REQUEST FOR INFORMATION (RFI) QUESTIONS AND ANSWERS
Technology Solutions to Support PermitSF

ISSUED BY: City and County of San Francisco, Mayor's Office of Innovation
DATE: June 11, 2025

This document provides answers to questions submitted by potential RFI respondents between May 20, 2025 and June 9, 2025.

Please find questions and answers organized across five overarching topics: RFI processes, Permitting Teams' needs, technology integration, selection criteria, and internal staffing.

Topic 1: RFI Processes

Question	Answer
Which department will be responsible for the implementation and become the system owner?	The PermitSF team, as laid out in [Mayor Lurie's Executive Directive](#), will lead implementation. The City will negotiate further details with selected vendors during the latter stages of the procurement process.
Does the 10-page limit include the cover letter, the executive summary, Vendor Day Participation Request, and Appendix or just the responses for the RFI?	It excludes the appendix only.
Are there any specific font format, minimum font size, or margin size requirements for RFI responses?	No
Where can we access a sample of the required Business Associate Agreement (BAA) referenced during the pre-bid conference for review before the June 9 question deadline?	Vendors do not need a Business Associate Agreement (BAA) to submit an RFI response. The City develops BAAs on a case-by-case basis and will provide a draft to vendors invited to the Showcase for review.
What do I need to do to be considered a respondent, and how do I submit my RFI response?	The RFI response of 10 pages is all that needs to be submitted by the deadline of June 13 at 3:00 PM PST. Responses must be submitted in PDF format by email to moi.rfis@sfgov.org with "Technology Solutions for PermitSF" in the subject line. The City will share any additional steps or required agreements with vendors invited to the Showcase.

Question	Answer
How many different record types is the City asking vendors to implement? *Can this be broken down by department and name of the Process/Application?*	For the one-year requirement, the City will start with centralized digital intake for three permit types: construction, restaurant, and special events. This phase focuses on intake and status tracking. We'll work with the selected vendor and departments to define backend workflows and map record types by department in the next phase.
Can you provide a complete list of permit and license types (e.g., building, business, health, fire, etc.) that are in-scope for centralization under the PermitSF initiative?	We're starting with centralized digital intake for construction, restaurant, and special event permits. From there, we'll work with the selected vendor and departments to scope the full breakdown of records and sub-records.
For a potential Phase 1 implementation of a digital front door for comprehensive permit intake and real-time status tracking, how many internal users will require system access?	The City expects roughly 200 internal users working across construction, restaurant, and special event permits for the initial phase of the front door build. The final user count will be confirmed in coordination with the selected vendor during implementation planning.
What types of users must the system support (e.g., homeowners, contractors, architects, permit center staff, reviewers, inspectors)?	The system should support customers (homeowners, contractors, architects, small business owners, event planners), as well as City employees (plan reviewers, inspectors, Department leadership teams). The City will finalize user scoping with vendor and PermitSF staff.
What is the total number of internal users needing access to the system?	We're providing the total estimated number of internal users across all departments. The number of users for centralized intake in Phase 1 will be fewer and finalized in coordination with the selected vendor. **Current User Counts:** Planning Department: 200 users Department of Building Inspection: 300 users Fire Department: 100 users Permit Center: 25 users Partner Agencies *(Public Utilities, Public Works, Environmental Health, Community Investment & Infrastructure, OSB)*: 250 users **Total Users: ~875**

