

SCHEDULE A: SCOPE OF SERVICES

Background Information

The City of Port Moody aims to accelerate and streamline the processing of development applications and permits by adopting modern digital technologies. Currently, development and building permit applications require applicants to submit plans via email. These submissions are reviewed by staff across various departments, including Community Development, Engineering, Operations, Fire Services, and Community Services, prior to issuing approvals or permits.

Our organization utilizes the Tempest Prospero module to manage workflows and track development-related applications. Other Tempest modules support functions such as property records, licensing, bylaw enforcement, taxation, utilities, and payments. We are not seeking to replace Tempest, but rather to implement a complementary solution that enables electronic submission, management and referrals of plans, drawings and other documents. This solution should support version control, collaborative review, and seamless communication with applicants.

The City anticipates that the electronic document review software solution will be integrated or linked through the Tempest web application portal for the uploading of required documents.

Project Purpose and Expected Outcomes

The City is soliciting proposals for the purpose of implementing a digital document submission and review solution that will integrate and leverage our current permit workflow system (Tempest).

The desired solution should:

- Enhance document security and revision tracking
- Reduce turnaround times and physical storage needs
- Lower printing costs
- Improve two-way communication with applicants and staff
- Enable convenient online submissions
- Support both applicants and internal reviewers by enabling easy referral to internal departments, tracking and sharing review comments, and providing a simple interface for feedback and collaboration

Implementation is targeted for Spring 2026. The solution may be extended to other departments in the future to support additional workflows.

We are specifically seeking a cloud-based solution hosted in Canadian data centres.

Required Features of the Digital Document Submission & Review Solution:

- 1. System Support & Maintenance**
 - i. Ongoing support and maintenance services
 - ii. Clear strategy for updates and patches
 - iii. Ability to manage multiple environments (e.g., test and production)

- 2. Security & Access Control**
 - i. Role-based access with multi-tiered permissions
 - ii. Concurrent editing capabilities
 - iii. Cloud-based solution hosted in Canadian data centres

- 3. Customization & Configuration**
 - i. Customizable workflows, fields, and email templates
 - ii. Branding options for the public-facing portal

- 4. Integration Capabilities**
 - i. API/web service integration with existing systems (e.g., Tempest)
 - ii. Workflow synchronization with Tempest stages
 - iii. Export functionality for finalized documents into Tempest

- 5. Reporting & Analytics**
 - i. Custom dashboards and queries
 - ii. Tools for tracking review progress and deadlines

- 6. User Experience**
 - i. Web-based interface with mobile compatibility
 - ii. Real-time status updates for applicants
 - iii. Automated email notifications for key events
 - iv. Compliance with Web Content Accessibility Guidelines (WCAG) accessibility standards
 - v. Support for large file uploads, including vector drawings
 - vi. Secure document upload with virus/malware scanning
 - vii. Document classification options

- 7. File Management & Version Control**
 - i. Locking and finalization of reviewed files
 - ii. Version tracking and comparison tools
 - iii. Support for PDF and AutoCAD formats

- 8. Markup & Review Tools**
 - i. Annotation tools (text, callouts, highlights)
 - ii. Customizable markup properties

- iii. Measurement and scaling tools
- iv. Standard comment templates
- v. Overlay comparison for document revisions, including plans, drawings, reports, and other document types.
- vi. Digital signatures/stamps compliant and compatible with BC professional standards (e.g., AIBC, EGBC)

9. Collaboration Tools

- i. Features to support multi-user review and feedback

Implementation Support Services

The selected vendor should also be able to provide consulting services to assist with:

- Environment setup and configuration
- System implementation and staff training
- Integration with existing permitting systems (Tempest, Prospero, eApply Dashboard)

Privacy Requirements

Proponents must acknowledge that during performance of any services with the City, they may have access to 'personal information' (as defined in the Freedom of Information and Protection of Privacy Act, RSBC 1996, c 165 ("FIPPA")) of third parties that is in the City's possession. Proponents must understand that such personal information is subject to Part 3 of FIPPA and the City and all parties acting for the City, including a Contractor, have certain obligations as set out in FIPPA with respect to protection of such personal information and will be required to agree that it shall transmit, store or otherwise handle such personal information in a manner consistent with Part 3 of FIPPA.

Upon assessment by the City's Legislative Services Division, the successful proponent may be required to complete a Privacy Impact Assessment, of which it may determined that a Privacy Protection agreement be entered as a condition of contract.

Schedule / Contract Term

The schedule and contract term anticipate a project start date in late 2025 or early January 2026, with full implementation expected by summer 2026. The initial contract will also include two years of annual subscription, inclusive of support, with fees expected to remain firm during this period. Annual renewal options will be available thereafter, subject to mutual agreement.