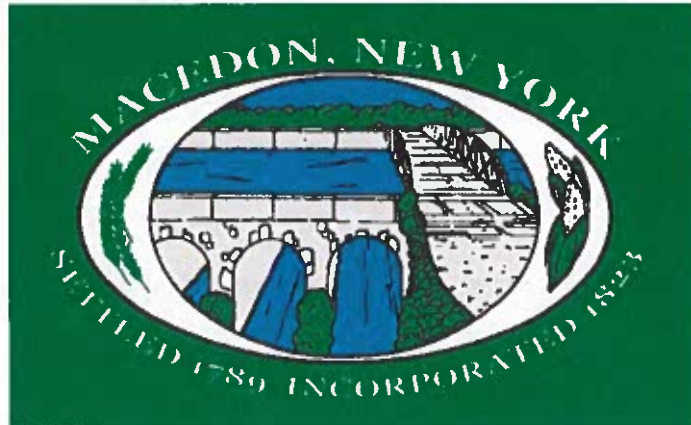


Town of Macedon

32 Main Street
Macedon, NY 14502
315-986-5932
www.macedontown.net



REQUEST FOR PROPOSALS July 9, 2026

Permitting, Inspection, Plan Review & Code Enforcement Software

Milestone	Date
RFP Issue Date	July 9, 2026
Questions Deadline	July 23, 2026
Proposals Due	August 6, 2026 at 4:30 pm EST
Vendor Interviews / Demonstrations	August-September 2026
Anticipated Award (pending budget approval)	November 2026
Implementation	FY 2027

I. INTRODUCTION

The Town of Macedon is seeking proposals from qualified vendors to provide a cloud-based work-flow management, plan review, permitting, inspection, and code enforcement software platform. The Town currently processes approximately 400 to 500 permits annually and seeks to modernize its operations by replacing its current paper-based, in person processes with modern technology.

The primary goal of this project is to provide the Town of Macedon with one central location for electronic permitting, plan review, code compliance, required record retention, and reporting software systems. Implementing this solution will effectively become a conduit for the Building and Zoning Department, other Town Departments, the Town Boards, and the various residents, Developers, Architects and Engineers that do business every day in our Town.

Any technical inquiries related to this proposal may be made to Scott Allen, P.E. – Town Engineer, by email at: buildinginspector@macedontown.gov or by calling 315-986-5932.

II. SCOPE OF WORK

The overall goals of this project are to:

1. Reduce the storage space and time required to physically manage paper copies of site/building plans.
2. Ensure compliance with record retention mandates re: electronic storage of plans (PDF/A).
3. Web-based solution with cloud-based storage.
4. Mark up tools for plan review.
5. Simultaneous review throughout the various departments or divisions that are instrumental in the plan review process.
6. Enhance communications between and amongst reviewers and developers who are in different departments and/or locations.
7. Decrease processing cycle time and/or number of cycles to submit and review site/building plans.
8. Establish a cost-effective process for maintaining and configuring the solution over the long term as new and changing requirements emerge.
9. Dashboard functionality to monitor the status of review tasks and track the completion against scheduled due dates.
10. Enable the flexibility to define the document review workflow and notification process based upon the requirements for each project.
11. Create a virtual one-stop-shop for applicants to securely and electronically submit and manage plans and associated files (photos, videos, GIS maps, CAD drawings, text documents, electronic forms, etc.) required for plan review services and permits within individual project folders.
12. Mobile friendly/support mobile access (smartphone or tablet) to plan review documents and comments required for on-site inspections.
13. Web-based email functionality, comments for revisions, and automatic notification of permit expirations/pending expirations.
14. Ensure timely fire code inspections for all businesses and multiple housing developments through automatic notifications of expired/expiring permits.
15. Efficient tracking of permit timeframes to allow for timely permit expiration notifications.
16. Real-time fire code and code enforcement complaint notification and monitoring.
17. Efficient coordination of inspections between departments.
18. Consolidation of parcel records based on Tax I.D. # vs. physical address.
19. Ability to create detailed reports for all permit categories.
20. Portal connects with Wayne County's GIS Parcels & Zoning layers.

