

**REQUEST FOR PROPOSAL NOTICE ISSUED:**    [08-22-2007](#)

**COUNTY OF JEFFERSON, MISSOURI**

Department of Administration  
729 Maple Street  
PO Box 100  
Hillsboro, MO 63050  
www.jeffcomo.org  
636-797-5382

**SPECIFICATION CONTACT**

**RANDY MULLER**  
Director of Information Technology  
636-797-5592

**REQUEST FOR PROPOSAL**

**BUILDING DIVISION PERMIT SYSTEM**

**PROPOSALS SHALL BE ACCEPTED UNTIL:**

**TUESDAY, SEPTEMBER 25, 2007, at 2:00 p.m. local time.**

Thereafter, proposals shall be opened in the County Commission Assembly Room.

**THREE (3) COMPLETE COPIES OF SEALED PROPOSALS MUST BE DELIVERED TO:**

**Office of the County Clerk  
Wes Wagner (636) 797-5478  
County of Jefferson, Missouri  
729 Maple Street  
Hillsboro, MO 63050**

**The outside of the envelope must contain the vendor's name, address and the following language:**

**SEALED PROPOSAL FOR:**    **BUILDING DIVISION PERMIT SYSTEM**

**SUBMITTED PROPOSALS ARE SUBJECT TO THE TERMS AND CONDITIONS OF THIS PROPOSAL INVITATION AND SPECIFICATIONS.**

**The Agreement/Contract term is from:**

**09-25-2007 through 09-24-2008.**

The undersigned certifies that he/she has the authority to bind this company in an agreement/contract to supply the commodity or service in accordance with all terms, conditions, and pricing specified. Prices are firm during this agreement term, unless agreed upon in writing by the County. The County has the option to renew this agreement at the same terms and conditions as the original agreement for one additional one-year term with the written consent of the successful bidder. Price increases for renewals are not authorized unless approved in writing by the County.

_____	_____
<b>Company Name</b>	<b>Authorized Agent (Print)</b>
_____	_____
<b>Address</b>	<b>Signature</b>
_____	_____
<b>City/State/Zip Code</b>	<b>Title</b>
_____	_____
<b>Telephone #</b>	<b>Date</b> <b>Tax ID #</b>
_____	_____
<b>E-mail</b>	<b>Fax #</b>

**TABLE OF CONTENTS:**

<b>Legal Notice and Request for Proposal</b>	<b>Page 1</b>
<b>Table of Contents</b>	<b>Page 2</b>
<b>Proposal Requirements</b>	<b>Page 3</b>
<b>Proposal Form and Contract</b>	<b>Page 5</b>
<b>Specifications</b>	<b>Page 8</b>
<b>Exceptions to Proposal</b>	<b>Page 8</b>
<b>Pricing</b>	<b>Page 24</b>

## **PROPOSAL REQUIREMENTS**

**A. PROPOSAL SUBMISSION:**

Submit PROPOSAL form in triplicate (three copies) with specification pages, if applicable. No facsimile PROPOSALS shall be accepted and shall be rejected.

**B. BASIS OF PROPOSAL AWARD:**

Award may be made on an item-by-item basis to the lowest and best PROPOSALS or award may be made to the lowest and best PROPOSAL total, whichever is in the best interest of the County. County may reject any or all PROPOSALS for any reason and may waive any informality. PROPOSALS submitted from a Missouri State Contract shall include a copy of the State Contract with the PROPOSAL.

It is further agreed that the Contract shall not be valid and binding upon the County until approved by the County Counselor, as to legal form and is subject to the Resolutions and Orders of the County of Jefferson, Missouri, and State and Federal Law. If no Proposal or Proposals have been awarded by the County Commission within thirty (30) days following the opening of the Proposal then all Proposals will be deemed Rejected.

**C. PROPOSAL PREPARATION:**

1. VENDORS are responsible for examination of drawings, specifications, schedules and instructions.
2. Each VENDOR shall furnish the information required by the invitation. The VENDOR shall sign all required documents. All deletions and erasures shall be initialed
3. Alternate PROPOSALS for supplies or services other than specified shall not be considered unless authorized by invitation.
4. VENDOR shall state a definite time for delivery of goods or for performance of services unless otherwise specified in the Request for Proposal.
5. When specified, samples must be timely submitted and at no expense to the County.

**D. MODIFICATION OR WITHDRAWAL OF PROPOSALS:**

PROPOSALS may be modified or withdrawn prior to the exact hour and date specified for receipt of PROPOSALS, provided the modification or withdrawal is in writing and is delivered in the same manner as a PROPOSAL submission.

**E. LATE PROPOSALS:**

It is the responsibility of the vendor to deliver his PROPOSAL or PROPOSAL modification on or before the date and time of the PROPOSAL closing to the Office of the County Clerk. PROPOSALS received late will be rejected and returned unopened to the vendor.

