



Request for Proposal

Permitting and Planning Software and Implementation Services

RFP Release Date: September 1, 2021
RFP Response Due Date: September 28, 2021

Partnering With:



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SECTION 1 - REQUEST FOR PROPOSALS

Thurston County, Washington, is located at the southern end of Puget Sound in the beautiful Pacific Northwest. Majestic Mount Rainier and the rugged Cascade Mountains are nearby to the east, while Washington's Pacific Ocean coast is just an hour's drive to the west. Thurston County is 60 miles south of Seattle, Washington and is 100 miles north of Portland, Oregon. Thurston County is 727 square miles in area. Thurston County is the eighth most populated county among Washington State's 39 counties and is among the fastest growing counties in the Pacific Northwest.

Thurston County is home to more than 286,000+ residents. Nearly half of the County's residents live in the more urban north county areas in and around the cities of Lacey, Olympia, and Tumwater. The rest live in and around the smaller towns of Bucoda, Tenino, Rainier, and Yelm and in the more rural areas of Thurston County.

The purpose of this RFP is to solicit proposals for the most appropriate Permitting and Planning Software. The County is requesting proposals from qualified Vendors to provide software and implementation services. For the purpose of this RFP, a "Vendor" is a company that can provide goods and/or services to Thurston County; a "Proposer" is a Vendor who has submitted a response to this RFP; and a "Contractor" is a Vendor with whom the County has contracted for goods and/or services.) The County prefers to purchase an existing system that is commercially available without major customizations, in use by other similar public sector jurisdictions of similar size and complexity. A detailed description of the products and services required are contained in Section 3 – Scope of Work and Timeline. The County has attempted to provide all available information.

The County will purchase from a Vendor who has demonstrated long-term viability as a company and a long-term commitment to customers through regular product enhancements and on-going support. The County is seeking a Vendor that provides a proven, effective, and carefully structured approach to implementation of the chosen system. In this context, implementation refers to all efforts required to provide a complete and functioning system and to prepare and effectively train County personnel and system stakeholders to properly utilize it. This includes technology and implementation planning, detailed design, interfaces, software integration, designing minimal software modifications, testing, training, data conversion, end user and technical documentation, project management, change management, and post-implementation warranty support.

Prior to submitting a proposal, Proposers are advised to carefully read the instructions included in this RFP. It is the responsibility of each Proposer to review, evaluate, and, where necessary, request any clarification prior to submission of a Proposal. Proposers are not to contact County staff outside of the RFP facilitator with any questions or clarifications concerning this RFP.

SECTION 2 - CURRENT SYSTEMS

The County uses several software applications to support critical Permitting and Planning processes. The County would like to improve overall functionality as well as to add functionality that includes mobile access, public portals, dashboards, compliance standards, employee level reporting, and other tools to support decision-making and constituent interaction. The County's preference is for Hosted or Cloud-based solutions, but on-premises solutions will be considered if the functionality is advantageous to the County. Optimally, the systems technology should support interoperability with complimentary solutions such as Esri ArcGIS Online for land management and addressing, Bluebeam for plan reviews, and the Office 365 suite of products for the generation of emails or import/export of data to Excel, letter generation, etc.

The following table summarizes key systems used by the County that are under consideration for replacement or integration.

Software	Modules - Function	Replace	Integrate/ Interface
Calytera Amanda Vs. 6	Permitting, LMS, Inspections, Code Enforcement	Yes	
Esri ArcGIS Enterprise Vs. 10.6.X	GIS – Internal and public facing, Enterprise Multi-user geodatabase (SQL 2019) (10.8.1), ArcGIS Portal (10.8.1), ArcGIS Server (10.8.1), Image Server (10.8.1), ArcGIS Online (SaaS)		Yes
GeoCortex Map Viewer Vs. 4x	Internal and Public-facing GIS Map Viewer	Maybe	Yes
Bluebeam	Electronic Plan Review		Yes
Selectron	IVR for Inspection Scheduling	Maybe	Yes
Oracle ERP Cloud (implementing)	Financial Management		Yes
Laserfiche	Enterprise Document Management		Yes
Oracle Cashiering	Central Cashiering (implementing)		Yes
Point and Pay	Credit Card Processing	No	Yes
DTS VUEWorks Vs. 2020.x.x	Public Works - Asset Management, uses ArcGIS Enterprise Multi-user geodatabase (SQL 2012R2/2017) (10.5.1) and ArcGIS Server (10.5.1).		Maybe
Ascend	County Assessor's Records Management		Yes

In addition to these systems, County departments have developed various shadow systems using Excel, SQL, and Access databases and other desktop tools to manage, query, and report information outside the Permitting and Planning system. A list of Key Reports and Shadow Systems is provided as Exhibit D of this RFP. The vision of the County is to eliminate or minimize the need for shadow systems within each department and rely on Permitting and Planning technology to improve efficiencies and system usability. Process improvement is expected to coincide with software implementation activities and the adoption of best practices wherever possible.

It is anticipated that the new Permitting and Planning system and successful implementation will:

- Improve service level for customers.
- Make information easily and broadly available to internal and external consumers of data.
- Improve collaboration of Permitting and Planning data across County departments.
- Reduce paper-based processes and support automation where possible.
- Standardize processes across the organization.
- Minimize the reliance on shadow systems.

- Replace redundant systems where possible.
 - Track financial components.
 - Integrate with GIS Systems
 - Promote the adoption of best practices and the development of policies and procedures.
 - Provide intuitive systems that are easy to navigate
 - Provide end-user reporting, analytics and dashboards.
 - Improve ease of maintenance for ongoing software upgrades and support.
-

SECTION 3 – SCOPE OF WORK AND TIMELINE

Scope of Work

The County intends to purchase an integrated Permitting and Planning solution that includes the following modules and functional areas:

Modules - Required
Land Management and Addressing
Permitting and Planning
Inspections
Code Enforcement
Licensing and Certifications
Reporting and Query Tools

The County will choose a Permitting and Planning system that most closely meets its requirements for flexibility and configurability, addresses the key functional and technical requirements defined in this RFP, and that provides an open system architecture that permits interfacing to other internal and external systems in a timely manner.

The solution selected will be implemented using an approach as recommended by the selected Proposer and approved by the County. The County expects process improvement through implementation of new systems and intends to adopt the best practices offered by the selected Proposer. Proposers who are invited to demonstrate their product should be prepared to discuss the application's best practices and the system's ability to adapt to user preferences.

Timeline

The following defines the estimated timeline for this project. However, the County reserves the right to modify or reschedule procurement milestones as necessary.

Activity	Dates
Release of Request for Proposal	September 1, 2021
Vendors Questions Submitted	September 15, 2021
Vendors Questions – Answers Returned and Posted	September 20, 2021
Proposals Due	September 28, 2021
Selection of Finalists	November 3, 2021
Software Demos	December 2021
Due Diligence Review	January 2022
Contract Negotiations	January 2022-February 2022
Award Contract	March 2022
Implementation Start Date	TBD – Based on Vendor

SECTION 4 – PROPOSAL EVALUATION

Proposal Evaluation

All interested parties are requested to provide a response containing all required sections outlined in Section 5 of this RFP. The County intends to enter into an agreement with the Proposer who provides an RFP response that best supports the requirements defined in this RFP. The County reserves the right to conduct reviews with selected Proposers as necessary to complete its evaluation. Evaluation of proposals will be based on a fair, impartial, and competitive selection process. Functional and technical merit and total cost will be the primary consideration in the selection process. The County has established an internal Project Team who will evaluate all proposals.

The County may select a solution based solely on the information submitted in the proposal and to make a contract award without any further discussion with the Proposers regarding the responses received. Therefore, responses should be submitted initially as complete as possible with favorable terms available to the County from a price, terms and conditions, and technical standpoint.

Proposals shall be consistently evaluated based on the following competitive selection criteria:

Item	Weighting
Functional and Technical Requirements	40%
Experience and Expertise	25%
Total Cost	25%
References	10%

The County reserves the right to reject any or all proposals, and to waive any irregularities or information in the evaluation process. The County also reserves the right to re-evaluate Proposers who were not originally short listed at any time before the determination of a finalist is made. The final decision is the sole decision of the County, and the Proposers to this request have no appeal rights or procedures guaranteed to them.

Notification

Based on the evaluation of proposals received, the County will select a Short List of three solutions and invite the associated Proposers to participate in pre-demo meetings and software demonstrations. The selected Proposers will be notified by e-mail by the date indicated in Section 3 of this RFP.

Software Demos

The functional and technical product demos will be presented to the County by the short-listed Proposers according to a customized Demo Script. Proposers will receive the Demo Script in advance of the demos and be provided an opportunity to ask questions about the Demo Script and demo process prior to the scheduled demo. All Proposers must follow this script during their demo process. The evaluation criteria for the demo process will include adherence to the script as well as the ability to successfully demonstrate the product's ability to meet the County's functional and technical requirements. The County reserves the right to request additional information, interviews, follow-up demonstrations or any other type of clarification of proposal information it deems necessary to support the decision-making process.

Due Diligence Review

The County may request a more extensive technical or functional demo from Proposers as part of a final due diligence review. The County may also conduct reference reviews or site visits to the Proposer's headquarters. These activities will be scheduled on an as-needed basis.

Selection Procedure

The evaluation committee will present the highest rated proposal to the Board of County Commissioners for consideration. Negotiations may be conducted with the firm selected. Price shall be considered but need not be the sole determining factor. The County may cancel this RFP or reject proposals at any time prior to award and is not required to furnish a statement of the reason why a proposal was not deemed to be the most advantageous.

Rejection and Award of Proposal

Information gathered during interviews, negotiations, and any reference checks, in addition to the evaluation criteria stated in the RFP, and any other information or factors deemed relevant by the County, shall be used for determination of the final award. The County reserves the right to reject any or all proposals, to waive irregularities, and re-issue any RFPs.

SECTION 5 – RFP RESPONSE INSTRUCTIONS

Please submit your proposal via email to Courtnie Wilson at Courtnie.Wilson@co.thurston.wa.us as follows:

- a. One PDF file of the entire RFP proposal in the order defined in this RFP.
- b. One copy of the Requirements section of the RFP response in MS Word format using the template provided in this RFP.

Submission of a proposal shall constitute acknowledgment and acceptance of all terms and conditions contained in this RFP and all exhibits and attachments hereto. Questions about this RFP must be directed in writing, via email to Courtnie.Wilson@co.thurston.wa.us

The County reserves the right to amend or supplement this RFP prior to the proposal due date. All addendums, responses to questions received, and additional information will be posted to the County's Web site at <https://www.thurstoncountywa.gov/tchome/pages/rfprfq.aspx>.

Proposers should monitor this web page for new information. The County will post all questions with answers to the County's website by the date indicated in Section 3 of this RFP.

From the date that this RFP is issued until a firm or entity is selected and the selection is announced, firms or public entities are not allowed to communicate outside the process set forth in this RFP with any County employee other than the RFP Facilitator listed above regarding this RFP. The County reserves the right to reject any proposal for violation of this provision. No questions other than written questions will be accepted, and no response other than written responses will be binding upon the County. No formal pre-proposal meeting will be held.

Proposal Response Format

In order to assist in the fair and equitable evaluation of all responses, Proposers are asked to adhere to the specific response format outlined below. Responses that deviate from the requested format may be classified as "non-responsive" at the discretion of the County and subject to disqualification. Marketing information will not be accepted in lieu of direct responses to all requirements and questions. Proposers should create a single PDF version of your response in the order defined. Submit the PDF version and a separate Word document for item #2 below.

Section	Description
1. Cover Letter	A Cover Letter which provides an executive summary of the Proposer's products and services offered relevant to the scope of work described in this RFP. An individual authorized to bind the Proposer must sign the cover letter. Limit to 2 pages.
2. Requirements	Complete the "Requirements" form provided as an attachment to this RFP using the original Word format (also provided in Section C of this RFP for reference). Each Requirement must have a rating and a comment relative to how the function is met with the software. Submit this within your pdf proposal version as well as a separate Word document. Do not make any changes to formatting of this document, e.g., fonts, page breaks, layout, etc.
3. Pricing	Complete the form provided in Section A of this RFP (Pricing Summary) and insert as Section 3 to your response. Include all costs including software, implementation and maintenance. Pricing must be comprehensive and complete, including all taxes, and list any available discounts. Pricing must be valid for at least 180 days from response submission date. Include all one-time and recurring costs.

