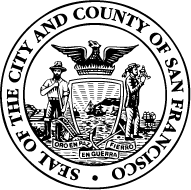
**CITY AND COUNTY OF SAN FRANCISCO**

**DEPARTMENT OF BUILDING INSPECTION**

**AND**

**PLANNING DEPARTMENT**



**Request for Proposals for**

**Permit and Project Tracking System**

**Attachment A – Proposal Summary Template**

**Directions**

Attachment A will be used to collect information required for evaluation of the degree to which proposals meet the requirements state in this REFP. Please complete your response in the template provided, using as much space as needed. Indicate clearly when separate documents are provided. Failure to provide any information requested in the quote template will result in rejection of your proposal. Note that responses of “To be provided upon request” or “To be determined” or a similar statement is not acceptable.

All documents under this process are subject to public disclosure. Please redact confidential or proprietary information as appropriate.

1. **Letter of Introduction**

Submit a letter of introductionsigned by a person authorized by your firm to obligate the firm to perform the commitments contained in the proposal. Submission of the letter will constitute a representation that the firm is willing and able to perform the commitments contained in the proposal.

Any Joint Venture responding to this RFP must clearly identify the roles, responsibilities and experience of each member of the Joint Venture. All Proposers must have the relevant expertise to successfully perform the scope of services described in this RFP. Proposers and Joint Ventures will be referred to as PROPOSERS in this RFP.

1. **Executive Summary**

Submit an Executive Summary that covers the following information in italics:

*PROPOSER Name:*

*PROPOSER Address:*

*Contact Name:*

*Contact Title:*

*Contact E-mail:*

*Contact Phone:*

*Provide a brief statement regarding your interest in and qualifications for the services under this RFP.*

**B. Certifications**

The Letter of introduction must contain the following certifications listed in italics.

* 1. Enterprise License Agreement

*The PROPOSER must certify that they offer an Enterprise License Agreement (ELA) on the software products(s) that applies to the entire CCSF organization, encompassing all or a combination of departments that allows users to work on the same software product with one annual payment. The contract will also allow CCSF to forgo the need to register the software each time it is installed on another computer.*

2. Examination of RFP

*The PROPOSER shall certify that it has carefully examined this RFP and documents attached hereto for terms, conditions, specifications, covenants, requirements, services, etc.; and the PROPOSER certifies that it understands the services requested, that the PROPOSER has knowledge and expertise to provide the proposed services submitted for consideration, and that the proposal is based upon the terms, conditions, specifications, services, and requirements of this RFP and attachments.*

*Each PROPOSER shall certify that its proposal is made without prior understanding, agreement, or connection with any corporation, firm or person submitting a proposal for the same materials, supplies, or equipment, and is in all respects fair and without collusion or fraud, so that all proposals for the purchase will result from free, open and competitive proposing among all vendors, in compliance with the City’s laws.*

1. Human Rights Commission and Office of Contract Administration Requirements

*The PROPOSER will submit proof that it has complied with all of CCSF’s Human Rights Commission and Office of Contract Administration requirements by the time of contract award*.

**IV. Information Requirements**

**A. Minimum Qualifications**

The Minimum Qualifications are used by the City to determine whether the PROPOSER has experience on projects comparable to the services that the City is requesting. Any proposal that does not demonstrate that the PROPOSER meets all these minimum qualifications by the quote deadline shall considered non-responsive and will not be evaluated or eligible for award of any subsequent contract(s).

1. Three (3) Past Project Descriptions

In accordance with the Minimum Qualifications stated in the RFP, PROPOSERS must submit at least three (3) Past Project Descriptions. Descriptions should be limited to no more than three (3) pages for each project and focus on the PROPOSER’S experience as it relates to the RFP requirements.

The information in italics must be provided in the following format.

***Past Project Description # 1***

*Agency Name:* Insert response here.

*Agency Address:* Insert response here.

*Contact Name:* Insert response here.

*Contact Title:* Insert response here.

