Proposal for
Permit & Inspection Software for the
Community Development Department
RFP 2016-03

Prepared for
Baker County

Baker County Board of County Commissioners Administration Office
55 N Third Street
MacClenny, FL 32063

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3001 North Rocky Point Drive East, Suite 200
Tampa, FL 33607
Toll Free: (866) 530-4980
84WORKS.COM

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December 22, 2016

Subject: Proposal for Permit & Inspection Software

Charles Abbott Associates, Inc. (CAA) is pleased to submit the enclosed Proposal to provide Baker County (County) with our 84Works Inspection and Permitting Software.

84Works was one of the first electronic permit issuance systems available to cities and counties. Today, the system is completely cloud-based and offers electronic plan check processing as well as a mobile tablet inspector solution, all in one. Whether you process 10 or 10,000 permits annually, 84Works is an easy to use, highly dependable and cost effective resource.

With extensive expertise in the government sector, CAA understands the challenges the County is facing. In fact, most of our clients have faced very similar issues, and have succeeded in not only solving these issues, but have benefited from numerous other efficiencies our solutions provide. Our clients are not only streamlining their processes, reducing the amount of labor required to complete their work, and increasing public access to information – but they are also seeing tremendous benefits from paper savings, saved courier costs, fewer public information requests at the office, and synergies from automating processes not only in their departments but county wide.

Our entirely web-based solution gives cities the flexibility to meet permit automation needs through a single solution while also meeting their budgets. Our easy-to-use, intuitive interface translates into instant user adoption. Built on FileMaker technology, 84Works easily integrates with your existing systems and third-party applications, if desired.

Company Information

1) Background: Charles Abbott Associates, Inc. (CAA) is a California corporation specializing in providing Building and Safety, Engineering/Public Works, and Environmental services along with supporting software to municipalities.

2) Years in Business: 32

3) Number of Software Customers: 10

4) Experience: Since 1984, CAA has been providing a growing number of cities with outstanding engineering, building & safety, code compliance and plan checking services. Over the years, we have developed and perfected our own municipal software, 84Works, to support and streamline the services we provide to our municipal clients. Our product suite is specifically designed for Building & Planning departments, and dramatically reduces the time and cost of manually processing, storing, and retrieving plans and permits.

5) Tax ID: 33-0053899

6) Copy of Business License: CAA is headquartered in Mission Viejo, CA. Business licenses are not required for businesses located and operating in City of Mission Viejo.

7) Main Contact: The staff person assigned to the County’s project will be Mark Abbott, CBO and Principal Software Engineer. Mr. Abbott has over 14 years of municipal
experience with building and engineering related activities, and oversees the continued development of the company’s 84 Works software suite. He will serve as Project Manager and will ensure the County is completely satisfied with the software implementation and training.

8) Qualifications:

**Strong Focus on State & Local Government:** Our products are designed and developed uniquely for the needs of state and local government agencies. This focus has allowed us to gain a wealth of knowledge and experience with projects in the government sector and has resulted in a deep understanding of the environment in which government operates.

**We Develop & Support our Products:** Our clients don’t have to worry about dealing with outsourced support or resellers who may or may not support our products in the future.

**Outstanding Customer Service & Support:** 100% project completion and 95% client retention.

**Open Architecture:** Thanks to our architecture, 84Works can be integrated with virtually any 3rd party application at an additional cost.

**Quantifiable, quick return on investment:** Significantly reduce staff time required to review plans, process permits, conduct inspections, counter time, and more.

**Scalable:** From small to large cities, 84Works is built to meet your needs.

**User Friendliness:** The ease and extent to which 84Works can be configured allows the screen to be clutter free and easy to navigate. It also allows users to gain immediate comfort using the system.

**Value:** We take projects from start to finish and control our product development and pricing. That’s how we are able to best meet your needs.

9) Addenda: CAA has not received any addenda to the County’s RFP.

10) Validity: Our proposal will remain valid for a minimum of 90 days from the due date of the County’s RFP.

11) Authorized Signature: Rusty Reed, Principal, is the individual authorized to bind the company in a contract with the County. His signature can be found below.

We want to be your partner in delivering exceptional public service and promoting Baker County. We pledge the full resources and backing of our firm to assure that the County has the most efficient and cost effective permitting software strategy available.

We would be happy to meet with you to discuss how our products meet your needs. If there are any questions, or if any additional information is needed, please contact Mark Abbott at (760) 403-8082. Thank you in advance for your consideration.

