

The City and County of San Francisco



Technology Store Request for Quote and Demonstration (RFQ)

Electronic Document Management
and
Electronic Plan Review

May 2010

www.sfdbi.org

Key Dates

Issue Request for Quote and Demonstration	05/03/2010
Vendor Conference	05/10/2010
Deadline for questions	05/14/2010
Questions and Answers mailed to vendors	05/19/2010
Deadline for Submittal of Responses	05/24/2010
Short listed vendors notified for product demonstration and oral interview	05/31/2010
Product demonstration and oral interview	Week of 06/07/2010

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Introduction

The Department of Building Inspection (DBI) of the City and County of San Francisco (City) is requesting a vendor to submit quotes and to demonstrate the software functions and capabilities for a phased implementation of a Commercial off the Shelf (COTS) electronic document management and electronic plan review product.

Electronic Document Management: Most of DBI's business is mandated by Federal, State or City specific rules and regulations. Meeting these standards and responding to public requests require a lot of paperwork. Storing and accessing information from the filed paper documents is inefficient and costly. DBI intends to use the electronic document management system (EDMS) to capture, index, store, retrieve, archive, and secure access to business related documents. EDMS will allow the establishment of electronic rules-based workflow that dictates the flow of documents through the department, and allow documents to be recovered in the event of a disaster.

Electronic Plan Review: DBI currently processes about 65,000 permits and associated plans annually. The review process involves multiple departments – Building Inspection, Planning, Public Works, Fire, Public Health, and Environment – the Public Utilities Commission and the Mayor's Office of Disability. Currently, these reviews are routed manually. Plan sets are exchanged between staff and applicants in paper format. No electronic exchanges are available. DBI intends to use the electronic plan review system (e-Plan Review) to capture, index, store, retrieve, review, approve, archive, and secure access to all permitting plans/drawings. E-Plan Review will automate the entire permitting plan review process, eliminate excess paperwork, provide the ability to review project status on a real-time basis, and provide for future expansion to integrate with the next generation of the Permit Tracking System.

The estimated volume of DBI documents are as follows:

Historical Documents

- a. Permit related (scanned documents and drawings/plans) = 2 Terabytes
- b. Non-permit related/administrative (scanned documents) = 1 Terabyte

Ongoing Documents

- a. Permit related drawings = 12,000 plan reviews per year at an average of 40 pages of drawings per plan review (CAD, PDF, and etc format).
- b. Permit related documents = 50 Gigabyte per year
- c. Non-permit related/administrative = 50 Gigabyte per year

Project Goals

DBI's long-term goal is to implement an EDMS and e-Plan Review product for Building Department documents to control the flow, storage, and retrieval of new and existing documents and drawings. In addition, the system will be made available for City-wide implementation.

The benefits will include reduction of paper storage, improved document retrieval time, improved productivity, secured accessibility to documents, enhanced ability to conduct parallel reviews, and the ability to restore documents in the event of a disaster. It is anticipated that accessibility to documents could be reduced to minutes instead of days. The accuracy of data presented in plans/drawings will be greatly improved and the turnaround time between DBI's review of plans and edits made by design professionals will be significantly decreased.

Overview of Existing Systems

DBI currently uses a legacy and custom-built Permit Tracking System (PTS). The system is used by many City Departments including Planning, Public Works (DPW), Fire, Health and the Public Utilities Commission (PUC). Several systems are integrated with the existing PTS including Cashiering and GIS Addressing.

The City is looking to replace the legacy Permit Tracking System with a COTS state-of-the-art system. Both the COTS EDMS and e-Plan Review must seamlessly integrate with the current and future Permit Tracking Systems. In addition, we are implementing a customer queuing system (Q-matic) and an IVR and Scheduling System (Selectron). See Attachment C, DBI IT Application and Infrastructure Environment

Project Implementation

The project will be implemented in two phases. The general objectives for each phase are as follows.