What are the estimated external permit requests per year?	The breakdown of 2024 permit volumes by department are provided below. These figures reflect total volume across all departments. The initial scope for Phase 1 will be determined in coordination with the selected vendor. **2024 Permit Volume** **Construction & Land Use** DBI: ~25,000 Planning Dept: ~3,000 **Business Operation** Fire Dept: ~1600 Dept of Public Works: ~800 Dept of Public Health: ~2900 Entertainment Commission: ~550 **Total Volume: ~34,000**
How many field inspectors will eventually require access to the mobile field inspections application? *How many dispatchers require access?* *Do any dispatchers require access to both the field inspections and dispatching?*	The City will determine the number of field inspectors and dispatchers who will require access in collaboration with the selected vendor as part of scoping additional use cases beyond centralized intake. We will refine details during implementation planning to align with departmental workflows and operational needs.
Does the City anticipate setting a maximum file size limit for documents uploaded as part of the Plan Review and permitting process?	The City does not have a set maximum file size at this stage but expects the platform to support large uploads, including plan sets that can reach 750MB to 1GB. The ability to handle large files reliably is important, and vendors should highlight their platform's capacity as part of their response.
Will the City prioritize a single permitting domain for MVP delivery, or expect multi-domain go-live?	Vendors may propose any approach they believe will meet the City's goals in their project plan and methodology.
Are dashboards for department performance be a required deliverable for the first phase?	Yes, performance tracking dashboards are a priority feature for the centralized intake. The City's Unified Data Platform (UDP), built on Snowflake, is available to support dashboard development. We'll work with the selected vendor to define the requirements and data flows.

Will inspection results (e.g., passed/failed, violation notices) and license statuses be visible publicly or limited to authenticated users?	The City will decide on public visibility of inspection results and license statuses during a later phase of the system build. We'll work with the selected vendor to balance transparency with privacy, legal, and operational needs.
Has any change management analysis been conducted to assess the level of buy in from various stakeholders to adopt a centralized intake process? IF yes, will the PermitSF team share these insights to support responses to this RFI?	The City will have a centralized implementation team to coordinate across departments. Departments will continue to manage their own processes, but any changes must be made in direct coordination with the central team to ensure the system stays unified and avoids fragmentation.
What is the expected public access model for real-time status tracking? *Is a log-in required?* *Are there any security considerations if it is open access?*	The City expects applicants to have full access to permit details through a secure, authenticated experience. Public users will be able to view limited, read-only status information without logging in. Any activity that involves submitting or editing information, uploading documents, or representing an organization will require authentication. The City will finalize visibility and access rules in coordination with departments and the selected vendor. We will address security and privacy considerations during implementation to ensure that open access does not compromise sensitive information.
Has any service design, user research, process improvement, change management, or other non-development work been conducted to the desired (i.e. "future") state? IF yes, will the PermitSF team share these insights to support responses to this RFI?	Not for the PermitSF future state. The City will provide service design staff support to pair with the selected vendor.
What would users need to do with the data in the PeopleSoft Financials system? Will they need to just see the data or will they have to make updates in PeopleSoft from the permitting tool?	The permitting system should be able to interface with PeopleSoft to post Accounts Receivable (A/R) files and Journal Entries (JE). In later phases, the permitting system could ingest data from PeopleSoft that includes unique indicators, allowing it to match posted transactions to specific actions initiated in the permitting system. This supports accurate reconciliation and end-to-end financial traceability.

What level of detail does the City expect to publish in real-time dashboards (e.g., open inspections, average permit turnaround, license renewal volumes)?	The City expects real-time dashboards to track key performance indicators tied to customer outcomes and operational accountability. Metrics may include: • Percentage of permits meeting performance target deadlines • Percentage reduction in processing times for selected permit types • Time to completeness check, first review, and recheck review The City would like to track additional outcome metrics, such as total time required to build new homes, complete home remodels, or open small businesses, or small business opening delays, as long-term indicators outside of immediate dashboard reporting. We will refine these expectations with the selected vendor. Examples of existing performance metrics can be found [here]().
Do you have a process flow that outlines the permitting process from end to end from a systems integration perspective that you can share with us?	The City does not have a single comprehensive end-to-end process flow from a systems integration perspective. However, we have provided departmental process flows and tools on [Slides 11, 12, and 16 of the PermitSF RFI webinar slide deck](), which offer insight into current workflows and system touchpoints.
What are the City's expectations for cost management and budgeting for the new permitting system? Are there any specific cost constraints or considerations that should be addressed?	The City will define cost management and budgeting expectations in collaboration with the selected vendor. Proposals should include transparent pricing models, identify major cost drivers, and outline strategies for implementation to support flexibility and value. Final cost parameters will be developed as part of the contracting and planning process.
How does the City envision the scalability of the new permitting system? Are there any specific growth projections or future needs that should be considered?	The City expects comprehensive permitting solutions to scale over time to support additional permit types, departments, users, and use cases. While there are no fixed growth projections, vendors are encouraged to design for flexibility, modular expansion, and increased user volume. The system must be able to accommodate both near-term needs and long-term growth. Scalability planning will continue in partnership with the selected vendor.