Sincerely,

CHARLES ABBOTT ASSOCIATES, INC.

Rusty Reed, Principal

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MUNICIPAL SOFTWARE
84Works automates and simplifies the permit application, review, resubmittal, approval and inspection process. It allows you to route applications for review, upload plans and other documents, create your inspection reports and generate certificates of occupancy easily through an intuitive, user-friendly interface. With 84Works permitting software, contractors can apply and submit for plan check online, calculate fees, and track the status of their application. Permit applications are then automatically routed to the appropriate departments based on permit type. Review notes and resubmittal requirements are consolidated into the review status sheet simplifying the resubmittal process for employees and contractors. Once the permit is issued, contractors can request inspections over the internet or your staff can use the scheduling function of the system to schedule inspections. With mobile user defined inspection checklists and commenting features, inspectors can conduct inspections and update inspection reports immediately.

84Works also manages code enforcement processes. Our software streamlines the process of opening cases, scheduling inspections, recording violations and coordinating resolutions. Crucial information such as property ownership, inspection notes and results, photos, notices, violations and notes becomes part of each case. 84Works is an entirely mobile solution that gives inspectors complete remote access to your code enforcement data from the field.

Additionally, 84Works provides support for the County’s inspection programs, including scheduling, inspection performance, licensing, and other related tasks.

84Works manages licensing programs by automating the application, payment, review and renewal of business licenses. Business owners can submit for and renew business licenses quickly through our web portal. Custom fields based on license type gives you the ability to track pertinent information associated with different license types.

Reports enable the County to track employee utilization, performance, and all manners of financial information.

84Works integrates directly with Electronic Plan Check (ePC). We provide a customizable web portal that is easy to navigate, quick to work through and provides the latest drag and drop capabilities with the highest of credit card security. In fact, we don’t see or keep any credit card data, as we provide Payment Card Industry Data Security Standard (PCI DSS) compliance by programming the credit card processor’s payment gateway right into our site. Our integration with ePC not only allows for the review and mark-up of digital construction plans on a computer, but encompasses the entire plan check process from the first submittal to preparing for permit issuance. Our ePC solution includes:

- A web site for the creation of online customer accounts to manage the uploading and downloading of construction plans and the payment of plan check fees
- A building permit system to manage the plan check fees to be charged and capture the project data for future permit issuance
An electronic mark-up program that not only provides the review and mark-up of digital construction plans, but also the necessary document management tools to be able to assign the work to the appropriate plan checkers throughout various departments.

By using 84Works, architects, contractors and homeowners can now get entirely through a plan check process without leaving their home or office. Our system is designed to save printing cost, travel cost and staff time (applicant and County) that it would normally take to submit paper plans for plan check the traditional way.

**Software Features**

Our goal is to make our software the easiest to use municipal permit software solution available. Many companies offer expensive permit software that is time consuming to install and difficult to use. 84Works Permits is just the opposite! It is installed quickly, it is efficient, it is easy to use, jam packed full of fantastic features, and the cost will not break the County’s budget.

Some of our unique features include:
- **Estimates:** A dedicated screen to create and print estimated permit fees in seconds
- **Dashboard:** Built-in bar graphs for permit fee data with no Crystal Reports!
- **Kiosk:** Get rid of paper and have customers fill out permit applications on an iPad

**Main Permit Screen:**
- The interface is easier to use than any other permit system
- Permit screen shows all of the essentials for quick data collection
- Check what inspections have been performed for the permit
- Print permits, invoices, transmittals and job cards
- Permit screen is locked to keep accidental data entry errors
- Issue a permit and schedule an inspection from the same screen
**Inspection Screen:**
- Create and view inspection run lists
- Sort and print run lists by days, weeks or even by inspectors
- Insert an inspection result (pass/fail) for each inspection
- Add notes to each inspection
- Click a button to final a permit or extend it for 180 days
- Don’t want to print a list? Then be green and email it!

**Permit Fee Cost Estimates**
- Create permit fee estimates in seconds
- Print estimates to send/email customers
Check Contractor Licenses
- Don’t leave your permit to check a license
- View the state web site right in the app
Charts And Graphs
- View department revenues for any period
- Charts and graphs can be customized

Permit iPad Ready
- iPad access to all permit info in the field
- Write and email corrections
84 Permits Form

- Our permit form is 8.5” x 11”
- Fees & worker’s comp info on the permit
84 Permits Job Card

- Our job card is 8.5” x 11”
- Print with permit address on the card
Additionally, 84Works offers a customer web site for permit applicants to upload plans and pay a plan check fee. With this we have also incorporated ePlanSoft’s electronic plan check software into Permits for a complete full service electronic plan check system.

