complete familiarization in applicable system operation for selected agency management, operational, and technical personnel
- Proposer shall provide a detailed training plan. Training must be provided in separate topic sessions for technical support personnel, system management personnel and end user trainers. A lesson summary should be provided, as part of the proposal, for each individual subject area to be taught
- System Administration. For up to six (6) persons and will cover general administrative functions such as maintaining users, system tables, system configuration options, security functions, system reports, etc
- Technical Support. For up to six (6) technical support personnel for such functions as starting and

stopping the system, performing back up operations, performing diagnostic routines, installing MCS applications, etc. Included in this level of training must be a comprehensive presentation on the tables and databases used by the system, their layout and how various data elements are related and how information is posted to the various databases in use by the system

- Proposer shall be able to accommodate training outside of normal business hour, if needed.

The Information Technology staff training shall include, but not be limited to, the following:

- A. Application Architecture - This phase of the instruction shall provide the city personnel with a general understanding of the function of each module as well as the interaction between modules and the Operating System.
- B. System Installation and Updating – This module shall detail the methods used by the Proposer to install the application software after the Operating System distribution software has been installed and tested on the processors. In addition, city personnel shall be trained to install revisions and updates as supplied by the Proposer.
- C. Operating System Discussion - This instruction module shall provide city personnel with information about the Operating System which is unique to the application's software package, specifically, system devices, device drivers, library modules, etc., which were chosen for inter process communication, I/O, language support, etc. This module shall include an Operating System parameter tuning which is required to accommodate the application's software.

All training material shall be provided in both electronic and hard copy format.

5. DOCUMENTATION

Proposer shall provide no less than five (5) sets of complete "as built" operation and maintenance manuals for each software module. The type of binding used shall facilitate frequent reference and page revision over the expected life of the maintenance contract. The Proposer shall continue to supply updates to the manuals for the life of the maintenance contract. The Certificate of Final Acceptance shall not be issued unless the City has received and approved all manuals and documentation.

The manuals described in this section shall also be supplied by the Proposer in an electronic format (preferably on CD-ROM).

System Software Documentation

The proposal shall include a list and description of the system software that is required to operate the proposed configuration. Examples of these are:

- Operating System Software
- Utilities
- Relational Data Base Management Systems

Such system software shall be project deliverables unless specified as "exceptions" in the proposal. Project pricing shall include these deliverables and shall include any initial "license" costs as well as any recurring costs, if applicable.

Application Software Documentation

The Proposer shall deliver appropriate application software documentation, prior to final system acceptance that provides an overview of the business system and business workflow.

SECTION C – SYSTEM AND NETWORK ENVIRONMENT AND INTERFACES

1) INFORMATION TECHNOLOGY CURRENT ENVIRONMENT SUMMARY

The Information Technology architecture includes both hardware and communications. The Information Technology Department currently provides service to over 1500 active users on the City's network, supports approximately 145 servers and over 150 network printers. The City's physical network consists of 35 sites utilizing a combination of AT&T Dark Fiber, Metro Ethernet Service and direct connects T1's.

The main concentration of clients is located in two major sites: City Hall and the Miami Beach Police Department. These two major sites are connected via City owned fiber connection with an AT&T dark fiber for backup purposes.

The base applications the City employs to our user base of 1500 are the Microsoft Office Suite, Microsoft Project and Visio, Adobe Systems Suite of products, Autodesk products, Laserfiche, Eden's Inforum Gold Enterprise software, Permits Plus as well as several other specialized applications as needed. The City's means of electronic communication is via Microsoft Exchange with enterprise faxing capabilities.

Additional infrastructure includes Voice Communications, Telecommunications Infrastructure, Facilities Wiring, Voice Response System, Automated Call Distribution, Call Accounting, Telephone Maintenance/Support, Wireless Services, Payphones, Wireless Service, and 800mhz Public Safety System.

The Building Development process currently uses the software called Permits Plus from Accela Systems in Visalia, California. The City has used this software from 1987 when it was running on the mini-computer. Prior to Y2K, the City's data was migrated from a mini-computer to a 2-Tier Client /Server Architecture. The primary users of the system include the Building Department, Code Compliance, Planning, Fire, Public Works and Finance Departments.

In 2006, the Building Department purchased the Accela Wireless application with thirty five Panasonic CF18 ruggedized though books for use in the field. In 2009, an additional fifteen 15 Panasonic CF18 were purchased for use by the Fire Inspectors and 25 Dell ATG semi rugged laptops for the Code Inspectors. The handheld software interfaces to the Permits Plus software via City's Net Motion solution. The handheld software is a real-time application using a wireless solution from Verizon air card.

The current server that is hosting the Permits Plus software is a Dell Power Edge 2650, running Windows 2000 Server. The database server is a Microsoft SQL Server 2000 running on the same server. The City is licensed for 32 concurrent users on the Permits Plus application. The server is attached to a Storage Area Network (SAN) for the drives that contain the database. The City uses best practices for this type of configuration. The data resides on RAID5 volume, and the transaction log resides on RAID1 type of configuration. The City uses Symantec Net backup as the software to backup the data on this server. The server uses both the SQL Backup and the open file agents.

The Permits Plus server is connected to the City's Backbone Network through Gig Ethernet. The City's Backbone Network is comprised of a pair Cisco 6509 Layer 3-4 switches and various other Cisco hardware and software components.

2) NETWORK REQUIREMENTS

A. System should be capable of sharing server space on a fully-patched Windows Enterprise Server 2003/2008 server with other MS SQL database applications/instances. The system should not

require a dedicated database server. The database should preferably reside on a node in the existing City 64-Bit MS-SQL 2005 farm environment.

- B. Tier1 and Tier 2 application/system components should be capable of running in a virtually hosted server environment, as it is the preferred City hosting strategy. The City standard for virtualization is VMware ESX 3.5 Enterprise Edition. All City VMware hosts are backed up with the Symantec Enterprise NetBackup solution, via VCB integration.
- C. All Tier 1 and Tier 2 application/system components should be capable of running in a load balanced server configuration. The City currently uses HTTP hardware load balancers to provide for this capability; however, the Tier1 and Tier2 application/system components need to appropriately manage session states for all user sessions.
- D. System should allow the City's existing Backup software to backup the database while in use.
- E. System should provide installed scripts for application deployment.
- F. System should be able to operate on Windows XP and Windows VISTA
- G. The solution system should be equipped with a production environment and a separate training environment that can simulate actual operating conditions for all functions and uses a training database that can be leverage for testing of hot fixes and software upgrades.
- H. It is expected that the Proposers provide an implementation plan and cost factor for a proposed Disaster Recovery Solution (i.e. natural disasters - hurricanes, evacuations etc.).

3) **INTERFACES**

The City of Miami Beach's existing permitting system interfaces with many other systems to provide a computer solution and it is expected that the new system will also have interfaces with these systems. The City currently utilizes Q-Matic for its queuing management system, New World CAD, RMS & Field Based reporting for its public safety software package utilized by the Fire Department, Eden for its Financial Package, NOVAtime for the City's time and attendance, and Laser fiche for its Document Management System. The City has acquired ProjectDox, an electronic plan review package, to assist them in the streamlining of the plan review process; and has implemented a Call Center solution.

- A. Q-MATIC is the City's queuing system which manages the Building Department's customer flow. The proposed system should make available Process information to the queuing system for retrieval to quickly and effectively queue and route the customer through the City's Building Department.
- B. GIS - All applications using GIS information need to connect to the GIS SDE Production Server to get the needed GIS Information. Any application which uses address information for addresses within the City of Miami Beach city limits needs to verify this information using the GIS Addressing System. The vendor is to supply an address load program to re-populate the addresses and owner information in the vendor's address and owner database. The City currently gets a disk file transfer from the County's Property Appraiser's Office on a monthly basis. This information is process by the City's **Geographic Information System** database and then transferred to the Building Department's Permitting System.

The City of Miami Beach is currently using the ESRI ArcGIS 9.2 GIS Software. This version will be updated to version 9.3 in the third quarter of this year. The City has the ESRI Small Municipal and County Enterprise License Agreement (ELA). This license agreement gives the City unlimited access to the following ESRI Software:

⇒ **ArcGIS® desktop software**—ArcInfo®, ArcEditor™, ArcView®.

- ⇒ **ArcGIS desktop extensions**—3D Analyst™, Spatial Analyst, Geostatistical Analyst, ArcScan™, ArcGIS Publisher, Maplex™, Network Analyst, ArcGIS Schematics, Job Tracking for ArcGIS (JTX™)
- ⇒ **ArcGIS server-based software**—ArcGIS Server (advanced, standard, basic/workgroup, enterprise).
- ⇒ **ArcIMS®**
- ⇒ **ArcGIS Server extensions**—3D Analyst, Network Analyst, Spatial Analyst, Geostatistical, Schematics and Job Tracking for ArcGIS (JTX™)
- ⇒ **ArcGIS Engine Runtime deployments**
- ⇒ **ArcGIS Engine Runtime extensions**—3D Analyst, Spatial Analyst, Geodatabase Update, Network Analyst, Arc Schematics and Maplex.

The City of Miami Beach does not allow the use of any other type of GIS Software nor for in-house or for third party developed applications. The City also does not allow any additional licenses to ESRI products as part of third party software.

GIS Data and Data Storage

The City of Miami Beach has all its GIS Data stored in a central SDE Database on a Windows 2003 Server using a SQL Server 2005 database engine. The City has over 150 individual feature classes and access to any data layer available by Miami-Dade County.

The Feature Classes pertaining to a Permitting System are as follows:

- ⇒ Address Points with 16171 address points
- ⇒ Address Table with 100018 current and historic address information records.
- ⇒ Street Centerline with address range and district information in 2085 segments.
- ⇒ Jurisdiction with both City and County boundaries
- ⇒ Parcels which are monthly updated with 9914 parcels.
- ⇒ Zoning Districts
- ⇒ Planning Districts
- ⇒ Road Right of Way
- ⇒ Subdivisions
- ⇒ Neighborhoods
- ⇒ Parks
- ⇒ Parking Lots
- ⇒ Residential Parking Permits
- ⇒ Utilities like Water, Waste Water, Storm Water and Street Lights.
- ⇒ Streets and Side Walks.
- ⇒ Flood Zones
- ⇒ Census Blocks and Tracts

GIS Tools, Services and Web Services

The City of Miami Beach has many tools and Service available to access the available data inclusive tools which can be used in the permitting process:

- ⇒ Address Locator which uses Addresses, Common Places, Streets, Street Intersection, Parcel Number as input parameters.
- ⇒ Mailing address generator based on buffers around Address, Parcel, Streets, Zoning and Planning Districts.
- ⇒ Spatial Overlay tools using any available Feature Class both as input and search feature.

Access to and use of GIS Data

The City of Miami Beach has tools and dedicated staff assigned to Edit and Update GIS Data in one unique location. This data is safe guarded with modern backup and mirroring tools. Beside duplication of the data to the Test and Development Server the City of Miami Beach does not allow further duplication of this data into other database or file systems.

- C. Laser fiche is the City's document management system. The City wants to be able have the Proposer's application relate all documentation using the City's electronic document system for file storage in an effort to seamlessly manage a client's process through the Proposer's application
- D. EDEN is a software application utilized for financial activities including accounts payable, purchasing, position budgeting. The financial interface with Eden will be created to provide the ability for financial data to go into the financial system. Additionally, the system may need to integrate with Eden's Business License Tax function.
 - 1. Interface with the City's Financial Management System's General Ledger provided by InForum Gold software from EDEN.
 - 2. Integrate/interface with GIS to validate parcels, addresses, owners, and zoning.
 - 3. Integrate/interface with the City's Resort Tax Application.
 - 4. Interface with the City's Financial Management System's Cashiering Module provided by InForum Gold software from EDEN.
- E. NOVAtime is the City's time and attendance workforce management software.
- F. Electronic Plan Review _ Integration with ProjectDox software. The City wants the permitting component of the proposed system to optionally initialize a ProjectDox project and maintain the plan review status, results and comments. Although, when utilized, the Plan Review Application will manage the entire process, the permitting component will need to remain in sync with all review comments and results. To allow for a complete, fully-functional integration with ProjectDox the following requirements should be met:
 - i. - Web service API to allow calls on any necessary core process in permitting system to facilitate the flow of data to and from ProjectDox.
 - ii. - Web service API which supports WSI standards and allow communication via SOAP 1.1 or SOAP 1.2
 - iii. - WSDL document describing web service definitions
- G. Siemens IVR – the City is currently utilizing a Siemens Interactive Voice Recognition system. The system will have to interact with the IVR to receive updates such as scheduling inspections.
- H. New World system is the City's public safety system utilized by the Fire Department.
- I. WebQ&A integration – to provide consistent and concise information to customers.
- J. Call Center Access to specific components to serve customers and contractors.

The City has outsourced to a Call Center system. The system must provide the ability to interface with a Call Center Operator to retrieve and update data.
- K. The system will also be required to configure web links including but not limited to the following websites:

Metro-Dade License. - <http://egvsys.metrodade.com:1608/WWWSErv/ggvt/bnzawbcc.dia>
Florida State License - <https://www.myfloridalicense.com/wl11.asp>
Corporate License - <http://www.sunbiz.org/>
MDC Property Appraiser - <http://gisims2.co.miami-dade.fl.us/myhome/propmap.asp>
Workers Comp. Ins - http://www.fldfs.com/wcapps/compliance_poc/wpages/query.asp
- L. The Proposer should attempt to establish interface with the State and County licensing Authorities to periodically update all Contractor, Architects and Engineers records through Department of Professional Regulations in order to update the City's records with the appropriate licensing statuses.

SECTION D – GENERAL SYSTEM REQUIREMENTS

1) GENERAL SYSTEM REQUIREMENTS

The City of Miami Beach is seeking proposals for software to perform the various functions described in the request for proposal. It is the intent of the City to host the solution and will directly purchase any equipment that may be necessary. The Proposer must provide detailed hardware requirements as part of their proposal.

- A. Ability to have City Staff configure job processes and workflow with data entry fields
- B. Direct interoperability of processes at various related functions.
- C. Ability to link Documents of Processes in proposed application and stored in Laser Fiche
- D. Complete on-line help functions
- E. Ability to configure numbering system to reflect business intelligence of process
- F. Integrated online help with errors and corrections display
- G. Database shall maintain referential integrity. Updates to records will contain user ID updating and the timestamp of the update.
- H. Drill down from reports, queries, or screens from summary to transactional detail
- I. Capable of receiving payments on-line by check and credit cards.
- J. Capable of accepting forms filled online
- K. Capable of uploading documents (i.e. PDF, mtiff, Microsoft office file, etc.)
- L. Interfacing efficient with the City's existing server (Windows Server 2003) and workstation platforms (Windows XP and VISTA)
- M. Acceptance of Electronic Signatures
- N. Alerts to notify employees of due dates
- O. System must be able to generate date/time stamping of transactions
- P. Ability to display GIS and select property in lieu of entering address
- Q. All addresses entered into any of the modules will automatically be verified against the City's GIS database.
- R. Ability to manage performance measures and tracking
- S. Maintain separate "tickler" files for active, inactive, and closed permits
- T. Automated Background Processing
- U. Issues and track multiple permits associated with one location
- V. Ability to generate and read barcodes
- W. Able to generate letters, reports and notifications automatically and email to recipient
- X. Ability to run exception reports and print them in the field
- Y. Object driven data entry
- Z. Ability to temporarily assign supervisory rights (i.e. when Building official is not available)
- AA. Ability to identify those staff members scheduled off and alert supervisor to re-assigned based on staff availability
- BB. Built in spell check and grammar check
- CC. Ability to customize fields and or pull down list

2) DATA STRUCTURE

- A. Interface with similar data in other modules (see table A in Section 5)
- B. Microsoft Structured Query Language.; no proprietary databases

3) ACCESS CONTROLS

- A. Use network logon credentials and MS Active Directory to assign permissions
- B. Role based security where users can be assigned multiple roles – modify, view, or restrict access control.