Phase I: Implementation of an EDMS for records associated with the Department's business functions. The records include, but are not limited to:

- a. Public Records Requests for information on permit records relating to a property/address;
- b. Subpoenas to provide permit related records;
- c. Financial records including contracts, accounts receivable, accounts payable, and budget documents;
- d. Meetings minutes/transcripts and agendas in order to make them available to the public,
- e. Legislation and Ordinance Tracking including the process to create, modify, approve and store executed ordinances, such as implementing new rates; and
- f. Other documents associated with Records Management functions. This includes the process to scan and retrieve permit applications, job cards, inspection records, and to access scanned drawings stored in various formats such as PaperVision.

Phase II: Implementation of the e-Plan Review and EDMS for plans/drawings and remaining business related documents. As part of Phase II, the system will need to provide DBI and other City departments (e.g., Public Works, Planning Department, Fire Department, and PUC) involved in the Permit Process the ability to access and modify shared documents on the system. Other departments will have access to view documents including but not limited to the Assessor/Recorder's Office, Port of San Francisco, and the Municipal Transportation Agency.

The standard Permit Process encompasses

- a. Site Development (application through approval) process
- b. Permit application process.
- c. Plan Review (application through approval) process.
- d. Assessment, review, and approval of addenda (application and plan review).
- e. Construction, inspection, and certificate issuance process.

This system will be a single software product solution, offering centralized electronic access to all business related documents, including building plans and engineering plans. In addition, the system will offer check-in and check-out, version control, version compare or redlining, plan/document annotation or mark-up, workflow, and allow concurrent review capabilities.

Scope of Work

Two budgetary quotes are required:

Phase I (1st quote): Implement an EDMS for documents up to 11" X 17" in dimension, Enterprise license, for selected Department Business functions.

In addition to general EDMS functions, the system must include the following specific types of documents and functions:

- a. Public Records Requests for information on permit records relating to a property/address.
- b. Subpoenas to provide permit related records.
- c. Financial records including contracts, accounts receivable, accounts payable, and budget documents.
- d. Meetings minutes/transcripts and agendas in order to make them available to the public,
- e. Legislation and Ordinance Tracking including the process to create, modify, approve and store executed ordinances, such as implementing new rates.
- f. Other documents associated with Records Management functions. This includes the process to scan and retrieve permit applications, job cards, inspection records, and to access scanned drawings stored in various formats such as PaperVision.)

Phase II (2nd quote): Implement an EDMS and e-Plan Review for plans/drawings and remaining business related documents, accessible by City-wide departments, for the Permit Process, for documents and plans of industry standard dimensions, Enterprise license (The prices should reflect continuation/upgrade from Phase I to Phase II.)

The standard Permit Process encompasses

- a. Site Development (application through approval).
- b. Permit application process.
- c. Plan Review (application through approval) process.
- d. Assessment, review, and approval of addenda (application and plan review).
- e. Construction, inspection, and certificate issuance process.

The following functions must be fulfilled for EDMS. List all functions and features that your product cannot fulfill under the "assumption" section of the Price Quote Template.

- A. Functions and Features
 1. Accepts all digital formats, e.g. scanned, e-documents
 2. Automatic index, with manual index option, containing multiple key values, e.g. person's name, address, permit number, etc.
 3. Automatic version control
 4. e-Version compare
 5. Assignment routing and workflow
 6. Secured electronic approval stamps and signatures for both departmental approvals and overall permit approval
 7. Automatic notification
 8. Check-in and check-out capability
 9. Allow concurrent review and identify which reviewer made which comment

10. Secured reviewer and modifier of documents, based on hierarchical authentication and authorizing rules
 11. Online status monitoring
 12. Reporting: Audit activities, with drill down capability reviewing “who” worked on “what” and for “how long”.
 13. Customizable settings, e.g. access, workflow, security, reporting.
 14. Links (web links) from and to existing systems.
 15. Bar Code recognition
 16. Text searching, wild-card searching
 17. 100% web access
- B. Capable of applying these functions and features to:
1. Public Records Requests for information on permit records relating to a property/address.
 2. Subpoenas to provide permit related records
 3. Financial records including contracts, accounts receivable, accounts payable, and budget documents,
 4. Meetings minutes/transcripts and agendas in order to make them available to the public
 5. Legislation and Ordinance Tracking including the process to create, modify, approve and store executed ordinances, such as implementing new rates.
 6. Other documents associated with a Records Management functions. This includes the process to scan and retrieve permit applications, job cards, inspection records, and to access scanned drawings stored in various formats such as PaperVision.)

