

**Office of Procurement Services**

P.O. Box 7800 • 315 W. Main St., Suite 416 • Tavares, FL 32778

**SOLICTATION: COMMUNITY DEVELOPMENT SOFTWARE** 08/23/2024

Vendors are responsible for the receipt and acknowledgement of all addenda to a solicitation. Confirm acknowledgement by including an electronically completed copy of this addendum with submittal. Failure to acknowledge each addendum may prevent the submittal from being considered for award.

THIS ADDENDUM DOES NOT CHANGE THE DATE FOR RECEIPT OF PROPOSALS.

**ADDTIONAL INFORMATION**

1. Proposers shall review and understand the RFI Sections 1, 2, 3, 4, and 9 prior to preparing and submitting a response.
2. The County cannot provide detailed responses to some questions due to Florida Statute 119.0725.
3. After initial response, Proposers interested in future participation will be required to review and execute the County-prepared Confidentiality Agreement allowing Proposers to access County information while complying to Florida Statute 119.0725.
4. The Selection Committee shall follow the process stated in RFI Section 10.

**QUESTIONS/RESPONSES**

Q1. What is the budget or anticipated cost of this project?

R1. To Be Determined (TBD) depending upon vendor selected.

Q2. What are the anticipated initial costs?

R2. TBD depending upon vendor selected.

Q3. What is the anticipated ongoing annual costs?

R3. TBD depending upon vendor selected.

Q4. What is the anticipated start date?

R4. TBD

Q5. How long is the anticipated implementation period?

R5. TBD

Q6. You mentioned a preferred vendor. What is their name and what other cities/counties are they implemented in?

R6. The preferred vendor has (or has had) a contract within the State of Florida due to familiarity with Florida Statutes and Laws.

Q7. Would there be an appetite for custom development given the requirements to connect to existing systems and desired functionality?

R7. Proposer shall propose system based off the information provided within the RFI document.

Q8. We have great experience developing similar requests for large enterprise utility companies that leverage a majority of the requirements listed in the documentation that I believe would align to the requests of the commission board. Is this an option or a desired path for you?

R8. See Attachment 2. County is seeking responses from firms that have experience with contracts, preferably in the State of Florida, as they are likely to be familiar with Florida’s statutes and laws as they related to permitting and land development regulation.

Q9. Is the County requesting any form of pricing to be included in the bid response?

R9. See RFI Section 11.5.6.

Q10. Can you provide more specifics regarding the method of award? How will scoring being calculated and weighted?

R10. See RFI Section 4, Process Overview, Section 9, RFI Determines Future Participation, and Section 10, Method of Further Participation Selection.

Q11. Will there be a formal RFP subsequently released or will the County be purchasing directly from this RFI?

R11. See RFI Section 4, 9 and 10.

Q12. Regarding Section 10.2.1, are vendors in Florida only being considered or is this just a preference?

R12. See RFI Section 1 and 10.

Q13. Regarding Section 10.2.5, Can you verify if this is for product reference or implementation vendor references, or both? We’re looking to do a joint response with a product vendor.

R13. Both

Q14. I read through the initial documentation and was unclear if you were looking for an out-of-the-box software solution or a customized software development approach to meet the needs and requirements of the County.

R14. See RFI Section 1, 9, 10.

Q15. Can you tell us how many named users will be using the system?

R15. The current system has 156 named users.

Q16. By “external users”, does the County mean the contractors, property owners, etc, who will be submitting applications on the portal?

R16. External users refer to any user who will interact with the system as a customer. An external user may be a contractor, property owner, or interested party. An external user may be uploading applications or relevant application data or may simply be querying records for review applications or activity.

Q17. What is the County’s source of parcel data?

R17. Lake County Property Appraiser

Q18. What is the County source of property ownership data?

R18. Lake County Property Appraiser

Q19. Can you provide the use cases for requirements 01.7 on Attachment 2? For example, how would a customer go about obtaining general and permit specific information via telephone from the system? How is the County interested in using voice recognition?

R19. There are customers who are not familiar with, or capable of using, computer/internet access to utilize permitting functions. The county is interested in phone interfaces with the system, to include but not limited to, obtaining status updates for permits, scheduling inspections, obtaining inspection results, and payment processing. Phone functionalities should mimic that of online as much as possible, and proposers should indicate in their responses and be prepared to demonstrate.

Q20. What is the County’s legacy system. Is this the only system the County is interested in migrating data from?

R20. Proposer shall propose system based off the information provided within the RFI document.

Q21. What is the County’s payment processor that will be used for online payments?