C. Report on unauthorized access to data classified as sensitive.

4) QUERY AND REPORT CAPABILITIES

The City of Miami Beach currently utilizes an external interface into the Permit Plus software to produce reports. "ATTACHMENT II" details the existing reports that will be required from the new system. This section describes the required reporting capabilities of the proposed system. The selected vendor application must be capable of generating a series of standardized reports attached in Attachment II as well as customized reports from collected and stored data. These reports must be flexible to accept input parameters for filtering of report contents, grouping of report contents, or changing the sort order. The total number of customized reports, layouts, sort criteria, etc. will be determined during the system design and implementation process. Vendors responding to this RFP shall submit a list with descriptions of their standard (pre-designed) reports. The vendor must identify all software packages and computer languages used to generate reports.

- A. Vendors responding to this RFP must describe their reporting tool, and address the following requirements that are system wide:
- B. Provide an ad-hoc reporting tool to enable non-technical users to quickly and easily create, generate, display and print basic reports from the application software.
- C. Provide the ability to update relevant information for City purposes.
- D. Provide the user the ability to select query options from one or more database tables.
- E. Allow the user to specify selection criteria through either a conditional menu or an SQL form approach.
- F. The system must allow for at least the following query methods:
 - i) Start – to search records that are greater than or equal to the specified search criteria
 - ii) Match – to search records with fields having values that begin with the specified search criteria
 - iii) Exact – to search records with fields that exactly match the specified search criteria
- G. Allow for the insertion of headers and footers into reports, including user-selected fonts and font sizes.
- H. Allow multilevel sorting on any selected column(s) in either ascending or descending order.
- I. Allow the user to select any of these rows and load them into a data entry screen.
- J. Provide for column positioning which will allow the user to arrange the order that the columns appear in the report.
- K. Provide options to change a column title, width or attributes.
- L. Ability to perform mathematical computations on selected columns (average, count, sum, maximum, minimum, number of rows, percentage, standard deviation and variance).
- M. Allow the user to adjust the page length, page width, and placement of a new page.
- N. Allow the user to save and edit the current query or current report settings once a report has been built.
- O. Ability to save reports built with the ad-hoc report module for future printing.
- P. Ability to scheduled reports for over night or batch processing.
- Q. Ability to direct report output to a specific printer or file.
- R. Ability to export output to multiple third party applications such as PDF, Excel, Word, or ACCESS.
- S. The system must provide the ability to query using ESRI GIS tools.
- T. Allow reports created by users to be added to the system menus by the system administrator.
- U. Allow the user to direct printouts to LAN printers on an IP network or print to dedicated personal printers, if available.
- V. Support printing of mailing labels in Avery and other formats.
- W. Generate a variety of documents that will be issued to City customers. The City must have the option of utilizing pre-printed forms and the system must have sufficient graphics capability to provide custom documents (e.g. permits, inspection requests cards, certificates of occupancy, license cards, etc.)that includes logos and symbols.
- X. Reports to run automatically based on a pre-defined schedule
- Y. Directly e-mail a report and log security violation when report is being emailed to outside email

address

5) PRINTING

- A. Display reports to the screen
- B. Printing to non-proprietary forms and labels

6) WEB REQUIREMENTS

- A. Provide for on-line payment (checks and credit cards) using City's payment gateway
- B. Online permit application
- C. Ability to access all permit information online
- D. Ability to access inspection schedules
- E. Ability to access permit information and status updates online
- F. Ability to access Code enforcement information online
- G. Ability to schedule online inspections
- H. Ability to display inspection route
- I. Ability to display pictures of inspectors
- J. Ability of customer to initiate and respond to job processing, as defined by workflow, via the web
- K. Ability to accept contractor license information online
- L. Ability to obtain minor trade and sub permits online
- M. Ability for customers to initiate applications online for further processing and validation by City staff without re-entry of information
- N. Ability to scan and attach required documentation to complete permit application
- O. Ability to support outside call center agents conducting transactions in the system.
- P. Utilize a middle tier web service to access backend database. Application will reside in a multiple N-tier environment. The web user interface must access the database through a web service residing on a server behind a firewall. No web facing direct connections to a database. Proper filtering of user input to avoid SQL injection attempts.
- Q. Web application must pass a PCI vulnerability scan to reside in the production web environment.
- R. Provide adequate security functions to handle web-based transactions without compromising the integrity of the system.

7) FINANCIAL COMPONENT

"ATTACHMENT IV" includes all of the fee ordinances for the Departments that are part of the Building Development Process and Code Enforcement functions. The system must be able to automatically calculate fees based on the above reference tables.

- A. Effective dating of Fees.
- B. Edit and calculate fees automatically based on City's ordinances for Building, Planning and Zoning, Fire, Business Tax, Certificate of Use and Public Works
- C. Provide ability to setup future due date for payments
- D. Provide ability to load, test, and store revised schedules to be implemented in the future
- E. Provide ability to directly link payments received to the City's financial system.
- F. Management of Trust Accounts - Payment in advance for overtime by contractor
- G. Verifying NSF checks in the payment screen
- H. Ability to handle Bond Refunds
- I. Ability to match fields in the permit application screen to the fee schedule
- J. Ability to track Permit refund requests and credit multiple accounts when a refund is processed
- K. Ability to calculate fines and interest
- L. Ability to automatically hold reviews and inspections when payment is due
- M. Ability to invoice on a yearly basis for the certificate of use fees

- N. Provide daily financial reconciliation reports.
- O. **For NSF Checks:** System needs to maintain historical records of all NSF checks issued, and issue holds on future checks acceptance by City from Payer.
- P. **For NSF Checks and Refunds:** Ability to reverse a transaction and all related allocations with a single entry.
- Q. **For Refunds:** Ability to process refunds and allow project to move forward if a balance in the Payers favor is showing on the permit.

8) **AUDITING**

- A. Maintain complete audit trails of user activities including (but not limited to) enforcement action entry, receipts, payments, late fees, approvals, extensions, denials, board appearances and who performed the transaction.
- B. Ability to report any user activities
- C. View history of who has accessed, created, or modified each data entry item.
- D. Ability to structure filtering capabilities to identify transactions to be reported
- E. Provide daily, weekly, monthly security reports for viewing access violations, access patterns, and abnormal access outside normal business hours.
- F. Read/Write capability to users assigned to this department. Read Only rights to users in other departments.
- G. Audit trail of all transactions.
- H. Ability to secure to the field level and provide automatic notification if changes are made.
- I. The end result is the ability to ensure that all transactions on the system allow for full transparency.
- J. Ability to perform statistical analysis on the data and ability to highlight deviations in the form of statistical means.

9) **SUPPORT AND MAINTENANCE**

The proposer shall provide a maintenance support plan that details the application software warranty and the software maintenance service that will be provided. The plan shall specifically state what services are offered under the plan and for what time period.

At a minimum, the following specification describes the performance requirements for the Proposer's system throughout the life of the contract between the City and the Proposer:

- Support via the web, phone and electronic correspondence
- Support during the hours of 7:00 am and 7:00 pm. Eastern Standard Time, and
- After hours and weekend support as required and pre-arranged with the vendor and City of Miami Beach staff.
- Maintenance cost shall include latest upgrades to the software system
- Maintenance & Support costs are to be specified for the next five (5) years and included in the Bid Form.
- Ongoing System Performance
 - A. The system shall accommodate all users and other applicable sizing parameters as specified.
 - B. The system shall provide all of the operational capabilities described in this RFP.
 - C. All files and tables shall be updated on-line without adversely affecting performance.
 - D. All necessary back-ups shall be done on-line without adversely affecting system operations, and without lockouts for updates.

10) **MOBILE COMPONENT**

- A. Mobile /Wireless job processing, vitalizing the office

- B. Ability to enter the inspection disposition in the field and update in real time
- C. Ability to print documentation in the field
- D. Ability to research information such as prior inspections from the laptops
- E. Ability to create public notifications automatically
- F. Ability to email documentation from the field
- G. Ability to display all the inspections related to a permit in the field

11) SYSTEM SECURITY

The proposed system will support the establishment, monitoring, and enforcement of appropriate system security capabilities. The proposed system will maintain the integrity and validity of information through the use of its own security features, network security features, RDBMS security features, administrative access through a web based browser, etc. Vendors responding to this RFP should at a minimum, describe how the system provides for the following modules:

- A. A Database Administration Module that provides for the development of user accounts and provides user and password protection. Multiple levels of user security must be available that provide for read-only access, read-write, and read-write-delete access. Database administration functions should provide the ability to selectively “lock” certain database tables.
- B. Allow the system administrator to enforce unique passwords per user and to have user passwords expire after a specified number of days.
- C. The system must be able to integrate with Microsoft Active Directory Services for application login / authentication and role based user access within the system.
- D. Enable the system administrator to easily create new security levels (including the ability to create, store and assign user groups having similar access capabilities) and/or modify the existing ones.
- E. The system must be capable of displaying only those modules and pull-down menus that the user is authorized to access, as defined in the Database Administration Module. Based on a user’s ID and password, pull-down menus must be custom displayed. If changed, the user’s pull-down menus must also change.
- F. The system must only display buttons on the toolbar that the user has access to perform.
- G. Provide automatic notification to system administration when a user’s access to authorized modules or functions is inactive for a specified period of time.
- H. For any and all web based components the system must use a multi-tiered strategy whereby direct calls are not made to any back-end RDBS directly from the web. All calls to internal server equipment via any application components must be made via middle-tier that manages all requests made from the web. This type of architecture is commonly referred to as a Three –Tiered architecture.
- I. The system must be able to log off an inactive user after a specified period of time, determined and controlled by the administrator.

12) SYSTEM RECOVERY AND FAULT TOLERANCE

Proposers responding to this RFP must fully describe their recommended disaster recovery plans for the proposed system. The recovery solution should preserve the integrity of applications, data, and systems.

Application and data recovery should be accomplished with minimum downtime possible according to the industry standards.

13) ELECTRONIC SIGNATURES

Proposers responding to the RFP must describe their methodology for supporting electronic signatures. Citizens submitting applications for permits through the Internet will be required to electronically sign the

application. There is also a requirement for some of these documents to be notarized. The City of Miami Beach Building Development Review Departments and the City's Legal Department as well as the selected Proposer will work together to bring best practices forward and establish a policy that will provide for the acceptance of electronic signatures.

14) CASHIERING

Proposers responding to the RFP must describe their methodology for managing the payment collection and processing activities from all application revenue sources and transfer Cash receipts to accounting systems.

- a. Electronic Check Processing (NACHA compliant)
- b. Complement of tools to collect, manage and audit revenue data, including Cashiering, Payment Administration, Query, Reporting and Export Modules.

SECTION E – SPECIFIC BUILDING DEVELOPMENT AND RELATED PROCESSES REQUIREMENTS

The main goal of the Miami Beach building development review and code enforcement agencies is to safeguard the public health, safety and general welfare of the City's residents and visitors by ensuring compliance with the Florida Building Code and Municipal Code.

This Scope of Services document has been written so that the Proposer's response is technology driven and not driven by the current processes the City has in place. The City wishes to streamline current processes employed by the User Departments pursuant to the latest technologies available today. To that end, this document describes the general functional requirements and system capabilities desired by the City to automate all the processes and tasks desired by the User Departments, which include:

Building Department includes:

- Permitting
- Building Section
- Structural Section
- Electrical Section
- Mechanical Section
- Plumbing Section
- Elevator Section
- Violations Section
- Governmental Compliance Section
- Administration & Support Services
- Records Section

Planning Department

Fire - Fire Prevention Division

Public Works – Engineering, Sanitation and GIS

City Clerks Office - Special Master

Code Enforcement

Finance - Business Tax Management

1) BUILDING DEVELOPMENT PROCESS

There are four departments that are principally involved in the Building Development Process, these are:

- Building Department
- Fire Department, Fire Prevention Section
- Planning Department
- Public Works Department

The Departments' main goal is to safeguard the public health, safety, and general welfare for the City's residents and visitors by ensuring compliance with the Florida Building Code. The Building Department is divided into two divisions; Support Services and Operations. The Support Services Division supervises the Permitting, Governmental Compliance, Records, Call Center, and Administration Services. The Operations Division supervises the daily operation of the Building, Mechanical, Electrical, Plumbing, Inspection Services, Structural, Violations, and Elevator section and it is responsible for the enforcement and compliance of the Florida Building Code through the performance of plan review and field inspections in a competent and professional manner.

The Fire Department's Fire Prevention Division is responsible for enforcing the Florida Fire Prevention Code by providing plan review and inspection services, as well as code compliance / enforcement of existing buildings. In order to ensure occupant safety and property protection, the Fire Department is involved in the majority of all Building Permits issued by the City. This Division also issues permits for any work performed pertaining to fire protection systems.

The Planning Department prepares, updates, and maintains neighborhood and Citywide plans and technical data for the City pursuant to Florida Statutes and City Codes. The Department is divided into four distinct sections: Planning, Zoning, Design and Historic Preservation. A project may require approval from the Design Review Board, Historic Preservation Board, Planning Board or Board of Adjustment.

A) PRE-DEVELOPMENT APPROVAL PROCESS

1. PLANNING DEPARTMENT PLAN REVIEW PROCESS

The Planning Department's Plan Review process will ensure that all the requirements of the City's Land Development Regulations are incorporated into the proposed set of plans. It includes reviewing plans which have been received and routed by the Building Department. The plans are reviewed for compliance with the Land Development Regulations (zoning code) and also, in most cases, for consistency with previously approved development approvals (Design Review Board, Historic Preservation Board, Planning Board and Board of Adjustment).

Data which is required to be captured in the Planning review and approval process and is required to be included in the new permitting software system includes but is not limited to items such as:

- Address
- Legal Description
- Folio Number
- Zoning Classification of property
- Lot size and dimensions
- Lot frontage
- Historic District if any
- Proposed project description
- Proposed use or uses of property
- Number of units, if residential or hotel
- Minimum and Average size of proposed units
- Square footage of floor area proposed.
- Floor Area Ratio (FAR)
- New construction, remodeling, or addition
- Number of stories
- Height of building
- Setbacks to property lines
- Parking data
- Previous development approvals (HPB, DRB, BOA, PB file numbers)
- Demolition proposed, if any
- Related permits, if any

Process involves but is not limited to the review of plans submitted, and the generation of review comments by Planning Department staff, when plans do not qualify for approval. Review comments should be viewable by applicants in a timely and easy manner, and contact information for plans reviewers should be given. The process may involve multiple iterations of the above described procedure, until the finalized plans are approved by the Planning Department.

Since changes made as a response to one department's comments may affect other department's review criteria, a mechanism must be in place to ensure that plans that have been reviewed and approved by the Planning Department are flagged for re-review if those plans change as a result of another department's review comments. Such plans should be re-reviewed by the Planning Department to ensure that the changes made do not affect the status of the zoning approval previously given.

