CITY OF LEXINGTON, NORTH CAROLINA
REQUEST FOR PROPOSALS
PERMITTING AND DEVELOPMENT REVIEW SOFTWARE

RFP number	10-26-0002
Issue date	Tuesday, October 27, 2026
Questions due	Thursday, November 12, 2026, 5:00PM
Response to Questions/ Addendum Issued (If needed)	Wednesday, November 18, 2026, (Addendum issued by 5:00PM if needed)
DOWNLOAD RFP & ADDENDUMS LINK:	https://cloud.lexingtonnc.gov/s/zJRvw4aoBjXKpD5
Proposals due	Tuesday, December 1, 2026, 3:00PM
PROPOSAL SUBMISSION LINK:	https://cloud.lexingtonnc.gov/s/snuevk6noPW2xyu
Procurement contact	Britt Smith, Purchasing Officer
Project Lead	David Lambert, Assistant City Manager
City address	28 W. Center Street, Lexington, NC 27292

The City reserves the right to revise the schedule by written addendum.

The City of Lexington invites qualified firms to propose a cloud-hosted software solution for permitting, development review, plan review, zoning, inspections, code enforcement, payment processing, and related municipal development functions.

This solicitation is intended to support a best-overall-proposal selection under North Carolina General Statutes (NCGS) §143-129.8. The City may negotiate with one or more proposers within the scope of this RFP before contract award.

Questions concerning the specifications and requirements of this Request for Proposals (RFP) shall be submitted in writing to Purchasing Officer, Britt Smith at bssmith@lexingtonnc.gov no later than **5:00pm on Thursday, November 12, 2026**. Please make sure your email clearly indicates **RFP# 10-26-0002 PERMITTING AND DEVELOPMENT REVIEW SOFTWARE**.

Responses to all questions received and any modifications to this RFP will be issued by formal addendum. All addenda will be posted and made available to all prospective vendors no later than **5:00pm on Wednesday, November 18, 2026**, from the download link on the coversheet.

No oral statement, explanation, interpretation or commitment made by any person shall be binding or have any force or effect unless expressly incorporated into a written addendum issued by the City. It is the responsibility of each firm to access and review all addenda posted at the link provided above and to acknowledge receipt of all addenda by signing and returning the required documentation with its proposal submission.

Proposers must submit one (1) electronic copy of their proposal in PDF format via document upload to the link provided in the coversheet above no later than 3:00PM on Tuesday, December 1, 2026 and clearly identify the proposal number RFP# 10-26-0002 on the submission. Proposals received after the stated deadline will not be accepted or considered. The proposer is responsible for confirming timely receipt.

The City of Lexington reserves the right to reject any or all submissions, in whole or in part, and to waive any informalities, irregularities, or technicalities when it is determined to be in the best interest of the City to do so. Any requirement of this RFP that a proposer cannot satisfy must be clearly identified and explained within the proposal submission. Proposers are required to respond to all sections and requirements of this Request for Proposals (RFP). Failure to provide complete responses or required information may result in the proposal being deemed non-responsive and may constitute grounds for disqualification.

1. PURPOSE, BACKGROUND, AND OBJECTIVES

The City of Lexington is seeking a modern, integrated system to support the full lifecycle of permits and development applications from public intake and payment through staff review, electronic plan review, inspections, issuance, closeout, records retention, enforcement, and reporting. The City currently relies on CityView and related systems and processes.

The system will be managed by City permitting staff and used across all departments participating in development review, approval and permitting, and enforcement. The City's objectives are to:

1. Provide one reliable record for permits, development projects, plans, reviews, inspections, code cases, payments, documents, contacts, and property history.
2. Provide a clear, self-service applicant experience for guided applications, uploads, payments, resubmittals, inspection scheduling, status checks, and downloads.
3. Reduce duplicate entry and manual handoffs among permitting, plan review, GIS, finance, payments, records, and reporting.
4. Allow trained and authorized City administrators to create or revise forms, record/permit types, fees, workflows, notices, inspection types, required documents, and portal fields without routine vendor professional-service charges.
5. Provide timely workload, turnaround-time, inspection, revenue, development, and enforcement information through City-configurable reports and dashboards.
6. Use automation and artificial intelligence, where appropriate, to assist with intake, completeness review, document classification, data extraction, search, analysis, and reporting while keeping regulatory decisions under authorized human control.
7. Support interoperability with the City's enterprise systems, including Tyler Munis, Cayenta, and Esri GIS, through secure, documented, and vendor-supported integration methods, while allowing the City to develop and maintain integrations using internal resources where appropriate.