**F. PROPOSAL DEPOSITS:**

Proposal Deposits are not required unless specified in the Specifications.

**G. MATERIAL AVAILABILITY:**

VENDORS must accept responsibility for verification of material availability, product schedules and other pertinent data prior to submission of PROPOSAL and delivery time. It is the responsibility of the VENDOR to notify the County immediately if the materials specified are discontinued, replaced, or not available for an extended period of time. All materials ordered by the County, shall be as needed. A sample of materials may be requested.

**H. ALTERNATE PROPOSALS:**

Where required, VENDORS must submit complete specifications on all alternate PROPOSALS with the PROPOSAL form. Alternate PROPOSALS without complete specifications may be rejected. Alternate PROPOSALS and exceptions to PROPOSAL clauses must be clearly noted on the PROPOSAL form. The County may accept or reject alternate PROPOSALS; whatever is most advantageous to the County.

**I. INCORPORATION OF DOCUMENTS:**

The terms of the PROPOSAL Invitation, PROPOSAL Specifications, PROPOSAL Form are incorporated into the contract as if fully setout therein.

**J. ADDENDA:**

Addenda to PROPOSAL specifications are incorporated by reference as if fully setout herein. It is the responsibility of the vendor to insure and verify that they are in receipt of and completed all attached addenda's prior to submission of

PROPOSAL forms. Verification is made by contacting the Office of Contracts, Grants, and Special Projects, or by reviewing the County Web Site. ([www.jeffcomo.org](http://www.jeffcomo.org)).

**K. INSURANCE:**

The Vendor/Contractor shall purchase and maintain in force, with an insurance company licensed to do business in the State of Missouri, at its own expense, such insurance as will protect the Vendor/Contractor from claims which may arise out of or result from the Vendor/Contractor's execution of the work, whether such execution be by himself, his employees, agents, or by anyone for whose acts any of them may be liable. If any such work covered by the Contract is to be performed on County owned or leased premises, the Vendor agrees to carry liability and workman's compensation insurance, satisfactory to the County, and to indemnify the County against all liability, loss, and damage arising out of any injuries to persons and property caused by the Vendor, his sub-contractors, employees or agents. The insurance coverage shall be such as to fully protect the County and the general public from any and all claims for injury and damage resulting by any actions on the part of the Vendor/Contractor or its' forces as enumerated above. All policies must name the County as an additional insured and provide for thirty (30) days written prior to any material changes or cancellation.

THE COUNTY REQUIRES ORIGINAL CERTIFICATES OF INSURANCE BEFORE THE CONTRACT IS AWARDED.

A.      Required      Not Required     **Comprehensive General Liability Insurance**

The Vendor/Contractor shall maintain and keep in force of this Contract such comprehensive general liability insurance as shall protect them from claims which may arise from operations under this Contract, whether such operations be by themselves or by anyone directly or indirectly employed by them. The amounts of insurance shall be not less than \$1,000,000.00 combined single limit for any one occurrence covering both bodily injury and property damage, including accidental death.

B.      Required      Not Required     **Professional Liability Insurance**

The Vendor/Contractor shall provide the County with proof of Professional Liability Insurance, which shall protect the County against any and all claims, which might arise as a result of the operation of the Vendor/Contractor in fulfilling the terms of this Contract during the life of the Contract. The minimum amounts of such insurance will be \$1,000,000.00. Should any work be subcontracted, these limits will also apply.

C.      Required      Not Required     **Worker's Compensation Insurance:**  
per Missouri Revised Statutes Chapter 287

The Vendor/Contractor shall maintain and keep in force of this Contract such worker's compensation insurance limits as required by the statues of the State of Missouri and Employer's Liability with limits no less than \$500,000.00.

## PROPOSAL FORM AND CONTRACT

**A. PROPOSAL REPRESENTATIONS:**

The VENDOR, by executing the PROPOSAL form certifies that:

1. The PROPOSAL complies with Request for Proposal, Form and PROPOSAL Specifications.

**B. CERTIFICATION OF INDEPENDENT PRICE DETERMINATION:**

1. The prices in the PROPOSAL shall be independently determined, without consultation, communication, or agreement for the purpose of restricting competition as to any matter relating to price with any Vendor or other person.
2. Unless otherwise required by law, the prices shall not have been knowingly disclosed by the Vendor prior to opening; or
3. No attempt has been made or will be made by the VENDOR to induce any other person or firm to submit or not to submit a PROPOSAL.