2. PLANNING DEPARTMENT DEVELOPMENT APPROVAL PROCESSING (BOARD APPROVALS)

In many if not most cases, the development process starts with projects first being approved by one or more of the City's "Land Use Boards" - (Design Review Board, Historic Preservation Board, Planning Board and Board of Adjustment). Once a development approval is granted by the Board, the project then proceeds to the building permit plan review process, on the basis of that approval

In order to more fully harmonize the building permit plan review process with the development approval process administered by the Planning Department, the proposed permitting review software system should be able to accommodate data and information regarding the development approvals. Data which has importance to this process and is required to be included in the system for inclusion includes items and processes including but not limited to:

- Address, Legal Description, Zoning Classification of property, Folio Number
- Proposed project description
- Development Review Board (DRB)
- Historic Board (HP)
- Planning Board (PB)
- Board of Adjustment (BOA)
- Ability to track variances
- Ability to track concurrency
- Ability to track and approve Certificate of Use
- Board File number
- Date of meeting or meetings
- Action of Board (approved, denied, withdrawn, continued)
- Development data such as Number of units, Square footage, Number of stories, Parking data.
- File storage or archive information.
- Time limit on (DRB, HP, PB, BOA)
- Tickler and email notifications to A/E and Owner when DRB, HP, PB, BOA approvals will expire.
- System should have the ability to scan approved agreements and/or development orders in the project.

The system should be able to "link" or "relate" one or more of these development approvals together, as some projects get more than one Board approval. These records should then be able to be "linked" or "related" to subsequent permit applications. The records should be able to be updated and revised, to reflect subsequent modifications to project approvals, as well as final disposition of projects in terms of building permits approved and constructed.

In addition the system should have the following capabilities and functional requirements relative to the zoning application, zoning appeal, and zoning rehearing processes involved in the Planning and Zoning Department:

Capability of accepting applications and related documents submitted in “hard copy” form.

Capability of tracking an application’s life cycle status (pending, accepted, revised, response letter, etc.).

At the conclusion of data entry, the system must generate the applicable distribution memo, reminder task, electronic notification to Stakeholders and/or reviewer(s), etc.

Capability of retrieving and displaying; Zoning maps, FEMA maps, aerial photographs, topographic surveys, etc., and linking them electronically to the project file. Must be able to print a “hard” copy.

Capability of displaying and researching applications based on user defined parameters.

Capability of accepting web generated pre-application form for review and discussion with potential applicant with user controlled recipient list.

System will have capability of assigning an application prefix and number (case number) based on the type of request. (Unique prefix for each type of case).

System will have capability to check and validate the property address and ownership.

System will have capability of a user-controlled checklist to verify application completeness with checkbox for required and provided items along with note line.

System will have capability of generating notification documents, including list of surrounding property owners and map showing parcels to be notified, based on information that will have to be extracted from the GIS system, or, other means as determined by the vendor.

System will set date of hearing with staff override capabilities based on user control tables.

System will have capability of tracking and automatically calculating all fees related to the Planning and Zoning process including but not limited concurrency fees.

System will have capability of automatically generating letter to applicant if application is incomplete, stating reasons for incompleteness based on user controlled checklist with user ability to edit.

System has capability of accepting plans for scanning, with zoom capabilities and integrates with ProjectDox Electronic Plan Review Software (Avolve).

System will generate distribution memo based on staff input once staff meeting is held to determine routing for zoning application (agencies involved, necessary reviews and all conditions of approval). Based on staff input, system will generate distribution memo.

System is capable of producing legal advertisement from shell document with user-controlled drop down menu for user controlled specified language.

System has capability of recording submission of affidavit of compliance regarding public notice.

System has capability of populating a predetermined form with case information so that it can be easily used as an attachment to, or be copied into, a County Council agenda item and contain all pertinent information.

System has flexibility of allowing:

- Amendment of application (change of request, etc.)
- Continuance of application
- Withdrawal of application
- Refund of application fees

System will insert a result into a predetermined form that can be easily used as an attachment to, or be copied into, a City agenda item and contain all pertinent information.

System has capability of generating continuance letter.

System has capability of generating withdrawal letter.

The approval flow from permit application to approval to inspections to final CO/CC is as follows:

B) FRONT PERMIT COUNTER

Responsible for receiving, reviewing, processing, and issuance of all building and trade permit applications including analyzing, computing, and collecting of all building and trade permit fees. Responsible for receiving, reviewing, and updating of all information related to contractor's licenses, liability insurance, and workmen's compensation insurance. The functionality of the front permit counter should include:

- a) Create custom permit templates for common permit types
- b) Ability to incorporate our Plan Review Guide to automatically generate plan review requirements for each permit type.
- c) Unique permit number assigned to each permit
- d) Provide logical association between master and subsidiary permits
- e) Provide logical association from Master to revision.
- f) Support web based permit application process
- g) Ability to interface with GIS program (ArcGIS)
- h) Display violations when entering a location and / or contractor.
- i) Ability to duplicate permit card
- j) Ability to have a drop down list for holds in the permits
- k) Ability to have an owner-builder designation
- l) Ability to verify Owner/Builder requirements and transfer information to contractor information upon approval.
- m) Ability to attach multiple documents to the permit application, stored in Laser Fiche
- n) Ability to clone a permit information
- o) Ability to track permit clerks comments
- p) Interface with the Q-Matic system
- q) Able to display contractors expired permits automatically
- r) Display contractor information if any license and/or insurance is expired or if any expired permits exist
- s) The system should automatically flag the permit when a Contractor's license, Workman's compensation and or insurance are expired.
- t) If there is a hold on the permit for any reason, the system should display an information message to the clerk.
- u) Ability to process a Change of Contractor, Change of Architect and Change of Engineer.
- v) Maintain a NSF check list in the system that should display an alert Not to accept additional checks from payer.

- w) Ability to automatically remove hold placed on processes that have been resolved.
- x) Special Events Permits

The Tourism and Cultural Development office provides assistance in the coordination of events on public property and other properties requiring special zoning exemptions (i.e. pool deck and roof top events) by assisting producers with guidelines and permit requirements and serving as liaison with local and regional city services and neighborhood associations.

- a. Ability to receive special event application online.
- b. Ability to calculate fees based on configurable fields
- c. Ability to track Contractor's information for the special event
- d. Ability to track information such as, but not limited to,
 - 1. Event name
 - 2. Address
 - 3. Setup Date
 - 4. Breakdown Date
 - 5. Type of work
 - 6. Permit type
 - 7. Owners' information

C) PLAN REVIEW PROCESS

The Plan Review process will ensure that all the requirements of all applicable City and State codes are incorporated into the proposed set of plans. It includes receiving, reviewing, processing, and routing of all plans and records through the Walk-through plans processing and drop-off plans processing program. The plan review process will be essentially handled mostly by our ProjectDox software; however, permits that will not use ProjectDox will have their plan review processing handled by this system.

- a) Determine and tracks plan review steps and department comments based on permit type
- b) Enter Plan Review results and reference Florida Building Code as a comment
- c) Notifies customer electronically at the completion of a plan review discipline
- d) Electronically route permit application for approval and inspection management
- e) Interfaces with electronic plan review software
- f) Ability to track plans in and out. Ability to track time
- g) Generates list of applications nearing expiration
- h) Ability to incorporate plan review checklists by all disciplines.

D) INSPECTION PROCESS

Responsible for performing inspections of building and structures in compliance with provisions of the applicable City, State and Federal codes.

- a) Calendar for scheduling daily building inspections that can be queried and included in reports
- b) Ability to deny a final inspection until all the required inspections are approved
- c) Ability to customize inspections checklists by permit type and inspection item.
- d) Allow inspectors to enter inspection results and reference applicable code as comments and append specific details
- e) Built in schedule module for inspections and daily assignments – non completed inspections notify officer and supervisor and automatically are rescheduled
- f) Provide daily schedules for inspections and support schedule modifications

E) CERTIFICATION OF OCCUPANCY OR CERTIFICATE OF COMPLETION

The governmental compliance section handles the procedural requirements for the issuance of the certificate of occupancy or the certificate of completion. The functionality of this process should include:

- a) Ability to generate final reconciliation statement at the time of CO/CC indicating all payments received and all charges due for the project.
- b) Automatically prevent the issuance of the CO/CC until appropriate department approvals are in the system.

F) CERTIFICATE OF USE

- a) Ability to track the City's Certificate of Use process from initial application to approval.
- b) Ability to bill in batch mode via email
- c) Ability to accept application online
- d) Ability to route application to appropriate approval entity.
- e) Ability to schedule inspection.
- f) Ability to link Certificate of Use to CO/CC.
- g) Ability to bill by any combination of the following criteria:
 - a) Use,
 - b) Square footage
 - c) Number of seats
 - d) Number of beds
 - e) Number of units
 - f) Number of boat slips
- h) Ability to track and report on information such as, but not limited to:
 - a) Job address
 - b) Folio number
 - c) Name of business
 - d) Previous use
 - e) Current use
 - f) Applicant name
 - g) Applicant's address
 - h) Applicant's phone number
 - i) Applicant's email address
 - j) Architect/Engineer name
 - k) Architect/Engineer phone number
 - l) Architect/Engineer email address

G) OCCUPANT CONTENT PROCESS

- 1. Ability to track Occupant Content from initial application to approval.
- 2. Ability to accept application and plans online
- 3. Ability to route application and plans for review
- 4. Ability to schedule inspection
- 5. Ability to track and report on information such as, but not limited to:
 - a) Job address
 - b) Folio number
 - c) Name of business

- d) Previous use
- e) Current use
- f) Applicant name
- g) Applicant's address
- h) Applicant's phone number
- i) Applicant's email address
- j) Architect/Engineer name
- k) Architect/Engineer phone number
- l) Architect/Engineer email address

H) GOVERNMENTAL COMPLIANCE PROCESS

Responsible for; Reviews plans for compliance with the City of Miami Beach Flood Plain Management Ordinance, DEP, DERM, and the National Flood Insurance program regulations, Implementing the provisions of the Miami Dade County's 40-year building re-certification ordinance and to review that all requirements for demolition and partial demolition permits within the City of Miami Beach are met.

1. Plan Review Process:

- a. Ability to determine Flood Zone and Flood Base Elevation of a building from GIS
- b. Ability to determine a project location reference to Costal Construction Control Line (CCCL) by GIS
- c. Ability to determine automatically 10-years improvements for each permit application activity
- d. Ability to capture Building Tax Assessed Value from GIS database
- e. Ability to enter the Building Appraised Market Value
- f. Ability to identify any project that would be substantial improvement (new structure or 10-year building improvements cost equals or exceeds 50 percent of the building market value)
- g. Ability to prepare staff report and FPMB Variance Order under the building permit or development activity
- h. Ability to track improvements cost for each revision permit process
- i. Ability to have a designated field in the plan review screen to enter comments and approvals related to the following Agencies:
 - 1. DERM,
 - 2. WASD,
 - 3. FDOT,
 - 4. DEP,
 - 5. MIAMI DADE IMPACT FEE
 - 6. HEALTH DEPARTMENT.

2. Building Recertification Process:

- a. Ability to produce a report to identify buildings that are 40-year old, their gross area is larger than 2000 sq-ft and they are more than 2 units (utilizing Miami- Dade County Property Appraisal's data)
- b. Ability to notify automatically the owner of the buildings in advance, 90 days prior to the building rectifications expiration date
- c. Ability to initialize building recertification activities in a batch format
- d. Ability to produce standard letters and mailing labels for the building recertification activities
- e. Ability to link 10- year building recertification activities to the pervious building recertification activities for the same address or parcel number
- f. Designate document/screen for building recertification checklist
- g. Ability to process building recertification tasks as outline below:
 - 1. Initialization

2. Notification
 3. Posting Notification
 4. Repairs
 5. Repair Correction Progress Report
 6. Structural Report/ Cover Letter Report
 7. Electrical Report/ Cover Letter Report
 8. Structural Inspection Verification
 9. Electrical Inspection Verification
 10. Building Recertification Fess
 11. Building Recertification Violations
 12. Building Recertification Special Master
 13. Recertification Issuance
- h. Ability to assign electrical and building recertification inspections to chiefs of perspective trades.
 - i. Ability to set automatically the compliance date (90 days/150 days after notification date)
 - j. Applicants should be able to view the status of process of building recertification via website
 - k. Applicants should be able to view pending comments for building recertification process via website
 - l. Applicants should be able to view building recertification violation comments
 - m. Ability to produce a report for expired building recertification activities
 - n. Ability to produce a report for those building that their status is in Initialization, Posting Notification, Repairs, Violation, Fees, Special Master and Approved
 - o. Ability to produce a report for non-compliance building recertification activities
 - p. Ability to produce a report to select randomly 10% of building recertification activities that require a building inspection
 - q. Ability to produce a report to identify building recertification activities that require building and or electrical inspection.
 - r. Ability to produce inspection results report
 - s. Ability to receive, store , link and view electronically the scanned structural and electrical recertification Reports
 - t. Ability to produce a summary report to include the following information:
 1. Total number of buildings that are 40 year or older
 2. Number and percentage of buildings that have not been notified
 3. Number and percentage of building that have notified within 90 days or 150 days (repair status)
 4. Number and percentage of building that require repairs
 5. Number and percentage of buildings that have been notified but they are not in compliance
 6. Number and percentage of building that have received a building recertification violation
 7. Number and percentage of buildings that have been forwarded to the Special Master due to non-compliance building re-certification
 8. Number and percentage of buildings that are incompliance with building recertification

3. Certificate of Completion and Occupancy:

- a. Applicant should be able to view electronically all related permit activities of a project.
- b. Applicants should be able to request all required inspections including Floodplain and Waste Management, Planning and Public works, Fire and Building under a Master Building Permit.
- c. Permitting inspection module should not allow an inspection to be requested prior to the required prerequisite inspection approvals
- d. Ability to produce a report for staff to identify the status of required inspections for the projects.

- e. Ability to link certificate of occupancy or completion activities to the related Building Development Permit
- f. Ability to duplicate permit application information to certificate of occupancy application
- g. Ability to change the status of TCO and TCC automatically to EXPIRED after TCO/TCC expiration dates
- h. Ability to automatically send the tenant and owners a notification to advise them that their temporary certificate of occupancy will be expired in 30 days.
- i. Ability to process monitor and track percent of value of project completed in a Partial Certificate of Occupancies for projects
- j. Ability to process and identify certificate of occupancies for the space units
- k. Ability to link certificate of occupancy activities to certificate of use application for the same space
- l. Ability to link certificate of occupancies activity violation to certificate of occupancy activities
- m. Ability to subdivide application activities as TCO/TCC/PCO/PCC/ CO/CC
- n. Ability to send an advisory letter to the issued PCO, TCO or TCC applicants after 60-90 days issuance date if they have not received a final certificate of occupancy.
- o. Ability to print certificate of occupancy checklist prior issuance of TCO/TCC/PCO/PCC/CO/CC
- p. Ability to report monthly on the value of construction brought online based on Certificates of Occupancy and Completion and Partial Certificates of Occupancy and Completion.
- q. Ability to track required inspection and approvals for portions of a building to obtain partial Certificate of Occupancy.

J. CONTRACTOR, ARCHITECT AND ENGINEER MANAGEMENT

- a. Ability to verify license status for all Contractors, Architect/Engineer and to add to permit.
- b. Ability to relate one or more qualifiers to a contracting company.
- c. Ability to relate one or more licenses to a qualifier
- d. Ability to maintain Contractors, Architect/Engineer information including but not limited to the following;
 - a. Name
 - b. Address
 - c. Phone
 - d. Email
 - e. Status
 - f. Additional Names
 - g. License number
 - h. Insurance company
 - i. Policy number
 - j. Insurance amount
 - k. Insurance expiration date
 - l. License expiration date
 - m. Business license number
 - n. Business license expiration date
 - o. Qualifier's name
 - p. Workers' Compensation insurance company
 - q. Worker's compensation number
 - r. Worker's compensation expiration date
 - s. Worker's compensation exemption expiration
 - t. Approve discipline

2) CODE COMPLIANCE – CITY, BUILDING, AND FIRE CODES

The City expects to utilize the system to perform all of its various code enforcement/compliance functions, these includes the enforcing of the Florida Building Code by the Building Department, the enforcement of the State Fire Code by the Fire Department and the enforcement of the City code by the Code Compliance Division. The three departments' functions will be hereby referred as "code compliance".