Software Capabilities Sheet

Please find below the County's Software Capabilities Sheet.
SOFTWARE CAPABILITIES SHEET

Vendor name  Charles Abbott Associates, Inc.  
Software name  84 Works  

Place an “X” in the appropriate box that describes each feature of your proposed software.

<table>
<thead>
<tr>
<th>ITEM</th>
<th>CAPABILITY</th>
<th>Yes, the software can do this function</th>
<th>No the software cannot do this function</th>
<th>With modifications, the software can do this function. Describe on a separate sheet</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Create &amp; Track Permits/Projects – Ability to create cases and associated data for permits and projects.</td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Online Document Management – Ability to create Permit and Project documents within the system.</td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Ability to store permit and project documents within the system.</td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Ability to import files of various software formats into the system. Provide a list of software formats accepted.</td>
<td></td>
<td>X</td>
<td></td>
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<tr>
<td>5</td>
<td>Workflow - Must be able to flow cases through a minimum of 3 individuals.</td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Workflow Approvals- The case does not forward to the next individual on the workflow until the previous person has reviewed and approved.</td>
<td></td>
<td>X</td>
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</tr>
<tr>
<td>7</td>
<td>Workflow Automation – Ability to modify workflow so that reviews, inspections, statuses, and notifications can be modified both automatically or manually. County can make the changes.</td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Application Processing/Online Permits) – A user-friendly, online web portal for citizens which is easy to understand and navigate</td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>Each citizen or contractor (user) has the ability to create a user login account through the web portal.</td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>Permit applications can be made through the web portal from any internet connection or mobile device.</td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Users can process permit applications through the web portal.</td>
<td></td>
<td>X</td>
<td></td>
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<tr>
<td>12</td>
<td>Users can review fee statuses through the web portal.</td>
<td></td>
<td>X</td>
<td></td>
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<tr>
<td>13</td>
<td>Users can make fee payments through the web portal.</td>
<td></td>
<td>X</td>
<td></td>
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<tr>
<td></td>
<td>Users can get a receipt they can print off through the web portal.</td>
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<td>---------------------------------------------------------------</td>
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<td></td>
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<tr>
<td>15</td>
<td>Web portal payments can be by debit or credit card.</td>
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<tr>
<td>16</td>
<td>Web portal supports debit or credit card payments through Pay Pal.</td>
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<tr>
<td>17</td>
<td>The web portal will show County staff that fees have been paid by the user, and a duplicate receipt can be printed, if needed.</td>
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<td></td>
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</tr>
<tr>
<td>18</td>
<td>If the user comes in person to County offices, the software will allow acceptance of the debit or credit card, and a data entry for “cash”.</td>
<td></td>
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</tr>
<tr>
<td>19</td>
<td>All cashiering transactions including payments, refunds, fee calculations, fees added, fees removed, or fees modified will be auditable.</td>
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<tr>
<td>20</td>
<td>Users can view project updates and status of their case on the web portal.</td>
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<tr>
<td>21</td>
<td>Users can schedule inspections on the web portal.</td>
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<tr>
<td>22</td>
<td>Fee Calculation- The software allows staff to develop custom fee variations and fee formula calculations.</td>
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<tr>
<td>23</td>
<td>The building fees on the web portal can be changed by County staff at any time.</td>
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<tr>
<td>24</td>
<td>Plan Submission/Revision – The software will accept digital, scaled drawings/plans and supporting documentation on the web portal.</td>
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<tr>
<td>25</td>
<td>Plans can be submitted to the web portal through any internet connection or mobile device.</td>
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<tr>
<td>26</td>
<td>The submitted plans can be reviewed digitally.</td>
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</tr>
<tr>
<td>27</td>
<td>The submitted plans can be redlined and saved on the web portal.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>28</td>
<td>Users can access the web portal and review redlined drawings and plans, make revisions, and resubmit.</td>
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</tr>
<tr>
<td>29</td>
<td>The software would retain and track all versions of the plans.</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>30</td>
<td>The County can approve submitted plans through the web portal.</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>31</td>
<td>Mobile Inspections – Ability for inspectors to use smart devices in the field to receive dispatches.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>32</td>
<td>Inspectors can map and route inspections through the software on their smart device</td>
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<tr>
<td></td>
<td>Inspectors can schedule inspection activities on a calendar.</td>
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</tr>
<tr>
<td>34</td>
<td>Inspectors can photograph and document findings. All photos and findings must be saved in each case file.</td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>35</td>
<td>Inspectors can approve or deny inspections in the field on their smart device.</td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>36</td>
<td>Inspectors can download all assigned permit or case related inspections for the day locally to a device so that an active data connection is not required in the field to complete an inspection. Upon returning to coverage area, the offline work, including status, photos, and comments, can be uploaded to sync with the live system.</td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>37</td>
<td>Reporting – Includes standard reporting with the ability to query data.</td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>38</td>
<td>Ability to develop custom reports based on the County’s needs.</td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>39</td>
<td>User’s Portal – Permit and Development status will be available via online portal for 24/7 access through any internet connection or mobile device.</td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>40</td>
<td>The system has the ability to create and store electronic signature on inspection documents and plans.</td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>41</td>
<td>Software has 95% uptime. If not explain on a separate sheet.</td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>42</td>
<td>Do you have an API or direct database access so the County can access our data to customize our own reports?</td>
<td></td>
<td>X</td>
<td></td>
</tr>
</tbody>
</table>
Regarding item 4): Pictures are currently allowed to be added in the iOS app Inspector module. All other document formats coming soon to the Permit system. The Code Enforcement module allows for all types of files to be added to the system. Types of files include: PDF, DOC, XLS, JPG, PNG, MOV, MP4