Section	Description
	<p>a. Software: Provide estimates for user counts defined in the Pricing summary page. Include pricing for both on-premises and SaaS or hosted options if applicable.</p> <p>b. Implementation Services: Include all costs for implementation; implementation of the software, data conversion, system configuration, report development, testing, and training for all required software modules to meet the functional and technical requirements included in this RFP.</p> <p>c. Maintenance: Indicate the cost and percent of software license cost for 10 years.</p> <p>Note: Additional pricing details can be included to provide clarification and relevant detail for your estimate.</p>
<p>4. Implementation</p>	<p>Provide an overview of Proposer’s implementation methodology including:</p> <p>a. Project Plan: Sample Project Plan including Phases, Tasks and Timeline</p> <p>b. County resources: Roles, responsibilities, average estimated time per month</p> <p>c. Proposer resources: Roles, responsibilities, average estimated time per month</p> <p>d. Process improvement approach</p> <p>e. Change management methodology and tools used</p> <p>f. Data conversion methodology</p> <p>g. Testing methodology and tools</p> <p>h. Training methodology, programs and tools offered</p> <p>i. Report development</p> <p>j. Integration approach, tools, experience</p> <p>k. Post go-live support services</p>
<p>5. Support</p>	<p>Provide an overview of support services offered including:</p> <p>a. User support – hours of service, after-hours support, average/guaranteed response time, ticketing system used, resources available, escalation process</p> <p>b. System enhancements – approach to user enhancement requests</p> <p>c. Hosting or Cloud services</p> <p>d. User groups and conferences</p>
<p>6. Technology Overview</p>	<p>Provide an overview of the system technology and strategic direction including:</p> <p>a. Options for technical architecture; hosted, on-premises, SaaS, etc.</p> <p>b. Hardware specifications for the proposed solution</p> <p>c. Mobile hardware and operating system specifications</p> <p>d. Support for two-factor authentication (or DUO integration)</p> <p>e. Remote access capabilities, supported technologies and portals available</p> <p>f. Online data dictionary</p> <p>g. Escrow agreements</p> <p>h. Languages, structures or frameworks used e.g., .NET architecture, SQL, etc.</p> <p>i. Integration tools and approach</p> <p>j. Timing and frequency of software updates, e.g., scheduled release, automatic updates, etc.</p>
<p>7. References</p>	<p>Complete the form provided in Exhibit B for existing and prior customers similar in size and scope to the County’s project.</p>
<p>8. Contract Performance</p>	<p>Indicate if at any time during the past five years Proposer has had a contract terminated for convenience, non-performance, or any other reason, or has entered into legal action with a customer.</p>
<p>9. Contract Exceptions</p>	<p>Provide any exceptions to the County’s sample contract terms and conditions provided in Exhibit E.</p>
<p>10. Contract Samples</p>	<p>Provide sample contract documents that may include the following:</p> <p>a. Statement of Work</p> <p>b. License Agreement</p> <p>c. Maintenance Agreement</p> <p>d. Service Level Agreement</p>

SECTION 6 – REQUIREMENTS

This section includes instructions for completing the Permitting and Planning system requirements document. This document will become Section 2 of your RFP response. Do not modify the template provided in any form. This is not a comprehensive list of all of the County’s requirements but includes the key requirements that will be used to evaluate the proposals and will be incorporated into the final contract with the selected Proposer.

Each line item has been assigned a ranking indicating the importance to the County. Rankings used are “R” for Required, “I” for Important, “N” for Nice to Have, or “E” for Explore. Software applications that are missing a significant number of required functional and technical requirements may be eliminated from consideration.

Proposers must **provide a rating and a comment for every item**. The comment should include a **brief explanation** of how the item is supported. Comments should not exceed 125 words per item. Do not include marketing language. If a submitted RFP includes blank responses, the document may be considered in violation and rejected. If the requirement does not pertain to the proposal being submitted indicate “N/A”. Use the following rating system to evaluate each requirement:

Rating	Definition
4	Standard and available in the current release. Software supports this requirement and can be implemented out of the box or with configuration at no additional cost. No source code modification is required.
3	Meet requirement with minor modification. Modification maintains application on upgrade path. Testing and production of modifications will be completed by implementation date. Include an estimate for the cost of the modification.
2	Available with 3rd party software application. Indicate name of the application recommended.
1	Does not meet requirement and requires substantial system modification. Indicate timing required and estimated cost of modification.
0	Not available. Software will not meet requirement.
F	Future Release. Requirement will be available in future release. Indicate anticipated release month and year.

Sample Response Format: Please use the format below when completing your response.

	General	Rating and Comment
R	1. Audit Trail with user, date, time stamp throughout all modules. Before/after values is Important.	4 System logs all transactions and stamps them with user, date, time and before/after values. A report can be generated to review audit history.

Please use the Requirements document provided in Section C of this RFP and submit as a Word version with your proposal.

SECTION 7 – TERMS AND CONDITIONS

1. **Conditions for Proposal Acceptance:** This RFP does not commit the County to award a contract or to pay any costs incurred for any services. The County, at its sole discretion, reserves the right to accept or reject any or all Proposals received as a result of this RFP, to negotiate with any qualified source(s), or to cancel this RFP in part or in its entirety. The County may waive any irregularity in any Proposal. All Proposals will become the property of the County. If any proprietary information is contained in the Proposal, it should be clearly identified.
2. **Insurance:** The County requires that licensees, lessees, and Proposers obtain and maintain, at their sole expense, specified types of insurance coverages, as outlined in the sample contract, evidenced by an approved Certificate of Insurance (not a declaration or policy) or proof of self-insurance on file with the County for the issuance of a permit or contract. Within ten (10) calendar days of award of contract, the successful Proposer must furnish the County with the Certificates of Insurance proving coverage as specified in the sample contract. County reserves the right to require different or additional insurance coverages than those specified in the sample contract.
3. **W-9:** Proposer must provide a signed form W-9 (Taxpayer Identification Number & Certification), which includes Proposer's legal business name(s).
4. **Protests:** Failure to comply with the rules set forth herein may result in rejection of the protest. Protests based upon restrictive specifications or alleged improprieties in the Proposal procedure, which are apparent or reasonably should have been discovered prior to receipt of Proposals shall be filed in writing with the County at least ten (10) calendar days prior to the deadline for receipt of Proposals. The protest must clearly specify in writing the grounds and evidence on which the protest is based.

Protests based upon alleged improprieties that are not apparent or that could not reasonably have been discovered prior to submission date of the Proposals, such as disputes over the staff recommendation for contract award, shall be submitted in writing to the County's Purchasing Department, within forty-eight (48) hours from receipt of the notice from the County advising of County's recommendation for award of contract. The protest must clearly specify in writing the grounds and evidence on which the protest is based. The County's Purchasing Department will respond to the protest in writing at least three (3) days prior to the meeting at which County's recommendation to the County Board of Commissioners will be considered. Should Proposer decide to appeal the response of the County's Purchasing Department, and pursue its protest at the Board meeting, it will notify the County's Purchasing Department of its intention at least two (2) days prior to the scheduled meeting.

Procedure – All protests shall be typed on the protester's letterhead and submitted in accordance with the provisions stated herein. All protests shall include at a minimum the following information:

- The name, address and telephone number of the protester.
 - The signature of the protester or the protester's representative.
 - The solicitation or contract number.
 - A detailed statement of the legal and/or factual grounds for the protest; and
 - The form of relief requested.
5. **Accuracy of Proposals:** Proposers shall take all responsibility for any errors or omissions in their Proposals. Any discrepancies in numbers or calculations shall be interpreted to reflect the cost to the County.

If, prior to contract award, a Proposer discovers a mistake in their Proposal which renders the Proposer

unwilling to perform under any resulting contract, the Proposer must immediately notify the RFP Facilitator and request to withdraw the Proposal. It shall be solely within the County's discretion as to whether withdrawal will be permitted. If the solicitation contemplated evaluation an award of "all or none" of the items, then any withdrawal must be for the entire Proposal. If the solicitation provided for evaluation and award on a line item or combination of items basis, the County may consider permitting withdrawal of specific line item(s) or combination of items.

6. **Responsibility of Proposers:** The County shall not be liable for any expenses incurred by potential Proposers in the preparation or submission of their Proposals. Pre-contractual expenses are not to be included in the Proposer's Pricing Summary. Pre-contractual expenses include but are not limited to, expenses incurred by Proposer in:
 - Preparing Proposal in response to this RFP.
 - Submitting that Proposal to the County.
 - Negotiating with the County any matter related to the Proposal; and
 - Any other expenses incurred by the Proposer prior to the date of the award and execution, if any, of the contract.

7. **Confidentiality:** Under Washington state law, the documents (including but not limited to written, printed, graphic, electronic, photographic or voice mail materials and/or transcriptions, recordings, or reproductions thereof) submitted in response to this RFP becomes a public record upon submission to the County, subject to mandatory disclosure upon request, unless the documents are exempted from public disclosure by a specific provision of the law.

If Proposer believes any communication contains trade secrets or other proprietary information that the Proposer believes would cause substantial injury to the Proposer's competitive position if disclosed, the Proposer shall request that the County withhold from disclosure the proprietary information by marking each page containing such proprietary information as confidential. Proposer may not designate its entire Proposal as confidential nor designate its Price Summary as confidential.

Submission of a Proposal shall indicate that, if Proposer requests that the County withhold from disclosure information identified as confidential, and the County complies with the Proposer's request, Proposer shall assume all responsibility for any challenges resulting from the non-disclosure, indemnify and hold harmless the County from and against all damages (including but not limited to attorneys' fees and costs that may be awarded to the party requesting the Proposer information), and pay any and all costs and expenses related to the withholding of Proposer information. Proposer shall not make a claim, sue, or maintain any legal action against the County or its directors, officers, employees, or agents concerning the disclosure, or withholding from disclosure, of any Proposer information. If Proposer does not request that the County withhold from disclosure information identified as confidential, the County shall have no obligation to withhold the information from disclosure and may release the information sought without any liability to the County.

8. **Conflict of Interest:** The Proposer represents and warrants that it presently has no interest and agrees that it will not acquire any interest which would present a conflict of interest during the performance of services under any contract awarded. The Proposer further covenants that it will not knowingly employ any person having such an interest in the performance of any contract awarded. Violation of this provision may result in any contract awarded being deemed void and unenforceable.

9. **RFP Addendums:** The County reserves the right to amend or supplement this RFP prior to the Proposal Due Date. All addendum(s) and additional information will be posted to the County's web site at <https://www.thurstoncountywa.gov/tchome/pages/rfprfq.aspx>. Proposers should monitor this web page for updates.

10. **Governing Law and Venue:** In the event of litigation concerning this RFP, the proposal documents, specifications and related matters shall be governed by and construed in accordance with the law of the State of Washington. Venue shall be with the appropriate state or federal court located in Thurston County.

Exhibit A - Pricing Summary

Use this summary page to provide pricing information. If both SaaS and On-Premises deployment options are available, provide a summary page for each option. Supporting documentation may be provided as backup to this summary page. This form will become Section 3 of your RFP response.