The primary objective is to acquire and implement a software application system that:

- Assists the Departments in tracking code complaints from complaint inception to conclusion, including the ability to generate ad hoc reports necessary to identify trends, report on objectives, and monitor employee and departmental workload measures;
- Provides residents and business owners with the ability to report, review and research property information, including complaints and complaint history, from inception to conclusion, including a record of any code compliance liens and cases by property.
- Creates and maintains annual fire inspections for all existing buildings and issuance of annual fire permits.

A. General Requirements

1. Maximize productivity through the automation of business processes for Code Compliance agencies,
2. Reduce staff time in researching project status and history.
3. Increase the accuracy and consistency of the project status information.
4. Make status information available to interested parties in both government and the public.
5. Reduce legal exposure through accurate logs of cases.
6. Document communications with the public.
7. Improve turnaround time.
8. Enhance recovery of fines to include the processing of liens and subsequent documentation.

B. Maintenance of the City of Miami Beach City Code Ordinances; Florida Building Code and Florida Fire Code

Provide the ability to create and update code ordinances that may consist of various conditions.

1. Ability to create in the system new Code ordinances with the following requirements:
 - o Various conditions
 - o Variety of violation types
 - o Fine, fees, and cost calculations
2. Provide ability to calculate fines, fees and costs.
3. Ability to include checklist in the creation of City Code ordinances. These checklists can be used by a Code Compliance Officer to conduct a uniform and standard inspection on a City Code ordinance.
4. Ability to include checklists and generate code violations with code reference for fire inspections

C. Case Maintenance

Provide the ability to create and maintain unique code case. A code case is defined as any event that requires an inspection from a Code Compliance inspector, whether it self-initiated by the officer, initiated by a department or Special Master order, as well as a complaint. The system must meet the following minimum requirements:

1. Ability to store an audit trail of all changes occurring on a case.
2. Security
3. Ability to provide notification to responsible parties, such as letter to complainants, letters to owners.
4. Ability to track accumulating fines and fees.
5. Allow multiple cases to be associated with a property
6. Ability to enter the results of daily inspections
7. Allow multiple violations to be cited to multiple units under a single case for that property and violations to be sorted by unit.
8. Select standard information from pull down list to simplified data entry and provide the ability to input comments, such as inspection results
9. Automatically determine fees and compliance dates from types codes based on rules defined by the code ordinances
10. Select standard information to simplify data entry
11. Provide a drop down menu of all similar addresses during the entry phase
12. Allow the entry of an activity that does not have a specific address i.e. at the corner of 10th St and Washington Av.
13. Allow user to define case types with user defined sequence of actions and case data for each type
14. Allow user defined violation types and related freeform text at the case level, violation level, inspection level, review level and for reporting findings of boards and meetings
15. Send inquiries and messages for enforcement information directly from the main screen
16. Ability to track all remediation related activities, such as lot clearing, graffiti, etc.
17. Store scanned images, such as extensions letters
18. Allow for the creation of a project number, under which other activities may be associated
19. Upload, Process and store digital pictures associated with an activity
20. User can override fees with management approval
21. System to track multiple code enforcement types
22. Ability to generate a City Bill from imposed fines.
23. Support issuance of tickets as citations in lieu of violations.
24. Ability to monitor number of tickets in a 12 month cycle.

D. Inspection

Scheduling

Provide the ability to prioritize and schedule inspections, including assigning of the inspection to specific Code Compliance Inspector.

1. Prioritize (not necessarily in the following order) and schedule inspections based on (but not limited to) the following criteria:
 - o Late inspections
 - o Annual Schedule by month, based on Zone and Street.
 - o Complaints (prioritized by severity)
 - o Violations (prioritized by violation type, life/safety, area, and based on compliance time frames)
 - o Special Master requested inspection
 - o Inspections observed by the officer
 - o Courtesy Notice
 - o # of days from a specific event
 - o Letter Of Intent / Community Development Block Grant
2. Automatically prompts first inspections, re-inspections and all other inspections
3. Ability to define geographical areas for the purpose of creating code officer zones and/or boundaries
4. Ability to automatically assign inspections to inspectors based on their geographical zone

5. Provide method of assigning a case for follow-up to an inspector
6. Allow for the flexibility for officer to schedule follow-up inspection for early inspections only.
7. Alert supervisors of inspections overdue by a specified number of days or for another reason
8. Ability to prompt officers on locations that require an Letter Of Intent / Community Development Block Grant
9. Allow Code Compliance Officers to schedule their own Letter Of Intent / Community Development Block Grant
10. Supervisors must be alerted of inspections overdue by 7 calendar days.
11. Code Compliance Officer should have the flexibility of scheduling follow-up inspections for early inspections only.
12. All inspection extension up to 60 days must be approved by a supervisor.
13. Inspection extensions below or equal to 7 calendar days can be provided by the Code Compliance Officer without the approval of a supervisor, but only once per case.
14. Supervisory rights can be temporarily assigned in the system to an individual, when a supervisor is out of the office (i.e. vacation, sick).
15. Alert Code Compliance for follow-up inspection or action
16. Ability to grant extensions for compliance date in violation.

Inspect

Provide the ability for the Code Compliance Inspector to record and enter inspection and research data into a case in a standardization and minimal manual input. Specific requirements are as follows:

1. Automatically provide compliance dates, fines, and conditions based on violation found during the inspection. There should be no manual input or changes from the Code Officer on compliance dates, fines, and conditions that are specifically defined by the Code ordinance.
2. Provide an alert to inform the inspector of an existing notice citing the same code section. This will avoid duplication of enforcement efforts.
3. Ability to interface with hand held/laptop computers to upload and download information for daily inspections
4. Allow Code Compliance Officer to enter inspection results in narrative format
5. Ability to print out violations

Research

Provide the ability to research property and owner information to complete inspections and issue violations.

1. Ability to access Miami-Dade County Property Appraiser's Office information and Secretary of State website
2. Display historical information about each case and inspection
3. Identify violations by parcel, address and folio number
4. Maintain, sort, search, retrieve, and report on key information about property, including:
 - o Parcel ID
 - o Name, Address and Phone Number of the business or individual.
 - o Name, Address, Phone Number of the Owner/Agent.
 - o Name address and Phone number of the title holder.
 - o Inspection zone.
 - o Inspection status.
 - o Zoning classification.
 - o Number of units.
 - o Date of entry.
 - o Date of status updates.
 - o Date of last inspection/re-inspection.
 - o Fees paid and owed.
 - o Last hearing date

- o Several user defined fields.
- o Inspector name

E. Reporting and Tracking

1. Provide the ability to track inspection data and ensure accountability of staff.
2. Provide the ability to report on departmental performance indicators and measures including (but not limited to):
 - o Number of inspections for a specific violation
 - o Number violations issued by type, such as handbill, sign, sanitation, property marine, zoning, fire extinguisher, exit lighting, etc.
 - o Number of days from first report of complaint until Code Officer's First Inspection
 - o Number of days between violation and compliance
 - o Number of Re-inspections until compliance
 - o Percentage of graffiti remediated on private property.
3. Ability to print screens and/or reports
4. Allow for generation of standard form letters with accompanying envelopes based upon information in the property owner, license holder and agent data base.
5. Track zoning history and status for specific properties
6. Maintain, sort, search, retrieve, and report on key information about property, including:
 - o Parcel ID
 - o Name, Address and Phone Number of the business or individual.
 - o Name, Address, Phone Number of the Owner/Agent.
 - o Name address and Phone number of the title holder.
 - o Inspection zone.
 - o Inspection status.
 - o Inspector name
 - o Zoning classification.
 - o Number of units.
 - o Date of entry.
 - o Date of status updates.
 - o Date of last inspection/re-inspection.
 - o Fees paid and owed.
 - o Last hearing date
 - o Several user defined fields.
 - o Geographical area/perimeters
7. Provide the ability to create custom ad hoc reports through a report writer using key fields
8. Allow queries (custom) of database of user-defined criteria, over a user defined date range
9. Have the ability to customize reports, letter and other printed material
10. Generate custom correspondence concerning inspections, violations, notices, etc
11. Report on fines by type including rolling fines
12. Report on warnings and other types of enforcement activities
13. Ability for public inquiry such as web interface
14. Ability to email to appropriate departments if case does not belong to Code Compliance.
15. Track inspection and violation data including but not limited to
 - o Inspection type
 - o Date and Time
 - o Action taken
 - o Comments
 - o Inspector
 - o User audit trail
 - o Violation type

16. Accommodates several different fiscal years
17. Allow users to specify the print sequence of reports based on inspection and violation data
18. Ability to sort field in reports

F. Technical Functionality

1. Ability to integrate with Microsoft Word, Microsoft Excel
2. Convert documentation and reports to PDF formatted files.
3. Provide faster service and accurate information retrieval to the public via remote on-line access.
4. Ability to integrate with GIS.
5. Ability to provide information and assistance to inspectors in the field via hand held/laptop devices.
6. Convert and migrate historical information from the current system.
7. Ability and create interface with Eden System to update system when a bill or fine is paid.
8. Ability and create interface with Eden system to produce invoices for Code fines, fees, costs and liens.
9. Ability to interface with GIS system, where address and parcel information is provided to the system
10. Ability to run on the City's SQL server
11. Ability to print out in the field:
 - a) Ability to create custom enforcement file templates
 - b) When a custom template is used, allow all data from template to be modified
 - c) Assign a unique file number to each file. Files link by folio number.
 - d) Ability to set a date for compliance and automatically generate reminders for code officers and management.
 - e) Create code enforcement letters based on level of non-compliance
 - f) Provide reminder to the code enforcement officer when date for compliance approaches and passes.
 - g) Attach digital photos and scanned images to enforcement file
 - h) Ability to add contractors' and adjacent property owners' information that are involved in the action
 - i) Allow the creation of code enforcement reports that can be viewed on-line
 - j) Ability to create reports on all fields
 - k) Ability to do case management, including automatically tracking each case, calendar each step in the process automatically while alerting officer for each step until case is closed
 - l) Ability to define geographical areas for the purpose of creating zones and or boundaries
 - m) Automatically assign case to officer based on zone
 - n) Ability to Import/export images while in the field
 - o) Ability to obtain signature while on inspection (signature pad)
 - p) Ability to print notices of violation in the field
 - q) Automatically establish appropriate fines and calculate what the current fine is Specified users can override fees with management approval
 - r) Allow officer to enter inspection results in narrative format
 - s) Ability for specified users to grant extensions
 - t) Ability to run aging reports for open cases in general and by officer, zone, type of case etc.
 - u) Ability to automatically generate required letters at each step of the case process
 - v) Allow the entry of an activity that does not have a specific address
 - w) Ability to store and scan documents and to setup a direct link between case, permit and scan documents
 - x) Ability to built in custom letter templates
 - y) Built in schedule module for inspections and daily assignments – non completed inspections notify officer and supervisor and automatically are rescheduled
 - z) Ability to automatically move to lien status if fine not paid within specific timeframe

- aa) Allow multiple cases to be associated with a property
- bb) Relate all pertinent information to a particular property - permits, liens, licenses. For example, a sidewalk café permit and the boundary diagram associated with that sidewalk café permit
- cc) Allow multiple violations to be cited to multiple units under a single case
- dd) Entry recognition
- ee) Ability to re-assign cases from officer to officer to be re-assigned. Case ownership transferable by zone, officer or case #
- ff) Alerts to supervisors on pending cases by time range

3) LICENSING – BUSINESS TAX AND OTHER PERMITS

The Finance Department is responsible for processing all applications and renewals for Business Tax Receipts, formerly known as Occupational Licenses, as well as, other permits such as but not limited to: Garage Sale Permits, Real Estate Permits, Sidewalk Café Permits, Valet Permits, Artist Vendor Permits, and Non-Profit Vendor Permits.

The Finance Department wishes to acquire and implement an integrated software application system that: 1) assists the department in processing and tracking Business Tax Receipts and other permits, including the ability to generate ad hoc reports necessary to identify trends, report on objectives, and monitor employee and departmental workload measures; and 2) provides residents and business owners with the ability to report, review and research application and permit information, including history, from inception to conclusion.

The system selected must be web-based and must be able to interface with the InForum Gold software from EDEN.

A. Finance General Requirements

The system selected must provide the ability to:

1. Issue permits and licenses to businesses and individuals.
2. Utilize SIC and NAICS codes to define the class/type of business.
3. Identify parent company of a business.
4. Associate multiple contacts with a business/individual.
5. Define an unlimited number of business categories.
6. Identify the status of a business/individual with user-defined status codes.
7. Associate multiple addresses with a business/individual.
8. Assign multiple permits/licenses to a business/individual.
9. Associate an unlimited number of user-defined fields with a business/individual.
10. Track multiple types of insurance associated with a business/individual.
11. Track an audit log of all changes made to a business/individual.
12. Track all transaction history (renewals, bills, payments, penalties, late fees, etc) associated with a business/individual.
13. Permit the capture of hazardous materials by location.
14. Track business history including ownership changes, address changes, payment history, etc.
15. Assign multiple locations to one permit/license.
16. Define through table entry, business license types and add, change and delete license types as required.
17. Set default due dates, expiration dates, and penalty dates, through table entry, for all license/permit types.
18. Track transactions associated with each license/permit type, such as application, renewal, inspection, etc.

19. Generate transactions for a single business/individual or in a batch process.
20. Calculate multiple fees associated with a license/permit type, including penalties.
21. Vary fees by license/permit type and business category.
22. Prorate fees as warranted.
23. Create and associate standard letters and forms with licenses and permits.
24. Define an expiration date as a fixed date or a specific time interval by license/permit type.
25. Schedule and log results of multiple inspections per applicant.
26. Provide capability to log type of inspection, results, date, time, inspector, and comments.
27. Track taxes including, but not limited to, sales taxes, transient occupancy tax, etc.
28. Track and accommodate approvals from various departments including date of approval, person approving, and comments.
29. Print license and permits.
30. Reprint licensees and permits on demand.
31. Print barcodes on letters, forms, renewals, bills, licenses, and permits.
32. Submit applications, renewals, or returns via web applications.
33. Accept various forms of traditional payments via a web application.
34. Accept license/permit via web-browser interface.
35. Accept on-line documents and attachments for web applications.
36. Offer different regulatory departmental routing queues/workflows depending on type of application.
37. Electronically route and notify, via email, each reviewer on a queue that an approval for an application or renewal is pending.
38. Track applications and approval status on a real-time basis.
39. Track applications on-line.
40. Provide electronic correspondence to customers when applications have been denied and/or approved.
41. Track the amount of time departments on each approval queue spend on each application and/or renewal.
42. Flag applications and renewals which have outstanding pre-defined issues.
43. Allow for internal and external notes associated with each customer file.
44. Email renewal notices to all licenses holders

Offer reports based on revenues, categories, workflows, employees for selected date ranges

B. ELEVATOR INSPECTION AND WITNESSING TEST AND BOILER INSPECTIONS-

The Elevator Safety Section is responsible to issue construction permits, temporary operation permits, and certificates of operation, perform routine inspections, and enforce the Elevator Safety Code. The Mechanical Section is responsible for annual inspections for Boilers.