Question	Answer
Can data migration and integration be phased out to go-live/be completed after the February 2026 deadline? Or would you need all data migrated and all desired integrations to go live by February 2026?	Data migration and systems integration can be phased. Not all migrations or integrations must be complete by the February 2026 go-live deadline. The City's priority is to launch a centralized intake and status tracking experience by that date. Broader integration and historical data migration will be scoped and sequenced with the selected vendor based on feasibility and impact.
How are you currently handling entity resolution when the same contractor or property owner appears with different names across DBI, Planning, and Fire systems?	Currently there is not central entity resolution across these different systems. However, there is varying level of validation of contractors and property owners against City & State sources of truth including CA CSLA data (contractors), registered businesses, and property owner information. The City data is available on the City's DataSF Data Portals and Unified Data Platform.
What APIs or integration methods does the City currently use, and are there known limitations that have affected past system integration efforts?	External systems cannot directly access internal City infrastructure. To enable integration, the City exposes services in a secure perimeter network (DMZ environment). All connectors, integrations, gateways, and enterprise service busses must pass cybersecurity review and are subject to annual recertification. These security requirements apply to any new system.
How many external databases/systems integration points will be required?	The exact number of external databases and integration points will be determined in coordination with the selected vendor. The City currently has 9+ systems of records for permitting that may require integration with depending on solution capabilities. The Citywide Unified Data Platform, which is a Snowflake instance, may be a useful intermediary/data lake for integration. We can confirm that integration with Snowflake will be necessary for any selected vendor.

Is integration with legacy systems expected in Phase 1, or will a hybrid model be used during migration?	The City expects to maintain a hybrid environment during the initial phase, but we will determine the exact integration approach with the selected vendor. We are looking for proposals that outline how your solution can support phased integration with legacy systems while enabling a smooth transition toward a unified platform.
Will GIS tools like EAS and PIM be consumed via API or embedded in the portal experience?	The new permitting system must include core GIS functions like address validation and map-based property information. Vendors may use APIs to connect to existing tools at first, but the goal is to embed these features directly in the platform.
Could the City confirm whether it is interested in receiving proposed solutions that can replace existing point-solutions? For example, solutions that include a fully embedded enterprise content management system to avoid the need for complex integrations.	Yes, the City is open to solutions that can replace existing point-solutions if they reduce complexity and support long-term maintainability.
Is the intent to consolidate all permit types onto a single application instance, or maintain federated systems with unified front-end?	The City's long-term goal is to consolidate permitting into a single, integrated system that supports centralized intake, shared workflows, and unified reporting. We are open to approaches that deliver a seamless user experience and operational coordination, whether through a single application instance or a well-integrated system with a unified front-end. The preferred architecture will be developed in collaboration with the selected vendor.
Is data being migrated from any legacy systems? If so, please identify the systems involved, and provide the estimated number of tables and attributes to be migrated.	Yes, the City expects to migrate data from legacy systems, but centralized intake will most likely launch before any major data migration occurs. Key systems may include Planning's Accela, DBI's PTS, and Fire's Oracle-based system. The City will work with the selected vendor to determine which data to migrate and when, focusing on what is needed for status tracking and historical reference. Migration will be phased based on value, feasibility, and long-term goals.