Thurston County - Permitting and Planning Pricing		
80 Concurrent or 130 Named Users + 25 Mobile Users		
Software		
Required Modules – To Support Requirements	\$	Assumptions
Land Management and Addressing		
Permitting and Planning		
Inspections		
Code Enforcement		
Licensing and Certifications		
Reporting/Query Tools		
Other		
Sub-Total – Software		
Implementation – Required Software		Assumptions
Implementation		
Data Conversion		
Training		
Report Development		
Integration – all County business applications listed in Requirements		
Travel		
Other		
Sub-Total - Implementation		
Maintenance – Required Software		Indicate Basis
Year 1		
Year 2		
Year 3		
Year 4		
Year 5		
Year 6		
Year 7		
Year 8		
Year 9		
Year 10		
Sub-Total Maintenance		
TOTAL		SOFTWARE, IMPLEMENTATION, MAINTENANCE

Exhibit B

Customer References - Existing

Item	Response
Client Reference No. 1 - Existing	
Name	
Number of Employees	
Population	
Contact Name	
Contact Title	
Contact Telephone Number	
Contact E-mail Address	
Provided by Proposer: Products, Modules, Services	
Implementation Duration	
Go Live Date	
Name of Software Replaced	
Client Reference No. 2 - Existing	
Name	
Number of Employees	
Population	
Contact Name	
Contact Title	
Contact Telephone Number	
Contact E-mail Address	
Provided by Proposer: Products, Modules, Services	
Implementation Duration	
Go Live Date	
Name of Software Replaced	
Client Reference No. 3 - Existing	
Name	
Number of Employees	
Population	
Contact Name	
Contact Title	
Contact Telephone Number	
Contact E-mail Address	
Provided by Proposer: Products, Modules, Services	
Implementation Duration	
Go Live Date	
Name of Software Replaced	

Exhibit B Customer References – Prior

Item	Response
Client Reference No. 1 - Prior	
Name	
Number of Employees	
Population	
Contact Name	
Contact Title	
Contact Telephone Number	
Contact E-mail Address	
Provided by Proposer: Products, Modules, Services	
Implementation Duration	
Go Live Date	
Name of Software Replaced	
Client Reference No. 2 - Prior	
Name	
Number of Employees	
Population	
Contact Name	
Contact Title	
Contact Telephone Number	
Contact E-mail Address	
Provided by Proposer: Products, Modules, Services	
Implementation Duration	
Go Live Date	
Name of Software Replaced	

Exhibit C Key Requirements

Thurston County, WA Requirements - Permitting and Planning Software

Rating
R = Required
I = Important
N = Nice to have
E = Explore

Vendor Background	
2. Company	
▪ Company Name	
▪ Contact Person Name and Title	
▪ Contact Address, Phone, Email	
3. Company Information	
▪ Public vs. Private	
▪ Year Founded	
▪ Revenue and Income: Current and Prior Year	
▪ Headquarter Office Location	
▪ Nearest regional office to Thurston County	
4. Vendor Employee Counts	
▪ Total	
▪ Product Development	
▪ Implementation	
▪ Support/Help Desk	
▪ Sales	
▪ Administration/Other	
5. Number of Customers for Proposed Application	
▪ Total - All	
▪ Total - Counties	
▪ Total - Cities	
▪ Total - Washington State	
6. Target Customer Profile	
▪ Sizing – Users and/or Population	
7. Implementation Model: Specify Direct or Partner	
8. Version Schedule	
▪ Current version and release date	
▪ Version release schedule	

Thurston County, WA
Requirements - Permitting and Planning Software

Rating
 R = Required
 I = Important
 N = Nice to have
 E = Explore

	9. Customer Support	
	▪ Location	
	▪ Hours of Support	
	Modules/Functionality	
R	10. Land Management and Addressing	
R	11. Permitting and Planning	
R	12. Inspections	
R	13. Code Enforcement	
R	14. Licensing and Certifications	
R	15. Reporting and Query Tools	
	Pricing Summary – On Premises	
	16. Software License: Permitting: 80 Concurrent or 130 Named Users Mobile: 25 Named Users (included in total Named above)	
	17. Implementation: Estimated for installation, training, configuration, integration, etc.	
	18. Annual Maintenance: Indicate percent of software license cost	
	19. Other Costs: 3 rd party software, optional modules, etc.	
	20. Total Cost - Year One	
	21. Total Cost – Ten Years	
	Pricing Summary – Cloud/SaaS	
	22. Annual Subscription: Permitting: 80 Concurrent or 130 Named Users Mobile: 25 Named Users (included in total Named above)	
	23. Implementation: Estimated for installation, training, configuration, integration, etc.	
	24. Annual Maintenance: If excluded from annual subscription cost.	
	25. Other Costs: 3 rd party software, hosting, other modules, etc.	
	26. Total Cost – Year One	
	27. Total Cost – Ten Years	
	Functionality	Response - Rating and Comment
	General	

	Functionality	Response - Rating and Comment
R	28. Configurable role-based dashboards to present reports, tasks, reminders, notifications, etc.	
R	29. Audit trail with user, date, time stamp and before/after history throughout application.	
R	30. User configurable menus and drop downs.	
R	31. User defined fields that are reportable.	
I	32. Define mandatory fields for data entry on screen form, Web form, mobile device, etc.	
R	33. Rules-based workflow including concurrent, sequential, by application type, Permit type, review type, department, etc. with digital signatures.	
R	34. Visible cross-departmental online workflow status queue.	
R	35. Action or date-triggered alerts, flags and notifications.	
N	36. Spell checking of data entry, notes, etc.	
R	37. Prevent creation of duplicate records across all modules and transactions, e.g., Permits, invoices, payments, customers, etc.	
R	38. MS Office Integration with Word and Excel; mail merge, letters, data upload, data export, etc.).	
R	39. Microsoft Outlook integration; email generation and archive, calendaring and scheduling, letter distribution, notifications, etc.	
R	40. Washington State Environmental Policy Act (SEPA) compliance: capture and report on filing date, level of review, contracted studies, notes, documents, etc.	
	Technology	
R	41. VMWare virtual servers if on-premises.	
R	42. MS SQL Server 2016 or higher for on-premises or SaaS. Will consider Oracle for SaaS option.	
R	43. Prefer hosted or cloud deployment of solution. Optionally will consider on premises. Describe if single tenant or multi-tenant.	
R	44. Support digital signatures for workflow approval, plan review, inspections, code violations, etc.	
R	45. Role-level security to menu and screen level. Field-level is Important to hide confidential information.	
R	46. Single sign-on via MS Active Directory or federated ADFS.	
R	47. Multi-factor authentication; currently using DUO.	
R	48. Data encryption in-transit and at-rest.	

	Functionality	Response - Rating and Comment
R	49. List integration technologies, e.g., Web Services, SOA, etc. Preference is for API's.	
	50. Indicate experience with and method proposed for integration or interface with:	
R	<ul style="list-style-type: none"> • Bluebeam - Electronic Plan Review 	
I	<ul style="list-style-type: none"> • GeoCortex Map Viewer - or replace 	
R	<ul style="list-style-type: none"> • Esri ArcGIS Online or Enterprise Portal – ArcGIS Server is on premise served through ArcGIS Online (Cloud-based) or Portal (on premise) GIS 	
R	<ul style="list-style-type: none"> • Oracle ERP Cloud – Financials and Human Resources 	
R	<ul style="list-style-type: none"> • Laserfiche – Enterprise Document Management 	
N	<ul style="list-style-type: none"> • DTS VUEWorks – Asset Management 	
R	51. Scan and attach documents to records throughout all modules in multiple formats, e.g., PDF, JPEG, TIF, DWG, and MS Office (e.g., Word, Excel). Laserfiche is County's enterprise document management solution.	
R	52. Describe portal functionality for internal and external users with ability to define what is presented, e.g., apply for select Permit types, submit plans, payments, schedule inspections, history lookup, complaints, check zoning, status notifications, etc.	
R	53. Describe mobile functionality for internal and external users Permitting, Planning, Inspections, Code Enforcement, etc. Allow for store and forward when working in area with no connectivity.	
R	54. Support mobile devices using MS Surface, iOS or Android. Prefer platform agnostic.	
R	Land Management and Addressing	
R	55. Central property record that captures Assessor Parcel Number (APN), address, type, legal description, block and lot identifiers, status, projects, Permits, GPS coordinates, parent/child relationships, area, boundary, etc.	
R	56. Import parcel, addressing and land use data from external or internal sources, e.g., County Assessor, real estate, CMMS, etc. Identify source, date last updated, etc.	
R	57. Describe addressing functionality within the system.	

	Functionality	Response - Rating and Comment
R	58. Support all addressing components including: <ul style="list-style-type: none"> a. Street name or number b. Street type c. Address modifier d. Street prefix or suffix e. Building, floor, suite f. Store addresses and address ranges g. Lat/long coordinates h. Status 	
R	59. Accept a GPS coordinate for “address” in undeveloped or right-of-way (e.g., utilities, sign location, etc.).	
I	60. Launch GIS query within Permitting system based on parcel, address, GPS coordinate, etc. Ability to view development history, properties that touch critical areas, mitigation, zoning, etc. with ability to save and refresh queries as needed.	
R	61. Store data with a building record that includes usage, number of stories, type of construction, size, occupancy, units, and parking spaces.	
R	Permitting and Planning	
	General	
R	62. Define unlimited Permit, Plan Review, and Land Use types (pre-application and application) that drive task checklists, workflow, fees, reviews, inspections, timelines, attachment requirements, etc.	
R	63. Define rules to allow for submission of a pre-application or application on-line or in person by type.	
R	64. Single view of all activities for a parcel, address, or point. Present in menu or map view.	
R	65. Consume GIS layers and present as map view within Permitting and Planning solution. Ability to toggle on/off map layers.	
R	66. Associate Permit and case records to one or many properties or buildings, including unit or floor.	
R	67. Place an alert on an address, individual, building or parcel that is visible to all users.	
R	68. Define Project number or Parent record number to an activity and associate to other Projects or Permits.	
R	69. Capture multiple contacts with addresses for each Permit or Project e.g., owner, contractor, architect, etc.	
R	70. User defined fees that are effective dated and rules based by type; base fee, base fee plus time in excess of maximum.	

	Functionality	Response - Rating and Comment
R	71. Track review time expired and generate bill for excess beyond standard.	
R	72. Define if Permit fees are collected up front, at issuance or combination based on Permit type.	
R	73. Add, remove, waive, cancel, override, or update fees with reason code.	
R	74. Present updated fees to online customer portal.	
R	75. Mass update of fees by percent with ability to exempt some fee types.	
R	76. Calculate estimated fees-based parameters input; Project, Permit type, user-defined values, etc.	
R	77. Retain fee history and provide ability to research history.	
R	78. Electronic workflow to manage checklist and reviews required by application type. Document results, communications, notes, etc. for each review and attach supporting documentation with date and time stamp.	
I	79. Verify contractor licensing as part of workflow with link out to Washington State site.	
I	80. Schedule and calendar appointments with applicants including: <ul style="list-style-type: none"> a. Set up recurring appointments b. View applicant and Project within appointment screen c. Assign multiple employees to an appointment d. Display appointments on Outlook calendar e. Copy assignments from one employee to another 	
R	83. Track the following for each review: <ul style="list-style-type: none"> a. Assigned by b. Assigned to c. Start date d. Due date e. Complete date f. Status g. Code Version Reviewed Under h. Review notes 	
R	84. Initiate an activity via GIS parcel map, GIS address point, or another GIS or user defined area, e.g., create a Permit application, schedule and inspection, create a code compliance case, etc.	
R	85. Default in Permit fees by type or select from drop down menu.	
R	86. View history of activities to a parcel or address including Permits, fees, payments, corrections, etc.	

	Functionality	Response - Rating and Comment
I	87. Track contract/sublet/outside consultancy, invoices received, and costs for billing purposes.	
R	Planning	
R	88. Multiple Plan review types with rules that govern activities, timeline requirements, workflow, reviews, and fees by type.	
R	89. Overlay multiple GIS layers that present property boundaries, zoning, land use restrictions, development mitigation, etc. while reviewing Planning Applications.	
R	90. Dashboard or Portal view of Plan Review process queue with viability of task assignments, notifications, status, expiration dates, actual to expected timeline, etc.	
R	91. Email notification of pending plan reviews and due dates.	
R	92. Generate and distribute Plan Review notifications to applicants that includes multiple department review comments, code references, corrections, conditions, etc. Multiple forms of distribution for notifications; email, US mail, via Portal, etc.	
R	93. Track review timelines that start and stop based on status of the application process. Generate report that compares actual to required standards.	
R	94. Generate fees based on application type; base fee or base fee plus hourly beyond maximum review hours allowed.	
R	95. Assign timetable requirements in days to activities, record actual time, report on progress, notifications for nearing expiration or expired timelines, etc.	
R	96. Add standard corrections to a review from drop down list library.	
	Land Use	
R	97. Track and apply Land Use conditions that are used as an element for approval of a project/Permit/land use review e.g., status (met, not met), monitoring period, submittal of monitoring reports, submittal requirements for additional Permits or reviews, etc. Track changes as they occur.	
R	98. Enter project-specific Land Use conditions that affect other Permits/cases associated with the project.	
R	99. Distinguish between public project comments vs. in-house notes not to be made publicly available.	
I	100. Transfer required uses and features determined during a Land Use review to a property for on-going tracking e.g., floor area updates, density, parking, etc.	