1. Ability to track all elevators/boilers in the City.
2. Ability to schedule and monitor periodic inspections and witnessing of tests, by Elevator / Boiler Contractor Name, by month, week, or day.
3. Ability to track inspection and witnessing tests results by date, by building address, by Elevator / Boiler Contractor.
4. Ability to print invoices automatically based on configurable parameters
5. Ability to e-mail receipts and certificates
6. Ability to produce delinquent report
7. Ability to log all call from Elevator / Boiler Contractor, Building Owners and/or Others
8. Ability to issue permits
9. Ability to calculate based on City's ordinances
10. Ability to produce a report automatically of all inspections that need to be done
11. Ability to create accident / incident reports

12. Provide an on-line billing and payment mechanism for annual inspections and witnessing test
13. Ability to track complaints about all lifts and issue fines based on the number of violations within the prior 12 months

C. SIDEWALK CAFÉS AND OTHER PERMITS

The Engineering Division is responsible for providing civil engineering, transportation planning and environmental regulatory services to Public Works and Other City Departments. The Right-of-Way Management section is responsible for managing the utilization of the City's Right of Way. The Right of Way section reviews all residential and commercial construction plans, reviews planning and Planning Board and Zoning Board items, issues ROW permits and manages the daily utilization of the Right of Way.

Sidewalk Café Permits are the permitted use of the city sidewalk right of way which is associated with a restaurant and is primarily characterized by tables and chairs; may include such other sidewalk cafe furniture as defined as permitted and/or approved pursuant to Sidewalk Cafe Ordinance No. 2008-3601.

D. REVOCABLE PERMITS

The Engineering Division is responsible for providing civil engineering, transportation planning and environmental regulatory services to Public Works and Other City Departments. The Right-of-Way Management section is responsible for managing the utilization of the City's Right of Way. The Right of Way section reviews all residential and commercial construction plans, reviews planning and Planning Board and Zoning Board items, issues ROW permits and manages the daily utilization of the Right of Way.

Revocable Permits are for any use of real property owned or maintained by the city or which the city holds an interest, by a person or entity, establishing conditions for such use, providing for revocation by the city and establishing requirements for return after the expiration of 20 years, unless surrendered or revoked at an earlier date of the property upon termination/revocation.

4) SPECIAL MASTER

The Clerk of the Special Master serves as the Official Secretary for the Special Master hearing cases brought before them by the Building, Code Compliance, and Fire Departments. Responsibilities include, but are not limited to:

- Preparing case files/assigning case numbers.
- Preparing Notices to Appear for mailing.
- Preparing Orders, Liens, Satisfactions/Releases, agendas, synopsis/case histories, financial data and statistics.
- Collecting and depositing revenue collected.
- Assisting Special Master, Inspectors, Attorneys and the general Public.
- Recording liens in the Public Records.
- Closing cases upon full compliance and payment in full of all money owed.
- Records Custodian for the Special Master.

A. Miscellaneous

1. Maximize productivity through the automation of the Special Master process.
2. Convert and migrate all existing Special Master cases into new system, with the ability to update information on cases.
3. Able to have online forms to request continuances, extension of time to comply, and mitigation.
4. Allow multiple users to view same case simultaneously.
5. Able to associate specific folio numbers for condominiums to the master folio number for the

- property.
- 6. Print case documents related to a specific folio number, in addition to the master folio number.
- 7. Allow for free-form comments, with unlimited amount of characters, in the system and to print in documents.
- 8. Allow multiple cases to be associated with a property or individual.
- 9. Allow the IT Department, in conjunction with the Vendor to delete records from the system that have met the retention requirements established by the State. Create a report that identifies which records (based on case number, property address, date closed) were deleted, the date deleted, and who authorized. Audit trail.

B. New Cases and Case Management

- 1. Ability to relate a Special Master case with the violation case.
- 2. Allow case to be generated without link to a violation case (for those departments that utilize the Special Master process, but do not use the new computer system).
- 3. Current property ownership and date of sale visible on base screen of case.
- 4. Identify if a case is for an Owner, Tenant, Unit, Vendor, or Common Area.
- 5. Able to notify user that there is an existing Special Master case prior to generating a new case (example: a notice pops up and states: "There is currently a Special Master Case associated with this violation. Do you wish to continue?" This will eliminate duplicate cases, unless specifically necessary.
- 6. Unique number scheme assigned to each case, with the ability to identify the type of case by the number scheme (example: JA – appeal, JB – building, JC – code, JF – fire).
- 7. Able to alert department when an appeal has been filed, a continuance, extension or mitigation request has been filed.
- 8. Able to automatically notify inspectors that affidavits are pending or overdue.
- 9. Secured drop down menu of statuses to choose from and the ability to change or update status for each case as necessary.
- 10. Ability to have sub-type for case to identify what type of case it is (pm, zoning, license, plumbing, electrical, etc.).
- 11. Able to add new sub-types as the need arises.
- 12. Create custom screen templates based on the subtype of the case (example: Noise).
- 13. Allow the entry of an activity that does not have a specific address (0 Street, 500 Block of Washington Avenue, etc.)
- 14. Violation number (code, building, fire) needs to automatically carry over from violation case to Special Master case.
- 15. Violation of Code Section needs to be automatically populated from violation case to Special Master case.
- 16. Date violation was issued needs to be automatically populated from violation case to Special Master case.
- 17. Violator or Applicant needs to automatically carry over from violation case to Special Master case.
- 18. Inspector area (zone) needs to be automatically populated from violation case to Special Master case.
- 19. Drop down menu listing inspectors, their phone number, and zone (ability to update drop down list as inspectors and zones change or are added).
- 20. Able to reassign case to different inspector on a case by case basis.
- 21. Able to reassign zone as the zone boundaries change on a case by case basis.
- 22. Able to assign Special Master based on a hearing date and time.
- 23. Able to customize fields and pull down lists (hearing time, inspector, special master assigned, type of hearing)
- 24. Able to track multiple dates associated with a case (hearing dates, compliance dates, Order imposing fines, 20 day Notice, etc.), in addition to time when case was heard (may have been scheduled for 9:00 a.m. but was actually heard at 10:43 a.m.)

25. Able to attach multiple document templates to a case.

C. Agenda Preparation

1. Able to schedule a case to be heard on a specific date and time.
2. Able to have multiple cases scheduled for the same time.
3. Able to identify how many cases are scheduled on a specific date at a specific time.
4. Able to assign Special Master based on a hearing date and time.
5. Able to have multiple Special Master scheduled on a specific date and time.
6. Able to customize fields and pull down lists (hearing time, inspector, special master assigned, type of hearing)
7. Able to create mailing labels, file labels, meeting notices, and schedule on a Special Master Agenda.
8. Able to track multiple dates associated with a case (hearing dates, compliance dates, Order imposing fines, 20 day Notice, etc.), in addition to time when case was heard (may have been scheduled for 9:00 a.m. but was actually heard at 10:43 a.m.)
9. Able to do case management, automatically track each case. (document when a request for hearing is received, when the matter is scheduled, disposition, etc.).

D. 20 Day Notices

1. Automatically calendar a case 20 days from when an Order is signed and generate 20 day Notice.

E. Orders

1. Allow for free-form comments, with unlimited amount of characters, in the system and to print in documents.
2. Able to merge fields in a case into a document template.
3. Built in spell-check and grammar check.

F. Fees

1. Able to assess unlimited amount of hearing fees, identifying the date the fee was assessed.
2. Must calculate all fines and fees based on numerous variables (beginning date, ending date, daily fine amount, add interest based on date lien recorded). Allow for multiple entry of beginning and ending dates, fine amounts, recording dates.
3. Automatically calculate copy fees based on the amount of copies made.
4. Able to assess additional fees that are currently not provided for.
5. System should have internal clock which automatically calculates and updates all fines and fees on a daily basis, so that user is always viewing current amounts due, without the need to manually update the record. **This is a mandatory requirement.**
6. Able to match fields in fee schedule to the payment screen.
7. Post payments and print receipts.
8. Allow partial payments.
9. Subtract payments from balance due.
10. Keep running total of all calculated fees.
11. Able to make adjustments to fees as required, with proper documentation and audit trail.
12. Verify NSF checks in the payment screen and charge the appropriate fees.
13. Able to calculate a payoff of a condominium unit based on the percentage owned in the common area through a specific date.

G. Lien Processing

1. Able to store all recording information (date, book, page, etc.)

SECTION F - MINIMUM REQUIREMENTS

- Proposers must have **five (5) years of experience with at least one (1) documented successful migration and implementation**, inclusive of data conversion, of a project of a similar size for a government agency.

Project of similar size for a government agency is defined to mean any government agency which processed at least 5,000 building permits per year, and has a population of more than 90,000 residents.

- Proposers shall submit the **cost proposal, check list, and system Software Rating** (See Attachment IV, V, and VI).

SYSTEM SOFTWARE RATING

Proposers must use the following rating system to complete the RFP System Software Rating Form and evaluate the fundamental requirements and include a brief description of how the software supports the stated requirement. **After each functional requirement of the RFP, the proposer will initiate the response by indicating the rating, in parenthesis, as per the schedule below:**

- (4) Standard and available in the current release. Software supports this requirement. No customization or modification is required.
- (3) Meets requirement with minor configuration or modification. Configuration maintains application on upgrade path. Testing and production of modifications will be completed by implementation date. Include an estimate for the cost of the modification, if any.
- (2) Available with 3rd party software application. Indicate name of the application recommended and number of installs jointly completed.
- (1) Does not meet requirement and requires substantial system modification. Indicate timing required and estimated cost of modification.
- (0) Not available. Software will not meet requirement
- (0R) Future Release. Requirement will be available in future release. Indicate anticipated release month and year.

**ATTACHMENT I
ACTIVE COMPOSITIONS**

To retrieve these documents please visit the following link:

<http://web.miamibeachfl.gov/procurement/scroll.aspx?id=23510>

**ATTACHMENT II
HISTORICAL COMPOSITIONS**

To retrieve these documents please visit the following link:

<http://web.miamibeachfl.gov/procurement/scroll.aspx?id=23510>

ATTACHMENT III EXISTING REPORTS

Revenue Reports

Revenue Status by Month

All revenue General ledger accounts (Date Range)

Revenue Status, Permit fees

All Permit fees by Permit Type and General Ledger Accounts (Date Range)

Budget and Benchmark Reports

Master Permit Totals with Job Values

Total Master Permits Approved with Job Values per FY (Date Range)

All Permit Totals With Job Values

Total Permits Approved with Job Values per FY (Date Range)

Building Violations Issued

Total Building Violations issued

Building and Trade Inspections

Total Building and Trade Permits Inspections completed (Date Range)

Certificates of Completion

Certificates of Occupancy

Total Certificates of Completion Issued. (Date Range)

Total Certificates of Occupancy Issued. (Date Range)

Building and Trade Plan Review

Total Building & Trade Permits Plan Reviews completed. (Date Range)

All Permits Issued by Type (BEMP)

Total Permits Approved By Permit type. (Date Range)

Average Drop Off Plan Review Durations

Average Number of Days in Drop Off Plan

Review Per Discipline, In City and Out of City. (Date Range)

Average Walk-Through Plan Review Dur.

Average Number of days in Walk Through Plan Review Per Discipline. (Date Range)

Total Expired Permits

Total Expired Permits.(Ending Date)

Tracking/General Information Reports

Summary of Plan Review Progress.

Complete Listing of Plan Review Submissions and included disciplines.(Permit Number)

Permit Inspection History by Address

Permit Inspection history with results & inspector.(Permit Number)

Pending Re-certifications

Complete List of Buildings in Process of their 40 Year Recertification.

Pending Re-certifications in Violation

Complete List of Buildings Due 40 Year Recertification in Violation Status

Pending Re-certification in Notified

Complete List of Buildings Due 40 Year Recertification in Notified Status

Pending Re-certification Progress

Complete List of Recertifications in Progress grouped by pending action.

Pending Re-certification mailing Labels

Mailing Labels for each stage of the recertification Process.

Owner/Contractor Permits

Complete List of Permits Processed by Owner/Constrictor. (Owner/Contractor Name) or License Number.

Inspections Requested

Complete list of Inspections Requested by Trade. (Date Range)

Inspection Guide Sheet

Complete List of Inspection Guide Sheet Items by inspection type

Percentage of Reviews On-Target

Complete List of Permits Plan Review completed in designated duration.(Date Range)

Average Plan Review Duration

Average duration to complete the Plan Review phase of Permits.(Date Range)

Average Re-Submittal per Trade

Average re-submissions of plans for review per trade.(Date Range)

Contractors Listing

Complete list of All Active Contractors Registered with City of Miami Beach.

Plan Expeditors Listing

Complete List of Plan Expeditors in Permitting System.

Daily Tracking Reports

Inspections Performed

Complete list of Inspections performed by trade per inspector.(Date)

Inspections Performed with Comments

Complete list of inspections performed by trade per inspector with comments.(Date)

Daily Permitting Activity

Complete list of Permits Applied and Approved by permit type with General Description. (Date)

Completed Plan Review

Complete List of Completed Plan Review by trade per plans examiner with comments.(Date)

Applications complete plan review Call List

Complete list of Applications that have completed the current review of plans that need to be notified.(Date Range)

Dropped Off Plan Review Inventory

Complete List of Plans the have been Dropped Off for Review.(Date Range)

Pending Plan Reviews

Complete list of Plans waiting to be reviewed by discipline.(Date Range)

Disciplines to Review per Permit SPOC

Complete list of Plans that have been dropped off for review ,City,Private Provider, SP.(Date Range)

Disciplines to Review Per Permit

Complete List of Plans to be Reviewed by discipline.(Date Range)

Elevator Section Reports

1 year inspection

3 year inspections

5 year inspection

Complete list of Wheel Chair Lifts

Complete list of Elevators Designated(R,M,S)

Miami Dade Property Appraiser

Monthly CO issued with Masters and Sub-Permits

Monthly Number of Master Permits and Sub-Permits

Special Master Reports

Case Synopsis (ability to view on web)
Special Master Agenda (ability to view on web)
Address Inquiry Report
Parcel Inquiry Report
Name Inquiry Report
Courtesy Notices for Condominiums (by case number)
Condo Courtesy Notice Report (by case number)
Building Violation (by case number)
Code Violation (by case number)
Fire Violation (by case number)
Individual mailing labels (3 across of the same label)
Sign in log (sorted by time)
Fines and lien report (ability to sort on multiple fields)
Mailing Labels (sorted by date entered – allow date range)
Mailing envelopes
File Labels (sorted by date entered – allow date range)
Fees collected (sorted by date range)
List of pending affidavits (sorted by compliance date)
List of all cases (separate report for each Status)
Records Disposition Report

IDS Report for Code

Search Cases - General Case report: This is used by Code Officers to track open cases etc. (Daily)
Search Complaints - Complaints Report: This is used by Code Officers to obtain a list of complaints assigned in their zone. (Daily)
Search By Name - Search By Name Report: This is used by Code Officers to track violations by name. (Daily)
Case Summary Counts - Summary Count Totals: This is used by Code Officers to track number of cases by Officers. (Weekly)
Case History - Code Compliance Case History By Case Number: This report is used by Officers to review a case. (Daily)
Inspection Worksheets - Print Inspection Worksheet: This report is used to by Code Officers to print inspections for the day or period.(Daily)
Inspector Report - Violation Cases by Inspector Number: This report allows the Code Officer to print cases issued for a specified period of time.(Daily)
Fees Collected - Fees Collected by Date Range (ccvio and csvio): This report shows all cases issued by Code Officers with fines.(Monthly)
Noise Report: This is a report that we cannot operate without and is used by just about every Code Officer. (Daily).
Sanitation Report - Sanitation List Report - This report is used to identify Sanitation applications for inspection by the Code Officer.(Daily)
Case Photographs - Print Case Photographs: This report enables the Officer to print all Pictures for a particular case.(Daily)
Inspection Report - Print Inspection List by Inspector Area: This report shows cases by Code Officer Zone. (Daily)
Address Report - Violation Cases by Address Number: This report is used by the Code Officer to show all violations on a particular street. (Monthly)
Comply Dates - Violation Cases by Compliance Date: This report is used by the Code Officer to indicate cases that need inspection on a certain date.(Weekly)

Status Report - Violation Cases by Status, Violation: This report is used by the Code Officer to show cases Open, Closed etc. for any period chosen.(Weekly)

The Following reports are used mainly by our Clerical Staff and should be retained. (Daily)

- a. 15 Day Warning For Owner
- b. 15 Day Warning For Applicants
- c. 30 Day Warning Notices
- d. Commercial Letter Of Intent Owners
- e. Residential Letter Of Intent Owners
- f. 48 Hour Warnings
- g. Calendar Report - Clerical Calendar Report
- h. Inspector Table Relationship Report - Administrative use only
- i. Composition Types/Subtypes - Comp Subtype Report
- j. Violation Letters - CCvio, CZvio, CSvio Letters
- k. Conditions List - Code Conditions Text.