Are there non-negotiable workflows or interfaces (e.g., CityBase payments, Bluebeam markup) that must be retained as-is?	The City expects vendors to integrate with a range of existing systems as part of the centralized intake build. Some systems, like DBI's PTS, Planning's Accela, and Fire's inspection tools, are prioritized for replacement. Others, such as PeopleSoft Financials, 311, the Unified Data Platform Snowflake instance, and Contractors State License Board (CSLB) license validation, will remain and must be integrated. Proposals should account for near-term integration across permit tracking, document management, GIS, payment processing, and reporting systems. Final system decisions will be made with the selected vendor.
Please specify the expected integration method for each integration point and frequency (e.g. real-time APIs, scheduled batch jobs, event-driven)? This will support RFI budget estimation.	The City aims for real-time integration where feasible, especially for intake, status updates, and payments. In the short term, batch or event-based methods may be more practical depending on system constraints. Vendors should propose the best method for each integration and note which can be real-time now versus later. Final decisions will be made with the selected vendor.
Is the City open to an alternative payment processor that is PCI compliant?	The City is open to considering alternative PCI-compliant payment processors. Proposals must clearly explain the payment flow, payment processing rates, including ACH payments, Merchant of Record structure, and how the solution would integrate with the City's centralized cashiering systems.
Are there any preferred vendors for visualization tools (e.g. PowerBI, Tableau, Google Looker) that are already used and connected to the City's Unified Data Platform?	The City's Unified Data Platform, built on Snowflake, currently supports integrations with tools like Power BI and Tableau, which are commonly used for reporting and dashboards. Power BI is the City's current enterprise BI tool but the City is open to proposals that include other visualization tools, as long as they can integrate with the data platform and meet reporting needs. The tools should also be widely accessible to City staff via existing tools and would need to meet the City's digital accessibility standards for any public-facing applications or reporting.

Will data migration for existing system(s) be required? How much?Are there specific compliance requirements?
 	
Will you require backup, restore and archive solutions?
	The City will work with the selected vendor to determine the scope of data migration based on the proposed solution. Appendix B of the RFI outlines the City's existing systems and can help vendors assess what migration may be needed.
	
	Yes, the City has compliance requirements that vary based on the specific use case and data involved. These requirements will be reviewed and addressed on a case-by-case basis in coordination with the selected vendor and relevant City departments. Examples of requirements include:
	• Health has HIPAA compliance requirements
	• All post-entitlement permits are beholden to various state laws that dictate maximum times between receiving the application and response.
	  o Some laws cover the duration of the full journey
	  o Some laws dictate a period for completeness check to ensure application is reviewable before accepting for full review
	
	The City requires vendors to provide backup, restore, and archive solutions.

Have any of the connections with the systems identified in the RFI already been established?	No new system connections have been established since the RFI was released on May 20. While some departments have existing internal integrations, vendors should assume that all connections identified in the RFI will need to be re-evaluated and established as part of the new permitting system. Integration details will be confirmed during planning with the selected vendor.
What are the requirements for data encryption in transit and at rest?	The City requires all data to be encrypted in transit and at rest using industry-standard protocols. At a minimum, vendors must support TLS 1.2 or higher for data in transit and AES-256 or equivalent for data at rest. Final encryption standards and controls will be reviewed with the City's cybersecurity team during implementation.

Can you please describe what "SF Customer Inquiries" does for the City?	The City has centralized customer permitting inquiries for DBI, Planning, Fire, and Public Works into a single customer service channel built in Salesforce, and managed by the Permit Center. With Salesforce as a single point of intake, the City has: • Leveraged front-line customer service staff from the Permit Center to triage and resolve inquiries, reducing customer service workload for specialized staff (such as engineers, planners, and inspectors) in permitting departments. • Developed a knowledge base to provide more consistent and accurate responses to customers. • Captured analytics to drive operational improvement. The analytics include identifying topics that most commonly cause customer confusion, and measuring caseload and response times.
Is the City interested in integration with Outlook for e-mail or calendaring functionality? If so, please indicate the total number of users who would require Outlook integration.	The City is open to exploring Outlook integration for email or calendaring functionality. However, we would need to better understand the proposed capabilities and use cases before determining the number of users or whether this integration is viable.
Is the City interested in SMS communication capabilities with citizens? If so, please indicate the nature of SMS communication (e.g., one-way vs. bi-directional SMS) and the monthly average number of SMS messages sent.	The City is open to SMS communication capabilities as part of the permitting experience. We will work with the selected vendor to determine appropriate use cases, whether one-way or bi-directional, and the feasibility of integrating SMS into workflows. Volume estimates and requirements would be defined during project scoping with vendor.
What is the use-case for Bluebeam? How will users need to interact with Bluebeam in the future permitting tool? And at what stages of the permitting process?	Currently Bluebeam is used for digital plan review, markup, and commenting, primarily for construction permits. Reviewers rely on it to examine submitted plans, add comments, and coordinate across departments. Streamlined integration of electronic plan review and workflow management are expected in the long-term stack.