	Functionality	Response - Rating and Comment
R	101. Trigger rules-based automated messages/emails to reviewers for review at defined times/or events, e.g., Annual follow up, at issuance of a related Permit, etc.	
R	102. Generate Public Notice data for publication and signage; track milestones for Public Notices and notice events (e.g., notice posting period, public hearings, etc.).	
R	103. Interface with GIS to generate mailing lists and print mailing labels for notices/decisions to owner and occupants of parcels within a given buffer or polygon (e.g., 300') of subject parcel.	
R	104. Ability for administrator to set comment period start and end dates.	
R	105. Require public commenters to enter a valid email address or create a user id to post a comment.	
R	106. Associate comments to specific project documents such as electronic plans, design review proposals, or public notices.	
R	107. Generate consolidated review committee comments letter for hearing examiner.	
R	108. Maintain record of hearing dates, type, description and participants.	
R	109. Provide email notification of upcoming appeals to County staff.	
R	110. Applicant or owner online view of status and outcome of appeals.	
R	111. Generate management reports on appeals with information such as case number, review type, proposal, staff decision, etc.	
	Permitting	
R	112. Create new Permit based on existing Permit or Parent record using a copy function.	
R	113. Click on a parcel in GIS and display all activities related to that parcel with drill down.	
R	114. Create a Permit, Code Case, etc. based on a parcel, address, point, line, polygon, etc.	
R	115. Right of Way Permits with sub-types; annual lease Permits, signs, subgrade work, utilities, etc.	
R	116. Accumulate Right of Way Permit fees to a utility; send to financial system for consolidated monthly billing.	
I	117. Track ordinances and codes in effect at milestone events (e.g., issue date of Permit).	

	Functionality	Response - Rating and Comment
R	118. Attach electronic documents, images, plans, etc. to a Permit.	
R	119. Provide alert and block specific Permit release if unresolved issues e.g., no business license, expired license, unpaid fees, etc.	
R	120. Alert or email notification when nearing Permit expiration date (e.g., within 30 days); generate notification to applicant through portal, email, US mail.	
R	121. Define Permit expiration dates by type, e.g., XX days from issue date, reissue date, days since last inspection, etc.	
R	122. Generate mailers, letters, email, etc. based on polygon on map or defined buffer, e.g., within 500 feet.	
R	123. Create Project and associate multiple Permits to the project (e.g., Parent/Child relationships).	
R	124. Event Permitting: manage multi-jurisdictional activities tied to an event, e.g., Saturday Market, including: pre-application, conditions of approval, Permits, approval workflows, status, fees, inspections, related complaints, code violations, street closures, signage, etc.	
R	125. Maintain Permitted and as-built data by building.	
	Cash Receipting	
R	126. Receipt payments for fees generated. Generate General Ledger interface file to post to financial system.	
R	127. Issue required refunds.	
R	128. Pay all fees in a single transaction. Allow partial payments with user control of how payment is applied.	
R	129. Provide automated warnings or holds based on NSF checks or delinquent accounts.	
R	130. User defined receipt to include fees paid, fee balances, date, time, and name.	
I	131. Send alerts or trigger actions based on payment of fees.	
R	132. Net credit balance in the calculation of total amount due.	
I	133. Update fees due based on modifications to fee related data.	
R	Inspections	
R	134. Multiple inspection types defined with sub-categories, hierarchies, checklists, workflow, and fees with ability to override.	
R	135. Define inspection schedule based on staff availability with ability to override; work schedules, holidays, etc.	

	Functionality	Response - Rating and Comment
R	136. Schedule and manage non-building related inspections, e.g., fire, health, water quality, business, etc. that can be quarterly, annual, or bi-annual.	
I	137. Interface with Selectron IVR for initiation of inspection requests and available schedule.	
R	138. Restrict ability to schedule an inspection based on business rules, e.g., Permit or application review status, case type, stop work order, flagged, etc.	
R	139. Online calendar to schedule inspections; display available dates and times by inspection type; allow customer to select from available time slots.	
R	140. Automate assignment of staff to required inspections with ability to override.	
R	141. Reassign inspector workload to one or multiple staff.	
I	142. Prioritize inspections assignment based on type, e.g., standard, emergency, accident, etc. with reason code.	
R	143. Inspection route optimization tools. List available methods supported, e.g., Esri, Google, etc.	
R	144. Issue stop work order in the field; restricts inspections until released.	
R	145. Create additional inspections (referrals, re-inspections) or Permits during a mobile inspection in the field.	
R	146. User defined library of comments, descriptions, and code to select from when resulting inspections and to populate correction notices.	
R	147. Track performance data by type, e.g., number of inspections, review time, inspector, fees billed, etc.	
R	148. Capture unlimited inspector notes and comments for both internal and external inspectors.	
R	149. Define workflow to generate Certificate of Occupancy after final inspection and payment of all fees.	
R	150. Record information from Certificate of Occupancy that includes: Permit number, Address, Building ID, Building Description, Records Filed at Address (a "master" address for the property), Project Description, Total Unit count, and List of all occupancies in the Building (with Occupancy Group, Location or floors that occupancy exists in the Building, Assembly load for the occupancy, Type of Construction, and Type of sprinkler system).	
R	Code Enforcement	
R	151. Unlimited code case types with default checklists, reviews, fees, workflow, etc.	

	Functionality	Response - Rating and Comment
R	152. Submit online complaints with or without anonymity; generate acknowledgement via email or portal.	
R	153. Import citizen complaints or service requests from citizen portal, mobile app, etc.	
R	154. Record inspection of complaint with results and ability to close case, resolve, or convert to a Code case.	
R	155. Assign priority based on complaint type.	
R	156. Record if calls or cases are transferred to outside jurisdictions.	
R	157. Add attachments to a case such as documents, emails, notes, photos, etc.	
R	158. Update Code Case with violations from drop down library list.	
R	159. Create a code case on the fly via mobile device; based on GPS pin on location is Nice to Have.	
I	160. Issue citations in the field; assess fines, collect signatures, print, issue, upload to system, etc.	
R	161. Record Code Case notes, calls, emails, citations issued, etc. on violator and property owner record.	
R	162. Issue and track stop work orders related to a violation; trigger re-inspection of site after determined wait period.	
R	163. Schedule re-inspections and follow up tasks in the field.	
R	164. Enter multiple citations into a single complaint; consolidate multiple violations onto a single case letter.	
R	165. Capture if citation judgment was sent to Accounting for collection and associated date.	
R	166. Generate and print notices for legal action against non-compliant property owners.	
R	167. Require that a resolution code be entered in order to close a complaint.	
I	168. Flag repeat problem properties based on complaints or code cases initiated. View on map layer.	
R	169. Flag case records with safety concerns, e.g., hazardous materials, vicious dog, etc.	
I	170. Generate complaint aging reports for public disclosure requests.	
R	Licensing and Certifications	
R	171. Multiple license and certification types with renewal dates, expiration dates, reviews required, fees, required training, etc.	

	Functionality	Response - Rating and Comment
R	172. Bill and collect certification and license fees with ability to reduce fees for businesses that perform self-inspections.	
R	173. Administer operational and maintenance certifications for septic systems and contractors.	
E	174. Monthly reminders and collection of self-reporting from restaurants and pools.	
R	175. Online self-service for license and certification queries, renewals, payment, and printing.	
E	176. Create certification tests in the system based on questions that need to be answered by the applicant.	
R	Reporting and Query Tools	
R	177. End user reporting tools (e.g., ad hoc, standard reports, 3 rd party) and level of integration across modules with security and drill down.	
R	178. End user query tools that support wild cards search, drop down lists or other methods to create queries (e.g., date range, by parcel ID, owner name, applicant, Permit number, partial address, contractor name, case, project #, etc.) with security and drill down.	
I	179. Generate reports that show unit counts, square footage counts, lot area, etc. for a defined period of time.	
R	180. End user Query and Reporting based upon GIS data area extents and self-defined GIS/Map areas.	

Exhibit D

Key Reports and Shadow Systems

Key:

Department/Function – List department(s) using the Shadow System

Shadow System Name/System – Name of the shadow system and program used

Description and Purpose – Describe the purpose of the Shadow System

Key Data Elements – List key fields of data that are housed in the Shadow System

A. Current Key Reports

No.	Department/Function	System Used	Report Name	Description and Purpose	Key Data Elements
1.	Finance/Auditor	MS Access	CAFR (annual)	Comprehensive Annual Financial Report. Data is generated by an Access database	Total permits, total construction value
2.	Finance/WA State Dept of Ecology	SQL Server	State Mandated Well Fees (annual)	Report well fees taken in during either the calendar or fiscal reporting year for each WRIA and splitting amounts of the fee to stay with the County and to go to Ecology	WRIA (Water Resource Inventory Area), paid fees
3.	Thurston Regional Planning Council (TRPC)	Visual Studio, Access	Issued building permits (annual)	Previous year's issued building permits for regional planning support	Permit data
4.	CPED	SQL Server, Batch Scheduler, Crystal Reports	Metrics (monthly and annual)	Summary permit statistics by month and year to be posted on website for public use	Permit data
5.	Assessor	SQL Server, MS Access	Assessor Extract (weekly)	Permit data used by Assessor for property valuation	Permit data
6.	Unknown	SQL Server (SSIS)	Building Report (monthly)	Unknown	
7.	Fire Districts	SQL Server, Excel	Fire Reports	Report fire-related permit activity to individual fire districts	Permit data, fire district GIS overlay
8.	CPED/Public Works/Tax Districts	SQL Server (SSIS), Excel	Impact Fee Reports (monthly) – Fire, Parks, Traffic, Schools	Report the previous month's collected impact fees and email to the appropriate contact(s) at each taxing district	Permit data, fees collected, tax districts GIS overlay
9.	CPED/NW Building Guild	SQL Server	Innovative Building Report (monthly)	Report on innovative/green projects and email to the NW Building Guild	Permit data
10.	Waste Connections, Inc	SQL Server	Weekly Building Permits (weekly)	Report weekly permit activity and email to Waste Connections	Permit data
11.	Public	SQL Server, Batch Scheduler, Crystal Reports	Web Reports (monthly)	Create PDF reports of permit activity to post on website	Permit data
12.	CPED/Public Works/PHSS/Customers	Batch Scheduler, Crystal Reports	Invoice - Folder	Generate customer invoices for fees due	Permit data, billed fees
13.	CPED/Public Works/PHSS	AMANDA Quick & Simple Reports	Various – 1,013 saved reports	Over 1,000 SQL-based reports for use by end users for a multitude of purposes. Some are business-critical, but many (possibly most) are probably obsolete or forgotten. There's no accounting of which reports actually get used, so there's no feasible way to know which ones are important	Permit data
14.	PHSS/FESS	Munis	Various	Fiscal system	Revenue, expenses, payroll

No.	Department/Function	System Used	Report Name	Description and Purpose	Key Data Elements
15.	PHSS/FESS	AMANDA & Website	Restaurant inspection results	Extracts daily inspection results and posts on department website	Facility, date, inspection outcome
16.	PHSS/FESS	MS Office (Excel, Word, Publisher)	Various	Develop form documents, manipulate query/report data	
17.	PHSS/FESS	Constant Contact		Contact information exported to be used for mass/reoccurring communications	Facility name, contact information
18.	PHSS/Financial	Munis	Various	Fiscal system	Revenue, expenses, payroll
19.	PHSS/Notification for various programs	Constant Contact	Notifications	Contact information exported to be used for mass/reoccurring communications	Facility name, business, operator, contact information
20.	PHSS/Program Activities	MS Office (Excel, Word, Publisher)	Various	Develop form documents, manipulate query/report data	
21.	PHSS / Program Activities	AMANDA	Various Quick & Simple (SQL) Reports	Track productivity, work volumes, QC, Final inspections called in	
22.	PHSS/research	Amanda	Quick & Simple #401	Search the "memo" field from the fees tab/payments	Free type
23.	PHSS/research	Amanda	Quick & Simple # 25	Payment Number Detail	Receipt number
24.	PHSS/research	Amanda/Excel	Quick & Simple # 26	Expired Installers – exported to excel	Status: Active ones
25.	PHSS/research	Amanda	Quick & Simple #27	Account Bills sorted by Bill Number	Invoice number
26.	PHSS/till reconciliation	Amanda	Reports/Environmental Health/GL Deposit Slip EH-Bldg 1	Daily reconciliation of monies received	date
27.	PHSS/EH/O&M	OnlineRME, aka eonsite	55580	Monitored systems with payment but not issued OPC folder ready for review	
28.	PHSS/EH/O&M		55636	Lists all HH or HA Monitored systems and their status	
29.	PHSS/EH/O&M	OnlineRME, aka eonsite	593	EOnsite Sample reports Log ALL Lists all OPC with sample results, look for exceedances	
30.	PHSS/EH/O&M	AMANDA	914	OM Sewage Complaints and Violations in HPA	