2. SCOPE OF WORK

The solution will include all licensing, subscriptions, configuration, interfaces, data conversion, testing, training, implementation, go-live support, hosting, maintenance, security, and ongoing support for the following business areas with more specific operating requirements outlined in Section 3 and 4.

1. Building and trade permits, certificates, amendments, closeout, and related inspections.
2. Civil, site, subdivision, and other development-plan intake and coordinated departmental review.
3. Planning and zoning applications, including rezonings, text amendments, administrative decisions, certificates, temporary uses, special-event permits, Board of Adjustment matters, and other City-designated multi-departmental applications.
4. Fire, Public Services, Utilities, and other departmental reviews and approvals associated with permits, activities, or development projects.
5. Code-enforcement complaints, cases, notices, hearings, reinspections, work orders, demolition permits, abatement, penalties, liens, releases, and collections history.

The solution must support integration with the City's existing enterprise systems, including Tyler Munis, Cayenta, and Esri GIS. The City may use internal resources to develop or maintain certain integrations. The proposer shall provide the APIs, documentation, access, environments, and reasonable technical support necessary for the integration approach proposed and shall clearly identify any vendor-developed interfaces included in the proposal. Proposers may recommend a phased implementation, but must identify the operational effect, added cost, interim interfaces, dependencies, and date by which all required functions will be live.

The following is an approximate current summary of the City’s current inventory. The selected vendor will be responsible for identifying any additional infrastructure, licensing, integrations, or technical requirements associated with their solution. User counts and transaction volumes are estimates only and may change during implementation.

- Current financial/utility system: Harris Cayenta, version 9.2
    - Approximately 132 current users
    - The replacement system should be able to integrate with Cayenta as needed for items such as cashiering, payments, customer/account information, and related financial transactions.
- Current GIS environment:
    - ArcGIS Online version 2026.2
    - ArcGIS Server version 10.8.1
    - Approximately 167 ArcGIS online users.
    - The new system will need to integrate closely with the City’s GIS environment, including mapping, parcel/property information, address/location data, and other GIS-based workflows currently associated with CityView.
- City endpoint/device environment:
    - Standard City workstations are Windows 11 desktops and touch-screen laptops.
    - Mobile devices are primarily iPhones.
    - The City does not currently have significant use of iPads or Android tablets in the field, although the device mix could change depending on the capabilities and requirements of the selected system.
- Application/device compatibility expectations:
    - The City anticipates a modern, browser-based application and/or standard applications compatible with commonly used operating systems.

  - Vendors should identify supported browsers and operating systems, including compatibility with Windows, iOS, and Android.
  - Field functionality should not require specialized or proprietary hardware unless clearly identified in the proposal.
- Transaction volumes: The following are approximate annual volumes:
  - Permit applications/permits issued: 3,577
  - Inspections performed: 7,565
  - Code enforcement cases: 2,256
  - Plan reviews: 2,178
  - Online payments/financial transactions: 2,749

3. SOLUTION REQUIREMENTS

The requirements below describe the City's desired operating capabilities. Proposers shall complete Appendix A using the required response codes and should use the narrative proposal only to explain material dependencies, limitations, third-party components, custom work, added costs, or alternative approaches. This structure is intended to avoid repetitive narrative responses.

Platform Configuration and Workflow Administration

- City staff can configure and update workflows in-house.
- Authorized staff can create or modify record/permit types, forms, fees, required documents, inspection types, portal fields, letters, notices, routing, and approval steps without routine vendor professional-service fees.
- Configurable approval authority, departmental routing, conditions, required items, and automated closeout controls.
- Preserve historical records, configuration history, and a complete audit trail when workflows or record types change.
- For purposes of this RFP, "City configurable" means the capability can be performed by trained City administrators using standard administrative tools included with the proposed solution, without source-code modification, vendor intervention, custom development, or additional professional-service charges. This definition does not apply to development or maintenance of external system integrations through APIs or other integration tools.