Regarding specific task functionality for the Town of Macedon, the selected vendor shall provide, configure, deploy, and support a software solution encompassing all aspects of the following listed workflow functions:

1. Building Permits & Inspections
2. Building Permit Plan Review for compliance with current NYS Building and Energy Codes (automated AI review)
3. Planning Board Applications and Processing
4. Zoning Board of Appeals Applications and Processing
5. Special Use Permits
6. Code Enforcement Case Management
7. Contractor Registration for Parties Performing Work in Macedon (liability, disability, workers compensation insurance upload portal – including waiver form for residents self-performing work)
8. Fire Marshal Office
 - a. Periodic Fire Safety Inspection workflow with timeframe reminders, correction notices and compliance letters
 - b. Annual Operating Permits
 - c. Periodic Occupancy Posting Certificates
9. First Responder Notification Portal (Fire, EMS, Police)
 - a. Ability to report unsafe conditions and fire/otherwise damaged structures to the Town Fire Marshal and Code Enforcement Office
 - b. Ability of First Responders to upload photos and documents to the report
 - c. Ability for Code Enforcement to send informational notifications to select First Responders
10. Miscellaneous Short-Term Permits
 - a. Special Event Permits
 - b. Peddler Permits
 - c. Food Truck Permits
 - d. Tent Permit
 - e. Fireworks / Pyrotechnics Permit
11. Highway Department Permits
 - a. Driveway Work Permits
 - b. Utility Work Permits
 - c. Roadside ditch piping requests
12. Townwide Drainage District Work Requests
13. Zoning and Building Code Letter of Compliance Requests

III. FUNCTIONAL REQUIREMENTS

Proposals must demonstrate the ability to meet all requirements below. For each, indicate Y (fully met out-of-the-box), P (partially met / requires configuration), or N (not available).

3.1 Public Portal & Applicant Experience

Requirement	Y	P	N
Online application submission and status tracking via public portal			
24/7 AI-powered community assistant trained on Town-specific codes, fees, and ordinances (available in multiple languages)			
GIS auto-fill: address entry populates parcel data and zoning information automatically			
Automated email notifications to applicants at each workflow stage			
Online fee payment (credit card and ACH); system also supports in-person cash/check with receipt generation with automatic daily accounting summaries			
Public dashboard allowing residents to look up permit status, active licenses, and code case status (configurable by record type)			
Multiple contacts (applicant, architect, attorney, contractor) can be linked to a single application and receive notifications			

3.2 Staff Tools & Workflow Management

Requirement	Y	P	N
Configurable, drag-and-drop workflows per permit/application type; steps can be added, removed, or reordered without vendor assistance			
AI-assisted pre-submission review (auto-check) that flags logical errors and potential code violations before application is received by staff			
Built-in digital plan review with markup tools (annotations, stamps, measurements, area calculations)			
AI-assisted plan review for compliance with specified state and national codes (currently 2025 NYS Building Codes)			
Side-by-side plan comparison with automatic highlighting of changes between submission versions			
Simultaneous multi-reviewer plan review with shared comments and real-time collaboration			
Auto-generated corrections reports, permit documents, and result letters based on configurable templates			

Requirement	Y	P	N
Configurable role-based access controls (e.g., administrators, inspectors, plan reviewers, third-party teams)			
Meeting management with ability to assign applications to scheduled board meetings			
All permit activity, communications, and documents stored in a complete, searchable activity log per record			

3.3 Inspections & Field Operations

Requirement	Y	P	N
Mobile inspection app (iOS and Android) for field logging of results, comments, and photos from any smartphone or tablet			
The ability to log inspections offline, with pending inspections automatically uploading once the device is reconnected to service or an internet connection			
Applicant ability to request inspections on specific dates, with staff ability to finalize scheduling; automated notifications sent to applicant and to inspector once scheduled			
Automatic inspection report generation and delivery to all relevant parties immediately upon logging			
Sequential inspection enforcement — applicants cannot request subsequent inspections until prior steps are completed			
Recurring inspection management with automatic renewal reminders (e.g., building permit expirations, annual fire safety inspections, operating permits, etc.)			