No.	Department/Function	System Used	Report Name	Description and Purpose	Key Data Elements
				Lists all CA and CZ folders: Cleared, Cancelled, Intake, In review	
31.	PHSS/EH/O&M	OnlineRME, aka eonsite	591	HH Monitored Systems Recent Inspections Report to check on Monitored system RME deficiency reports"	
32.	PHSS/EH/O&M	AMANDA	1904	High Risk NonConforming Lists all high risk systems in Non-Conforming status	
33.	PHSS/EH/O&M	AMANDA	1921	All Open CA and CZ folders w/ subtype 'Sewage' or 'Sewage-Deficient Report' Lists all open CA and CZ folders which have Sewage	
34.	PHSS/EH/O&M	AMANDA	5052	Active HH with Active CA Sewer Lists all HH folders with an active complaint folder	
35.	PHSS/EH/O&M	AMANDA	93	Lists all the names and addresses of owners with ATU. Possible use: mailing list	
36.	PHSS/EH/O&M	AMANDA	207	O&M - Number of Glendon Systems Counts number of total systems	
37.	PHSS/EH/O&M	GeoData	212	Sewer Parcels Lists all parcels in the Sewer Utility Area according to GeoData	
38.	PHSS/EH/O&M	AMANDA	330	Septic in geographic location mailing List Mailing list for HA properties	
39.	PHSS/EH/O&M	AMANDA	400	Review the work completed by an individual staff	
40.	PHSS/EH/O&M	AMANDA	569	Distinct parcels attached to Required or Monitored HA folders Lists all the parcels for HA OPC	
41.	PHSS/EH/O&M	AMANDA	573	O&M HH Per Parcel Detail Lists all the HWPAs parcels and counts how many septic systems are in each parcel	
42.	PHSS/EH/O&M	AMANDA	5004	Distinct matching active parcel with count active HH	

No.	Department/Function	System Used	Report Name	Description and Purpose	Key Data Elements
				lists all the parcels and counts how many System on each parcel	
43.	PHSS/EH/O&M	AMANDA	5005	Active Henderson parcel with No HH lists all the parcels without a System	
44.	PHSS/EH/O&M	AMANDA	5006	Distinct Active Henderson Parcel with 1 active HH Lists all HH folders with one OSS	
45.	PHSS/EH/O&M	AMANDA	5007	distinct active Henderson parcel with > 1 active HH Lists all HH folders with more than one OSS	
46.	PHSS/EH/O&M	AMANDA	5019	Henderson Tax Roll - multiple prop folders Lists Henderson folders with multiple properties attached	
47.	PHSS/EH/O&M	AMANDA	5021	Henderson Tax Roll - All Data Lists all Henderson parcels with OSS	
48.	PHSS/EH/O&M	AMANDA	8000	CMS as opc recipient on HA/HH with work = required Lists all OPC folders with the CMS set as OPC recipient	
49.	PHSS/EH/O&M	AMANDA	1201	Temp - past due HH Lists HH OPC which came due on the day the report is ran	
50.	PHSS/EH/O&M	AMANDA	RME	Properties w/out ID Shows all RME properties which are active and not connected to a county Jurisdiction ID	
51.	PHSS/EH/O&M	AMANDA	238	HA missing FolderInfo 1212 Lists all HA properties missing the info field Treatment Stnd (1212)	
52.	PHSS/EH/O&M	AMANDA	245	HD with more than 1 open HA Review cases for duplicate folders	
53.	PHSS/EH/O&M	AMANDA	576	Active HH folders where HD parent has Repair workcode	
54.	PHSS/EH/O&M	AMANDA	Ad-hoc	HA/HH; OPC required; status: Intake	

No.	Department/Function	System Used	Report Name	Description and Purpose	Key Data Elements
				Look for OPC's stuck at 'Intake'	
55.	PHSS/EH/O&M	AMANDA	Ad-hoc	HA/HH; OPC required; Folder initiated <6-months ago; status: In review Look for OPC's stuck at 'In review'	
56.	PHSS/EH/O&M	Assessor's database	5050	Checking Sewer Parcels with Active OPC Lists HH/HA folders which have Sewer listed in Assessors	
57.	PHSS/EH/O&M	AMANDA	48	HD Folders with Info 4008 = yes and no feecode 10006 Correct folders. Report shows HD folders which have OPC required but are not assessed a fee. Review info tab to ensure 'OPC required' matches the OPC requirement.	
58.	PHSS/EH/O&M	AMANDA	51	HA Errors - cannot be auto renewed Correct folders	
59.	PHSS/EH/O&M	AMANDA	53	OPCs 'On Hold' Review if Hold is still applicable	
60.	PHSS/EH/O&M	AMANDA	65	HH Cannot be renewed due to errors Correct folders info so OPC can renew	
61.	PHSS/EH/O&M	AMANDA	66	HH Errors Info Only Correct folders info fields	
62.	PHSS/EH/O&M	AMANDA	67	HA Errors Info Only Correct folders info fields	
63.	PHSS/EH/O&M	AMANDA	230	All HA NOT voluntary status other than finished or canceled Lists HA OPC with status: In Review, Violation, On Hold, Issued. Use to check for OPC's which fell through the cracks	
64.	PHSS/EH/O&M	AMANDA	232	HA 90 day All HA folders which received a 90-day notice. Check case to see if OPC can	

No.	Department/Function	System Used	Report Name	Description and Purpose	Key Data Elements
				be issued. Ensure OPC have not fallen through the cracks.	
65.	PHSS/EH/O&M	AMANDA	54	Required Renewal Distribution Lists number of systems renewed. List organized by year	
66.	PHSS/EH/O&M	AMANDA	55	Required Renewal Detail Lists all HH systems with renewal due between specific dates	
67.	PHSS/EH/O&M	AMANDA	57	Voluntary Renewal Detail Lists all HA systems with renewal due between specific dates	
68.	PHSS/EH/O&M	AMANDA	213	HA current NOT voluntary Lists the current HA OPC's	
69.	PHSS/EH/O&M	AMANDA	216	Health - HA monitor Lists the current HA & HH monitored OPC's (despite name)	
70.	PHSS/EH/O&M	AMANDA	217	Health - HA disinfection chlorine or UV Lists the current HA OPC's with disinfection	
71.	PHSS/EH/O&M	O&M Access database	218	Homeowner Certified for Inspection Counts number of total self-certified people	
72.	PHSS/EH/O&M	AMANDA	219	O&M HH Henderson active ALL Henderson MRA OPCs	
73.	PHSS/EH/O&M	AMANDA	220	how many required/monitored renewals sent Number of OPC sent in a period of time	
74.	PHSS/EH/O&M	AMANDA	221	how many required renewals completed Number of OPC sent in a period of time	
75.	PHSS/EH/O&M	AMANDA	222	how many 60-day notices sent Number of notices sent in a period of time	
76.	PHSS/EH/O&M	AMANDA	223	how many 90-day notices sent Number of notices sent in a period of time	

No.	Department/Function	System Used	Report Name	Description and Purpose	Key Data Elements
77.	PHSS/EH/O&M	AMANDA	224	how many CS violation folders created Number of CS folders started in a period of time	
78.	PHSS/EH/O&M	AMANDA	225	how many new req/mon HAs as a result of as-builts rec'd Number of OPC started in a period of time	
79.	PHSS/EH/O&M	AMANDA	226	How many active parcels with an HD folder Counts number of parcels with an active HD	
80.	PHSS/EH/O&M	AMANDA	227	How many CS have had status changed to cleared	
81.	PHSS/EH/O&M	AMANDA	552	OPC NonConforming - date status created	
82.	PHSS/EH/O&M	AMANDA	553	how many HH renewals sent Lists HH OPC with renewals sent	
83.	PHSS/EH/O&M	AMANDA	554	how many HH renewals completed Lists how many HH renewals completed	
84.	PHSS/EH/O&M	AMANDA	555	how many HH 60-day notices sent Lists HH OPC with notices sent	
85.	PHSS/EH/O&M	AMANDA	556	how many HH 90-day notices sent Lists HH OPC with notices sent	
86.	PHSS/EH/O&M	AMANDA	572	O&M Repairs Result of HH renewal Lists those repairs that came in after the inspection notice has been sent	
87.	PHSS/EH/O&M	AMANDA	908	OM Checklist Items Detail Lists the results of when the checklist is completed in the Process Tab	
88.	PHSS/EH/O&M	AMANDA	909	OM Checklist Items Summary Counts the results of each type of repair on the checklist	
89.	PHSS/EH/O&M	AMANDA	910	OM Info 8005 Site Visited detail	

No.	Department/Function	System Used	Report Name	Description and Purpose	Key Data Elements
				Lists properties where QA/QC visits field completed and lists who completed	
90.	PHSS/EH/O&M	AMANDA	911	OM Info 8005 Site Visited summary Counts how many QA/QC visits in a date range	
91.	PHSS/EH/O&M	AMANDA	949	HH community systems Lists all folders identified as a Community System	
92.	PHSS/EH/O&M	AMANDA	991	HAs with Require or Monitor worktype Lists all HA parcels which are Required or Monitored worktype	
93.	PHSS/EH/O&M	AMANDA	992	OM Community systems used to edit folders for accuracy	
94.	PHSS/EH/O&M	OnlineRME, aka eonsite	994	Lists all HH folders with inspection received	
95.	PHSS/EH/O&M	OnlineRME, aka eonsite	995	Lists all HA folders with inspection received	
96.	PHSS/EH/O&M	AMANDA	1905	Lists all monitored systems	
97.	PHSS/EH/O&M	AMANDA	4999	Cleared CS Lists all cleared CA folders (attached to closed OPC violation folders) in a date range	
98.	PHSS/EH/O&M	AMANDA	5051	Folders still at violation went to violation during period given Lists all properties which went into violation within a date range	
99.	PHSS/EH/O&M	AMANDA	8888	Lists all HH properties in violation	
100	PHSS/EH/O&M	GeoData	712	Lists Repair HD started within the geographic range for Woodland Creek	
101	PHSS/EH/O&M	OnlineRME, aka eonsite	583	EOnsite Multiple Pump Reports per Folder Lists HH/HA with more than one pump report. Possibly to look for "pump for relief" situations?	
102	PHSS/EH/O&M	OnlineRME, aka eonsite	594	EOnsite Sample reports property comments	

No.	Department/Function	System Used	Report Name	Description and Purpose	Key Data Elements
				Lists the RSN number properties which have Eonsite reports submitted with comments - reports should be in the OPC folder and not Property. Move reports.	
103	PHSS/EH/O&M	OnlineRME, aka eonsite	595	EOnsite Sample reports could not load to property EOnsite inspection Reports could not load to property. Property was sent to eOnsite, now no longer valid, so sent back to AMANDA	
104	PHSS/EH/O&M	AMANDA	923	HH Violation but cannot be system generated Correct folder based on error description	
105	PHSS/EH/O&M	AMANDA	924	HH Violations to be system generated Correct folders	
106	PHSS/EH/O&M	AMANDA	925	In Violation with pending owner change Lists Violation HH/HA folders with ownership changes	
107	PHSS/EH/O&M	AMANDA	927	Violation Reminders that cannot process (ha and hh)	
108	PHSS/EH/O&M	AMANDA	930	HH due for nonCompliance letter but can't autosend Fix report based on error description	
109	PHSS/EH/O&M	AMANDA	932	HA due for nonCompliance letter but can't autosend Fix report based on error description	
110	PHSS/EH/O&M	AMANDA	934	HA Violation but cannot be system generated Fix report based on error description	
111	PHSS/EH/O&M	AMANDA	935	HA Violations to be system generated Fix report based on error description	
112	PHSS/EH/O&M	AMANDA	562	HH HA Monitor Lists data for download to Access for quarterly update for Monitored and Required OPC	