*Contact Phone:* Insert response here.

*Contact Email:* Insert response here.

*Population:* Insert response here.

*Construction Permits processed per annum:* Insert response here.

*Was the COTS product pre-configurable and modifiable?*

Insert response here.

*Name and version of the software implemented:*

Insert response here.

*Date implemented to the end use:*

Insert response here.

*Is system currently running in production?*

Insert response here.

*Describe the project Scope:*

Insert response here.

*Describe the implementation strategy including transition approach:*

Insert response here.

*Describe the hardware and network architecture*

Insert response here.

*What was the project duration in months (from user requirement thru user acceptance?*

Insert response here.

*Was project completed on schedule and if not please explain?*

Insert response here.

*Was project completed on budget and if not please explain?*

Insert response here.

*What were the project challenges and approach to resolution?*

Insert response here.

*What is your current relationship with the municipality?*

Insert response here.

*Did the municipality use a hosted solution and if so who is it with?*

Insert response here.

*Describe your role as a facilitator in the business operations change management process:*

Insert response here.

*Describe your role in data conversion:*

Insert response here.

***Past Project Description # 2***

*Agency Name:* Insert response here.

*Agency Address:* Insert response here.

*Contact Name:* Insert response here.

*Contact Title:* Insert response here.

*Contact Phone:* Insert response here.

*Contact Email:* Insert response here.

*Population:* Insert response here.

*Construction Permits processed per annum:* Insert response here.

*Was the COTS product pre-configurable and modifiable?*

Insert response here.

*Name and version of the software implemented:*

Insert response here.

*Date implemented to the end use:*

Insert response here.

*Is system currently running in production?*

Insert response here.

*Describe the project Scope:*

Insert response here.

*Describe the implementation strategy including transition approach:*

Insert response here.

*Describe the hardware and network architecture*

Insert response here.

*What was the project duration in months (from user requirement thru user acceptance?*

Insert response here.

*Was project completed on schedule and if not please explain?*

Insert response here.

*Was project completed on budget and if not please explain?*

Insert response here.

*What were the project challenges and approach to resolution?*

Insert response here.

*What is your current relationship with the municipality?*

Insert response here.

*Did the municipality use a hosted solution and if so who is it with?*

Insert response here.

*Describe your role as a facilitator in the business operations change management process:*

Insert response here.

*Describe your role in data conversion:*

Insert response here.

***Past Project Description # 3***

*Agency Name:* Insert response here.

*Agency Address:* Insert response here.

*Contact Name:* Insert response here.

*Contact Title:* Insert response here.

*Contact Phone:* Insert response here.

*Contact Email:* Insert response here.

*Population:* Insert response here.

*Construction Permits processed per annum:* Insert response here.

*Was the COTS product pre-configurable and modifiable?*

Insert response here.

*Name and version of the software implemented:*

Insert response here.

*Date implemented to the end use:*

Insert response here.

*Is system currently running in production?*

Insert response here.

*Describe the project Scope:*

Insert response here.

*Describe the implementation strategy including transition approach:*

Insert response here.

*Describe the hardware and network architecture*

Insert response here.

*What was the project duration in months (from user requirement thru user acceptance?*

Insert response here.

*Was project completed on schedule and if not please explain?*

Insert response here.

*Was project completed on budget and if not please explain?*

Insert response here.

*What were the project challenges and approach to resolution?*

Insert response here.

*What is your current relationship with the municipality?*

Insert response here.

*Did the municipality use a hosted solution and if so who is it with?*

Insert response here.

*Describe your role as a facilitator in the business operations change management process:*

Insert response here.

*Describe your role in data conversion:*

Insert response here.

1. Pre-configured and/or modifiable COTS solution

The information from the above *past project descriptions* will be used to determine if the PROPOSER meets the minimum qualification to have a pre-configured and/or modifiable COTS solution.