Fire Department Reports

Daily Inspection List

Daily Inspection Worksheet

Hydrant Flow Test worksheet

History of Inspection Requests

Inspection Total by Inspector; by Type of Inspection

Notice of Violation Report

**ATTACHMENT IV
CITY FEE ORDINANCES**

To retrieve these documents please visit the following link:

<http://web.miamibeachfl.gov/procurement/scroll.aspx?id=23510>

**ATTACHMENT V
COST PROPOSAL**

Cost Proposal Base Bid : RFP # 37-08/09

A. Software License Cost	\$
1 Building Development Process	\$
2 Code Compliance	\$
3 Licensing	\$
4 Special Master	\$
B. Project Management / Implementation	\$
C. Data Conversion	\$
1 Active Compositions	
2 Historical Compositions	
D. Training Program during Implementation	\$
E. Maintenance and Support for Five Years	\$
F. Optional Components	\$
1 Daily Rate for Data Conversion per Section II - 3	\$
2 Electronic Signature Option per Section IV - 13	\$
Total Costs	\$

**ATTACHMENT VI
CHECK LIST**

RFP CHECK LIST FOR RFP # 37-08/09

To ensure that your proposal is submitted in conformance with the Contract Documents, please verify that the following items have been completed and submitted as required.



	Original and ten (10) copies of RFP
	Project Manager and Implementation Team (Resumes, References, previous experience)
	System Software: Detailed Response to each requirement in the RFP and all requirements specified in the RFP including but not limited to Sections A,B,C,D,E,F.
	Project Cost Proposal
	System Implementation, Cutover and System Test Plans, and Procedures (site preparation, functional system design documents, implementation plan, training plan, detailed system test plan and procedures, and project plan using Visio diagrams).
	Maintenance and Support Plan
	Methodology for Data Conversion, Data Migration, and Data Scrubbing (Base proposed cost on 48 archive data compositions, 100 historical data composition, and rates for data conversion).
	Training Plan
	Disaster Recovery Plan per Section C.2.h
	Project Implementation Schedule
	References (8)
	Proposer Qualifications
	List all Implementation over the last 10 years.
	Minimum Requirements: five (5) years of experience with at least one (1) documented successful migration and implementation , inclusive of data conversion, of a project of a similar size for a government agency. And Cost Proposal, Check List, and System Software Rating Documents
	Contractor's Questionnaire
	Declaration: Non-discrimination in Contrats and Benefits
	Past Performance Client Survey Information (sent to clients)

ATTACHMENT VII SYSTEM SOFTWARE RATING SYSTEM

SYSTEM SOFTWARE RATING Page 1

RFP#37-08/09 PURCHASE AND IMPLEMENTATION OF AN ENTERPRISE BUILDING SERVICE SYSTEM

INTERFACES	RATING (0 TO 4, OR)	DESCRIPTION
Q-MATIC		
Geographic Information System (GIS)		
Laser Fiche		
Eden		
Nova Time		
Electronic Plan Review		
Siemens IVR		
New World System		
Web Q&A		
Call Center Access		
Call Center System		
Contact list		
Web links		
Interface with Licensing Authorities		
GENERAL SYSTEM REQUIREMENTS	RATING (0 TO 4, OR)	DESCRIPTION
General system requirements		
Data Structure		
Access Controls		
Query and Report Capabilities		
Printing		
Web Requirements		
Financial Component		
Auditing		
Support and Maintenance		
Mobile Component		
System Security		
System Recovery and Fault Tolerance		
Electronic Signatures(for 1st year of contract - Base Bid)		
Cashiering		

SYSTEM SOFTWARE RATING Page 2

RFP#37-08/09 PURCHASE AND IMPLEMENTATION OF AN ENTERPRISE BUILDING SERVICE SYSTEM

BUILDING DEVELOPMENT PROCESS	RATING (0 TO 4, OR)	DESCRIPTION
Pre-Development Approval Process		
Front Permit Counter		
Plan Review Process		
Inspection Process		
Certification of Occupancy or Certificate of Completion		
Certificate of Use		
Occupant Content Process		
Governmental Compliance Process		
Contractor Architect Engineer Management		
Special Event Permit Process		

CODE COMPLIANCE - CITY, BUILDING, AND FIRE CODES	RATING (0 TO 4, OR)	DESCRIPTION
General Requirements		
Maintenance of CMB Code Ordinances, FBC and FFC		
Case Maintenance		
Inspection		
Reporting and Tracking		
Technical Functionality		

SYSTEM SOFTWARE RATING Page 3

RFP#37-08/09 PURCHASE AND IMPLEMENTATION OF AN ENTERPRISE BUILDING SERVICE SYSTEM

LICENSING	RATING (0 TO 4, OR)	DESCRIPTION
Business Tax Receipts		
Elevator Inspection and Witnessing		
Sidewalk Cafes and Other Permits		
Revocable Permits		

SPECIAL MASTER	RATING (0 TO 4, OR)	DESCRIPTION
Miscellaneous		
New Cases and Case Management		
Agenda Preparation		
20 Day Notices		
Orders		
Fees		
Lien Processing		

SECTION III – PROPOSAL FORMAT

Proposals must contain the following documents, each fully completed, and signed as required. If any items are omitted, Proposers must submit the documentation within five (5) calendar days upon request from the City, or the proposal shall be deemed non-responsive. **The City will not accept fee/cost information after deadline for receipt of Proposals.**

1. Table of Contents

Outline in sequential order the major areas of the Proposal, including enclosures. All pages must be consecutively numbered and correspond to the table of contents.

2. Proposal Points to Address:

Proposer must respond to all minimum requirements listed below. Proposals which do not contain such documentation may be deemed non-responsive.

- a) **Introduction letter** outlining the Proposer's professional specialization; provide past experience to support the qualifications of the Proposer. Proposers shall submit documents that provide evidence as to the capability to provide and implement the services as outlined in this RFP.
- b) **Proposers must provide documentation** which demonstrates their ability to satisfy all of the requirements detailed in this RFP.
- c) **References:** List at least eight (8) client references, to include contact name, title, company, address, telephone number, **e-mail address**, fax number. The City reserves the right to verify and confirm any information submitted in this process. Such verification may include, but is not limited to, speaking with current and former clients, review of relevant client documentation, site-visitation, and other independent confirmation of data.
- d) **Qualifications of Proposer:** Outline in detail the experience and qualifications of the business and individual members of the Proposer entity and experience of Proposer and/or Proposer members in providing similar projects/programs as the one proposed.

Provide an organizational chart of all personnel and consultants to be used on this project/program and their qualifications. A resume of each individual, including education, experience, and any other pertinent information, shall be included for each team member to be assigned to this project.

- 1. A brief history of the firm, name(s) of owner and principal(s) and number of years in business. Include the location(s) of the offices. Include all memberships, licenses, and accreditations your firm and employees hold.
 - 2. A listing of the proposed team members for this project, their specific experience, qualifications, licenses currently held, membership affiliations and any other pertinent information as it relates to the requirements outlined in this RFP.
 - 3. At least one project that demonstrates and/or meet the minimum experience requirements.
- e) **Past Performance Client Survey Information:**
Past performance information will be collected on all Proposers. Proposers are required to identify and submit their best projects. Proposers will be required to send out Performance Evaluation Surveys to each of their clients.

Please provide your client with the Performance Evaluation Letter and Survey attached herein on pages 79 and 79, and request that your client submit the completed survey to Maria Estevez, at (Fax) 786-394-4002 or (e-mail) mestevez@miamibeachfl.gov; and a copy to Gus Lopez, at (Fax) 786-394-4007 or (e-mail) guslopez@miamibeachfl.gov . **The City will not accept Client Surveys sent to the Procurement Division from the office of the Proposer. Surveys must be sent to the Procurement Division directly from your client's office(s).** Proposers are responsible for making sure their clients return the Performance Evaluation Surveys to the City. The City reserves the right to verify and confirm any information submitted in this process. Such verification may include, but is not limited to, speaking with current and former clients, review of relevant client documentation, site-visitation, and other independent confirmation of data.

f) Methodology and Approach for the Project.

The Proposer shall specifically describe its proposal methodology and approach as it relates to the requirements outlined in this RFP and its check list. Proposers must also submit the System Software Rating Form.

g) Cost Information:

Proposers shall submit the cost proposal

Fee information must be submitted with Proposal. Notwithstanding any cost submitted, the City reserves the right to further negotiate same with the successful Proposer.

3. Acknowledgment of Addenda:

(IF REQUIRED BY ADDENDUM) and Proposer Information forms.

4. Any other Documents Required by this RFP.

SECTION IV – EVALUATION/SELECTION PROCESS

The procedure for Proposal evaluation and selection is as follows:

1. Request for Proposals issued.
2. Receipt of proposals.
3. Opening of responses and determination if they meet the minimum standards of responsiveness.
4. An Evaluation Committee, appointed by the City Manager, shall meet to evaluate each proposal in accordance with the requirements of this RFP. Proposers may be requested to make additional written submissions or oral presentations to the Evaluation Committee.
5. The Evaluation Committee shall recommend to the City Manager the proposal or proposals acceptance of which the Evaluation Committee deems to be in the best interest of the City.

The Evaluation Committee shall base its recommendations on the following factors, for a total of **110 possible points**:

- Project costs (Fixed cost and maintenance and support cost) – **25 Points**
 - System architecture and network integration – **15 Points**
 - System functionality – **35 Points**
 - Maintenance and Support – **15 Points**
 - Independent company assessment and references – **10 Points**
 - Project implementation team – **10 Points**
6. The Evaluation Committee will appoint sub-committees (as appropriate) to listen to product demonstration, conduct question and answer sessions, and site visits if so directed by the Evaluation Committee.
 7. Each sub-committee chair will provide a report to the Evaluation Committee for its consideration.
 8. After considering the recommendation(s) of the Evaluation Committee, the City Manager shall recommend to the Mayor and Commission the proposal or proposals acceptance of which the City Manager deems to be in the best interest of the City.
 9. The City Commission shall consider the City Manager's recommendation(s) as it deems appropriate, and approve the City Manager's recommendation(s); may make its own recommendation (s); may reject all proposals; or may prescribe such other action, as it deems necessary and in the best interest of the City.

In consideration of its recommendation, the Mayor and City Commission may consider and give preference and/or additional consideration to a proposal and/or proposals which, in the determination of the City Commission, provide a "community" and/or "public" benefit, which added benefit the City Commission may deem is in the best interest of the City of Miami Beach.

10. Following recommendation of award by the City Commission, negotiations between the selected Proposers and the City Administration take place to arrive at a contract. If the Mayor and Commission has so directed, the City Manager may proceed to negotiate a contract with a proposer other than the top-ranked proposer if the negotiations with the top-ranked proposer fail to produce a mutually acceptable contract within a reasonable period of time.
11. A proposed contract or contracts are presented to the Mayor and Commission for approval, modification and approval, or rejection.
12. If and when a contract or contracts acceptable to the respective parties is approved by the Mayor

and Commission, the Mayor and City Clerk sign the contract(s) after the selected proposer(s) has (or have) done so.

By submitting a proposal, all Proposers shall be deemed to understand and agree that no property interest or legal right of any kind shall be created at any point during the aforesaid evaluation/selection process until and unless a contract has been agreed to and signed by both parties.

The evaluation process for the RFP will be based on the requirements outlined in Section D and E. This is not a comprehensive list of all of the City's fundamental requirements, but includes the key fundamental requirements that will be used to evaluate the RFPs and will be included as part of the signed contracts. Responses to each line item should be concise and straightforward.

The City expects vendors to respond in a factual manner, clearly identifying software that is fully released, in testing, or slated for future release for each functional requirement. Vendors must provide a rating for every item. If a submitted RFP includes blank responses, we will assume that the proposed system does not have that capability.

Notification:

Based on a preliminary evaluation of the RFP's the Evaluation Committee will short List several proposers and invite them to participate in Scripted Demonstration Meetings and Software Demos. The selected proposers will be notified in writing or email.

Evaluation Committee and Subcommittees:

An Evaluation Committee, appointed by the City Manager, shall meet to evaluate each proposal in accordance with the requirements of this RFP. The Evaluation Committee will evaluate, short list, and elaborate the final recommendation for the City Manager's review. In addition, several subcommittees will be appointed to assist the Evaluation Committee on specific aspects of the evaluation process.

Scripted Demos:

The functional and technical product demonstrations will be presented to the Evaluation Committee by the short listed proposers according to a pre-defined script. All proposers must follow this script during their demonstration process. The evaluation criteria for the demonstration process will include adherence to the script as well as the ability to successfully demonstrate the product's ability to meet the functional and technical requirements. The City reserves the right to request additional information, interviews, follow-up demonstrations, or any other type of clarification of proposal information it deems necessary to evaluate the final proposers.

Software Demonstration

In addition to scripted functional demonstrations, the City will provide a pre-determined amount of time for the Proposer to show any system functionality that may have not been presented during the scripted demonstration.

Site Visits

The City may also choose to conduct site visit(s) to the software proposers' headquarters and/or proposer's clients as part of the evaluation process. The site visits may be used to determine the successful vendor, and will be conducted following the scheduled software demonstrations of the short listed proposers. The City will select the sites to be visited at its own discretion. The object of the site visit will be to assess the following:

- Assessment of the vendor's service during system implementation.
- Assessment of the quality of vendor's ongoing support.
- Overall user satisfaction with the system.