Permitting, Issuance, and Closeout

- Electronic permit issuance and permit-card generation.
- Configurable permit conditions and amendments, including scope, contractor/owner, and valuation changes.
- Certificate of Occupancy, Certificate of Completion, and Temporary Certificate of Occupancy generation.
- Final-inspection tracking and permit closeout controls that prevent closure until required inspections, fees, documents, conditions, and approvals are complete.
- Complete permit and property history after closeout
- The solution shall support configurable dependencies among related permits and applications, required trade-permit inspections, outstanding fees, conditions, and approvals. The City shall be able to configure when issuance, inspection scheduling, final approval, and closeout are restricted until required related activities are complete. The proposer shall identify any limitations or manual steps associated with these controls.

Development, Planning, and Project Management

- Support planning, zoning, Board of Adjustment, civil/site/subdivision, special-event, and other multi-departmental workflows.
- Maintain separate permit or application records while providing a project-level view of status, documents, fees, reviews, inspections, conditions, and contacts.
- Support multiple parcels/addresses within one development and multiple permits/projects associated with a parcel.

Electronic Plan Review and Resubmittals

- Integrated electronic plan intake, markup, annotation, and approval.
- Side-by-side revision comparison and overlay/compare tools.
- Reusable departmental review comments and consolidated correction/comment letters or emails.
- Route resubmittals only to departments or reviewers requiring additional review.
- Maintain version history, approved plans, and related review records.

Inspections and Scheduling

- Mobile/tablet inspections with photos, notes, timestamps, standardized comments, and complete history.
- Offline inspection capability when cellular or Wi-Fi service is unavailable, with later synchronization.
- Online inspection scheduling and cancellation with staff-configurable cutoff times.
- Automatic inspection-result notifications to contractors/applicants.
- Configurable result types, including Pass, Fail, Partial, Cancelled, No Access, and Not Ready.
- Stop Work Order capability; automatic reinspection tracking and reinspection fee generation.
- Applicant upload photos/video to an inspection record for inspector review and retention.
- Ability to view prior failures, prevent final approval when required inspections are incomplete, schedule multiple inspections for the same property/day, and report inspector workload.
- The solution shall support configurable inspector assignment by inspection type, geographic service area, availability, or other City-designated criteria; workload reassignment; and supervisor review of inspection activity.
- The solution shall support configurable utility-service release workflows, including recording the authorized release of electric, gas, water, or other services; associating the release with the applicable permit, property, and service location; and making release information available through documented APIs or other supported integration methods. The City may develop or maintain the interface with Cayenta using internal resources. The proposer shall identify the available data, integration methods, dependencies, and any associated costs.

Applicant, Contractor, and Public Portal

- Mobile-responsive dashboard showing application status and outstanding requirements.
- Online applications, payments, document uploads, revisions, inspection scheduling, and permit/approved-plan downloads.
- Contractor license, insurance, workers' compensation, duplicate-record prevention, and expiration tracking.
- The solution shall support verification of contractor-license status through available North Carolina licensing-board sources or other supported verification methods, including identification of expired or invalid credentials, recording of verification status and date, and configurable restrictions or alerts where required. The proposer shall identify the verification method, third-party dependencies, frequency, and any additional costs.
- Public-facing permit search by address, permit number, parcel, contractor, and other common fields, including inspection results as configured by the City.

- Configurable separation/redaction of public versus internal documents and comments.
- Accessible public services consistent with WCAG 2.1 AA or current successor standard and screen-reader compatibility.

Code Enforcement

- Complaint intake, case creation/assignment, violation tracking, photos, field documentation, and notices of violation.
- Hearing/meeting tracking, work orders and deadlines, reinspection scheduling, administrative penalties/fees, and abatement tracking.
- Lien tracking, including multiple liens on one property; amount, date, recording information, status, release, collections, and payments.
- Complete enforcement history by property and ability to link code cases to permits and development projects.

Property, Parcel, GIS, and Mapping

- Property/parcel-based record linking and complete property history across permits, inspections, code cases, complaints, violations, liens, certificates, and documents.
- Integration with Esri GIS parcel/address data and support for owner history.
- Interactive staff mapping for permits, code enforcement, development activity, zoning layers, and density/trend analysis.
- Public-facing map capability where enabled by the City.

Fees, Cashiering, Payments, and Finance Integration

- Formula-based configurable fees, including valuation, percentage, square footage, minimum, per-unit, per-lot, and other calculations, with automatic recalculation where appropriate.
- Credit card and e-check support, receipt generation, settlement/batch reconciliation, and exception handling.
- Clearly identify payment gateway, processor, merchant-services, transaction, pass-through, and reconciliation costs.
- Integration with Tyler Munis or the City's then-current finance system for required financial transactions, including payment posting, revenue/account coding, adjustments, refunds, batch information, reconciliation, and exception handling. The proposer shall identify whether the proposed interface is vendor-provided, City-developed using available APIs or integration tools, third-party, or a combination of these approaches, and shall identify all associated dependencies and costs.