No.	Department/Function	System Used	Report Name	Description and Purpose	Key Data Elements
113	PHSS/EH/O&M	AMANDA	51	HA errors - cannot be auto renewed HA folder has errors and OPC can't be auto-issued	
114	PHSS/EH/O&M	AMANDA	65	HH errors - cannot be auto renewed	
115	PHSS/EH/O&M	AMANDA	574	Lists HA/HH OPC folders which will not renew due to attempt result	
116	PHSS/EH/O&M	OnlineRME, aka eonsite	582	EOnsite Pump Reports could not load to property. Property was sent to eOnsite, now no longer valid, so sent back to AMANDA. reports should be in the OPC folder and not Property. Move reports.	
117	PHSS/EH/O&M	OnlineRME, aka eonsite	588	EOnsite Multiple Inspection Reports per Folder Lists HH/HA with more than one inspection report. Possibly to look for "repair" situations?	
118	PHSS/EH/O&M	OnlineRME, aka eonsite	589	Lists EOnsite reports on HD folders. reports should be in the OPC folder and not HD. Move reports.	
119	PHSS/EH/O&M	AMANDA	599	Lists all HD without children. Check if OPC folders are missing, or if the HD is a duplicate.	
120	PHSS/EH/O&M	AMANDA	906	OM Property missing risk level info 8002 Lists HH folders with a blank info field for risk level	
121	PHSS/EH/O&M	AMANDA	5010	Lists HD with child at intake or in review	
122	PHSS/EH/O&M	OnlineRME, aka eonsite	RME	Systems without Jurisdiction ID Correct linking between AMANDA and RME	
123	PHSS/EH/O&M	AMANDA	570	O&M Expired repair permits with child HA/HH on hold same prop Lists properties where an OPC exists but a repair permit has expired	

No.	Department/Function	System Used	Report Name	Description and Purpose	Key Data Elements
124	PHSS/EH/O&M	AMANDA	920	OM HA RTI BUT cannot Print Cert Correct folders whose OPC RTI won't issue	
125	PHSS/EH/O&M	AMANDA	1905	Lists all monitored system and shows status	
126	PHSS/EH/O&M	AMANDA	1906	Lists HA folders with a pump report, Doesn't list Issued folders.	
127	PHSS/EH/O&M	AMANDA	100002	OPC violation folder closed but CS open Lists all open CS folders without an open parent violation folder	
128	PHSS/EH/O&M	OnlineRME, aka eonsite	926	In Violation has pump report or Eonsite rept and due < date range OPC folder ready for review Verify this report has the name number as on the staff's OPC review lists	
129	PHSS/EH/O&M	OnlineRME, aka eonsite	587	EOnsite inspection Reports could not load to property. Property was sent to eOnsite, now no longer valid, so sent back to AMANDA	
130	PHSS/EH/O&M	AMANDA	50	OSS conditions Lists all possible Info Tab "system conditions" which print on the back of the OPC	
131	PHSS/EH/O&M	AMANDA	235	HA Construction Required Treatment Standard Detail Details all the septic systems where a Treatment Standard is required	
132	PHSS/EH/O&M	AMANDA	236	HA Construction Required Treatment Standard Summary All Number of the new/constructed septic systems where a Treatment Standard is required listed by year	
133	PHSS/EH/O&M	AMANDA	237	HA Construction Required Treatment Standard Summary 1,2 Only Number of the new/constructed septic	

No.	Department/Function	System Used	Report Name	Description and Purpose	Key Data Elements
				systems where a Treatment Standard is required listed by year	
134	PHSS/EH/O&M	AMANDA	331	Health - HA and HH with no conditions Correct and update folders info tab	
135	PHSS/EH/O&M	AMANDA	900	OM HA with no risk assigned Lists all HH/HA folders with a blank info field for risk level	
136	PHSS/EH/O&M	AMANDA	901	OM HH High Risk with no 'next dye trace year' Lists high risk parcels without a next dye test year date	
137	PHSS/EH/O&M	AMANDA	902	OM HH high risk due but errors Lists high risk OPC folders with errors	
138	PHSS/EH/O&M	AMANDA	905	OM HH property risk <> folder risk Lists properties where the OPC risk level is different than the property risk level	
139	PHSS/EH/O&M	AMANDA	950	OM HH and Parcel risk level and folder status Lists all HH properties and their risk level. Ensure risk level is correct	
140	PHSS/EH/O&M	AMANDA	1500	Proof HWPAs for Dye Test Years Lists next DT date of High Risk systems	
141	PHSS/EH/O&M	AMANDA	5003	Henderson properties inactive Lists all the inactive property by RSN number	
142	PHSS/EH/O&M	Treasurer's database	5023	Henderson Tax Roll - correct Property Risk Henderson Properties without a risk level set	
143	PHSS/EH/O&M	Treasurer's database	5024	Henderson Tax Roll - Fees lists all Henderson parcels and any Fees owed	
144	PHSS/EH/O&M	Treasurer's database	5025	Nisqually Tax Roll - correct Property Risk Nisqually Properties without a risk level set	
145	PHSS/EH/O&M	AMANDA	59	HD ATU	

No.	Department/Function	System Used	Report Name	Description and Purpose	Key Data Elements
				Ensure systems with ATU have correct OPC settings	
146	PHSS/EH/O&M	AMANDA	68	HA or HH folder with open violation reminder process Ensure reminders are being sent Check to see if OPC can be issued/Cancelled/Held	
147	PHSS/EH/O&M	AMANDA	571	O&M Violation Reminder Lists all parcels/folders with an open violation reminder process.	
148	PHSS/EH/O&M	AMANDA	561	Henderson Repairs Lists all HD folders with Finished status within a date range where Info code 107 = yes (OPC Required)	
149	PHSS/EH/O&M	Access, Adobe	928	HH Violation Reminders to be processed automatically	
150	PHSS/EH/O&M	Access, Adobe	929	HH Ready for automatic NonCompliance Notice	
151	PHSS/EH/O&M	Access, Adobe	931	HA Ready for automatic NonCompliance Notice	
152	PHSS/EH/O&M	AMANDA	568	HH construction folders with in date variable Used to generate annual 'new' systems for HWP program	
153	PHSS/EH/O&M	Treasurer's database	5028	Nisqually Tax Roll - distinct parcel/count opc Counts how many OPC per parcel in Nisqually	
154	PHSS/EH/O&M	Treasurer's database	5029	Nisqually Tax Roll - distinct parcel Lists all Nisqually parcels	
155	PHSS/EH/O&M	Treasurer's database	5030	Nisqually Tax Roll - Fees Detail Lists details for all Nisqually parcels	
156	PHSS/EH/O&M	OnlineRME, aka eonsite, Crystal Reports, Excel	55576	OPC status of Food Establishments and Schools with Food on OSS	
157	PHSS/EH/O&M	AMANDA	55579	HA unresolved with attempts make by staff	
158	PHSS/EH/O&M	AMANDA	55580	HA payment made	
159	PHSS/EH/O&M	AMANDA	274	CMS and when they paid - pmt > date	

No.	Department/Function	System Used	Report Name	Description and Purpose	Key Data Elements
160	PHSS/EH/O&M	AMANDA	275	Pumper Trucks	
161	PHSS/EH/O&M	AMANDA	455	Active Pumpers	
162	PHSS/EH/O&M	AMANDA	456	Active Installers	
163	PHSS/EH/O&M	AMANDA	457	Active monitoring specialists	
164	PHSS/EH/O&M	Access	44	Pumper Renewal Fees Not Paid	
165	PHSS/EH/O&M	Access	45	CMS Renewal Fees Not Paid	
166	PHSS/EH/O&M	Access, OnlineRME, Excel, Munis	399	Track Folders and Revenue for EH Onsite, Land Use, and Drinking Water Program Activities within A-6	
167	PHSS/EH/O&M	OnlineRME	55653	Pump Reports Received from onlineRME in given date range by company	

B. Shadow Systems List

No.	Department/Function	Shadow System Name	Description and Purpose	Key Data Elements
1.	CPED/Assessor – AMANDA/Ascend Sync	MS Access, SQL Server, Ascend, Visual Studio	Synchronize data between the Address database (MS Access), AMANDA, and the Assessor's parcel database (Ascend). The process is partly automated and requires steps in Visual Studio, Access, and SQL Server. Primary purpose is to align property information in AMANDA with address information from Address database and parcel information (parcel number, address, parcel owner, parcel status, etc) from Ascend	Situs address, lot number, legal description, parcel number, parcel owner (Ascend), parcel address, parcel status, property owner (AMANDA)
2.	CPED/PHSS/Public Works – Move Documents to Attachments	Laserfiche, custom application with Adobe Acrobat integration	Move MS Word merge documents generated in AMANDA (e.g. letters to applicants) from the Documents tab to the Attachments tab after converting them to PDF so that they can be uploaded to Laserfiche (retained for public records)	MS Word merge documents
3.	EH/Septic Professionals - OnlineRME	OnlineRME	Track septic maintenance information ***This is mostly a placeholder for Joel Plewa, who maintains this process and can provide more info about purpose and data elements	
4.	CPED/PHSS/Public Works – Munis Data Entry	Humans	Enter daily transaction data from AMANDA into finance system. Custom report of transaction totals (PDF) is printed out and then manually entered into Munis	Payment amounts, payment types, fee codes, charge codes

No.	Department/Function	Shadow System Name	Description and Purpose	Key Data Elements
5.	All – GIS “integration”	ArcGIS, SQL Server	Import GIS overlay information for properties in AMANDA. Currently done by tabular export based on parcel number/boundary that requires extensive pre- and post-processing in ArcGIS and SQL Server	Parcel number, parcel boundary, numerous GIS layers
6.	All – Payment Processing	Point & Pay	Not a shadow system per se, but an external system used to process credit card (and other?) payments. I believe that payments are still manually entered into AMANDA	
7.	CPED – IVR	Selectron	IVR system is used for inspection scheduling, inspection result posting and reporting, permit status	Inspection types, inspectors (internal and external), inspector working days, available inspection times, allowed inspections, etc
8.	All – Addressing	MS Access (Address database)	Source database for new address creation	Property and project info (subdivision, lot, plat maps, etc), valid street names, street numbers
9.	All – Email Notifications	SQL Server	Automated email notifications to staff, customers, and external agencies are generated and processed via SQL Server agent jobs and stored procedures	
10.	CPED – Inspector Work Lists	Crystal Reports, SQL Server, Logicity (https://www.logicitysuite.com)	Logicity is used to generate and email Crystal Reports files (PDF) to inspectors with daily work assignments	

No.	Department/Function	Shadow System Name	Description and Purpose	Key Data Elements
11.	All/Public – Permit Status Web Lookup	SSIS, MS Access	Permit status information is made available on the web site for customers and the public. This is accomplished via an SSIS package that generates an Access file and sends via FTP to the web server. The contents of the Access file are dynamically read/displayed by the web site	
12.	CPED/Public Works/PHSS	SQL Server, Batch Scheduler, Crystal Reposts, AMANDA special folder, Humans	A special folder exists in AMANDA where a user needs to go in every month within a specific window of time to generate bills and past due bills for customers. The user adds an attempt on a process, which triggers a SQL Server procedure, which creates a Batch Scheduler job, which runs a Crystal Report to generate a PDF document of all of the bills. This must be printed and sorted and then mailed out to customers. The process also automatically moves all bills into the next 30-day past due bucket (30, 60, 90, collections), so if the user triggers the process at the wrong time, then bills get into the wrong past due bucket	
13.	CPED/Public Works	SQL Server, Selectron, AMANDA special folder, Humans	A special folder exists in AMANDA where a user needs to manually enter available inspections hours for each individual day that differs from the default setting	

No.	Department/Function	Shadow System Name	Description and Purpose	Key Data Elements
14.	PHSS/FESS	MS Access	Food Worker database - Food Worker database, tracks cert manager cards, billings	Billings, names, addresses, charges, expiration dates
15.	PHSS/FESS	GeoData	Jurisdiction's GIS solution - Geospatial data integration of permit information	Parcel #, address, permit data
16.	PHSS/FESS	MS Access	Archive Database - Tracks archived documents and allows to recall as needed	Facility/folder name, date archived, location, recall status
17.	PHSS/FESS	Web app	WA Food Worker training/testing system - Allows the public to train and test for food worker cards. Staff can access data as well as input/modify/update, including manually adding data from in-person training	Name, status, payment info [currently not connected to existing permitting system]
18.	PHSS / Land Use Archives	Access	Finding and requesting files pulled from records center	Project number, requested by, date, box #, ascension #, project #, applicant name, recall status
19.	PHSS / Septic Professionals	Access/pdf	Professionals lists, certification, renewal notices, data extraction, letters – exports to PDF (DIPS SQL Server)	Professional contact information, certification details, associated business, fees, etc.
20.	PHSS/ Water Lab	Access	Lab Database, recreated annually, reports export to PDF Data tracking, account billing, data extraction	Sample details (bacteria, nitrate and surface water), sample results, account information, customer