**C. PRICE:**

The price(s) specified in this PROPOSAL shall be firm and not subject to contingency or reservation. The VENDOR represents prices specified in the PROPOSAL do not exceed current selling price for the same or substantially similar good or service, and are the same as or lower than other prices charged to the VENDOR'S most favored customer. In the event the stated prices are determined to be higher than the prices for which Supplier has sold the items, or services, to others, this contract price shall be reduced accordingly. **PROPOSAL prices are ALL INCLUSIVE: (Shipping, Handling, Delivery, and Assembly to locations specified by the County). Prices shall be firm for ALL County departments and locations for term of the agreement.**

**D. MISSOURI DOMESTIC PRODUCT PROCUREMENT ACT:**

VENDOR represents that the goods provided comply with Sections 34.350 to 34.359, RSMo, known as the Domestic Product Procurement Act. VENDOR shall include proof of compliance with the Act with the PROPOSAL.

**E. DEFINITIONS:**

1. The term "County" means the County of Jefferson, Missouri and its designated representatives.
2. The term "Supplier" means Vendor, Contractor, and Seller and includes designated representatives.
3. The term "RFP" means Request for Proposal.

**F. INSPECTION, ACCEPTANCE AND APPROVALS:**

Goods shall at all times and places, including the period of manufacture, are subject to inspection and test by County. County will accept or give notice of rejection of goods delivered within a reasonable time after receipt. Acceptance shall not waive any warranty. All goods supplied are subject to final inspection and acceptance by County notwithstanding payment, prior inspections or approvals. County may require prompt replacement or correction of rejected goods at Supplier's expense, including a reduction in price for rejected goods. Supplier shall not resubmit rejected goods to County without prior written approval and instructions from County. In addition, Supplier shall identify resubmitted goods as previously rejected. Supplier shall provide and maintain a quality assurance and control system acceptable to County.

**G. WARRANTY:**

Unless otherwise agreed to in writing by the parties, Supplier warrants that items ordered to specifications will conform thereto and to any drawings, samples or other descriptions furnished or adopted by County, or, if not ordered to specifications will be fit and sufficient for the purpose intended, and that all items will be new, merchantable, of good material and workmanship, and free from defect. Such warranties, together with Supplier's service warranties and guarantees, if any, shall survive inspection, test, acceptance of, and payment for the items and shall run to County and its assigns. Except for latent defects, the County shall give notice of any nonconformity to the Supplier within one (1) year after acceptance. County may return for credit or require prompt correction or replacement of the defective or non-conforming goods or have the defective good corrected or replaced at Supplier's expense. Return to Supplier of any defective or non-conforming goods and delivery to County of any corrected or replaced goods shall be at Supplier's expense. Defective or non-conforming items shall not be corrected or replaced without written authorization by County. Goods required to be corrected or replaced shall be subject to the provisions of this clause and the clause hereof entitled "Inspection, Acceptance and Approvals" in the same manner and to the same extent as goods originally delivered under this contract.

**H. PAYMENT:**

County will pay Supplier for goods upon delivery to, submission of certified invoices and acceptance. Price is tax-exempt.

**I. CHANGE ORDER:**

County may make changes within the general scope of this contract. If any such changes cause an increase or decrease in the cost of or the time required for the performance of any part of the work, whether changed or not changed by any such order, an equitable adjustment shall be made in the price or delivery schedule or both, and any change order shall be in writing. Any claim by a Supplier for adjustment under this clause shall be asserted within fifteen (15) days from the date of receipt of this written order directing the change, provided, however, County, if it decides that the facts justify such action, may receive and act upon such claim asserted at any time prior to final payment.

**J. DELIVERIES:**

Deliveries shall be made in strict accordance with any delivery schedule contained in the PROPOSAL specification or contract and in the exact quantity ordered. Failure to adhere to delivery schedule is reason for termination in accordance with the "termination" clause.

**K. RESPONSIBILITY FOR SUPPLIES:**

Pursuant to Section 290.560 RSMo, Supplier/Contractor shall employ only Missouri laborers and laborers from nonrestrictive states except that other laborers may be used when Missouri laborers or laborers from nonrestrictive states are not available, or are incapable of performing the particular type of work involved, if so certified by the contractor and approved by the County. Except as otherwise provided, Supplier shall be responsible and bear all risks for loss and damage to goods until delivery at County's facilities, regardless of F.O.B. point, point of inspection or acceptance; and if the goods are rejected.

**L. SUBCONTRACTS:**

Supplier shall not enter into any subcontract(s) in excess of \$25,000 or 20% of this contract price; whichever is less, for any goods without County's prior written approval.

**M. CHOICE OF LAW:**

This PROPOSAL and contract shall be governed and interpreted according to the laws of the State of Missouri. Venue for any court action shall be in Jefferson County, Missouri.