	Use Case:
	• Customer applies on portal and uploads plan sets • Staff relevant to the permit application's workflow open the plan set, adding comments and updating status • Customer upload new versions while collaborating with staff • Staff and Customer collaborate until requirements are met and status allows issuance • Staff reports on plans, files and attachments based on permit number, address, their own activity, or other criteria
Are there other data sources not already identified in this RFI that would be included in this project?	At this stage, the City has identified the primary data sources relevant to the centralized permitting effort in the RFI. Additional sources may be included as the project evolves, particularly as new permit types or departmental processes are added. Any new data sources will be reviewed and prioritized in coordination with the selected vendor.
Are there currently any middleware or other integration platforms in use?	Yes, the City uses the Unified Data Hub, built on Snowflake, to streamline data exchange between systems and reduce point-to-point integrations. Additional integration tools may be in use at the departmental level, but middleware selection and configuration for the new permitting system will be determined with the selected vendor.
Is there a reference integration architecture (Snowflake hub-and-spoke, ESB, etc.)?	The City currently uses a hub-and-spoke integration architecture centered on the Unified Data Platform, which is built on Snowflake. This architecture is designed to reduce point-to-point connections and simplify data sharing across departments. Some departments also use direct APIs or platform-specific integration tools, but Snowflake serves as the primary integration layer for reporting, analytics, and cross-system coordination. You can refer to the RFI webinar slides for a high-level infrastructure diagram.

Will PeopleSoft Financials be the system of record for payments and accounting in the future state?	PeopleSoft Financials is the system of record for revenue and accounting. The payments system of record is permitting system, which may be feed by the centralized cashiering system and/or payment processor(s).
Is kiosk integration (CityBase, iPayment) expected at go-live or phased later?	The City will address kiosk integration after completing the first phase of centralized intake. We will work with the selected vendor to scope and schedule this integration based on department needs and system readiness.
How is data-exchange governance exercised?	Data exchange governance in the City is coordinated primarily through the Department of Technology and DataSF. The key policy governing this is the City's [Data Management Policy](#). Key governance practices include: • Use of the Unified Data Platform: The City leverages Snowflake as a centralized platform to manage, share, and monitor data across systems. • Standardized data contracts: Departments work with DataSF to define data schemas, access rules, and update frequencies to ensure consistency and quality. • Departmental data stewards: Each department is responsible for the accuracy, timeliness, and alignment of its shared data with systemwide standards. • Governance Boards: Cross-departmental governance structures are being established as part of the PermitSF effort to guide decision-making and oversight for data use and sharing.

Topic 4: Selection Criteria

Question	Answer
Do you require that the awarded vendor be headquartered in the United States?	No, the City does not require on-site work, but we prefer vendors to have staff available for in-person collaboration when needed.
If we do get selected for a demo, do we have to present it in person, or are we able to do it through zoom?	The City will consider a hybrid approach, but we recommend in person participation.