Documents, Notifications, Records, and Retention

- Configurable email and SMS notifications, including inspection results, permit expiration, outstanding items, and other record-driven notices.
- Template-based correspondence populated with record-specific data.
- Configurable records-retention schedules, legal-hold support, and preservation of historical records.
- City ownership of data and documents and routine export in documented, non-proprietary or commonly usable formats without excessive export fees.

Reporting, Dashboards, and Analytics

- City staff can build and modify reports and dashboards without vendor involvement.
- Scheduled reports and Excel/CSV exports.
- Permit, revenue, inspection, review-time, backlog, turnaround, workload, development, and code-enforcement reporting.

- Preferred advanced analytics include inspection-failure trends, workload forecasting, revenue forecasting, development trends, code-enforcement trends, and GIS display of trends.
- The proposer shall identify how the solution will provide the City's required operational, financial, regulatory, and management reports, including reports designated by the City during implementation. The solution shall provide documented data definitions and relationships sufficient to support City reporting, data validation, and authorized data export. The proposer shall identify any limitations on access to historical data, report data, or underlying data needed for City reporting and public-records purposes.

Integrations, APIs, and Architecture

- Documented, secure APIs/web services, or other standard integration methods supporting real-time or scheduled exchange with Esri GIS, Cayenta, Tyler Munis, payment processing, the City website, utilities, document management, identity services, and other municipal systems.
- The City may develop and maintain integrations using internal resources. The proposed solution shall provide the City with reasonable access to documented APIs and other supported integration methods necessary to do so without requiring vendor professional services for routine City-developed integrations.
- The proposer shall identify available APIs and integration methods, authentication requirements, supported data access and operations, API or transaction limits, licensing requirements, third-party dependencies, and all one-time or recurring charges associated with the City-developed or vendor-developed integrations.
- The proposer shall described technical resources available to support City-developed integrations, including API documentation, test or sandbox environments, technical support, troubleshooting, and advance notice of material API changes or depreciations.
- The proposer shall describe integration monitoring, error and exception handling, retry/recovery capability, and responsibility for maintaining compatibility following upgrades to the proposed platform.
- Routine API access necessary for City-developed integrations shall be included in the proposed subscription price. Any API usage limits, premium API tiers, transaction charges, additional environment charges, or other costs that may apply shall be specially identified in the Cost Proposal.
- Cloud-hosted production, test, and training environments with current browser support and responsive design.
- Pricing must identify user, administrator, portal, API, storage, environment, module, transaction, and usage limits. The City prefers licensing without separate charges for routine staff accounts or administrator consoles.

Security, Identity, Audit, and Continuity

- Role-based, department-level, and user-level permissions; multi-factor authentication; and single sign-on capability.
- Complete audit trail for material record creation, modification, approval, issuance, deletion, payment activity, configuration changes, and administrative access, including user and date/time information.
- Independent assurance appropriate to a hosted local-government system, such as a current SOC 2 Type II report or equivalent, plus vulnerability management, penetration testing, encryption, logging, access review, secure-development, and incident-response practices.
- Documented uptime, monitoring, backup, disaster recovery, business continuity, maintenance, release/change management, and security-incident notification processes.

Preferred Artificial Intelligence and Automation

- Identify incomplete applications and missing required information/documents.
- Suggest permit/application types based on applicant-provided project information.

- Plain-language search of City ordinances, policies, SOPs, and approved guidance, with source citation or traceability features.
- Automated document classification and data extraction.
- Inspection, workload, development, revenue, and enforcement trend analysis or forecasting.
- AI functions must remain advisory. The system should not approve, deny, issue, revoke, or materially alter a regulatory record without authorized human action.

AI disclosure requirements.

For each proposed AI capability, identify whether it is currently in production or planned; the model/provider; data flows and retention; whether City data is used for model training; security controls; auditability; accuracy/confidence or citation features; administrator controls and opt-out options; accessibility; and all additional costs. The vendor shall not sell, monetize, or use City data to train a generally available AI model without the City's express written authorization.