**N. TERMINATION:**

1. General: Performance of work may be terminated by the County in whole, or from time to time in part, whenever County shall determine that such termination is in the best interests of County. Termination shall be affected by delivery to Supplier of a Notice of Termination specifying the extent to which performance of work is terminated and the date upon which such termination becomes effective. If such notice does not state termination is pursuant to subparagraph 2, 3, or 4 of this paragraph, County shall have the right to so indicate within thirty (30) days. If no notice is delivered within the thirty (30) day period, or such longer periods as is mutually agreed to by the parties, the original Notice of Termination shall be deemed to be issued pursuant to subparagraph 1 of this paragraph.

2. Bankruptcy or Insolvency: In the event bankruptcy proceedings are commenced by or against Supplier or under any provisions of the United States Bankruptcy Act or for the appointment of a receiver or trustee or a general assignment for the benefit of creditors of either party, County shall be entitled to terminate without further cost or liability.

3. Default: County may terminate the whole Contract or any part in either of the following circumstances:

a. If supplier fails to deliver the items required by the contract within the time specified; or

b. If supplier fails to perform any of the other provisions of the contract, or so fails to make progress as to endanger performance of the contract in accordance with its terms, and in either of these two circumstances does not cure such failure within a period of ten (10) days after notice from County specifying such failure. In the event of termination under subparagraph 1, County shall have the right to procure, on such terms and in such manner as it may deem appropriate, items similar to those terminated, and to recover from Supplier the excess cost for such similar items provided, however, Supplier shall not be liable for such excess costs where the failure upon which the termination is based has arisen out of causes beyond the control of Supplier and without the fault or negligence of Supplier. Such causes shall be deemed to include fires, floods, earthquakes, strikes, and acts of the public enemy. The rights of County provided in subparagraph 1 shall be in addition to any other rights provided by law or the contract.

c. In the event of the Supplier's non-compliance with the provisions as set forth. This Contract may be cancelled, terminated or suspended in whole or in part and the supplier may be declared ineligible for further County contracts. The rights and remedies of the County provided in this paragraph shall not be exclusive but are in addition to any remedies provided in this Contract or as provided for by law.

**O. NOTICE AND SERVICE THEREOF:**

Any notice from the County shall be in writing and considered delivered and the service thereof completed when said notice is posted, by certified or regular mail, to the Supplier, at the address stated on the PROPOSAL form.

**P. CONTRACT TERM:**

Performance shall be governed solely by the terms and conditions as set forth in the Request for Proposal, Proposal Specifications, Proposal Form and the Contract notwithstanding any language contained on any invoice, shipping order, bill of lading or other document furnished the Seller at any time and the acceptance by the County for any goods furnished.

**Q. COMPLIANCE WITH APPLICABLE LAWS:**

Supplier warrants it has complied with all applicable laws, rules and ordinances of the United States, Missouri or any other Governmental authority or agency in the manufacture or sale of the goods, including but not limited to all provisions of the Fair Labor Standards Act of 1938, as amended.

**R. ACTS OF GOD:**

No party shall be liable for delays, nor defaults due to Acts of God or the public enemy, riots, strikes, fires, explosions, accidents, governmental actions of any kind or any other causes of a similar character beyond its control and without its fault or negligence.

**S. SELLER'S INVOICES:**

Invoices shall contain the following information. Contract number (if any), Purchase Order Number, Item number, contract description of goods or services, sizes, quantities, unit prices and extended totals. Invoices for and inquiries regarding payment should be addressed to the County Accounts Payable Clerk.

**T. APPROVAL:**

It is agreed the acceptance of a PROPOSAL shall not be valid and binding upon the County until approved by the County Commission, County Counselor, as to legal form and the County Auditor provides certification of an unencumbered balance sufficient to pay the PROPOSAL/Contract price.

**U. INDIVIDUAL, PARTNERSHIPS, CORPORATIONS:**

Indicate: [ ] Individual: [ ] Partnership: [ ] Corporation.

Incorporated in the State of \_\_\_\_\_.

**V. PROPOSAL TABULATIONS:** Are not available for 5 to 7 working days following the PROPOSAL Opening. PROPOSAL tabulations are open for public review at the time of the time of the PROPOSAL Opening or are available for review in the Office of Contracts, Grants, and Special Projects. **NO COPIES** of PROPOSAL tabulations are sent to vendors.

**JEFFERSON COUNTY POSTS ALL  
“INVITATION FOR BIDS” AND REQUEST FOR PROPOSALS”  
ON THE COUNTY WEB SITE.**

**Go To [www.jeffcomo.org](http://www.jeffcomo.org).**

**“IFB’s” and “RFP’s” CAN BE DOWNLOADED BY CLICKING ON  
“INVITATION FOR BIDS”.**

**SPECIFICATION  
CONTACT PERSON**

**RANDY MULLER  
DIRECTOR OF INFORMATION TECHNOLOGY  
(636) 797-5592**

## **SPECIFICATIONS**

### **FORMAT OF PROPOSAL RESPONSE:**

The format of the proposal is assembled as follows:

Section I	Scope of Project
Section II	Current Environment
Section III	Business Requirements
Section IV	Technical Requirements
Section V	Installation, Training, and Documentation
Section VI	Pricing
Section VII	Miscellaneous Reports
Section VIII	References

Bidders are requested to complete each item/paragraph in this section by inserting: (Yes or No) or Not Applicable (N/A), and may offer additional description where appropriate.