INSURANCE CHECK LIST

- XXX 1. Workers' Compensation and Employer's Liability per the statutory limits of the state of Florida.
- XXX 2. Comprehensive General Liability (occurrence form), limits of liability \$ 1,000,000.00 per occurrence for bodily injury property damage to include Premises/ Operations; Products, Completed Operations and Contractual Liability. **Contractual Liability** and Contractual Indemnity (Hold harmless endorsement exactly as written in "insurance requirements" of specifications).
- XXX3. Automobile Liability - \$1,000,000 each occurrence - owned/non-owned/hired automobiles included.
4. Excess Liability - \$. 00 per occurrence to follow the primary coverages.
- XXX 5. The City must be named as and additional insured on the liability policies; and it **must** be stated on the certificate.
6. Other Insurance as indicated:
- | | |
|---|---------------------------|
| <u> </u> Builders Risk completed value | \$ <u> </u> . 00 |
| <u> </u> Liquor Liability | \$ <u> </u> . 00 |
| <u> </u> Fire Legal Liability | \$ <u> </u> . 00 |
| <u> </u> Protection and Indemnity | \$ <u> </u> . 00 |
| <u> </u> Professional Liability | \$ <u> </u> . 00 |
| <u> </u> Employee Dishonesty Bond | \$ <u> </u> . 00 |
| <u> </u> Theft Covering Money and/or Property
Of Others | \$ <u> </u> . 00 |
- XXX 7. Thirty (30) days written cancellation notice required.
- XXX 8. Best's guide rating B+:VI or better, latest edition.
- XXX 9. The certificate must state the RFP number and title

PROPOSER AND INSURANCE AGENT STATEMENT:

We understand the Insurance Requirements of these specifications and that evidence of this insurance may be required within five (5) days after Proposal opening. **Selected Proposer's failure to procure or maintain required insurance program shall constitute a material breach of Agreement under which City may immediately terminate the proposed Agreement.**

Proposer

Signature of Proposer

PROPOSER INFORMATION

Submitted by: _____

Proposer (Entity): _____

Signature: _____

Name (Printed): _____

Address: _____

City/State: _____

Telephone: _____

Fax: _____

E-mail: _____

It is understood and agreed by Proposer that the City reserves the right to reject any and all Proposals, to make awards on all items or any items according to the best interest of the City, and to waive any irregularities in the RFP or in the Proposals received as a result of the RFP. It is also understood and agreed by the Proposer that by submitting a proposal, Proposer shall be deemed to understand and agree that no property interest or legal right of any kind shall be created at any time until and unless a contract has been agreed to and signed by both parties.

(Authorized Signature)

(Date)

(Printed Name)

**REQUEST FOR PROPOSALS NO. 37-08/09
ACKNOWLEDGMENT OF ADDENDA**

Directions: Complete Part I or Part II, whichever applies.

Part I: Listed below are the dates of issue for each Addendum received in connection with this RFP: 37-08/09:

Addendum No. 1, Dated _____

Addendum No. 2, Dated _____

Addendum No. 3, Dated _____

Addendum No. 4, Dated _____

Addendum No. 5, Dated _____

Part II: _____ No addendum was received in connection with this RFP.

Verified with Procurement staff

Name of staff

Date

Proposer -Name

Date

Signature

DECLARATION

TO: City of Miami Beach
City Hall
1700 Convention Center Drive
Procurement Division
Miami Beach, Florida 33139

Submitted this _____ day of _____, 2009.

The undersigned, as Proposer, declares that the only persons interested in this Proposal are named herein; that no other person has any interest in this responses or in the contract to which this response pertains; that this response is made without connection or arrangement with any other person; and that this response is in every respect fair and made in good faith, without collusion or fraud.

The Proposer agrees if this response is accepted, to execute an appropriate City of Miami Beach document for the purpose of establishing a formal contractual relationship between the Proposer and the City, Florida, for the performance of all requirements to which the response pertains.

The Proposer states that the response is based upon the documents identified by the following number: RFP No. 34-07/08.

WITNESS

PROPOSER SIGNATURE

PRINTED NAME

PRINTED NAME

WITNESS

TITLE

PRINTED NAME

**SWORN STATEMENT UNDER SECTION
287.133(3)(a), FLORIDA STATUTES, ON PUBLIC
ENTITY CRIMES**

THIS FORM MUST BE SIGNED AND SWORN TO IN THE PRESENCE OF A NOTARY PUBLIC OR
OTHER OFFICER AUTHORIZED TO ADMINISTER OATHS.

1. This sworn statement is submitted to _____
[print name of public entity]
- by _____
[print individual's name and title]
- for _____
[print name of entity submitting sworn statement]
- whose business address is _____
- and (if applicable) its Federal Employer Identification Number (FEIN) is _____ (If the
entity has no FEIN, include the Social Security Number of the individual signing this sworn
statement:

- _____ .)
4. I understand that a "public entity crime" as defined in Paragraph 287.133(1)(g), **Florida Statutes**, means a violation of any state or federal law by a person with respect to and directly related to the transaction of business with any business with any public entity or with an agency or political subdivision of any other state or of the United States, including, but not limited to, any bid or contract for goods or services to be provided to any public entity or an agency or political subdivision of any other state or of the United States and involving antitrust, fraud, theft, bribery, collusion, racketeering, conspiracy, or material misrepresentation.
5. I understand that "convicted" or "conviction" as defined in Paragraph 287.133(1)(b), **Florida Statutes**, means a finding of guilt or a conviction of a public entity crime, with or without an adjudication of guilt, in any federal or state trial court of record relating to charges brought by indictment or information after July 1, 1989, as a result of a jury verdict, nonjury trial, or entry of a plea of guilty or nolo contendere.
6. I understand that an "affiliate" as defined in Paragraph 287.133 (1)(a), **Florida Statutes**, means:
- 1) A predecessor or successor of a person convicted of a public entity crime; or
 - 2) An entity under the control of any natural person who is active in the management of the entity and who has been convicted of a public entity crime. The term "affiliate" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in the management of an affiliate. The ownership by one person of shares constituting a controlling interest in another person, or a pooling of equipment or income among persons when not for fair market value under an arm's length agreement, shall be a prima facie case that one person controls another person. A person who knowingly enters into a joint venture with a person who has been convicted of a public entity crime in Florida during the preceding 36 months shall be considered an affiliate.

- 5) I understand that a "person" as defined in Paragraph 287.133(1)(e), Florida Statutes means any natural person or entity organized under the laws of any state or of the United States with the legal power to enter into a binding contract and which bids or applies to bid on contracts for the provision of goods or services let by a public entity, or which otherwise transacts or applies to transact business with a public entity. The term "person" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in management of an entity.
- 6) Based on information and belief, the statement which I have marked below is true in relation to the entity submitting this sworn statement. **[indicate which statement applies.]**

_____ Neither the entity submitting this sworn statement, nor any officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, nor any affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989.

_____ The entity submitting this sworn statement, or one or more of its officers, directors, executives, partners, shareholders, employees, members or agents who are active in management of the entity, or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989.

_____ The entity submitting this sworn statement, or one or more of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989. However, there has been a subsequent proceeding before a Hearing Officer of the State of Florida, Division of Administrative Hearings and the Final Order entered by the hearing Officer determined that it was not in the public interest to place the entity submitting this sworn statement on the convicted vendor list. **[attach a copy of the final order]**

I UNDERSTAND THAT THE SUBMISSION OF THIS FORM TO THE CONTRACTING OFFICER FOR THE PUBLIC ENTITY IDENTIFIED IN PARAGRAPH 1 (ONE) ABOVE IS FOR THAT PUBLIC ENTITY ONLY AND, THAT THIS FORM IS VALID THROUGH DECEMBER 31 OF THE CALENDAR YEAR IN WHICH IT IS FILED. I ALSO UNDERSTAND THAT I AM REQUIRED TO INFORM THE PUBLIC ENTITY PRIOR TO ENTERING INTO A CONTRACT IN EXCESS OF THE THRESHOLD AMOUNT PROVIDED IN SECTION 287.017, FLORIDA STATUTES FOR CATEGORY TWO OF ANY CHANGE IN THE INFORMATION CONTAINED IN THIS FORM.

[signature]

Sworn to and subscribed before me this _____ day of _____, 2009

Personally known _____

OR Produced identification _____ Notary Public - State of _____

_____ My commission expires _____
(Type of Identification)

(Printed typed or stamped Commissioned name of Notary Public)

QUESTIONNAIRE

Proposer's Name:

Principal Office Address:

Official Representative:

**Individual
Partnership (Circle One)
Corporation**

**If a Corporation, answer this:
When Incorporated:**

In what State:

**If a Foreign Corporation:
Date of Registration with
Florida Secretary of State:**

Name of Resident Agent:

Address of Resident Agent:

President's Name:

Vice-President's Name:

Treasurer's Name:

Members of Board of Directors

Questionnaire (continued)

If a Partnership:

Date of organization:

General or Limited Partnership*:

Name and Address of Each Partner:

NAME

ADDRESS

*** Designate general partners in a Limited Partnership**

1. Number of years of relevant experience in operating same or similar business: _____

2. Have any agreements held by Proposer for a project ever been canceled?
Yes () No ()

If yes, give details on a separate sheet.

3. Has the Proposer or any principals of the applicant organization failed to qualify as a responsible Bidder/Proposer refused to enter into a contract after an award has been made, failed to complete a contract during the past five (5) years, or been declared to be in default in any contract in the last 5 years?

If yes, please explain:

Questionnaire (continued)

4. Has the Proposer or any of its principals ever been declared bankrupt or reorganized under Chapter 11 or put into receivership? Yes () No ()

If yes, give date, court jurisdiction, action taken, and any other explanation deemed necessary on a separate sheet.

5. Person or persons interested in this RFP and Qualification Form have () have not () been convicted by a Federal, State, County, or Municipal Court of any violation of law, other than traffic violations. To include stockholders over ten percent (10%). (Strike out inappropriate words)

Explain any convictions:

6. Lawsuits (any) pending or completed involving the corporation, partnership or individuals with more than ten percent (10%) interest:

A. List all pending lawsuits:

B. List all judgments from lawsuits in the last five (5) years:

C. List any criminal violations and/or convictions of the Proposer and/or any of its principals:

7. Conflicts of Interest. The following relationships are the only potential, actual, or perceived conflicts of interest in connection with this proposal: (If none, state same.)

Questionnaire (continued)

8. Public Disclosure. In order to determine whether the members of the Evaluation Committee for this Request for Proposals have any association or relationships which would constitute a conflict of interest, either actual or perceived, with any Proposer and/or individuals and entities comprising or representing such Proposer and in an attempt to ensure full and complete disclosure regarding this contract, all Proposers are required to disclose all persons and entities who may be involved with this Proposal. This list shall include public relation firms, lawyers and lobbyists. The Procurement Division shall be notified in writing if any person or entity is added to this list after receipt of proposals.

Questionnaire (continued)

The Proposer understands that information contained in this Questionnaire will be relied upon by the City in awarding the proposed contract, and such information is warranted by the Proposer to be true and accurate. The Proposer agrees to furnish such additional information, prior to acceptance of any proposal relating to the qualifications of the Proposer, as may be required by the City Manager. The Proposer further understands that the information contained in this Questionnaire may be confirmed through a background investigation conducted by the City, through the Miami Beach Police Department. By submitting this Questionnaire the Proposer agrees to cooperate with this investigation, including but not limited to, fingerprinting and providing information for a credit check.

PROPOSER

WITNESS:

IF INDIVIDUAL:

Signature

Signature

Print Name

Print Name

WITNESS:

IF PARTNERSHIP:

Signature

Print Name of Firm

Print Name

Address

By: _____
General Partner

Print Name

ATTEST:

IF CORPORATION:

Secretary

Print Name of Corporation

Print Name

Address

By: _____
President

(CORPORATE SEAL)

Print Name



MIAMIBEACH

City of Miami Beach, 1700 Convention Center Drive, Miami Beach, Florida 33139, www.miamibeachfl.gov

PROCUREMENT DIVISION

Tel: 305.673.7490 , Fax: 786.394.4002

To:

Phone:

Fax:

E-mail:

Subject: Performance Evaluation of _____
Number of pages including cover: 2

To Whom It May Concern:

The City of Miami Beach has implemented a process that collects past performance information pursuant to the submittal of responses to this Request for Proposal (RFP) No. 37-08-09 entitled "Purchase and Implementation of an Enterprise Building Development Service System." The information will be used to assist City of Miami Beach in the evaluation of proposals received in response to the RFP.

The company listed in the subject line has chosen to participate in this RFP. They have listed you as a past client for which they have provided services. Both the company and City of Miami Beach would greatly appreciate you taking a few minutes of your time to complete the accompanying questionnaire.

Please review all items in the following document and answer the questions to the best of your knowledge. If you cannot answer a particular question, please leave it blank. Please return this questionnaire to Maria Estevez by **July 1st, 2009** via fax: 786.394.4002; or e-mail mestevez@miamibeachfl.gov

Thank you for your time and effort.

Gus Lopez, CPPO
Procurement Director



City of Miami Beach, 1700 Convention Center Drive, Miami Beach, Florida 33139, www.miamibeachfl.gov

PROCUREMENT DIVISION

Tel: 305.673.7490 , Fax: 786.394.4002

PERFORMANCE EVALUATION SURVEY

Contractor Name: _____

Point of Contact: _____

Phone and e-mail: _____

Please evaluate the performance of the contractor (10 means you are very satisfied and have no questions about hiring them again, and 1 is if you would never hire them again because of very poor performance). If you don't know, please leave blank.

NO	CRITERIA	UNIT	
1	Ability to manage the project and budget costs	(1-10)	
2	Ability to maintain the schedule (complete on-time or early)	(1-10)	
3	Quality of work	(1-10)	
4	Does the system perform as proposed?	(1-10)	
5	How satisfactory was the data conversion process?	(1-10)	
6	How the system interfaces to your other applications?	(1-10)	
7	Was the staff competent and accessible at all times?	(1-10)	
8	Was the vendor responsive to your demands and suggestions?	(1-10)	
9	Are the "maintenance" or call-in support personnel responsive?	(1-10)	
10	Overall customer satisfaction and hiring again based on performance	(1-10)	
11	Do System updates implemented by the proposer demonstrate a commitment to innovation and customer demands by applying the latest technology?	(1-10)	

Overall Comments: _____

Agency or Contact Reference Business Name: _____

Contact Name: _____

Contact Phone and e-mail: _____

Date of Services: _____

Dollar Amount for Services: _____

Please return this questionnaire to Maria Estevez by July 1st, 2009 via fax: 786.394.4002; or e-mail mestevez@miamibeachfl.gov



QUICK REFERENCE GUIDE TO EQUAL BENEFITS COMPLIANCE

STEP 1: UNDERSTANDING THE LAW

What does the law require?

The proposed Ordinance will require certain contractors doing business with the City of Miami Beach, who are awarded a contract pursuant to competitive bids, to provide "Equal Benefits" to their employees with domestic partners, as they provide to employees with spouses.

Who is covered by this Ordinance?

Competitively bid City contracts valued at over \$100,000 whose contractors maintain 51 or more full time employees on their payrolls during 20 or more calendar work weeks. For more information, see Equal Benefits Ordinance Summary.

What benefits are covered?

The Ordinance applies to all benefits offered by a contractor to its employees who have spouses or domestic partners and all benefits offered directly to such spouses or domestic partners, even when the employee pays the entire cost of the benefit. This includes but is not limited to: sick leave, bereavement leave, family medical leave, and health benefits.

What is a Domestic Partner?

A "Domestic Partner" shall mean any two (2) adults of the same or different sex who have registered as domestic partners with a government body pursuant to state and local law authorizing such registration, or with an internal registry maintained by the employer of at least one of the domestic partners.

What if a contractor is unable to offer benefits equally?

Some contractors are unable to find an insurance company willing to offer domestic partner coverage. When a contractor takes all reasonable measures to stop discriminating, but can't for reasons outside its control, it can comply with the Equal Benefits Ordinance if it agrees to pay a cash equivalent. A cash equivalent is the amount of money paid by an employer for the spousal benefit that is unavailable for domestic partners, or vice versa. For more information, see Reasonable Measures Application.

What if a company will comply but needs time to do it?