4. IMPLEMENTATION, MIGRATION, TRAINING, AND SUPPORT EXPECTATIONS

Implementation Approach

- A detailed work plan with milestones, responsibilities, dependencies, deliverables, decision points, test cycles, acceptance criteria, risk management, cutover/rollback planning, and proposed go-live date.
- A named project manager and key personnel.
- Configuration workshops that define desirable processes rather than simply reproducing inefficient current steps.
- System, interface, security, conversion, performance, and user-acceptance testing, followed by go-live stabilization and post-go-live support.

CityView Data and Document Conversion

The vendor shall profile, map, cleanse as agreed, convert, reconcile, test, and validate the CityView data and documents designated by the City. The proposal shall separately address: (1) open and active records required for continued operations at go-live, and (2) historical and closed records. For each category, identify the records and documents proposed for conversion, any information that will remain in a read-only archive, the proposed schedule, data-quality limitations, City responsibilities, and all associated. Costs.

The proposal shall identify the number of trial conversions, validation reports, acceptance criteria, City staff effort, and the price of additional conversion work. Valdidation shall include, as applicable, source and converted record counts, document counts, rejected records, exceptions, duplicates, orphaned documents, broken relationships control totals and unresolved errors. No production conversion shall occur without City approval of final mapping and validation results. Production go-live shall not by itself constitute City acceptance of the conversion.

The proposer shall describe how existing permit types, fields, and workflows will be mapped to the proposed solution and identify opportunities to consolidate or simplify them without loss of required historical information.

Training and Knowledge Transfer

Training shall be role-based and include all key personnel. Include live training, administrator configuration training, recorded or on-demand resources, written procedures, and reusable City training materials. Identify class size and target audience, delivery method, training environment, prerequisites, and included refresher training.

Support and Service Levels

The proposal shall describe the vendor's customer support services, including hours of availability, methods for requesting assistance, response times based on the severity of an issue, escalation procedures, system uptime commitments, planned maintenance, and any service credits provided if required service levels are not met. The proposal shall also describe available training and self-help resources and whether the vendor provides direct support to applicants, contractors, and other public users. Clearly identify any support services that are included in the proposed price, available at an additional cost, or not offered.

5. REQUIRED PROPOSAL FORMAT AND CONTENT

Proposals should be concise and organized in the exact order below so the City can compare submissions consistently. Marketing material may be included only where it directly answers a requirement. The City may deem a materially incomplete proposal non-responsive.

Section	Proposal Component	Required Content
1	Transmittal and Authority	Legal name, address, primary contact, authorized signature, acknowledgement of addenda, and confirmation that the proposal remains valid for 120 days.
2	Executive Summary	Proposed product, hosting model, modules, implementation duration, principal assumptions, material exceptions, and annual costs for each of the first five years.
3	Company and Project Team	Comparable local-government experience; number of live clients on the proposed version; assigned personnel and availability; subcontractors; and any implementation terminated or materially delayed during the preceding 24 months.
4	Solution Response	Completed Appendix A plus a focused narrative explaining material limitations, dependencies, third-party components, custom development, separate applications, and proposed alternatives. Do not repeat every Appendix A requirement in narrative form.
5	Narrated Demonstration	Responses to Narrated Demonstration below, limited to 12 pages total, excluding specifically requested screenshots and diagrams. Videos, not exceeding a total of 15 minutes, may be substituted for written responses.
6	Implementation, Migration, Training, and Support	Work plan, schedule, staffing, City resource assumptions, CityView conversion approach, testing, training, service levels, and post-go-live operating model. Include a sample implementation schedule, sample conversion-validation report, and sample service-level report from a comparable implementation, where available. Identify any material differences between the samples and the services proposed for the City.
7	Cost Proposal	Completed Appendix B, pricing assumptions, licensing metric, renewal limits, optional items, and all third-party/pass-through charges.
8	References	At least three comparable public-sector clients, including at least two that went live within the last three years and one that has operated the proposed platform for at least two years.

Section	Proposal Component	Required Content
9	Exceptions and Contract Terms	One clearly identified list of all exceptions to the RFP and proposed contract terms. Silence constitutes acceptance for proposal-evaluation purposes, subject to final contract negotiation.