No.	Department/Function	Shadow System Name	Description and Purpose	Key Data Elements
				information, fees
21.	PHSS/Drinking Water	Access	Tracking construction and decommissioning of wells. Services contracted with Department of Ecology. Quarterly notices, inspections, and decommissioning reports	Drilling companies, drillers, enforcement, inspection details, tax parcels, notices, well logs
22.	PHSS/Program Activities	GeoData	Jurisdiction's GIS solution - Geospatial data integration of permit information	Parcel #, address, permit data
23.	PHSS/Program Activities	Auditor's Recorded Document Search Site	Search for recorded documents relevant to the property and project review	AF Number, Tax Parcel Number
24.	PHSS/Drinking Water	WA DOH Sentry Water System Database	Review public water system permits, sampling, contact information and other details.	Permit Status and Water Facilities Inventory Forms
25.	PHSS/Septic program Activities	OnlineRME, aka eonsite www.onlinerme.com	Website integrates with AMANDA to upload and download information regarding properties and septic system details and services	Septic components – inspections Property information Septic system details
26.	PHSS/EH/O&M Program	OnlineRME, aka eonsite www.onlinerme.com	3 rd party system used by OSS professionals and public to access septic records from county and to submit pumping and inspection reports.	Check with Joel Plewa
27.	PHSS/EH/O&M Program	Assessor's database	Property records, ownership, etc	
28.	PHSS/EH/O&M Program	Treasurer's database	Place O&M rates & charges on property tax statement	
29.	PHSS/EH/O&M Program	GeoData	assign types of activities required based on geographic location	

No.	Department/Function	Shadow System Name	Description and Purpose	Key Data Elements
30.	PHSS/EH/O&M Program	Access database	Certified self-inspectors, & workshop attendees database	
31.	PHSS/EH/O&M Program	Constant Contact	email system used to notify participants of required activities to become certified to self-inspect their septic system.	
32.	PHSS/EH/O&M Program	Adobe Acrobat	All OPC Renewals are converted into PDF files and saved separately from AMANDA	
33.	PHSS/EH/O&M Program	Microsoft Excel	This list of reports can be saved as Excel Spreadsheets for further review and follow-up in AMANDA.	

Exhibit E County Contract

PROFESSIONAL SERVICES CONTRACT

THURSTON COUNTY/_____.

THIS CONTRACT is entered into in duplicate originals between **THURSTON COUNTY**, a municipal corporation, with its principal offices at 2000 Lakeridge Drive S.W., Olympia, Washington 98502, hereinafter "**COUNTY**," and _____, with its principal offices at _____, hereinafter "**CONTRACTOR**."

In consideration of the mutual benefits and covenants contained herein, the parties agree as follows:

1. DURATION OF CONTRACT

The term of this Contract shall begin on the date last executed below, and shall terminate on _____.

2. SERVICES PROVIDED BY THE CONTRACTOR

The CONTRACTOR represents that it is qualified and possesses the necessary expertise, knowledge, training, and skills, and has the necessary licenses and/or certification to perform the services set forth in this Contract.

The CONTRACTOR shall perform the following services:

a. A detailed description of the services to be performed by the CONTRACTOR is set forth in Exhibit A, which is attached hereto and incorporated herein by reference.

b. The CONTRACTOR agrees to provide its own labor and materials. Unless otherwise provided for in the Contract, no material, labor, or facilities will be furnished by the COUNTY.

The CONTRACTOR represents that it is qualified and possesses the necessary expertise, knowledge, training, and skills, and has the necessary licenses and/or certifications to perform the services set forth in this Contract.

The CONTRACTOR shall provide a management information system to perform all functions and business processes identified in the [RFP NAME] dated [RFP DATE] and attached as Exhibit A of this document. Deliverables of this contract include:

- All information system software components and user licenses
- Professional services system configuration and implementation
- Interface development to existing Thurston County information systems

- Training related to the acquired information system

The CONTRACTOR shall ensure that the delivered information system meets all requirements identified by the COUNTY in the COUNTY 'S Request for Proposals (RFP) and that the CONTRACTOR'S information system was identified as FULLY SUPPORTING, by the CONTRACTOR, in the CONTRACTOR'S Proposal and response to the COUNTY'S RFP. The COUNTY'S RFP is attached to and incorporated herein as Exhibit A, and the CONTRACTOR'S proposal and response to the COUNTY 'S RFP is attached to and incorporated herein as Exhibit B.

c. The CONTRACTOR shall perform according to standard industry practice of the work specified by this Contract.

d. The CONTRACTOR shall complete its work in a timely manner and in accordance with the schedule agreed to by the parties.

e. The CONTRACTOR shall, from time to time, during the progress of the work, confer with the COUNTY. At the COUNTY'S request, the CONTRACTOR shall prepare and present status reports on its work.

3. SERVICES PROVIDED BY THE COUNTY

In order to assist the CONTRACTOR in fulfilling its duties under this Contract, the COUNTY shall provide the following:

a. Relevant information as exists to assist the CONTRACTOR with the performance of the CONTRACTOR'S services.

b. Coordination with other County Departments or other Consultants as necessary for the performance of the CONTRACTOR'S services.

c. Services documents, or other information identified in Exhibit A.

4. CONTRACT REPRESENTATIVES

Each party to this Contract shall have a contract representative. Each party may change its representative upon providing written notice to the other party. The parties' representatives are as follows:

a. For CONTRACTOR:

Name of Representative: _____

Title: _____

Mailing Address: _____

City, State and Zip Code: _____

Telephone Number: _____

Fax Number: _____

E-mail Address: _____

b. For COUNTY:

Name of Representative: _____

Title: _____

Mailing Address: _____

City, State and Zip Code: _____

Telephone Number: _____

Fax Number: _____

E-mail Address: _____

5. COMPENSATION

a. For the services performed hereunder, the CONTRACTOR shall be paid based upon mutually agreed rates contained in Exhibit B, which is attached hereto and incorporated herein by reference. The maximum total amount payable by the COUNTY to the CONTRACTOR under this Contract shall not exceed \$_____.

b. No payment shall be made for any work performed by the CONTRACTOR, except for work identified and set forth in this Contract or supporting exhibits or attachments incorporated by reference into this Contract.

c. The CONTRACTOR may, in accordance with Exhibit B, submit invoices to the COUNTY not more often than once per month during the progress of the work for partial payment of work completed to date. Invoices shall cover the time CONTRACTOR performed work for the COUNTY during the billing period. The COUNTY shall pay the CONTRACTOR for services rendered in the month following the actual delivery of the work and will remit payment within thirty (30) days from the date of receipt of billing.

d. The CONTRACTOR shall not be paid for services rendered under the CONTRACT unless and until they have been performed to the satisfaction of the COUNTY.

e. In the event the CONTRACTOR has failed to perform any substantial obligation to be performed by the CONTRACTOR under this Contract and such failure has not been cured within ten (10) days following notice from the COUNTY, then the COUNTY may, in its sole discretion, upon written notice to the CONTRACTOR, withhold any and all monies due and payable to the CONTRACTOR, without penalty until such failure to perform is cured or otherwise adjudicated. "Substantial" for purposes of this Contract means faithfully fulfilling the terms of the contract with variances only for technical or minor omissions or defects.

f. Unless otherwise provided for in this Contract or any exhibits or attachments hereto, the CONTRACTOR will not be paid for any billings or invoices presented for payment prior to the execution of the Contract or after its termination.

6. AMENDMENTS AND CHANGES IN WORK

a. In the event of any errors or omissions by the CONTRACTOR in the performance of any work

required under this Contract, the CONTRACTOR shall make any and all necessary corrections without additional compensation. All work submitted by the CONTRACTOR shall be certified by the CONTRACTOR and checked for errors and omissions. The CONTRACTOR shall be responsible for the accuracy of the work, even if the work is accepted by the COUNTY.

b. No amendment, modification or renewal shall be made to this Contract unless set forth in a written Contract Amendment, signed by both parties and attached to this Contract. Work under a Contract Amendment shall not proceed until the Contract Amendment is duly executed by the COUNTY.

7. HOLD HARMLESS AND INDEMNIFICATION

a. The CONTRACTOR shall hold harmless, indemnify and defend the COUNTY, its officers, officials, employees and agents, from and against any and all claims, actions, suits, liability, losses, expenses, damages, and judgments of any nature whatsoever, including costs and attorneys fees in defense thereof, for injury, sickness, disability or death to persons or damage to property or business, caused by or arising out of the CONTRACTOR'S acts, errors or omissions or the acts, errors or omissions of its employees, agents, subcontractors or anyone for whose acts any of them may be liable, in the performance of this Contract. Claims shall include, but not be limited to, assertions that information supplied or used by the CONTRACTOR or subcontractor infringes any patent, copyright, trademark, trade name, or otherwise results in an unfair trade practice. PROVIDED HOWEVER, that the CONTRACTOR'S obligations hereunder shall not extend to injury, sickness, death or damage caused by or arising out of the sole negligence of the COUNTY, its officers, officials, employees or agents. PROVIDED FURTHER, that in the event of the concurrent negligence of the parties, the CONTRACTOR'S obligations hereunder shall apply only to the percentage of fault attributable to the CONTRACTOR, its employees, agents or subcontractors.

b. In any and all claims against the COUNTY, its officers, officials, employees and agents by any employee of the CONTRACTOR, subcontractor, anyone directly or indirectly employed by any of them, or anyone for whose acts any of them may be liable, the indemnification obligation under this Section shall not be limited in any way by any limitation on the amount or type of damages, compensation, or benefits payable by or for the CONTRACTOR or subcontractor under Worker's Compensation acts, disability benefits acts, or other employee benefits acts, it being clearly agreed and understood by the parties hereto that the CONTRACTOR expressly waives any immunity the CONTRACTOR might have had under Title 51 RCW. By executing the Contract, the CONTRACTOR acknowledges that the foregoing waiver has been mutually negotiated by the parties and that the provisions of this Section shall be incorporated, as relevant, into any contract the CONTRACTOR makes with any subcontractor or agent performing work hereunder.

c. The CONTRACTOR'S obligations hereunder shall include, but are not limited to, investigating, adjusting and defending all claims alleging loss from action, error or omission, or breach of any common law, statutory or other delegated duty by the CONTRACTOR, the CONTRACTOR'S employees, agents or subcontractors.

8. INSURANCE

a. **Professional Legal Liability:** The CONTRACTOR, if he is a licensed professional, shall maintain Professional Legal Liability or Professional Errors and Omissions coverage appropriate to the CONTRACTOR'S profession and shall be written subject to limits of not less than \$1,000,000 per loss.

The coverage shall apply to liability for a professional error, act or omission arising out of the scope of the CONTRACTOR'S services defined in this Contract. Coverage shall not exclude bodily injury or property

damage. Coverage shall not exclude hazards related to the work rendered as part of the Contract or within the scope of the CONTRACTOR'S services as defined by this Contract including testing, monitoring, measuring operations, or laboratory analysis where such services are rendered as part of the Contract.

b. Workers' Compensation (Industrial Insurance): The CONTRACTOR shall maintain workers' compensation insurance as required by Title 51 RCW, and shall provide evidence of coverage to the Thurston County Risk Management Division.