The following functions must be fulfilled for e-Plan Review. List all functions and features that your product cannot fulfill under the “assumption” section of the Price Quote Template.

1. Online submission and resubmission of plan sets, and related documents that can handle multiple formats including, but not limited to native CAD files, JPEG, and PDF
2. Seamless integration between City-wide departments involved in the life cycle of the permit process.
3. Automatic index, with capability to associate with other indices, e.g. Permit Number
4. Automatic version control
5. Serial and Parallel review with “conditions of approval” workflow control.
6. Assignment routing and workflow
7. Automatic notification and alerts that can be triggered by the workflow
8. Automatic notifications configurable at the plan reviewer’s discretion to either fax or email.
9. e-Redlining: Markup on plans/drawings, and link redlined areas to pre-developed spec sheets
10. e-Version compare: Compare differences between drawing versions and between different drawings
11. Check-in and check-out capability
12. Allow concurrent review and identify which reviewer made which comment
13. Allow annotate comments, scale setting, page management
14. Secured electronic approval stamps and signatures for both departmental approvals and overall permit approval
15. Secured reviewer and modifier of plans
16. Secured method for public/customer download of approved drawings
17. Online status monitoring

18. Reporting: Audit activities, with drill down capability reviewing “who” worked on “what” and for “how long”.
19. Customizable settings, e.g. access, workflow, security, reporting.
20. Links (web links) from and to existing systems.
21. Bar Code recognition
22. Text searching, wild-card searching
23. 100% web access
24. Users outside of the CCSF network, e.g. the public, do not have to purchase software in order to use the system.
25. Integrate with our Lotus Notes Email system, so that official emails sent to customers in relations to a permit/case record is retained as a related document
26. Automatic calculation of floor areas with linear and/or polyline measurement tools
27. Automatic calculation of floor areas and vertical wall areas, to validate architects’ demolition data
28. Automatic calculation of structure by overlaying elevation drawings over survey information, to validate architects’ elevation dimension data

Both implementation quotes will be required to include the following services

1. Project Management
The project shall be managed based on a Project Plan, developed and maintained by the Proposer. A detailed project plan shall be submitted with the Quote in MS Project format including timeline, tasks, key milestones and deliverables.
2. Analysis and Requirements Definition
Review DBI’s plan submittal and review process for permit tracking, and document all requirements necessary for document management and automated business processes.
3. System Integration
The product should utilize industry standard Application Programming Interfaces (API), adapters, Web Services, SOAP, UDDI, IML, Java, and/or SOA, software development kits (SDK), or similar enterprise application integration (EAI) tools to facilitate data/transactions exchanges with DBI’s current Permit Tracking System (see Attachment C for technical description) and the new Permit and Project Tracking System – a Commercial Off The Shelf product that CCSF estimates to begin implementing in 2010.
4. Design and Configure
While applying market best practice experience in permit tracking business process, produce a detailed design of the proposed EDMS and e-Plan Review, including the automated business processes, indexing schema, system architecture, technical specifications for all hardware and software, and other aspects necessary to implement the system. Configure the product according to the City-approved specifications.
5. System Infrastructure Failover and Recovery
Design and implement a secondary system to take over when the primary system fails. Up-to-date copies of all applications are maintained on the secondary system in order to be activated if the primary system becomes unusable.
6. Install and test the EDMS and e-Plan Review product
Install and test the pre-configured product and deploy the EDMS and e-Plan Review delivering a completely functional solution. Lead and/or perform all levels of testing, including unit, system, integration, and user acceptance testing. Assist the City in developing deliverable acceptance criteria.

7. Training and System Go-Live
Provide end user and technical documentation. Train City staff (users and IT) in using all functional aspects of the system and administering the technical aspects of the system. Assure that the City has completed successful Full System tests, and signed off on full acceptance of the system before going live.
8. System Maintenance and Ongoing Support
Provide system maintenance and ongoing support to ensure that the City has a fully functional and reliable system.