R21. Proposer shall propose system based off the information provided within the RFI documents.

Q22. Section 12.6 describes the County’s ownership of intellectual property. Does this mean that responses that may include the County’s logo or seal will not be accepted?

R22. See RFI Section 12.6.

Q23. Section 11.5.5, Litigation, requests the nature and outcome of litigation for the previous 3 years. In what format would you like responses to this question.

R23. Case numbers, case status, and court jurisdictions in which cases are or have been being tried.

Q24. Please describe how Civic Clerk is used by the County.

R24. Proposer shall propose system based on the information provided within the RFI document.

Q25. See R15.

R25. More than 156 staff members will require access to the solution.

Q26. Regarding event/rental management, is the County looking for scheduling or permitting functionality?

R26. Event and/or rental management is not part of the scope for this RFI.

Q27. Does the County want its forms included in the Vendor Profile document, for example, or should the forms each be uploaded as separate documents.

R27. See RFI Section 11.5.

Q28. Regarding Section 2.39, Permitting, does project structure enable various cases from different pieces of the project's life to be connected to each other relationally to share fees, conditions and holds placed? (e.g., Relate cases from a Land Use or Engineering review through a Technical Document Review to finally the Construction Permit, as well as relating different kinds of Construction Permits like mechanical, electrical, plumbing, etc.). need clarification on fee sharing.

R28. The proposer should answer based upon information in the RFI document.

Q29. Regarding Section 5.5, Plan Review, does project structure enable various cases from different pieces of the project's life to be connected to each other relationally to share fees, conditions and holds placed? (e.g., Relate cases from a Land Use or Engineering review through a Technical Document Review to finally the Construction Permit, as well as relating different kinds of Construction Permits like mechanical, electrical, plumbing, etc.). Need clarification on fee sharing.

R29. The proposer should answer based upon information in the RFI document.

Q30. Regarding Section 6.21, IT, system integrate with third party scheduling systems, specifically Q-Flow from ACF Technologies, so customers can make or view their appointments in the third party system, through your system. Is there an API for integration?

R30. Yes

Q31. Regarding Section 6.26, IT, the system able to integrate with the Lake County Property Appraiser CAMA system (Vision). Is there an API for integration?

R31. At this time we do not know if that system has an API. The system does run off a standard database system and access to the database could be possible. If your firm has experience integrating with Vision, please provide that in your proposal.

Q32. Regarding Section 8.6, GIS, does the system include a graphic GIS reporting capability? Please clarify requirements.

R32. The proposer should answer based upon information provided in the RFI document.

Q33. Regarding Section 8.7, GIS, is there an emergency management/response module included? Describe capabilities in this regard, with particular attention to GIS interface, ability to assess property damage, structure damage cost estimating, critical facilities, etc. Please provide details of requirements.

R33. The proposer should answer based upon information provided in the RFI document.

Q34. Regarding Section 14.26, Fees-Payments, Will all fees, fee transactions and audit trails comply with the Generally Accepted Accounting Principles (GAAP) that is the standard framework of guidelines for financial accounting used in the jurisdiction? What specific GAAP actions do you require?

R34. The proposer should answer based upon information provided in the RFI document.

Q35. Can you please offer your best estimate of how many of the 16K permits issued last year required plan review?

R35. Approximately 40 percent of permit applications require electronic plan review.

Q36. Will a permit system vendor be able to respond with multiple plan review solutions?

R36. Yes.

Q37. Attachment 5 requires notarization within the State of Florida. Can companies out of state or country have this form notarized by a local notary in order to meet the requirement of submitting this form?

R37. Out of state is acceptable.

Q38. Can you provide an estimated budget range for this project? This will allow us to better make the best recommendations on various aspects of your project.

R38. See R1 above.

Q39. Are there any specific technology stacks, programming languages, or development frameworks that are preferred or required for the app?

R39. Please provide what technology stacks, programming languages and development frameworks your system is compatible with.

Q40. Are there any existing systems or platforms with which the application needs to integrate?

R40. Yes.

Q41. What are the expected peak usage times or scenarios?

R41. The proposer should answer based upon information provided in the RFI document.

Q42. What date are you planning to go live?

R42. See R5 above.

Q43. What are key things that are important for you in an organization that you partner with?

R43. Proposer shall propose system based off of the information provided within the RFI document.

Q44. How many staff members do you need us to train during the initial launch?

R44. Proposer shall propose system based off the information provided within the RFI document.

Q45. Are you open to us making suggestions not only on overall design and aesthetics?