Once a contractor makes it clear that it will comply with the Declaration, in certain situations ending discrimination in benefits may be delayed. For instance, offering medical insurance may be delayed until the contractor's next enrollment period; other benefits, such as bereavement leave, may be delayed until the contractor's personnel policies can be revised. For more information, see Rules of Procedure of the Substantial Compliance Form.

STEP 2: HOW TO COMPLETE THE DECLARATION: NON-DISCRIMINATION IN CONTRACTS AND BENEFITS FORM

Section 1 asks for information about your company. **If the company employs 50 or less employees in the U.S., skip to Section 4, date and sign.**

Section 2, Question 1A asks whether your company prohibits discrimination against people based on the categories listed.

- Answer "YES" if your company does have such a policy.
- Answer "NO" if your company does not have such a policy.

Question 1B asks whether your company agrees to include a nondiscrimination clause in all subcontracts entered into for the performance of a substantial portion of the any contracts you have with the City. This clause must include all of the categories listed in question 1A. You must answer this question even if your company will not be entering into any subcontracts associated with work performed for the City.

- Answer "YES" if you will agree to include a nondiscrimination clause in subcontracts.
- Answer "NO" if you will not agree to include a nondiscrimination clause in subcontracts.

Question 2A asks whether your company offers benefits (such as medical insurance) to employees' spouses or to employees because they are married (such as bereavement leave which can be taken because of the death of a spouse, or family medical leave which can be taken because of a spouse having a serious medical condition).

- Answer "YES" if you offer any such benefits.
- Answer "NO" if you do not offer any such benefits.

NOTE: You are considered as offering a benefit even if you don't pay for it. If access to the benefit is offered, but the cost must be paid in whole or in part by the employee, you should still answer "YES".

Question 2B asks whether your company offers benefits (such as medical insurance) to employees' domestic partners or to employees because they are in a domestic partnership (such as bereavement leave which can be taken because of the death of a domestic partner, or family medical leave which can be taken because of a domestic partner having a serious medical condition).

- Answer "YES" if you offer any such benefits.
- Answer "NO" if you do not offer any such benefits

NOTE: To comply, your answers to questions 2A and 2B should be the same. In very limited circumstances, you may comply without offering benefits equally. See Reasonable Measures Application Form.

Question 2C should be filled out ONLY if you have answered "YES" to question 2A and/or 2B. It asks you to indicate which benefits you offer to spouses (or employees because they are married), which benefits you offer to domestic partners (or employees because they are in a domestic partnership), and which benefits you do not offer. Please indicate only those benefits offered. If you offer benefits not already listed, write them in where it says "other". Remember, offering access to a benefit is still considered a benefit, even if your company does not pay for it.

Note: If you can't offer all benefit in a nondiscriminatory manner because of reasons outside your control, (e.g. there are no insurance providers willing to offer domestic partner coverage) you may be eligible for Reasonable Measures compliance. To comply on this basis, you must agree to pay a cash equivalent, submit a completed Reasonable Measures Application Form with all necessary attachments and have your application approved by the Procurement Division of the City of Miami Beach.

Step 3: ATTACH THE NECESSARY DOCUMENTATION

Section 3 states that you must submit documentation that verifies all benefits marked in your answer to Question 2C are offered in a nondiscriminatory manner. When possible, it is best if you submit this documentation along with your Declaration form. For policies that are unwritten, submit a letter to the Procurement Division indicating this. Use the list below as a guide for the type of documentation needed.

Medical Insurance A statement from your medical insurance provider that confirms spouses and domestic partners (as defined under this Ordinance) receive equal coverage in your medical plan. This may be in a letter from your insurance provider, or reflected in the eligibility section of your official insurance plan document. Similar documentation is needed for other types of insurance plans.

Retirement Plans (including 401k & pension plans)

The sections of your pension plan detailing how employees receive benefits. This should cover joint annuity options and pre retirement death benefits. Documentation should indicate that employees with domestic partners and employees with spouses receive the same benefits and payment options.

Bereavement Leave Your bereavement leave of funeral leave policy indicating the benefit is offered equally. If your policy allows employees time off from work because of the death of a spouse, it should also allow for time off because of the death of a domestic partner. If the policy allows for time off due to the death of a parent in-law or other relative of a spouse, it must include time off for the death of a domestic partner's equivalent relative.

Family Leave Your company's Family and Medical Leave Act policy. All companies with 50 or more employees must offer this benefit. Your policy should indicate that employees may take leave because of the serious medical condition of their spouse or domestic partner.

Parental Leave Your company's policy indicating that employees may take leave for the birth or adoption of a child, to care for a child who is ill, and/or to attend school appointments. If leave is available for step-children (the spouse's child) then leave also should be available for the child of a domestic partner.

Employee Assistance Program Your company's employee assistance program policy confirming that spouses, domestic partners and their parents and children are equally eligible (or ineligible) for such benefits.

Relocation & Travel Your company's policy confirming that expenses for travel or relocation will be paid on the same basis for spouses and domestic partners of employees.

Discounts, Facilities & Events Your company's policy confirming that discounts, facilities (e.g. gym) and events (e.g. holiday party) are equally available to spouses and domestic partners of employees.

Credit Union Documentation from the credit union indicating that spouses and domestic partners have equal access to credit union services.

Child Care Documentation that the children of spouses (step-children) and children of domestic partners have equal access to child care services.

Other Benefits Documentation of any other benefits listed to indicate that they are offered equally.

For medical insurance companies providing domestic partner coverage in the State of Florida, refer to the [Domestic Partner Insurance Coverage Search](#) available online at: www.miamibeachfl.gov under Business, Procurement drop down list.

For any questions on the City of Miami Beach Equal Benefits Ordinance or how to complete the applicable forms, please contact:

Cristina Diaz, Contracts Compliance Specialist
PROCUREMENT DIVISION
1700 Convention Center Drive, Miami Beach, FL 33139
Tel: 305-673-7496 / Fax: 786-394-4000/
cristinadiaz@miamibeachfl.gov

We are committed to providing excellent public service and safety to all who live, work and play in our vibrant, tropical, historic community.



MIAMIBEACH

CITY OF MIAMI BEACH

DECLARATION: NONDISCRIMINATION IN CONTRACTS AND BENEFITS

Section 1. Vendor Information

Name of Company: _____ Name of Company Contact Person: _____

Phone Number: _____ Fax Number: _____ E-mail: _____

Vendor Number (if known): _____

Federal ID or Social Security Number: _____

Approximate Number of Employees in the U.S.: _____ (If 50 or less, skip to Section 4, date and sign)

Are any of your employees covered by a collective bargaining agreement or union trust fund? ____ Yes ____ No

Union name(s): _____

Section 2. Compliance Questions

Question 1. Nondiscrimination - Protected Classes

A. Does your company agree to not discriminate against your employees, applicants for employment, employees of the City, or members of the public on the basis of the fact or perception of a person's membership in the categories listed below? Please note: a "YES" answer means your company agrees it will not discriminate; a "NO" answer means your company refuses to agree that it will not discriminate. Please answer yes or no to each category.

☐ Race	__ Yes __ No	☐ Sex	__ Yes __ No
☐ Color	__ Yes __ No	☐ Sexual orientation	__ Yes __ No
☐ Creed	__ Yes __ No	☐ Gender identity (transgender status)	__ Yes __ No
☐ Religion	__ Yes __ No	☐ Domestic partner status	__ Yes __ No
☐ National origin	__ Yes __ No	☐ Marital status	__ Yes __ No
☐ Ancestry	__ Yes __ No	☐ Disability	__ Yes __ No
☐ Age	__ Yes __ No	☐ AIDS/HIV status	__ Yes __ No
☐ Height	__ Yes __ No	☐ Weight	__ Yes __ No

B. Does your company agree to insert a similar nondiscrimination provision in any subcontract you enter into for the performance of a substantial portion of the contract you have with the City? Please note: you must answer this question, even if you do not intend to enter into any subcontracts.

__ Yes __ No

Question 2. Nondiscrimination - Equal Benefits for Employees with Spouses and Employees with Domestic Partners

Questions 2A and 2B should be answered YES even if your employees must pay some or all of the cost of spousal or domestic partner benefits.

A. Does your company provide or offer access to any benefits to employees with spouses or to spouses of employees?

☐ Yes ☐ No

B. Does your company provide or offer access to any benefits to employees with (same or opposite sex) domestic partners* or to domestic partners of employees? ☐ Yes ☐ No

*The term Domestic Partner shall mean any two (2) adults of the same or different sex, who have registered as domestic partners with a government body pursuant to state or local law authorizing such registration, or with an internal registry maintained by the employer of at least one of the domestic partners. A Contractor may institute an internal registry to allow for the provision of equal benefits to employees with domestic partner who do not register their partnerships pursuant to a governmental body authorizing such registration, or who are located in a jurisdiction where no such governmental domestic partnership exists. A Contractor that institutes such registry shall not impose criteria for registration that are more stringent than those required for domestic partnership registration by the City of Miami Beach

If you answered "NO" to both Questions 2A and 2B, go to Section 4 (at the bottom of this page), complete and sign the form, filling in all items requested.

If you answered "YES" to either or both Questions 2A and 2B, please continue to Question 2C below.

Question 2. (continued)

C. Please check all benefits that apply to your answers above and list in the "other" section any additional benefits not already specified. Note: some benefits are provided to employees because they have a spouse or domestic partner, such as bereavement leave; other benefits are provided directly to the spouse or domestic partner, such as medical insurance.

BENEFIT	Yes for Employees with Spouses	Yes for Employees with Domestic Partners	No, this Benefit is Not Offered	Documentation of this Benefit is Submitted with this Form
Health	☐	☐	☐	☐
Dental	☐	☐	☐	☐
Vision	☐	☐	☐	☐
Retirement (Pension, 401(k), etc.)	☐	☐	☐	☐
Bereavement	☐	☐	☐	☐
Family Leave	☐	☐	☐	☐
Parental Leave	☐	☐	☐	☐
Employee Assistance Program	☐	☐	☐	☐
Relocation & Travel	☐	☐	☐	☐
Company Discount, Facilities & Events	☐	☐	☐	☐
Credit Union	☐	☐	☐	☐
Child Care	☐	☐	☐	☐
Other	☐	☐	☐	☐

Note: If you can not offer a benefit in a nondiscriminatory manner because of reasons outside your control, (e.g., there are no insurance providers in your area willing to offer domestic partner coverage) you may be eligible for Reasonable Measures compliance. To comply on this basis, you must agree to pay a cash equivalent, submit a completed Reasonable Measures Application with all necessary attachments, and have your application approved by the City Manager, or his designee.

Section 3. Required Documentation

YOU MUST SUBMIT SUPPORTING DOCUMENTATION to verify each benefit marked in Question 2C. Without proper documentation, your company cannot be certified as complying with the City's Equal Benefits Requirement for Domestic Partner Ordinance. For example, to document medical insurance submit a statement from your insurance provider or a copy of the eligibility section of your plan document; to document leave programs, submit a copy of your company's employee handbook. If documentation for a particular benefit does not exist, attach an explanation.

Have you submitted supporting documentation for each benefit offered? ☐ Yes ☐ No

Section 4. Executing the Document

I declare under penalty of perjury under the laws of the State of Florida that the foregoing is true and correct, and that I am authorized to bind this entity contractually.

Executed this _____ day of _____, in the year _____, at _____, _____
City State

Signature

Mailing Address

Name of Signatory (please print)

City, State, Zip Code

Title



CITY OF MIAMI BEACH REASONABLE MEASURES APPLICATION

Declaration: Nondiscrimination in Contracts and Benefits

Submit this form and supporting documentation to the City's Procurement Division ONLY IF you:

- a. Have taken all reasonable measures to end discrimination in benefits; and
- b. Are unable to do so; and
- c. Intend to offer a cash equivalent to employees for whom equal benefits are not available.

You must submit the following information with this form:

1. The names, contact persons and telephone numbers of benefits providers contacted for the purpose of acquiring nondiscriminatory benefits;
2. The dates on which such benefits providers were contacted;
3. Copies of any written response(s) you received from such benefits providers, and if written responses are unavailable, summaries of oral responses; and
4. Any other information you feel is relevant to documenting your inability to end discrimination in benefits, including, but not limited to, reference to federal or state laws which preclude the ending of discrimination in benefits.

I declare (or certify) under penalty of perjury under the laws of the State of Florida that the foregoing is true and correct, and that I am authorized to bind this entity contractually.

Name of Company (please print)

Mailing Address of Company

Signature

City, State, Zip

Name of Signatory (please print)

Telephone Number

Title

Date



MIAMI BEACH

CITY OF MIAMI BEACH
SUBSTANTIAL COMPLIANCE AUTHORIZATION FORM

Declaration: Nondiscrimination in Contracts and Benefits

This form, and supporting documentation, must be submitted to the Procurement Division by entities seeking to contract with the City of Miami Beach that wish to delay ending their discrimination in benefits pursuant to the Rules of Procedure, as set out below.

Fill out all sections that apply. Attach additional sheets as necessary.

A. Open Enrollment

Ending discrimination in benefits may be delayed until the first effective date after the first open enrollment process following the date the contract with the City begins, provided that the City Contractor submits to the Procurement Division evidence that reasonable efforts are being undertaken to end discrimination in benefits. This delay may not exceed two years from the date the contract with the City is entered into, and only applies to benefits for which an open enrollment process is applicable.

Date next benefits plan year begins:

Date nondiscriminatory benefits will be available:

Reason for Delay:

Description of efforts being undertaken to end discrimination in benefits:

B. Administrative Actions and Request for Extension

Ending discrimination in benefits may be delayed to allow administrative steps to be taken to incorporate nondiscriminatory benefits into the City Contractor's infrastructure. The time allotted for these administrative steps shall apply only to those benefits for which administrative steps are necessary and may not exceed three months. An extension of this time may be granted at the discretion of the Procurement Director, upon the written request of the City Contractor. Administrative steps may include, but are not limited to, such actions as computer systems modifications, personnel policy revisions, and the development and distribution of employee communications.

Description of administrative steps and dates to be achieved:

If requesting extension beyond three months, please explain basis:

C. Collective Bargaining Agreements (CBA)

Ending discrimination in benefits may be delayed until the expiration of a City Contractor's Current collective bargaining agreement(s) where all of the following conditions have been met:

1. The provision of benefits is governed by one or more collective bargaining agreement(s);
2. The City Contractor takes all reasonable measures to end discrimination in benefits either by requesting that the Unions involved agree to reopen the agreements in order for the City Contractor to take whatever steps necessary to end discrimination in benefits or by ending discrimination in benefits without reopening the collective bargaining agreements; and
3. In the event that the City Contractor cannot end discrimination in benefits despite taking all reasonable measures to do so, the City Contractor provides a cash equivalent to eligible employees for whom benefits are not available. Unless otherwise authorized in writing by the Procurement Director, this cash equivalent payment must begin at the time the Unions refuse to allow the collective bargaining agreements to be reopened, or in any case no longer than three (3) months from the date the contract with the City is entered into.

For a delay to be granted under this provision, **written proof** must be submitted with this form that:

- The benefits for which the delay is requested are governed by a collective bargaining agreement;
- All reasonable measures have been taken to end discrimination in benefits (see Section C.2, above); and
- A cash equivalent payment will be provided to eligible employees for whom benefits are not available.

I declare (or certify) under penalty of perjury under the laws of the State of Florida that the foregoing is true and correct, and that I am authorized to bind this entity contractually.

Name of Company (please print)

Mailing Address of Company

Signature

City, State, Zip

Name of Signatory (please print)

Telephone Number

Title

Date