Budgetary Quote

Two budgetary quotes are required (see Attachment A: Quote Template):

- 1st quote - **Phase I: Implement an EDMS for the business related functions, for documents up to 11" X 17" in dimension. Enterprise license.**
- 2nd quote - **Phase II: Implement an EDMS and e-Plan Review for plans/drawings and remaining business related documents, accessible by City-wide departments, for the Permit Process, for documents and plans of industry standard dimensions. (The prices should reflect continuation/upgrade from Phase I to Phase II.) Enterprise license.**

Submission Requirements

Quotes must be received by 3:00 p.m. on 05/24/2010. All firms pre-qualified under the Technology Store pool for which this RFQ solicits from shall be given notice of this RFQ. Postmarks will not be considered in judging the timeliness of submissions. Quotes must be delivered in person and left with or mailed to:

Ms. Sarah Luu
City and County of San Francisco
Department of Building Inspection
1650 Mission, 3rd floor, Room 312B
San Francisco, CA 94103

The City shall not be liable for lost, misplaced, stolen or undelivered mail by the United States Post Office. It is the Proposer's duty to ensure that the Proposal was received by the due date and time.

Complete Attachment A: Quote Template.

1. Quotes and all related materials must be submitted in a sealed envelope clearly marked "CCSF DBI, EDM-PR Project". Quotes by email and by facsimile will not be accepted. Late submissions will not be considered.
2. Submit three (3) copies of the basic Quote package (one 3-ring bound, one unbound for photocopying, one CD with quote documents in read-only format in MS Word 2003 or higher or as an Adobe PDF).
3. In furtherance of ensuring that the LBE Subcontracting Goals for each of the Proposer's Master Contract is being adhered to, please submit a brief letter reflecting the current LBE Subcontracting participation percentage to date under such Master Contract and, to the extent that the LBE Subcontracting participation percentage is not being met or exceeded, please submit a brief narrative

Demonstration Requirements

Demonstrations of the proposed product will be held during the week of 06/07/2010. The top three (3) ranked proposers at the conclusion of the written evaluation phase will be notified via email, and given a date and time for the demonstration. Questions on scheduling should be addressed to Ms. Sarah Luu at 415-558-6324 or at sarah.luu@sfgov.org.

Demonstration will be based on Attachment B: Demonstration Script

Questions and Inquiries

Requests for information concerning this Request for Quote and Demonstration should be addressed to Ms. Sarah Luu, at 415-558-6324 or at sarah.luu@sfgov.org.

Requests for information after the Vendor Conference must be in writing to Ms. Sarah Luu and received before 05/14/2010.

Questions relating to HRC concerns, please contact James Soncuya, the Human Rights Compliance Officer at 415-554-3106.

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 quote that does not demonstrate that the Proposer meets all these minimum qualifications by the quote deadline may be considered non-responsive and may not be evaluated or eligible for award of any subsequent contract(s).

1. The proposed software is a COTS product. It is a single software product solution, offering both document management and electronic plan review capabilities as delineated in the scope of work.
2. The proposed software has been successfully implemented in at least three (3) public agencies for no less than one (1) year for use on Electronic Document Management and Plan Reviews and tracking of construction/building permits, within the last three (3) years.
3. The Proposer must have provided industry expertise and best practices in Permit Tracking business process consulting services to at least three (3) public agencies for no less than one (1) year for use on Electronic Document Management and Plan Reviews and tracking of construction/building permits, within the last three (3) years.
4. The proposed software is expected to be modifiable (using the Vendor System's inherent configuration tool) in order to meet the City's requirements.
5. The proposed software must operate with an ODBC-compliant relationship database.

6. The proposed software must use either a Windows based graphical user interface (GUI) or Web Browser user interface (BUI).
7. The proposed software must not require users outside of the CCSF network (e.g. the public) to purchase software in order to use the system.

Pre-Proposal Conference

Proposers are encouraged to attend a pre-proposal conference on 05/10/2010, 10:00 am, 1660 Mission Room 6034. All questions will be addressed at this conference and any available new information will be provided at that time. Questions raised at the pre-proposal conference will be answered in writing and sent to all vendors of the Computer Store.

Evaluation and Selection Criteria

1. Initial Screening

DBI staff will review each proposal to determine if they are responsive and responsible. Proposers' proposals will be reviewed for completeness, format requirements, verifiable references. Only those proposals that are properly completed, and meet the minimum format and content requirements will be considered in the evaluation process.