Narrated Demonstration

1. Describe one application from intake through issuance. Identify each separate tool, handoff, duplicate-entry point, and third-party product.
2. Explain how a City administrator creates a new permit type, changes a fee, revises a workflow, or updates portal fields after go-live. State who performs the work, typical time, and cost.
3. Describe how applicants, residents, contractors, frontline staff, and administrators obtain help; include hours, channels, response targets, and whether the vendor directly supports the public.
4. Explain how the City will create dashboards, ad hoc reports, scheduled reports, and exports without vendor or IT assistance.
5. Describe the proposed CityView conversion, including responsibilities, trial conversions, reconciliation, acceptance, typical failure points, and how they are corrected.
6. Describe the City's full-data export during the contract and at termination, including formats, documents, metadata, relationships, timing, assistance, and cost.
7. Explain each proposed AI capability, its production status, model and data controls, human oversight, auditability, accuracy limitations, and additional cost.
8. Identify substantive product capabilities released in the preceding 24 months and explain which updates are included in subscription pricing versus separately charged.
9. Describe the proposed integration approach for Tyler Munis and Cayenta, including which components would be vendor-provided, City-developed, or third-party; available APIs and documentation; authentication; test environments; data-access capabilities; monitoring and error handling; technical support; upgrade compatibility; and all associated costs. Identify comparable integrations currently operating in production, if available.

6. COST PROPOSAL REQUIREMENTS

Complete every line in Appendix B and enter $0 where a charge does not apply. The proposed five-year total cost shall include all products, licenses, modules, interfaces, API access, environments, third-party components, implementation services, conversion services, testing, training, travel, hosting, storage, support, and other items necessary to deliver the proposed scope, unless expressly identified as optional or excluded. State the pricing unit and volume assumptions and identify the maximum percentage increase for each renewal year. The City will evaluate total cost of ownership, not only first-year price.

7. EVALUATION, DEMONSTRATIONS, AND AWARD

The City intends to award the responsible proposer offering the best overall proposal, considering the published factors below. The lowest-cost proposal will not necessarily be selected. The City may seek clarification, verify information, conduct reference checks, request revised or best-and-final offers, invite finalists to demonstrations or interviews, and negotiate within the scope of this RFP.

Written Proposal Criterion	Points
Functional fit and staff configurability	25
Applicant, staff, and mobile usability	15
GIS, integrations, architecture, security, and data management	15

Written Proposal Criterion	Points
Implementation, CityView conversion, testing, and training	15
Vendor experience, references, service levels, and support	10
AI and automation capabilities with appropriate controls	5
Total cost of ownership and pricing clarity	15
TOTAL	100

Finalist Demonstrations

The City may require Finalists to demonstrate the proposed product using City-provided scenarios rather than a standard sales presentation. The City may refine Appendix C and issue a common script, data set, time limit, and participant instructions. Any feature described as available must be demonstrated. Third-party or separately priced features must be identified.

8. TERMS AND CONDITIONS

Reservation of rights.

The City may reject any or all proposals; waive minor irregularities that do not affect fairness; request clarification; verify qualifications; cancel or amend the RFP; reduce, expand, or phase the work within the advertised scope; request revised or best-and-final offers; and make no award when that action is in the City's interest.

No obligation and proposal costs.

Issuance of this RFP does not obligate the City to award a contract or reimburse proposals, demonstrations, negotiations, travel, or other costs.

Public records and confidential information.

Proposals are not subject to public inspection until contract award under N.C. Gen. Stat. § 143-129.8(d). After award, records may be subject to Chapter 132 of the North Carolina General Statutes. A proposer claiming trade-secret protection must identify the specific material at initial submission and state the legal basis. Marking an entire proposal confidential is not acceptable and does not bind the City.

Contract and negotiations.

The selected proposal, this RFP, addenda, written clarifications, and the executed agreement will form the contract documents, in the order of precedence stated in the final agreement. The City may negotiate with any proposer within the original scope as permitted by N.C. Gen. Stat. § 143-129.8.

Governing law and venue.

North Carolina law will govern. Venue for any action arising from the contract will lie in the state courts of Davidson County, North Carolina, or the applicable federal court. The City will not agree to mandatory out-of-state venue or binding arbitration unless expressly approved.

Funding and payment.

The contract is subject to lawful appropriation and availability of funds. Payment terms, acceptance milestones, retainage if any, and invoice requirements will be established in the final contract. The City will not pay for unaccepted work or undisclosed charges.

Insurance, indemnification, and limitation of liability.
The final RFP and contract will include City-approved insurance, indemnification, cybersecurity, and liability terms. Proposers shall identify requested limitations or exclusions in the exceptions section; they may be considered in evaluation and negotiation.