R45. Refer to RFI Section 1.

Q46. How frequently do you anticipate needing updates to content, and who will be responsible for managing these updates?

R46. Proposer shall propose system based off the information provided within the RFI document.

Q47. Can we submit pricing using offshore and onsite (hybrid) or does this need to be made in the USA?

R47. Onsite is acceptable.

Q48. Do you have any current vendors that you have worked with previously for this initiative?

R48. Irrelevant to this RFI.

Q49. How many internal resources have you allocated to this project and what are the areas you want them to contribute to?

R49. Proposer shall propose system based off the information provided within the RFI document.

Q50. Could you please confirm if you’re seeking an existing SaaS product or a custom-built solution from scratch?

R50. See RFI Section 1.

Q51. What is the budget or anticipated cost of this project?

R51. See R1 above.

Q52. Does the County have an anticipated timeline and/or go live date for the project?

R52. See R5 above.

Q53. Is Sunbiz.org registration required for this stage of the RFI or could it be deferred to a later stage?

R53. A contract will not be awarded without an active Sunbiz.org registration in place.

Q54. Could the notarized affidavit requirement be waived for the initial phases of the RFI?

R54. No.

Q55. Hs the county had demonstrations or presentations from software vendors in the last 12 months, and which ones?

R55. Irrelevant to this RFI.

Q56. Has the county received any pricing estimates from any vendor for a permitting or planning or land management or code enforcement or business licensing systems in the past 12 months. If so, can you please provide a list of vendors you have received pricing from?

R56. Irrelevant to this RFI.

Q57. Has an external consultant been involved in the preparation of this RFI? Please identify and whether they are eligible for bidding?

R57. No.

Q58. How many user licenses are requiring access to the new system?

R58. See R15 above.

Q59. How many permits does the County process annually (on average)?

R59. 16,300

Q60. How many inspections does the County conduct annually (on average)?

R60 72,000

Q61. How many enforcement cases does the County process annually (on average)?

R61. 2,500

Q62. How many planning applications does the County process annually (on average)?

R62. 300

Q63. How many active licenses are there in the County currently?

R63. Proposer shall propose system based on the information provided within the RFI document.

Q64. Can the County please provide a complete list of the following in order for us to provide an accurate implementation plan and price for implementation:

Planning Types:

1. Planning Application Types – Zoning Clearance, Lots of Record, Lot Splits, Lot Line Deviation, Zoning conformance Letter, Rezoning, CUP, MCUP, Variance, Comp Plan Text/Map Amendment, LDR Amendment, Adult Entertainment License, Capacity Encumbrance Letter, Capacity Reservation Certificate, Developers Agreement, Major Site Plan, Mine Operating Permit, Minor site Plan, Preliminary Plat, Pre-submittal application. Master Park Plan, Tree Removal Permit, Average Setbacks, Special Events Permit, Open Air Vendor Permit
2. Inspection Types
3. Code Enforcement Case Types
4. License Types
5. Other department or record types required

R64. A. Zoning Clearance, Lots of Record, Lot Splits, Lot Line Deviation, Zoning conformance Letter, Rezoning, CUP, MCUP, Variance, Comp Plan Text/Map Amendment, LDR Amendment, Adult Entertainment License, Capacity Encumbrance Letter, Capacity Reservation Certificate, Developers Agreement, Major Site Plan, Mine Operating Permit, Minor site Plan, Preliminary Plat, Pre-submittal application. Master Park Plan, Tree Removal Permit, Average Setbacks, Special Events Permit, Open Air Vendor Permit

B. There are 105 inspection types

C. There are 60 code enforcement case types

D. There are 103 license types – this is a record keeping function that ensures contractors are licensed and certain records are maintained about each license (state license #, insurance information, etc.)

E. No additional information at this time.

Q65. Please confirm which integrations to external systems are required for the new system?

1. GIS – What version of ArcGIS is in use currently?
2. Payment provider – What payment provider is currently used by the County?
3. Single sign-on with Microsoft Entra ID (SAML)
4. Property Appraiser CAMA system (Vision)
5. IVR integration – Does the County currently have an IVR solution in place?
6. CivicClerk –
7. Financials – What financial system is in use that would require financial transactions to be sent from the new system?

See RFI Section 2.

1. What other types of system will require integration?

R65. A. See RFI Section 2.

B. See RFI Section 2.

C. Yes, this would be our preferred option. However, we would also need the ability to have separate application logins for the system that are not tied to SSO. So the system would need the ability to have SSO users and non-SSO users.