Regarding item 7): Our standard workflow is manual and is very flexible. We can discuss further automation needs.

Regarding item 11): Users can process applications for plan check only through the web portal at the current time.

Regarding item 21): Online scheduling of inspections will be incorporated into the product within the next 12 months.

Regarding item 32): This feature is in our pipeline to add to our mobile inspector software.

Regarding item 33): Inspector can schedule inspections using drop down calendars as far out into the future as they would like; however, there is no Google Calendar per se.

Regarding item 40): Electronic signature capabilities will be incorporated in future software releases.

Regarding item 42): An API could be created for the County.
The following contains 3 related project references for 84Works with an outline of services provided to each client, as well as the period of time that we have been performing the referenced service. We are extremely proud of our track record and the length of time we have continuously provided services to our clients, and invite you to contact any of our clients to obtain their opinion of the services we provide for their cities.

<table>
<thead>
<tr>
<th>REFERENCES</th>
<th>SERVICES</th>
<th>SINCE</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>City of Fountain Valley</strong>&lt;br&gt;Matt Mogensen&lt;br&gt;(714) 593-4426&lt;br&gt;10200 Slater Avenue, Fountain Valley, CA 92708</td>
<td>84Works Software Building &amp; Safety Inspection &amp; Plan Check, Code Administration</td>
<td>2013</td>
</tr>
<tr>
<td><strong>City of La Palma</strong>&lt;br&gt;Douglas Dumhart, Community Dev. Director&lt;br&gt;(714) 690-3340&lt;br&gt;7822 Walker Street, La Palma, CA 90623</td>
<td>84Works Software Building &amp; Safety</td>
<td>2012</td>
</tr>
<tr>
<td><strong>City of Duarte</strong>&lt;br&gt;Craig Hensley, Community Dev. Director&lt;br&gt;(626) 386-6835&lt;br&gt;1600 Huntington Dr, Duarte, CA 91010</td>
<td>84Works Software Building &amp; Safety Inspection &amp; Plan Check, Code Administration</td>
<td>2013</td>
</tr>
</tbody>
</table>
**PROPOSAL FEE**

- **System Price – Permitting Module:** $10,000
- **System Price – ePlanSoft:** $15,000
- **System Implementation:** $17,500
- **System Training – End User Training:** $4,500
- **System Training – Technical Training:** $2,500

**ANNUAL SOFTWARE MAINTENANCE**

- **Annual Maintenance Price – Year 1:** $8,400
- **Annual License Fees – Year 1:** $28,800

- **Annual Maintenance Price – Year 2:** $8,400
- **Annual License Fees – Year 2:** $28,800

**Total Proposal Fee Year 1:** $74,400

As part of the annual maintenance services, CAA will provide the following:

- Maintenance of all infrastructure and system security as it applies to the hosted system and hosting data center.

- 24/7 technical and end-user support for the co-locate system and hardware located in the co-locate facility

- Standard support for servers, database, network, storage, and security services.