E-Verify.
The contractor and its subcontractors shall comply with Article 2 of Chapter 64 and N.C. Gen. Stat. § 143-133.3, as applicable.

Nondiscrimination and business participation.
The selected contractor shall comply with applicable federal, State, and local nondiscrimination requirements. The City encourages participation by minority and historically underutilized businesses and may require related forms or reporting in the final solicitation.

Required certifications.
The selected contractor shall provide certifications required by North Carolina law and City policy, including applicable restricted-company, divestment, boycott, non-collusion, conflict-of-interest, and debarment certifications. Purchasing and the City Attorney will confirm the forms and current statutory citations before release.

Subcontractors and assignment.
The proposer shall identify all material subcontractors and third-party products. The contractor may not assign the agreement or replace a material subcontractor without prior written City approval.

Ownership and license rights.
The City will own its data, City-created content, and deliverables created specifically for the City, subject to negotiated rights in the vendor's pre-existing software and tools. The City requires continued access to records, documents, configuration, and exports during transition and termination.

Records and audit.
The contractor shall maintain complete records supporting invoices, service levels, security obligations, and contract performance for the period stated in the final agreement and make them available to the City and authorized auditors as required by law.

APPENDIX A – REQUIREMENTS RESPONSE MATRIX

Complete one row for every requirement. Use one response code: S = standard/currently available; C = configurable by City staff; T = third-party component; X = custom development; R = committed roadmap; N = not available.

If a capability requires a separate module, third party, custom work, future release, additional license, or added fee, identify that fact in the notes.

No.	Requirement	Priority	Code	Release / Dependency / Added Cost / Notes
1	Cloud-hosted integrated platform supporting the required business areas	Must		
2	City-admin configuration of record types, forms, fees, workflows, notices, required documents, inspections, routing, and portal fields	Must		
3	Electronic permit issuance, permit cards, certificates, amendments, conditions, final tracking, and controlled closeout	Must		
4	Planning, zoning, Board of Adjustment, civil/site/subdivision, special-event, and multi-departmental workflows	Must		
5	Project-level management across related permits/applications, parcels, documents, fees, reviews, inspections, conditions, and contacts	Must		
6	Integrated electronic plan review, markup, version comparison, resubmittal routing, and consolidated comments	Must		
7	Mobile inspections with photos, history, standardized comments, scheduling, reinspection tracking, and offline operation	Must		
8	Mobile-responsive public portal for application, upload, payment, scheduling, status, revisions, and downloads	Must		
9	Contractor credential/expiration tracking and public permit/inspection search with configurable redaction	Must		
10	Code-enforcement complaints, cases, notices, hearings, work orders, abatement, liens, releases, payments, and collections history	Must		
11	Parcel/address-based record linking, complete property history, owner history, and multiple parcel/project relationships	Must		

No.	Requirement	Priority	Code	Release / Dependency / Added Cost / Notes
12	Esri GIS integration and interactive staff/public mapping	Must		
13	Configurable formula-based fees, online card/e-check payments, receipts, settlement, and batch reconciliation	Must		
14	Tyler Munis or current City finance-system integration supporting payment posting, reconciliation, adjustments, exception handling, and required financial data exchange	Must		
15	Documented, Secure APIs or other supported integration methods sufficient for City-developed integration with Cayenta	Must		
16	City access to API documentation, supported authentication methods, necessary data operations, and test/sandbox capabilities for City-developed integrations	Must		
17	Technical support, material API change/deprecation notification, and continued support for documented APIs through ordinary platform upgrades	Must		
18	Configurable notifications, correspondence templates, document management, records retention, and legal hold	Must		
19	Staff-built reports, dashboards, scheduled reporting, and Excel/CSV export	Must		
20	Documented secure APIs/web services without unreasonable routine access/integration charges	Must		
21	Role-based security, MFA, SSO capability, approval controls, full audit trail, and administrator/activity logs	Must		
22	Current independent security assurance and documented vulnerability, incident-response, backup, recovery, continuity, and release-management practices	Must		
23	City ownership and usable export of data, documents, metadata, relationships, and configuration during contract and at termination	Must		
24	CityView data and document conversion with profiling, trial conversions, reconciliation, validation, and acceptance	Must		