2. Overall Evaluation Process

The evaluation process will consist of three phases - Written Proposal, Oral Interview and Price. The points allocated for each phase of the evaluation are fifteen (15) points for the written proposal phase, Seventy-Five (75) points for the oral interview phase and ten (10) points for Price.

The Selection Panel will be comprised of individuals who are knowledgeable on the subject matter, and may include staff from DBI, other City agencies, and/or other utilities or organizations. DBI/City staff closely involved with the preparation of this RFQ and the development of the scope of services will not be allowed to be part of the Selection Panel.

A. Written Proposal Evaluation (15 points)

The selection panel will evaluate and score written proposals as reflected in Attachment A.

The Human Rights Commission (HRC) Contract Compliance officer will assign a rating bonus to the Written Proposal Score if applicable. The written proposal scores or HRC-adjusted written proposal scores (if applicable) will then be tabulated and Proposers will be ranked starting with the Proposer receiving the highest score, then continuing with the Proposer receiving the second highest score, and so on.

Only the top three (3) ranked Proposers will be short listed to continue on with oral interviews.

B. Oral Interview Evaluation (75 Points)

The Oral Interview Evaluation will consist of two phases – demonstration and oral interview. The points allocated for each phase of the evaluation are fifty (50) points for the demonstration and twenty five (25) points for the oral interview phase. DBI will notify all short-listed Proposers by email regarding the format of the interview, the scoring criteria to be used during the interview and the composition of the Proposer’s team to participate in the interview.

A. DEMONSTRATION (50 points)

- a. Responsiveness in demonstrating how the product satisfies a plan submittal and plan review process for a typical permit life cycle process, while electronically link permit records, such as application forms, job cards, Certificate of Final Completion, etc, to the job.
- b. Technical and functional integration between Electronic Document and Plan Review Management
- c. Responsiveness in addressing the required functions and capabilities for the Electronic Document Management and Electronic Plan Review.

In order to be considered for selection, Proposers must address each of the requested items outlined in Attachment B. Software in the development phase will not satisfy the demonstration requirements.

The HRC Contract Compliance officer will assign a rating bonus to the Demonstration Score if applicable.

B. ORAL INTERVIEW (25 points)

The Selection Panel will hold oral interviews with the short-listed Proposers immediately after the demonstration.

The interview evaluation process will consist of standard interview questions from the Selection Panel, and may include follow up questions if clarification of short-listed Proposer’s responses is necessary. The same set of interview questions will be used for all short-listed Proposers. Note that the oral interview questions may differ from the written proposal evaluation criteria.

The Selection Panel will proceed to evaluate each Proposer based on each Proposer’s presentation and responses.

The HRC Contract Compliance Officer will assess proposal compliance with LBE requirements and assign a rating bonus to the oral interview score, if applicable.

The oral interview scores or HRC-adjusted oral interview scores (if applicable) will then be tabulated.

C. PRICE (10 points)

CCSF will select the Proposer that will best be able to meet all of the requirements of the project. CCSF reserves the right to accept proposals other than the lowest priced offer and to reject any

proposals not responsive to this request. CCSF intends to make payments dependent on the quality of work and on-time satisfaction of key milestones and deliverables.

A Proposer will receive up to 5 points for Price in Phase I based on the following table:

Price (Phase I)	Point(s)
Lowest Price	5
Second Lowest Price	4
Third Lowest Price	3
Fourth Lowest Price	2
Fifth Lowest Price	1
Sixth Lowest Price and Lower	0

A Proposer will receive up to 5 points for Price in Phase II. Prices should reflect continuation/upgrade from Phase I to Phase II.

Price (Phase II)	Point(s)
Lowest Price	5
Second Lowest Price	4
Third Lowest Price	3
Fourth Lowest Price	2
Fifth Lowest Price	1
Sixth Lowest Price and Lower	0

The HRC Contract Compliance officer will assign a rating bonus to the Price Score if applicable.