### **SECTION I. SCOPE OF PROJECT**

The Jefferson County Building Division put forth this Request for Proposal software and service for a replacement to their current in-house permit system. Jefferson County Missouri is looking for an application that operates off a central database for a comprehensive overview of all permits, planning, and other related activity on parcels and addresses within the database.

The system should track permits and planning applications from inception to completion, including plan submission and plan check comments, fee calculations, inspection schedules and inspection results with all data validated prior to permit issuance. The system should allow information to be shared among all departments with unlimited number of users at no additional cost.

The system must be accessible via the Internet. There are many contractors who could schedule inspections during off business hours. Also, the system must have an IVR, Interactive Voice Response System. The IVR access is important for contractors and individuals who may be in the field without access to a computer that would like to schedule the inspection.

### **SECTION II. CURRENT ENVIRONMENT**

Jefferson County Building Division's current system is an in-house developed system residing on the IBM AS/400 platform. Jefferson County currently is able to create different types of permits, issue permits, record fees, schedule inspections, and create reports. The current permit system has a nightly process that comes from the IVR system and updates the AS/400 with inspection request and print inspection sheets. The current permit system also has an interface with a cashiering system where it updates the AS/400 with the date the fees are paid.

### **SECTION III. BUSINESS REQUIREMENTS**

#### **System Features and Functionality**

The proposed software should perform, at minimum, the functional specifications that follow:



Enter various types of permit applications.

Automatically interface with the present cashiering system.

Support remote data collection devices to leverage fieldwork efficiencies (laptops or hand held devices).

Support multi users on the system running concurrently.

**PERMITS**

		Y/N	Comment
1	Ability to automatically generate a permit number		
2	Ability to enter various types of permits (structure type)		Building, Electrical, Plumbing, Sewage, Mechanical, Mobile home, etc.  Table Entries – Use drop down for selections
3	Ability to Identify Construction type – Residential or Commercial		Table Entries – Use drop down for selections
4	Ability to have multiple names, addresses, and phone numbers per application		
5	Ability to create multiple sub-contractors associated to a single permit		
6	Automate fee calculation and permit expiration dates		
7	Access built-in mapping system		
8	Automatically check contractor requirements before a permit is processed		
9	Use graphical dashboards to display key information		
10	Drill down on reports for further detail		
11	Export all reports to Excel file		
12	Import historical data from other systems		
13	Create an inspection check list that can be updated		
14	Customize the software to our business rules, workflow and terminology		
15	Integrate with our GIS System (Uses ESRI)		
16	Provide queries by individual fields in the system, as well as by a combination of multiple fields		

17	Ability to attach documents and images to a permit		
18	Ability to flag a permit with comments and warning messages that are displayed before new activity can be scheduled		
19	All Permit addresses must be automatically edited for validity. No permit can be granted for an invalid address		
20	Ability to track a permit from plan submission to final inspection.		
21	Pertinent data for contractors, architects, engineers, etc. can be entered and tracked within the system. Tracking company (people profiles)		
22	Ability to print Certificates of Occupancy and Permits from the system		
23	Allow of single and/or combination permits		
24	Interface with the present cashiering system from Mitchell Humphrey.		
25	Must be able to provide a complete history of all permit activity on a parcel		

**INSPECTIONS**

		Y/N	Comment
1	Ability to manually request inspections		
2	Ability to generate inspections from an IVR or requests from the Internet		Nightly Process
3	Ability to use devices in the field that can have the inspections loaded.		
4	Ability to load the actual form for the type of inspections to be done on the device		
5	Ability to download inspections results from the remote devices and automatically update the data base		

6	Track all inspections for historical reference		
7	Schedule and automatically assign inspections		
8	Limit the number of inspections per inspector or reassign inspections		
9	Automate alerts for overdue inspections and re-inspections		

**REPORTS**

		Y/N	Comment
1	Statistics of Permits by permit number or date		
2	List location of issued permits		
3	List Issued Occupancy Permits		Summary or Detail
4	List Permits by School District		
5	List Inspections		
6	Ability to create reports using Crystal software		

**Miscellaneous Tracking**

		Y/N	Comment
1	Provide a licensing module that will track license requirements for electricians, plumbers, etc. and to automatically generate letters to assist with compliance.		
2	<p>Provide the ability to track specific items on a property for a specific time period.</p> <p>The system should be able to track multiple items and the letters should reflect the items being tracked.</p> <p>For example, septic tanks must be inspected every three years. They system should be able to send out notices that inspection is needed, and then send out reminders as inspections fail to be done.</p>		