D. See RFI Section 2.

E. Yes, but the current system would not be capable of integration. We would require a new IVR system that is compatible with the selected solution.

F. See RFI Section 2. Not a requirement to integrate but could be useful.

G. See RFI Section 2.

H. See RFI Section 2.

Q66. Does the County have an Electronic plan review (EPR) in use already or are you looking for EPR options as part of the proposal?

R66. No, we do not have one in use. See functional requirements for EPR requested features.

Q67. Does the County currently have a kiosk or other solution in place? Please provide details.

R67. Not a part of this RFI.

Q68. Is Hyland OnBase used for all document management or just for records management?

R68. OnBase is used for records management and records retention. It is not required for day-to day document management.

Q69. Is Exchange/Outlook online in use at the County and would integration be required?

R69. Yes, we use Outlook. Integration depends on what the purpose of the integration would be.

Q70. How many data sources require data migration to the new solution?

1. Please provide details on each data source (format of data to be converted, volume of data, etc.)
2. Is there a requirement to convert or link documents into the new system? What is the source system for documents?

R70. A. See RFI Section 2.

1. Yes. See RFI Section 2.

Q71. Can you please clarify what is meant by the EPR requirement “Does electronic plan review utilize full integration of adopted building codes including calculations, and generations of review and resubmittal for review?

1. Please provide expected functionality or use cases.

R71. A. Some electronic plan review solutions provide links and/or integrations with building code sources (International Code Council, Florida Building Code) as well as calculation functions common to building plan review.

Q72. How many users (including mobile) will the County need?

R72. See R15 above.

Q73. Could the County name all of the systems/interfaces the County currently uses or will need to be replaced and/or integrated?

R73. See RFI Section 2.

Q74. Has the County met with any potential vendors over the past 18 months. If so, which vendors?

R74. Irrelevant to this RFI.

Q75. Has the County seen any product demonstrations for possible solutions over the past 18 months? If so, which products?

R75. Irrelevant to this RFI.

Q76. How many reports are produced by the current system today?

R76. Approximately 60 in use today.

Q77. Approximately how many reports will the County need by go-live?

R77. 60

Q78. Does the County have the staff to develop its own reports if trained on the new system?

R78. As part of the implementation process, we expect all existing reports to be developed by selected vendor.

Q79. Does all data that needs to be converted reside in CD Plus?

R79. See RFI Section 2.

Q80. How many years of data will need to be converted?

R80. 25-30 years

Q81. Does the County have a preferred timeframe for project completion?

R81. See R5 above.

Q82. Has the County allocated a budget for this project? If so, what is the budget?

R82. See R1 above.

Q83. Is there a preferred format for pricing?

R83. Proposer shall propose system based on the information provided within the RFI document.

Q84. Can you confirm that “exceptions” are due to the County in advance of the submission deadline?

R84. See RFI Section 8.

Q85. How many total County staff will be accessing the system?

R85. See R15 above.

Q86. Of the total above, how many County staff will be performing digital plan review (i.e., markups)?

R86. Proposer shall propose system based off the information provided within the RFI document.

Q87. Can you provide a list of reports the County will expect the vendor to provide?

R87. Proposer shall propose system based off the information provided within the RFI document.

Q88. Does all data to be converted reside in CD Plus?

R88. See R80 above. Proposer shall propose system based off the information provided within the RFI document.

Q89. Can you share the budget or a budget range for this project?

R89. See R1 above.

Q90. Can you provide a listing of all vendors that have provided Community Development software demonstrations the County over the past 12 months?

R90. Irrelevant to this RFI.

Q91. Please confirm that integration to Tyler Munis (EERP) is required as part of the scope of work?

R91. Proposer shall propose system based off the information provided within the RFI document.

Q92. Please provide a complete inventory of case types or record types currently managed within the County’s CD Plus application (i.e., Building permit – Residential, Rezoning – Map Amendment, Electrical Permit, etc.).

R92. Proposer shall propose system based off the information provided within the RFI document.

**ACKNOWLEDGMENT**

Firm Name: Click or tap here to enter text.

I hereby certify my electronic signature has the same legal effect as if made under oath; I am an authorized representative of the firm and/or empowered to execute this submittal on behalf of the firm.

Signature of Legal Representative Submitting this Bid: Click or tap here to enter text.

Date: Click or tap to enter a date.

Print Name: Click or tap here to enter text.

Title: Click or tap here to enter text.

Primary E-mail Address: Click or tap here to enter text.

Secondary E-mail Address: Click or tap here to enter text.