Do you have to be on premise to build this?	No, but the City prefers a team that can spend significant time on-site working side by side with Departments. However, we understand remote resources may be part of a more holistic team.
Will the City share Showcase scenarios or mock data before June 27 so teams can prepare early?	The City will share scenarios and data by June 20 with vendors invited to present at the Showcase on July 7 or 8.
Would you consider a hybrid model with core team on-site 2-3 days and extended team available remotely?	Yes
For the Showcase, will you provide: Sample permit scenarios and test data before the trial weeks start? *Access to technical staff for integration questions?* *Specific evaluation criteria you'll use to assess solutions?*	The City will provide scenarios, data, and comprehensive instruction for the solution Showcase on June 20.
Will future contracting separate system integrators from UI/UX, service design, or analytics roles?	The City is looking for comprehensive solutions that include system integration, UI/UX, service design, and analytics. We may consider separating these roles on a case-by-case basis if a specialized approach better supports the project's goals.
How will Showcase performance influence future contracting eligibility or scoring?	The City will assess each solution during the Showcase based on how well it addresses our goals, pain points, and workflows. Vendors who demonstrate clear problem-solving during Trial Week strengthen their position in future procurement.
Will all Showcase participants be evaluated equally regardless of solution scope?	The City will evaluate individual solutions on July 7 and comprehensive solutions on July 8. We will use similar evaluation criteria across both days, but we will tailor the criteria to match the scope of each project.
Is the Showcase intended as a paid engagement or strictly informational?	Strictly informational

Will Showcase IP or prototypes remain the property of the vendor?	Vendors will retain ownership of any intellectual property or prototypes developed for the Showcase. The City will not copy work from demo environments. However, all submitted materials become the property of the City and may be subject to public disclosure under the California Public Records Act and the San Francisco Sunshine Ordinance. Vendors must clearly mark any materials they believe contain trade secrets or confidential information. The City will make reasonable efforts to protect such information, but cannot guarantee confidentiality under applicable law.
Can vendors use their own demo environments for Showcase solutions, or must we host on City infrastructure?	Yes, vendors may use their own demo environments as long as Permitting Staff have access to the environment on a temporary basis after the presentation.
Will the City consider small-business-friendly procurement methods or cooperative contracts?	The City welcomes submissions across procurement methods or cooperative contracts. We will review these approaches on a case-by-case basis to determine what best supports the goals of the project.
Will the City provide a feedback report or evaluation rubric post-Showcase	City staff will make this decision case by case, based on availability.
How should we submit partnership declarations for the Solution Showcase (formal teaming vs. informal collaboration)?	Please include the proposed partnership as part of your RFI submission.
Will the City allow modular or multi-vendor implementations, where small businesses can lead discrete components like intake, workflow, or dashboards?	Yes
Will the City allow partial solutions for the Showcase that focus on a specific value chain (e.g., intake to review handoff)?	Yes, the City will invite select vendors with partial solutions to present on July 7. We will share more details on June 20.
Is there any anticipated preference or scoring bonus for small businesses or SBE-certified firms in future RFPs?	The City will assess how each solution aligns with our PermitSF goals, pain points, and workflows. Strong performance will strengthen a vendor's consideration in future procurement decisions.

	There are no fixed requirements for prior experience, certifications, or security clearance at this stage. Staffing models with have relevant experience in enterprise permitting systems, government implementations, systems integration, and user-centered design are preferred. The City will evaluate team qualifications as part of the RFI review and may request additional information during vendor selection. Security and background clearance requirements, if any, will be defined during contracting.
Are there any specific requirements (i.e. minimum prior experience, certifications, security clearance) for the staffing of this project?	

Topic 5: Internal Staffing

Question	Answer
Which executive sponsor will have authority to mandate department participation and resolve conflicts when departments resist unified workflows?	The City is finalizing a PermitSF governance model to align process redesign with technology implementation. We will name an executive sponsor who can support alignment across departments and help resolve conflicts. We will finalize this structure before selecting a vendor to ensure departments stay aligned and accountable to shared goals.
How do you anticipate working with labor unions who may be concerned about automation of work in permitting? Which unions represent permitting workers?	The City will coordinate with labor unions based on the specific scope of the project. We will work closely with the selected vendor to identify where automation may impact work and engage the relevant unions early in the process. Multiple unions represent permitting staff, and we will tailor engagement to match the roles affected by each phase.
Will a centralized implementation team oversee coordination between departments, or will individual departments retain process ownership?	The City will have a centralized implementation team to coordinate across departments. Departments will continue to manage their own processes, but any changes must be made in direct coordination with the central team to ensure the system stays unified and avoids fragmentation.