## CODE ENFORCEMENT

		Y/N	Comment
1	Search for violations by parcel and case details		
2	Allow multiple violations per single case		
3	Provide user-defined notifications to multiple parties		
4	Flag parcels with code violations		
5	Generate compliance reports		
6	Prepare documentation for Commissioner's meetings		
7	Track complaints from initial report to compliance		
8	Generate notification of violation and associated citations		
9	Flag properties that are in violation stopping all further activity until the violations are corrected		
10	Track fees and fines for court action		
11	Ability to attach documents and images to a complaint		
12	Track all people involved with a complaint		
13	Allow comments		
14	Monitor inspections by time to complete		
15	Track hearings and court action.		
16	Ability to create reports.		
17	Provide the ability for complaints to be entered through the Internet		
18	Track all inspections for historical reference		

## PLANNING & ZONING

		Y/N	Comment
1	Locate a parcel on a map and view surrounding property owners		
2	Electronically submit and store submittals		
3	Assess fees		
4	Flag projects to building permits or for special conditions		

5	Track the life of a planning project From initial application, review, and approval, fee payments, hearing schedules through final review		
6	All planning projects must be verified for a valid address		
7	System must store pertinent information for contractors, architects, engineers, and other applicants		
8	Include Calendars to manage public hearings and committee meetings		
9	Track permits requiring hearings		
10	Allow comments		
11	Embed a map image in notifications		
12	Track fees		
13	Attach documents and images		
14	Ability to create reports using Crystal reports		
15	Generate queries against data base that will include wild card queries		
16	Automate tracking and routing of projects through user-defined processes		
17	Prevent changes in plan review status if corrections are still outstanding		
18	Track the amount of days that plans are under review		
20	Allow plan approvals only by authorized individuals		
21	Upload email and letter templates		

**SECTION IV TECHNICAL REQUIREMENTS**

		Y/N	COMMENTS
1	Must use Microsoft technology as its base		
2	Track via an audit trail all data entry and manipulation		
3	Archive, reinstate and purge data based on user-defined parameters		
4	Support workflow for transaction approvals based upon		

	organization chart hierarchy and established business rules		
5	Electronically transfer application patch/upgrade information from vendor site		
6	Switched access to both the test and live environments within the scope of the same client environment		
7	Provide a test environment for both training and application upgrade testing prior to putting upgrade into production		
8	Must run on Windows Server 2003 and XP Professional Desktop operating systems		
9	Please specify recommended server configuration		
10	Please specify recommended Work Station Configuration		
11	Please specify the different data bases supported		
12	Please specify recommended Data Base to be used		
13	Describe your deployment of bug fixes, software updates and upgrades		
14	Do you assist with problem resolution by accessing our system?  If yes, what are the ways that you will access our system?		
15	When was the last major release of your software?		
16	Do you have a Browser base environment?		
17	What reporting tools are available other than Crystal reports		
18	Are there interfaces into Microsoft Office?		

**Network Administration**

		Y/N	COMMENTS
1	Messaging to the system administrator when:  Maximum number of concurrent users has logged in, based on		

	<p>user-defined limit.</p> <p>Length of log in time set by administrator at the user level</p> <p>List of concurrent users displayed on-screen to administrator in real time</p> <p>An unregistered user attempts to log in.</p>		
2	Resolves the conflict if two or more users open and attempt to update the same record at the same time		
3	Allow administrator to set timeout length to bump inactive users off the system		
4	Allow system administrator to define actions for input errors at the screen level		
5	Allow system administrator to control if the system will suspend rejected transaction for reprocessing		
6	Produce exception reports		

**User Interface**

		Y/N	COMMENTS
1	The system must have a Windows standard with drop down menus.		
2	Allow users the ability to “Cut and Paste” text from this program to any other Windows based program		
3	Allow user to correct errors without re-input of entire transaction.		

**Utilities and Help Functions**

		Y/N	COMMENTS
1	Allow user access to system “Help” screen(s) without exiting entry screens.		
2	Provide on-line help for each application window or screen. Software must provide on-line help with Contents and Search capabilities		

3	Access to help information is context sensitive.  Software must provide context sensitive help based on Cursor location		
4	User capability to dynamically tailor menus or screen displays to accommodate differences in processes and procedures.		
5	Allows table maintenance without the intervention of a resource outside the Jefferson County staff.		