Tabulating Final Scores

The scores from the Written Proposal Evaluation, Oral Interview Evaluation and Price will be combined and tabulated using the following overall scoring breakdown:

5.1	Written Proposal	15 points
5.2	Oral Interview Evaluation	75 points
5.4	Price	<u>10 points</u>
	Total	100 points

The total points score or HRC-adjusted total points score (if applicable) will then be tabulated and Proposers will be ranked starting with the Proposer receiving the highest total score, then continuing with the Proposer receiving the second highest total score, and so on. The Proposer with the highest total score will be identified as the highest-ranked Proposer eligible to proceed with contract negotiations.

Reference Checks

Reference checks, including, but not limited to, prior clients as indicated in Attachment A Proposer Certification may be used to determine the applicability of Proposer's experience to the services the City is requesting and the quality of services and staffing provided to prior clients, as well as adherence to schedules/budgets and Proposer's problem-solving, project management and communication abilities, as well as performance on deliverables and outcomes, and effectiveness in meeting or exceeding project objectives. The City reserves the right to perform reference checks at any time during the selection process.

RELEASE OF LIABILITY: The Proposer hereby releases all individuals, entities and firms from all claims and losses that may arise from said individuals, entities or firms providing information, comments, or conclusions to inquiries that the City and County of San Francisco may make regarding the qualifications of any individual or firm seeking to be selected as a contractor or subcontractor in connection with this RFQ. This release is freely given and will be applicable whether or not the responses by said individuals, entities or firms are accurate or not, or made willfully or negligently.

LBE Prime/Joint Venture Participation

The City strongly encourages response packages from qualified LBEs. Pursuant to Chapter 14B, the following rating bonus will be in effect for the award of this project for any Proposers who are certified by HRC as a LBE, or joint ventures where the joint venture partners are in the same discipline and have the specific levels of participation as identified below. Certification applications may be obtained by calling HRC at (415) 252-2500. The rating bonus applies at each phase of the selection process. The application of the rating bonus is as follows:

- (1) A 10% discount to an LBE; or a joint venture between or among LBEs; or
- (2) A 5% discount to a joint venture with prime LBE participation that equals or exceeds 35%, but is under 40%; or
- (3) A 7.5% discount to a joint venture with prime LBE participation that equals or exceeds 40%;

If applying for a rating discount as a joint venture: The LBE must be an active partner in the joint venture and perform work, manage the job and take financial risks in proportion to the required level of participation stated in the proposal, and must be responsible for a clearly defined portion of the work to be performed and share in the ownership, control, management responsibilities, risks, and profits of the joint venture. The portion of the LBE joint venture's work shall be set forth in detail separately from the work to be performed by the non-LBE joint venture partner. The LBE joint venture's portion of the contract must be assigned a commercially useful function. The JV Partners must be of the same discipline in order to be eligible for a rating bonus.

If you have any questions concerning the HRC Forms, you may call James Soncuya at (415) 554-3106.

SBA-LBE Bid Discount/Rating Bonus

Pursuant to Chapter 14B, the following rating bonus will be in effect for the selection process for this contract for any Proposers who are certified by HRC as a SBA-LBE. A 2% rating bonus will be applied to any proposal from an SBA-LBE except that the 2% rating bonus shall not be applied at any stage if it would adversely affect a Micro or Small LBE Proposer or a J/V with LBE participation. The SBA-LBE rating bonuses do apply to this Agreement because the anticipated agreement amount is under \$20 million.

If you have any questions concerning the HRC Forms, you may call James Soncuya at (415) 554-3106.

Terms and Conditions

A. Errors and Omissions in RFQ

Proposers are responsible for reviewing all portions of this RFQ. Proposers are to promptly notify the Department, in writing, if the Proposer discovers any ambiguity, discrepancy, omission, or other error in the RFQ. Any such notification should be directed to the Department promptly after discovery, but in no event later than five working days prior to the date for receipt of proposals. Modifications and clarifications will be made by addenda as provided below.

B. Inquiries Regarding RFQ

Any requests for information concerning the RFQ, whether submitted before or after the pre-proposal conference must be by e-mail to Ms. Sarah Luu at sarah.luu@sfgov.org.

C. Objections to RFQ Terms

Should a Proposer object on any ground to any provision or legal requirement set forth in this RFQ, the Proposer must, not more than ten calendar days after the RFQ is issued, provide written notice to the Department setting forth with specificity the grounds for the objection. The failure of a Proposer to object in the manner set forth in this paragraph shall constitute a complete and irrevocable waiver of any such objection.