3.4 Data & Document Management

Requirement	Y	P	N
Unlimited cloud-based data storage with no mid-contract overage charges; if additional cost is required, please specify			
Large (1 GB) or unlimited individual file upload size limits at no additional cost; if additional cost is required, please specify			
All document versions (original, revised, issued) retained and accessible for the life of the record			
Records linked to parcel and address, with full history visible when a new application is submitted at the same property			
Ability to migrate historical records from existing system(s); vendor to describe methodology and associated costs			
Configurable automated reporting (e.g., scheduled annual permit activity reports for state reporting obligations)			

Requirement	Y	P	N
Ad hoc report builder with ability to export data in standard formats (CSV, PDF)			

3.5 Security & Technical Standards

Requirement	Y	P	N
Cloud-hosted SaaS platform; all production data stored and processed within the United States			
Data encryption in transit and at rest; role-based access controls and audit logging			
Security certifications (e.g., SOC 2 Type II or equivalent)			
Compliance with applicable state data privacy laws			
Automatic platform updates; no Town IT infrastructure required			

IV. SUPPORT & TRAINING

4.1 Ongoing Support

Vendors must describe their support model in detail. The Town is seeking:

- Live, US based human-staffed support (not AI chatbot or call center) accessible during normal business hours (8 am – 5 pm EST)
- Support available to both Town staff and members of the public using the platform

Support Tier	Format, Availability and Response Time	Annual Cost (if separate)
Standard (business hours, M–F)		
Support for platform end-users (public)		

4.2 Training

Vendors must provide a complete training plan, including:

- Initial training covering all staff roles (administrators, reviewers, inspectors)
 - Remote training sessions available as baseline
 - On-site / in-person training available — please confirm availability and describe associated costs

- Access to self-service training resources (documentation, video library, help center)
- Ongoing training with dedicated point of contact covering new features, overall satisfaction, and general relationship management — please confirm availability and describe associated costs

Training Format	Availability (Y/N)	Annual Cost (if separate)
Remote / virtual (live)		
On-site / in-person		
Self-paced online (recorded)		
Ongoing point of contact		

V. PRICING

Provide an itemized cost proposal using the table below. All costs should be clearly outlined — the Town should not encounter additional undisclosed charges for users, storage, or forms beyond what is stated here.

Please note that proposal costs stated here are assumed to be valid through December 31, 2026.

Cost Component	Year 1 - 2027	Year 2 - 2028	Year 3 – 2029
Annual Subscription (include a per-module cost, if applicable)			
Implementation / Setup (enter in year 1 column)		-----	-----
On-site Training (if separate)			
Other (describe)			
TOTAL COSTS			

Initial Contract term offered: 3 years

Initial Contract may be extended by the Town, based on satisfactory performance for additional years with negotiated terms as a professional service contract with the Town of Macedon.

The Town's preference is for a predictable cost, all-inclusive agreement.

Proposals that include separate per-user, per-form, or per-storage charges are less desirable, and will be evaluated accordingly.

VI. SUBMITTAL REQUIREMENTS

Proposals must be submitted and received by August 6, 2026 at 4:30 p.m. Proposals may be submitted hard copy directly to the Town Clerk at the Macedon Town Hall or may be submitted as a .pdf via email to the Town Clerk:

Karrie Bowers – Town Clerk

Town of Macedon

32 Main Street

Macedon, NY 14502

315-986-5932 (phone)

www.macedontown.gov

townclerk@macedontown.gov

Late submissions will not be considered. Proposals should include:

1. Cover Letter — signed by an authorized representative
2. Company Overview — years in business, ownership
3. Completed Requirements Matrix (Section III above)
4. Support & Training Plan (Section IV above)
5. Implementation Timeline — describe approach
6. Completed Pricing Table (Section V above)
7. Three (3) municipal references of similar size and scope, including contact name, title, and email, preferably in the Upstate NY area.

VII. EVALUATION CRITERIA

This process is a “best value” procurement by the Town of Macedon. Submissions will be evaluated against the following criteria:

1. Fulfillment of the listed scope of work
2. Ease of use
3. Professional appearance of the platform both in the public facing interface as well as the staff facing interface
4. Support and training available
5. Cost and value to the Town
6. The Vendor’s experience and ability to perform the work

The Town is not obligated to award a contract to the lowest-cost proposal.

VIII. MULTIPLE VENDORS

In any case where one individual vendor cannot provide the entire scope of services listed in a comprehensive proposal acceptable to the Town, either from a cost and/or ability standpoint (or otherwise), the Town will consider proposals from multiple vendors with programs which will work together to accomplish the comprehensive list of services and provide the best value to the Town.

IX. GENERAL TERMS

- The Town reserves the right to reject any or all proposals, waive informalities, or cancel this RFP at its discretion.
- All proposals and any resulting contract are subject to applicable public records laws.
- No contract may be subcontracted without prior written approval from the Town.
- The Town is an Equal Opportunity Employer.