1. Human Rights Commission requirements

The information from the *Letter of Introduction* (section I in this attachment) will be used to determine if the PROPOSER meets the minimum qualification of adherence to HRC requirements found in this RFP.

1. Enterprise License requirement

The information from the *Letter of Introduction* (section I in this attachment) will be used to determine if the PROPOSER meets the minimum qualification of providing an Enterprise License.

1. **Written Evaluation**

The written evaluation will be based on the following criteria.

The information that must be provided by the PROPOSER is found in italics.

* 1. Experience and Expertise (20 points)
     1. Experience with COTS project implementations

The information from the *past project descriptions* will be used to determine if the PROPOSER has experience with a prefigured and/or modifiable COTS solution.

(b) Expertise of PROPOSERS project staff

*Provide a proposed organization chart of the project team, and describe the training and expertise of the business and technical leads in the fields necessary to complete the Scope of Work outlined in this RFP.*

Insert response here.

In addition to the above, if the PROPOSER is a Joint Venture, HRC Form 4, Joint Venture Form will be used for evaluation purposes.

2. Functional and Technical Requirements (40 points)

1. Ability to meet functional and technical requirements
   * 1. Provide the completed Functional and Technical Requirement forms *(Attachment B)*
     2. *Describe workflow modeling functions to be used to create/modify rules, tasks, checklists, automated routing and notification, and other system functions based on processes from initiation to completion.*

Insert response here.

* + 1. *Provide samples of standard reports and information on the report writing tool.*

Insert response here.

* + 1. *Describe your proposed disaster recovery solution*

Insert response here.

1. *Provide a description of business and technical best practices incorporated in the proposed COTS solution*

Insert response here.

1. System Integration and Architecture (20 points)
   1. *Detail the technical architecture for each of your proposed solution(s) (virtualized, non-virtualized, SAAS), including but not limited to operating system, hardware, database, network requirement, API, security, web, fail-over, application and database recovery support, use of multiple tier architecture, and server configurations, etc*

Insert response here.

* 1. *Detail expertise in delivering secure, scalable, reliable and dependable COTS product*
     + 1. *Outline how security of the system and data is ensured by both software and procedures*

Insert response here.

* + - 1. *Provide service level agreement information as it relates to the application and administration support, system performance and system availability*

Insert response here.

* 1. *Provide examples and descriptions of instances where the COTS solution has interfaced with legacy systems and/or products*

Insert response here.

* 1. *Describe experience in delivering Service Oriented Architecture products*

Insert response here.

1. Project Execution (20 points)

(a) Proposed implementation strategy and timeline

* + 1. The information from the *past project descriptions* will be used to determine if the PROPOSER has met the timelines in the past projects.
    2. *Provide a timeline and a high level project plan including resource allocation to complete all aspects of the Scope of Work delineated in the RFP including the strategy for the migration and a smooth cutover to the new system*

Insert response here.

* + 1. *Describe the training and knowledge transfer strategy*

Insert response here.

* + 1. *Describe the Contingency/Fall-back plan pursuant to the Scope of Work in the RFP*

Insert response here.

* + 1. *Describe the process and procedures for converting data from existing databases and to assist CCSF in data cleanup*

Insert response here.

(b) Go live and post go live support

1. *Describe the strategy and timeline for providing go-live and post go-live support until the start of the maintenance support*

Insert response here.

2. *Describe the software maintenance standards including installation of new releases, patches, etc.*

Insert response here.

3. *List of documents/manuals which will be included in the system package*

Insert response here.

(c) Quality management and control

*Describe your standard project management policies, processes, method and change control.*

Insert response here.

**C. Hardware and 3rd Party Software**

*Hardware and 3rd Party Software shall be procured outside the scope of this RFP. PROPOSERS are to provide a comprehensive list of Hardware and 3rd Party Software necessary to fully support your entire proposed implementation strategy(ies) and deadlines for when the hardware must be in place.*

|  |  |  |
| --- | --- | --- |
| *Quantity* | *Item Description* | *Deadlines When Needed* |
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