D. Change Notices

The Department may modify the RFQ, prior to the proposal due date, by issuing Change Notices, which will be transmitted directly to the Technology Store Vendors. The Proposer shall be responsible for ensuring that its proposal reflects any and all Change Notices issued by the Department prior to the proposal due date regardless of when the proposal is submitted.

E. Term of Proposal

Submission of a proposal signifies that the proposed services and prices are valid for 120 calendar days from the proposal due date and that the quoted prices are genuine and not the result of collusion or any other anti-competitive activity.

F. Revision of Proposal

A Proposer may revise a proposal on the Proposer's own initiative at any time before the deadline for submission of proposals. The Proposer must submit the revised proposal in the same manner as the original. A revised proposal must be received on or before the proposal due date.

In no case will a statement of intent to submit a revised proposal, or commencement of a revision process, extend the proposal due date for any Proposer.

At any time during the proposal evaluation process, the Department may require a Proposer to provide oral or written clarification of its proposal. The Department reserves the right to make an award without further clarifications of proposals received.

G. Errors and Omissions in Proposal

Failure by the Department to object to an error, omission, or deviation in the proposal will in no way modify the RFQ or excuse the vendor from full compliance with the specifications of the RFQ or any contract awarded pursuant to the RFQ.

H. Financial Responsibility

The City accepts no financial responsibility for any costs incurred by a firm in responding to this RFQ. Submissions of the RFQ will become the property of the City and may be used by the City in any way deemed appropriate.

I. Proposer’s Obligations under the Campaign Reform Ordinance

Proposers must comply with Section 1.126 of the S.F. Campaign and Governmental Conduct Code, which states:

No person who contracts with the City and County of San Francisco for the rendition of personal services, for the furnishing of any material, supplies or equipment to the City, or for selling any land or building to the City, whenever such transaction would require approval by a City elective officer, or the board on which that City elective officer serves, shall make any contribution to such an officer, or candidates for such an office, or committee controlled by such officer or candidate at any time between commencement of negotiations and the later of either (1) the termination of negotiations for such contract, or (2) three months have elapsed from the date the contract is approved by the City elective officer or the board on which that City elective officer serves.

If a Proposer is negotiating for a contract that must be approved by an elected local officer or the board on which that officer serves, during the negotiation period the Proposer is prohibited from making contributions to:

- the officer’s re-election campaign
- a candidate for that officer’s office
- a committee controlled by the officer or candidate.

The negotiation period begins with the first point of contact, either by telephone, in person, or in writing, when a contractor approaches any City officer or employee about a particular contract, or a City officer or employee initiates communication with a potential contractor about a contract. The negotiation period ends when a contract is awarded or not awarded to the contractor. Examples of initial contacts include: (1) a vendor contacts a City officer or employee to promote himself or herself as a candidate for a contract; and (2) a City officer or employee contacts a contractor to propose that the contractor apply for a contract. Inquiries for information about a particular contract, requests for documents relating to a Request for Proposal, and requests to be placed on a mailing list do not constitute negotiations.

Violation of Section 1.126 may result in the following criminal, civil, or administrative penalties:

1. Criminal. Any person who knowingly or willfully violates section 1.126 is subject to a fine of up to \$5,000 and a jail term of not more than six months, or both.
2. Civil. Any person who intentionally or negligently violates section 1.126 may be held liable in a civil action brought by the civil prosecutor for an amount up to \$5,000.
3. Administrative. Any person who intentionally or negligently violates section 1.126 may be held liable in an administrative proceeding before the Ethics Commission held pursuant to the Charter for an amount up to \$5,000 for each violation.

For further information, Proposers should contact the San Francisco Ethics Commission at (415) 581-2300.

J. Sunshine Ordinance

In accordance with S.F. Administrative Code Section 67.24(e), contractors' bids, responses to RFQs and all other records of communications between the City and persons or firms seeking contracts shall be open to inspection immediately after a contract has been awarded. Nothing in this provision requires the disclosure of a private person's or organization's net worth or other proprietary financial data submitted for qualification for a contract or other benefits until and unless that person or organization is awarded the contract or benefit. Information provided which is covered by this paragraph will be made available to the public upon request.