No.	Requirement	Priority	Code	Release / Dependency / Added Cost / Notes
25	WCAG 2.1 AA or current-successor accessibility for public services	Must		
26	Defined uptime, support hours, priority levels, response/restoration targets, escalation, ticket visibility, and service levels	Must		
24	AI-assisted completeness checking with documented human oversight and data controls	Preferred		
25	Plain-language search of City ordinances, procedures, and approved guidance with source citations/traceability	Preferred		
26	Automated document classification and data extraction	Preferred		
27	Workload, inspection, development, revenue, and enforcement trend analytics/forecasting	Preferred		
28	Vendor support available directly to residents and contractors	Preferred		
29	Enterprise or unlimited City-user and administrator-console licensing	Preferred		

APPENDIX B – COST PROPOSAL

Enter a dollar amount on every line and explain all assumptions. Add rows as needed. The total must include every required product, third-party component, environment, interface, service, and expense necessary to deliver the proposed scope. Enter $0 where no charge applies.

Cost Component	One-Time	Recurring Annual
Software subscription / licensing	$	$
Implementation and configuration	$	$
Project management	$	$
CityView data and document conversion	$	$
Electronic plan review	$	$
Esri GIS integration	$	$
Tyler Munis / finance integration	$	$
API access/integration licensing	$	$
API test/ sandbox environment	$	$
Technical support for City-developed integrations	$	$
Vendor-provided Cayenta integration, if proposed	$	$
Payment gateway / processor integration	$	$
Other required interfaces	$	$
Testing and user-acceptance support	$	$
Training and administrator knowledge transfer	$	$
Go-live and stabilization support	$	$
Ongoing support and maintenance	$	$
Hosting, storage, environments, and backups	$	$
AI / automation modules	$	$
Typical post-go-live configuration changes	$	$
Travel and expenses	$	$
Other required cost (itemize)	$	$
TOTAL FIVE-YEAR COST OF OWNERSHIP	$	$

For City-developed integrations, identify all API access, licensing, usage, environment, support, or other charges applicable to the City. If the proposer offers a vendor-developed Cayenta integration, price it separately. Enter $0 where no charge applies.

Pricing basis and volume assumptions:

_____

Maximum annual renewal increase: _____ %

Proposed initial term: _____

Renewal terms: _____

Items excluded from the total above:

_____

Optional items and prices (attach schedule if needed):

_____

APPENDIX C – FINALIST DEMONSTRATION SCENARIOS

The City may refine these scenarios and issue a common script, data set, time limit, and participant instructions to all finalists. Finalists must use the version and components included in their proposal and identify any simulated, planned, third-party, custom-developed, or separately priced feature.

Scenario	Minimum Demonstration
Commercial permit and plan review	Applicant guidance, intake, fee, payment, departmental routing, plan markup, consolidated correction letter, resubmittal, revision comparison, approval, permit issuance, inspections, and closeout.
Civil or site-plan review	Multiple parcels, coordinated reviewers, departmental comments, external applicant response, conditions, approvals, related permits, and project-level status.
Board of Adjustment matter	Application, fee, completeness, hearing schedule, notice and mailing record, staff report, exhibits, decision, conditions, and decision letter.
Special event	Guided public application, multi-department review, insurance/document tracking, payment, conditions, approval, and applicant communication.
Field inspection	Schedule, route/workload view, prior failures, photos and notes, standardized comments, offline work, synchronization, result notice, and reinspection fee.
Administrative change	A City administrator creates or modifies a fee, required document, form field, workflow step, notice template, and report without vendor assistance.
Management reporting	Build and save a dashboard showing backlog, turnaround time, inspections, revenue, and workload; export detail and schedule distribution.
Payment reconciliation	Take an online payment, show the accounting record and receipt, demonstrate applicable account/revenue coding, process an exception or adjustment, and demonstrate the proposed method for batch transfer and reconciliation with Tyler Munis. Identify any manual steps, separate applications, third-party components, or duplicate-entry points.
API/ City-Developed Integration	Show the API documentation, authentication approach, available test/sandbox environment, and representative methods for retrieving and updating data that could support a City-developed integration. Demonstrate how API errors are returned and how the City would identify material API changes or deprecations. Identify any functionality, access level, environment, or support shown that is not included in the proposed price.
Code Enforcement:	Demonstrate complaint intake, case assignment, field documentation, notice generation, compliance deadline, reinspection, work order or abatement tracking, assessment of applicable costs or penalties, lien tracking, payment, release, and complete property history. Identify any separate applications, manual steps, or functionality not included in the proposed price.