**System Interfaces**

		Y/N	COMMENTS
1	Must interface into our Cashiering System that uses Microsoft SQL Server Data base		
2	Must interface with our Assessor/Collector system from CLT and Associates		

**Data Conversion**

		Y/N	Comments

**Maintenance**

		Y/N	Comments
1	Must be able to provide local on-site hardware and software support.		
2	Must be able to troubleshoot the system via remote dial up diagnostic.		
3	Must provide complete system documentation.		
4	Must describe all maintenance service to be contractually agreed to including the levels of contact for maintenance, preventive maintenance programs, warranties and liabilities.		
5	The response times should conform to the following minimum requirements for maintenance service Monday through Friday, nine hour per day basis:		



	voice response within two hours on-site response within 4 hours		
6	<p>Must provide the following information relating to the provision of maintenance service on a Monday through Friday, nine hour day:</p> <p>Where will the primary service organization be located and what is the geographic area served by the primary service organization? How many service technicians at the primary location are trained on the equipment proposal?</p>		
7	<p>Must provide the plan for responding to off-hour requests for service and requests for service on holidays, weekends, and vacations. State costs that apply.</p> <p>What are the procedures for requesting this service?</p>		
8	<p>Support/Upgrade/Maintenance: Describe your maintenance process for fixing errors to upgrading new releases.</p> <p>Does the vendor have a web site for disseminating software fixes/updates?</p> <p>Describe any product warranty.</p> <p>Describe what product maintenance contract is available.</p> <p>Are product upgrades included in the maintenance agreement?</p>		
9	<p>Date Activated Maintenance: All workstations must be able to be configured and maintained from any like workstation on the local / wide area network using a single copy of the system and location maintenance files residing on a server accessible by all workstations. All system and location maintenance changes should be able to be downloaded to all workstations on a user-defined date. Workstations not used for an indefinite period of time should, at time of re-use, should detect missed maintenance updates and</p>		

	automatically synchronize local settings with those of the master maintenance at the start of day.		
10	The vendor shall provide support for all software proposed under this proposal beginning on the delivery date and ending one year after system acceptance. This service shall include available software updates and new releases, as well as technical consultation and remote access support if the system has been customized, the vendor must, maintain customized software as part of the maintenance contract.		
11	The vendor shall have a support hot-line available to Jefferson County Staff for problem resolution with technical assistance response time of two business hours, support hours should be stated in the proposal. Explain applicable 'escalation procedures' additional assistance if a software failure is not resolved in a timely manner.		

**SECTION V - INSTALLATION, TRAINING, DOCUMENTATION**

		Y/N	Comments
	Following are the requirements for installation, training, and documentation:		
1	The vendor shall provide a comprehensive project timeline that depicts all major milestones, and a detailed schedule of tasks. Included in the plans will be a staffing plan.  The vendor must provide a staffing plan, outlining both proposed consulting resources and Jefferson County's staffing requirements, both technical and functional.		
2	Provide training materials and documentation for all aspects of the system implemented. a minimum of two hard copies of system documentation (user manuals,		

	<p>technical manuals, operations manuals, data element dictionaries, etc.) shall be provided with the system as well as copies of the same documentation electronically in Microsoft word format on cd-rom. vendor shall agree that we have the right to make additional copies of any training materials and system documentation provided and may use the material to train additional personnel. Vendor shall agree that we have the right to incorporate sections of the electronic version of the documentation into our in-house documentation for personnel working with the system</p>		
3	<p>Vendor shall be responsible for providing detailed documentation on system operation and troubleshooting. Should there be any hardware concurrently introduced with the software, the necessary operation manuals shall be provided.</p>		
4	<p>Provide both system training and end-user training for the system. All training will be conducted at Jefferson County.</p>		
5	<p>The scope of the system training must include any and all functions for supervisor, maintenance and technical support procedures required for the installation and on-going operations for the daily operations of the system, and writing queries and Reports.</p>		
6	<p>The scope of the end-user training must include all customization for the daily operations of the system, and writing queries and reports.</p>		
7	<p>Training is to be done by qualified instructors and shall provide a “hands on’ type of instructions.</p>		
8	<p>Provide detailed specifications for all required hardware, servers, and workstations.</p>		
9	<p>Provide the necessary services and personnel to assist in implementing the system. These services shall included to providing pre-</p>		

	implementation consulting to determine the optimal implementation plan to use to incorporate the system into exiting operations and on-site implementation support to ensure successful implementation of the system.		
10	The system supplied shall be in good working order upon implementation and shall conform to the published specifications including physical characteristics, space requirements, operating characteristics, power requirements, maintenance characteristics, modularity, and compatibility.		
11	<p>Vendor shall install and configure the software on the server(s) and at least 2 workstations, making them perform to the client's satisfaction, ensuring that the current functionality of the software installed on the workstations is not impaired.</p> <p>Vendor shall establish simultaneous access for the workstations to the servers and the associated current applications software without impairing the performance of the applications software and network connections. The customer will observe the installation process and gain knowledge transfer. Vendor shall perform unit and system tests of all software functions in accordance with vendor's standard installation and implementation tests to our satisfaction. Vendor shall certify in writing that the tests have been conducted successfully and that system meets the agreed upon specifications.</p>		
12	Supply the documentation and upgrades in a machine-readable format.		
	Acceptance of the System		
13	Acceptance testing shall begin upon receipt of written certification from Vendor that the system is installed and ready or acceptance testing. We		

	<p>will conduct acceptance testing beginning the first working day after receipt of certification and will continue for a period of 3 working days. We will verify that the system contains and meets all requirements that were offered in the proposal. We will also verify the system is fully operational and available for use. If acceptance testing is not successful the vendor will make corrections and the acceptance testing must start over. The time for response and the time for testing will be agreed upon by the client and vendor.</p>		
14	<p>The vendor shall be notified in writing of the status of system acceptance testing within 5 working days after the end of the acceptance-testing period.</p>		
15	<p>We shall require an acceptance-testing period of a minimum of 10 working days to complete final acceptance testing after the vendor verifies the system is installed and ready for acceptance testing.</p>		
16	<p>Vendor shall warrant that the system shall be free from programming errors and shall confirm to the performance reliability standards and system requirements set forth in the License Agreement and that the services to be performed by the vendor shall be performed in a timely and professional manner by qualified personnel. Vendor shall respond to requests for warranty service promptly and shall remedy any programming errors, defects, or breach of warranty as soon as practical and with minimal downtime, at no charge. The terms of this warranty shall expire one year after the date of acceptance of the system. In the event that this system, in whole or part does not perform in accordance with the contractual requirements, vendor shall promptly, and in no case any later than 20 days after notification, thereof, correct, modify, or improve the system, at</p>		

	vendor's expense, to ensure that the system complies with the agreed upon specifications and system requirements.		
17	Vendor warrants that the system delivered under this contract shall be able to accurately process data (including, but not limited to, calculating, comparing, and sequencing) from the year 1990 and forward, including leap year calculations, when used in accordance with the product development provided by the Vendor.		
18	Vendor warrants and represents that the system shall be free of any willfully introduced computer virus or any similar harmful, malicious, or hidden programs or data.		
19	The software warranty period must include toll-free calls for maintenance, software support, services, and software updates if released.		
20	The vendor shall provide a service representative who will respond by telephone to software failures within two business hours of notification. Hours of availability should be stated in the proposal.		

## SECTION VI PRICING

		Y/N	Comments
1	Vendor shall provide as part of their proposal, the cost and specific details of extended software maintenance agreements. Costs for upgrades or enhancements to the software are, if not included as part of this agreement, shall be listed separately.		
2	In an effort to reduce risk, a money back guarantee from the vendor is required with no charge for de-installing the system.		
3	List the hardware costs on the following detail pricing sheets.  Then carry the total hardware costs to the Pricing Summary.		

4	<p>List the software cost on the following detail pricing sheets. Then carry the total hardware costs to the Pricing Summary Server</p> <p>Workstations Update View only</p>		
5	<p>List any software that your company does not provide that is necessary for the system to be implemented.</p>		
6	<p>List the costs for implementation including training. Including travel expenses and project management.</p>		
7	<p>The vendor shall provide descriptions and pricing for maintenance and support after the initial warranty/support period. The vendor shall describe the method of distributing and installing modifications to the proposed software that are developed and recommend by the manufacturer, fully outlining the responsibilities of the vendor and Jefferson County in the installation and acceptance of such modification.</p>		
8	<p>Planning for the future is very important. The system must allow cost-effective growth.</p> <p>The vendor must show associated software license costs to double the original listed number of workstations and administrative workstations.</p>		
9	<p>The system shall be capable of supporting a growing number of concurrent workstations. Therefore, the vendor must state the cost of adding each additional user to the system after the initial installation.</p>		
10	<p>Vendor shall propose a license that allows unlimited concurrent use of the system for both the workstations and the administrative workstations.</p>		

**Pricing Summary**

	Investment	Annual Maintenance Starting Date	Annual Maintenance Cost	Comments
Hardware				
Software				
Training				
Travel Expenses				
Other:				
<b>Total</b>				

**DETAIL HARDWARE PRICING**

	Investment	Annual Maintenance Starting Date	Annual Maintenance Cost	Comments
<b>Total</b>				

**Detail Software Pricing**

	Investment	Annual Maintenance Starting Date	Annual Maintenance Cost	Comments
<b>Total</b>				



**Detail Optional Pricing**

	Investment	Annual Maintenance Starting Date	Annual Maintenance Cost	Comments
<b>Total</b>				

**SECTION VIII: REFERENCES**

Please include a minimum of 3 government references

(Preferably in Missouri)

		Years Software Installed	Comments
Address:			
City, State, Zip			
Contact Name			
Telephone Number			
EMAIL Address			