K. Public Access to Meetings and Records

If a Proposer is a non-profit entity that receives a cumulative total per year of at least \$250,000 in City funds or City-administered funds and is a non-profit organization as defined in Chapter 12L of the S.F. Administrative Code, the Proposer must comply with Chapter 12L. The Proposer must include in its proposal (1) a statement describing its efforts to comply with the Chapter 12L provisions regarding public access to Proposer's meetings and records, and (2) a summary of all complaints concerning the Proposer's compliance with Chapter 12L that were filed with the City in the last two years and deemed by the City to be substantiated. The summary shall also describe the disposition of each complaint. If no such complaints were filed, the Proposer shall include a statement to that effect. Failure to comply with the reporting requirements of Chapter 12L or material misrepresentation in Proposer's Chapter 12L submissions shall be grounds for rejection of the proposal and/or termination of any subsequent Agreement reached on the basis of the proposal.

L. Reservations of Rights by the City

The issuance of this RFQ does not constitute an agreement by the City that any contract will actually be entered into by the City. The City expressly reserves the right at any time to:

1. Waive or correct any defect or informality in any response, proposal, or proposal procedure;
2. Reject any or all proposals;
3. Reissue a Request for Proposals;
4. Prior to submission deadline for proposals, modify all or any portion of the selection procedures, including deadlines for accepting responses, the specifications or requirements

5. Procure any materials, equipment or services specified in this RFQ by any other means; or
6. Determine that no project will be pursued.

M. No Waiver

No waiver by the City of any provision of this RFQ shall be implied from any failure by the City to recognize or take action on account of any failure by a Proposer to observe any provision of this RFQ.

N. Software License Agreement (Form P-545)

The successful proposer may be required to enter into a contract substantially in the form of the Software License Agreement, attached hereto as Attachment D. Failure to timely execute the contract, or to furnish any and all insurance certificates and policy endorsement, surety bonds or other materials required in the contract, shall be deemed an abandonment of a contract offer. The City, in its sole discretion, may select another firm and may proceed against the original selectee for damages.

Protest Procedures

A. Protest of Non-Responsiveness Determination

Within five working days of the City's issuance of a notice of non-responsiveness, any firm that has submitted a proposal and believes that the City has incorrectly determined that its proposal is non-responsive may submit a written notice of protest. Such notice of protest must be received by the City on or before the fifth working day following the City's issuance of the notice of non-responsiveness. The notice of protest must include a written statement specifying in detail each and every one of the grounds asserted for the protest. The protest must be signed by an individual authorized to represent the Proposer, and must cite the law, rule, local ordinance, procedure or RFQ provision on which the protest is based. In addition, the protestor must specify facts and evidence sufficient for the City to determine the validity of the protest.

B. Protest of Contract Award

Within five working days of the City's issuance of a notice of intent to award the contract, any firm that has submitted a responsive proposal and believes that the City has incorrectly selected another Proposer for award may submit a written notice of protest. Such notice of protest must be received by the City on or before the fifth working day after the City's issuance of the notice of intent to award.

The notice of protest must include a written statement specifying in detail each and every one of the grounds asserted for the protest. The protest must be signed by an individual authorized to represent the Proposer, and must cite the law, rule, local ordinance, procedure or RFQ provision on which the protest is based. In addition, the protestor must specify facts and evidence sufficient for the City to determine the validity of the protest.

C. Delivery of Protests

All protests must be received by the due date. If a protest is mailed, the protestor bears the risk of non-delivery within the deadlines specified herein. Protests should be transmitted by a means that will objectively establish the date the City received the protest. Protests or notice of protests made orally (e.g., by telephone) will not be considered. Protests must be delivered to:

Sarah Luu
City and County of San Francisco
Department of Building Inspection
1650 Mission Street, 3rd floor, #313
San Francisco, CA 94103
Sarah.luu@sfgov.org

Attachment List

- Attachment A: Quote Template
- Attachment B: Demonstration Script
- Attachment C: DBI IT Application and Infrastructure Environment
- Attachment D: City Standard Software-Licensing Agreement (P-545)