The CONTRACTOR shall send to Thurston County at the end of each quarter written verification that premium has been paid to the Washington State Department of Labor and Industries for Industrial Insurance coverage. Alternatively, the CONTRACTOR shall provide certification of approval by the Washington State Department of Labor and Industries if self-insured for Workers Compensation.

c. Commercial General Liability: The CONTRACTOR shall maintain Commercial General Liability coverage for bodily injury, personal injury and property damage, subject to limits of not less than \$10,000,000 per loss. The general aggregate limit shall apply separately to this Contract and be no less than \$10,000,000.

i. The CONTRACTOR shall provide Commercial General Liability coverage which does not exclude any activity to be performed in fulfillment of this Contract. Specialized forms specific to the industry of the CONTRACTOR will be deemed equivalent provided coverage is no more restrictive than would be provided under a standard Commercial General Liability policy, including contractual liability coverage.

ii. The CONTRACTOR'S Commercial General Liability insurance shall include the COUNTY, its officers, officials, employees and agents with respect to performance of services, and shall contain no special limitations on the scope of protection afforded to the COUNTY as additional insured.

iii. The CONTRACTOR shall furnish the COUNTY with evidence that the additional insured provision required above has been met. An acceptable form of evidence is the endorsement pages of the policy showing the COUNTY as an additional insured.

iv. If the CONTRACTOR'S liability coverage is written as a claims made policy, then the CONTRACTOR must evidence the purchase of an extended reporting period or "tail" coverage for a three-year period after project completion, or otherwise maintain the coverage for the three-year period.

v. If the Contract is over \$50,000 then the CONTRACTOR shall also maintain Employers Liability Coverage with a limit of not less than \$1 million.

d. Automobile Liability: The CONTRACTOR shall maintain Business Automobile Liability insurance with a limit of not less than \$1,000,000 each accident combined Bodily Injury and Property Damages. Coverage shall include owned, hired and non-owned automobiles.

e. Cyber Liability Insurance: Cyber Liability Insurance, with limits not less than \$5,000,000 per occurrence or claim, \$5,000,000 aggregate. Coverage shall be sufficiently broad to respond to the duties and obligations as is undertaken by Vendor in this agreement and shall include, but not be limited to, claims involving infringement of intellectual property, including but not limited to infringement of copyright, trademark, trade dress, invasion of privacy violations, information theft, damage to or destruction of electronic information, release of private information, alteration of electronic information, extortion and network security. The policy shall provide coverage for breach response costs as well as regulatory fines and penalties as well as credit monitoring expenses with limits sufficient to respond to these obligations.

f. Other Insurance Provisions:

i. The CONTRACTOR'S liability insurance provisions shall be primary and non-contributory with respect to any insurance or self-insurance programs covering the COUNTY, its elected and appointed officers, officials, employees and agents.

ii. Any failure to comply with reporting provisions of the policies shall not affect coverage provided to the COUNTY, its officers, officials, employees or agents.

iii. The CONTRACTOR'S insurance shall apply separately to each insured against whom claim is made or suit is brought, except with respect to the limits of the insurer's liability.

iv. The CONTRACTOR shall include all subcontractors as insureds under its policies or shall

furnish separate certificates and endorsements for each subcontractor. All coverage for subcontractors shall be subject to all of the requirements stated herein.

- v. The insurance limits mandated for any insurance coverage required by this Contract are not intended to be an indication of exposure nor are they limitations on indemnification.
- vi. The CONTRACTOR shall maintain all required policies in force from the time services commence until services are completed. Certificates, policies, and endorsements expiring before completion of services shall be promptly replaced.

g. Verification of Coverage and Acceptability of Insurers: The CONTRACTOR shall place insurance with insurers licensed to do business in the State of Washington and having A.M. Best Company ratings of no less than A-, with the exception that excess and umbrella coverage used to meet the requirements for limits of liability or gaps in coverage need not be placed with insurers or re-insurers licensed in the State of Washington.

- i. Certificates of Insurance shall show the Certificate Holder as Thurston County and include c/o of the Office or Department issuing the Contract. The address of the Certificate Holder shall be shown as the current address of the Office or Department.
- ii. Written notice of cancellation or change shall be mailed to the COUNTY at the following address:

Attn: Risk Analyst
Human Resources
2000 Lakeridge Drive S.W.
Olympia, Washington 98502

- iii. The CONTRACTOR shall furnish the COUNTY with properly executed certificated of insurance or a signed policy endorsement which shall clearly evidence all insurance required in this section prior to commencement of services. The certificate will, at a minimum, list limits of liability and coverage. The certificate will provide that the underlying insurance contract will not be canceled or allowed to expire except on thirty (30) days prior written notice to the COUNTY.
- iv. The CONTRACTOR or its broker shall provide a copy of any and all insurance policies specified in this Contract upon request of the Thurston County Risk Management Division.

9. TERMINATION

a. The COUNTY may terminate this Contract for convenience in whole or in part whenever the COUNTY determines, in its sole discretion, that such termination is in the best interests of the COUNTY. The COUNTY may terminate this Contract upon giving ten (10) days written notice by Certified Mail to the CONTRACTOR. In that event, the COUNTY shall pay the CONTRACTOR for all costs incurred by the CONTRACTOR in performing the Contract up to the date of such notice. Payment shall be made in accordance with Section 5 of this Contract.

b. In the event that funding for this project is withdrawn, reduced or limited in any way after the effective date of this Contract, the COUNTY may summarily terminate this Contract notwithstanding any other termination provision of the Contract. Termination under this paragraph shall be effective upon the date

specified in the written notice of termination sent by the COUNTY to the CONTRACTOR. After the effective date, no charges incurred under this Contract are allowable.

c. If the CONTRACTOR breaches any of its obligations hereunder, and fails to cure the breach within ten (10) days of written notice to do so by the COUNTY, the COUNTY may terminate this Contract, in which case the COUNTY shall pay the CONTRACTOR only for the costs of services accepted by the COUNTY, in accordance with Section 5 of this Contract. Upon such termination, the COUNTY, at its discretion, may obtain performance of the work elsewhere, and the CONTRACTOR shall bear all costs and expenses incurred by the COUNTY in completing the work and all damage sustained by the COUNTY by reason of the CONTRACTOR'S breach. If, subsequent to termination, it is determined for any reason that (1) the CONTRACTOR was not in default, or (2) the CONTRACTOR'S failure to perform was not its fault or its subcontractor's fault or negligence, the termination shall be deemed to be a termination under subsection a of this section.

10. ASSIGNMENT, DELEGATION, AND SUBCONTRACTING

a. The CONTRACTOR shall perform the terms of the Contract using only its bona fide employees or agents who have the qualifications to perform under this Contract. The obligations and duties of the CONTRACTOR under this Contract shall not be assigned, delegated, or subcontracted to any other person or firm without the prior express written consent of the COUNTY.

b. The CONTRACTOR warrants that it has not paid nor has it agreed to pay any company, person, partnership, or firm, other than a bona fide employee working exclusively for CONTRACTOR, any fee, commission, percentage, brokerage fee, gift, or other consideration contingent upon or resulting from the award or making of this Contract.

11. NON-WAIVER OF RIGHTS

The parties agree that the excuse or forgiveness of performance, or waiver of any provision(s) of this Contract does not constitute a waiver of such provision(s) or future performance, or prejudice the right of the waiving party to enforce any of the provisions of this Contract at a later time.

12. INDEPENDENT CONTRACTOR

a. The CONTRACTOR'S services shall be furnished by the CONTRACTOR as an Independent Contractor and not as an agent, employee or servant of the COUNTY. The CONTRACTOR specifically has the right to direct and control CONTRACTOR'S own activities in providing the agreed services in accordance with the specifications set out in this Contract.

b. The CONTRACTOR acknowledges that the entire compensation for this Contract is set forth in Section 5 of this Contract, and the CONTRACTOR is not entitled to any County benefits, including, but not limited to: vacation pay, holiday pay, sick leave pay, medical, dental, or other insurance benefits, fringe benefits, or any other rights or privileges afforded to Thurston County employees.

c. The CONTRACTOR shall have and maintain complete responsibility and control over all of its subcontractors, employees, agents, and representatives. No subcontractor, employee, agent or representative of the CONTRACTOR shall be or deem to be or act or purport to act as an employee, agent or representative of the COUNTY.

d. The CONTRACTOR shall assume full responsibility for the payment of all payroll taxes, use, sales, income or other form of taxes, fees, licenses, excises, or payments required by any city, county, federal or state legislation which is now or may during the term of this Contract be enacted as to all persons employed by the CONTRACTOR and as to all duties, activities and requirements by the CONTRACTOR in performance of the work on this project and under this Contract and shall assume exclusive liability therefore, and meet all requirements thereunder pursuant to any rules or regulations.

e. The CONTRACTOR agrees to immediately remove any of its employees or agents from assignment to perform services under this Contract upon receipt of a written request to do so from the COUNTY'S contract representative or designee.

13. **COMPLIANCE WITH LAWS**

The CONTRACTOR shall comply with all applicable federal, state and local laws, rules and regulations in performing this Contract.

14. **INSPECTION OF BOOKS AND RECORDS**

The COUNTY may, at reasonable times, inspect the books and records of the CONTRACTOR relating to the performance of this Contract. The CONTRACTOR shall keep all records required by this Contract for six (6) years after termination of this Contract for audit purposes.

15. **NONDISCRIMINATION**

The CONTRACTOR, its assignees, delegates or subcontractors shall not discriminate against any person in the performance of any of its obligations hereunder on the basis of race, color, creed, ethnicity, religion, national origin, age, sex, marital status, veteran status, sexual orientation or the presence of any disability. Implementation of this provision shall be consistent with RCW 49.60.400.

16. **OWNERSHIP OF MATERIALS/WORK PRODUCED**

a. Material produced in the performance of the work under this Contract shall be "works for hire" as defined by the U.S. Copyright Act of 1976 and shall be owned by the COUNTY. This material includes, but is not limited to, books, computer programs, plans, specifications, documents, films, pamphlets, reports, sound reproductions, studies, surveys, tapes, and/or training materials. Ownership includes the right to copyright, patent, register, and the ability to transfer these rights. The COUNTY agrees that if it uses any materials prepared by the CONTRACTOR for purposes other than those intended by this Contract, it does so at its sole risk and it agrees to hold the CONTRACTOR harmless therefore to the extent such use is agreed to in writing by the CONTRACTOR.

b. An electronic copy of all or a portion of material produced shall be submitted to the COUNTY upon request or at the end of the job using the word processing program and version specified by the COUNTY.

17. **DISPUTES**

Differences between the CONTRACTOR and the COUNTY, arising under and by virtue of this Contract,

shall be brought to the attention of the COUNTY at the earliest possible time in order that such matters may be settled, or other appropriate action promptly taken. Any dispute relating to the quality or acceptability of performance and/or compensation due the CONTRACTOR shall be decided by the COUNTY'S Contract representative or designee. All rulings, orders, instructions and decisions of the COUNTY'S contract representative shall be final and conclusive, subject to the CONTRACTOR'S right to seek judicial relief pursuant to Section 18.

18. CHOICE OF LAW, JURISDICTION AND VENUE

- a. This Contract has been and shall be construed as having been made and delivered within the State of Washington, and it is agreed by each party hereto that this Contract shall be governed by the laws of the State of Washington, both as to its interpretation and performance.
- b. Any action at law, suit in equity, or judicial proceeding arising out of this Contract shall be instituted and maintained only in any of the courts of competent jurisdiction in Thurston County, Washington.

19. SEVERABILITY

- a. If a court of competent jurisdiction holds any part, term or provision of this Contract to be illegal, or invalid in whole or in part, the validity of the remaining provisions shall not be affected, and the parties' rights and obligations shall be construed and enforced as if the Contract did not contain the particular provision held to be invalid.
- b. If any provision of this Contract is in direct conflict with any statutory provision of the State of Washington, that provision which may conflict shall be deemed inoperative and null and void insofar as it may conflict and shall be deemed modified to conform to such statutory provision.
- c. Should the COUNTY determine that the severed portions substantially alter this Contract so that the original intent and purpose of the Contract no longer exists, the COUNTY may, in its sole discretion, terminate this Contract.

20. ENTIRE AGREEMENT

The parties agree that this Contract is the complete expression of its terms and conditions. Any oral or written representations or understandings not incorporated in this Contract are specifically excluded.

21. NOTICES

Any notices shall be effective if personally served upon the other party or if mailed by registered or certified mail, return receipt requested, to the addresses set out in Section 4. Notice may also be given by facsimile with the original to follow by regular mail. Notice shall be deemed to be given three days following the date of mailing or immediately if personally served. For service by facsimile, service shall be effective upon receipt during working hours. If a facsimile is sent after working hours, it shall be effective at the beginning of the next working day.

The parties hereto acknowledge that the waiver of immunity set out in Section 7.b. was mutually negotiated and specifically agreed to by the parties herein.

CONTRACTOR:

Thurston County, Washington

Firm: _____

By: _____

By: _____

Title: _____

Signature: _____
(Authorized Representative)

Date _____

Date _____

Title: _____

Address: _____

Approved as to Form by the Prosecuting Attorney's Office

EXHIBIT A

PROFESSIONAL SERVICES CONTRACT
THURSTON COUNTY/ VENDOR NAME

SCOPE OF SERVICES

1. The services to be performed by the CONTRACTOR under this Contract, which are described in Section 2 of the Contract (SERVICES PROVIDED BY THE CONTRACTOR), are set forth as follows:
2. The services to be performed by the COUNTY under this Contract, which are described in Section 3 of the Contract (SERVICES PROVIDED BY THE COUNTY) are set forth as follows (if applicable):

EXHIBIT B

PROFESSIONAL SERVICES CONTRACT

THURSTON COUNTY/ _____

COMPENSATION

1. The CONTRACTOR’S compensation under this Contract, which is described in Section 5 of the Contract (COMPENSATION), is set forth as follows: