



## Questions and Answers

**Date:** June 20, 2023

**To:** Interested Firms and Individuals

**From:** San Carlos Administrative Services

**Subject:** Q&A for *Community Development Land Management, Code Compliance, and Permitting Application RFP*

**BID PROPOSALS ARE DUE VIA EMAIL TO THE CITY CLERK’S OFFICE NO LATER THAN  
4:00 P.M. ON JULY 11, 2023**

	Question	Response
1.	Page 3 of the RFP notes the solution must include “Customer and Outside Agency Facing Online Solution for Land Management, Code Compliance and Permitting.” How does the City envision “Outside Agency Facing” to be satisfied? Will any Outside Agency users require access to the system?	<p>“Outside Agency Facing” can include authentication via Azure AD or a local username and password. The City highly prefers to use single sign on.</p> <p>If by “access to the system” means being able to change the system configurations or global preferences, then no.</p>
2.	What payment processor will the City be using to accept online credit card payments?	The City is currently using Authorize.net and Tyler Cashiering. The City would prefer to use either payment processor.
3.	Can you please confirm that you will not require migration of Code Enforcement data from Trakit?	We cannot confirm. We need ALL data from all current modules migrated from Trakit to the new system.
4.	How many staff users will be using the system? We are only speaking of the staff that will be using the system, not the contractors, citizens, and other constituents that will be using the online portal. Can you please break out the user count by department?	<p>We have 65 named users, 50 RW and 15 RO</p> <p>11 Building 1 City Manager’s Office 6 Finance 6 Fire Department 4 IT 19 Planning 15 Public Works</p>
5.	Can you please provide a count of named users who need to access the system? If you can break this count out by the number of users that need read/write access and the number of users that need read-only access, that would be ideal.	<p>We have 65 named users, 50 RW and 15 RO</p> <p>11 Building 1 City Manager’s Office 6 Finance 6 Fire Department 4 IT 19 Planning 15 Public Works</p>
6.	Can you please confirm how the proposals should be submitted? Email only or email and hard copies?	Proposals should be submitted electronically by email to the City of San Carlos City Clerk at

		<a href="mailto:cmui@cityofsancarlos.org">cmui@cityofsancarlos.org</a> Hard copies are not requested.
7.	The RFP mentions 'Additionally, proposals should attempt to address any solutions to the City's existing challenges/deficiencies found in Section 2.3'. We cannot find a Section 2.3. Can you please provide this?	Please disregard the reference to Section 2.3. This was a clerical error.
8.	How many internal users will require permissions greater than that of applicant or read only? These roles typically include plan reviewers, inspectors, permit coordinators, department supervisors, and system administrators.	There will be roughly 44 users and 6 system administrators.
9.	How many outside consultants will require permissions greater than that of applicant or read only?	The system should allow for at least 6 outside consultants to have access.
10	How many web forms would need to be professionally configured into the system of the following: Application forms that <b>do not</b> result in a permit (plan review only) Application forms that <b>do</b> result in a permit	We currently do not have a custom form for the public to fill out.
11.	How many permit types will need to be professionally configured (please include any documents requiring a sequential number scheme)?	Current number of permit types: 18 Building & Public Works 27 Projects and Planning 7 Code Enforcement
12.	How many inspection types will need to be professionally configured (i.e. Gate/Access Inspection, Key Box Inspection, Final / C.O., etc.)?	All inspection types need to be configured for different options.  There are currently: 118 Building and PW Inspection Types 1 Projects and Planning 6 Code Enforcement
13.	For data migration: 1. Approximately how many records will need to be imported? 2. Will documents need to be imported? 3. Will in-flight records need to be imported and resumed in the new system or will in-flight records be completed in the old system and migrated at a later date?	All records need to be imported from our current system(Trakit) into the new system.  There are: 4221 Code Enforcement Cases 62,292 Building and Public Works Permits 16,312 Projects and Planning  All attachments and supporting documents must be imported and useable prior to go-live.