- Server support includes continual monitoring and control of processing including notification of anomalies to qualified personnel for review and correction as necessary.

- Standard database support includes database monitoring and maintenance activities including file allocation monitoring and adjustment as well as reorganizations as necessary.

- Security services for virus protection and vendor-provided security patches for system level software.

- Support for the Software is defined as the technical assistance required in the operation of the Software Products on a day-to-day basis by way of unlimited telephone and e-mail support. Support also includes maintenance updates (i.e. patches, hotfixes and minor upgrades) for the Software Products. Critical software issues will be patched by CAA. Non-critical software issues will be addressed per the standard maintenance process. If the County requests on site support the customer will be billed at established service rates plus expenses.

**SOFTWARE UPGRADES**

Text

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84WORKS  MUNICIPAL SOFTWARE
HARDWARE REQUIREMENTS

Being an entirely web-based solution, 84Works easily integrates with your existing systems and third-party applications using Open Database Connectivity, if desired. The system will work with a variety of mobile devices, but we recommend Apple products for maximum efficiency.

FIELD CAPABILITIES

84Works is an entirely mobile solution that gives inspectors complete remote access to data from the field, including the ability to create correction notices, log results, schedule inspections and access images/documents attached to the permit. Secure remote access is supported through (DMZ) firewall environment. A County provided mobile printer would allow inspectors to easily print permit or reports directly in the field.

USER ACCESS

The system allows for an unlimited number of concurrent public “view only” users to access the web portal at the same time. In addition, the system offers the ability to allow or restrict specific user access by department or role.

EMERGENCY BACKUP

Our main server is located in the Northern California region with Amazon Web Services. Our backup server is located in the Oregon region with Amazon Web Services. So we have one main server and one backup server.

All of our solutions are hosted at an Amazon Web Services (AWS) datacenter that provides the most comprehensive security features in the industry. The AWS infrastructure is not only protected by extensive network and security monitoring, but its infrastructure components are continuously scanned and tested as well. If requested, CAA can provide AWS certification reports that describe how the AWS Cloud infrastructure meets the requirements of an extensive list of global security standards.

Further, 84Works also uses industry standard Secure Socket Layer (SSL) digital certificates with SHA-2 and 2048-bit encryption for all data transferred between the AWS datacenter and the end user. Whether the data is being used by a Permit Technician, Inspector or architect submitting plans online, the data passed between the server and client remains completely private, encrypted and integral.

BANDWIDTH

At any point in the day we average between 50-70 concurrent users connected to our servers. And while Amazon Web Services is the leader in the cloud services hosting space, they are vague in giving specifics on the bandwidth, or trunk, that is dedicated to our servers. With that said, our main data server is one of the largest that can be purchased, called Extra Large, and with that size of server Amazon dedicates their greatest amount of bandwidth, which they only classify as “large” on a large, medium, and low scale.
MAINTENANCE

Maintenance is coordinated centrally by CAA to the benefit of all customers in the interest of remaining on current/supported environment software. Such efforts are planned and socialized in advance with all affected customers, and released through periodic maintenance (bug fixes) and update (new or modified functionality/features) packages.

Unscheduled maintenance required to prevent or solve an outage is performed in accordance with the service level agreement. Outage modifications could potentially impact other customers within the shared environment, but will be thoroughly tested with impacts kept to a minimum.

GUARANTEED UPTIME

In the entire 2015 calendar year, Amazon Web Services only experienced 2.5 hours of downtime, which is above 99.9% uptime. As for our services that run on AWS, our services are nearly as good as the AWS uptime. We will schedule and perform regular Windows Server maintenance on our servers over weekend periods, but this routine maintenance causes minimal disruption to the service.

DATA USE

We acknowledge that data generated by the County during the course of County operations is the property of the County. If the contract should be terminated, the County data will be made available to the County in a format acceptable to the County and 84Works.

WEB PORTAL

The County will be able to access the web portal from a link on the County’s website.

REPORTS

Status Reports

1. Issued Permits
2. Finaled Permits
3. Expired Permits
4. Plan Check

General Report

1. Permit Report

Fee Reports

1. Monthly Fees Collected
2. Specific Fees Collected
Dashboard

1. Top Paid Permits - List
2. Top Permit Types - Bar Chart
3. Residential vs. Commercial - Pie Chart
4. Monthly Totals - Bar Chart
5. Plan Checks - Line Graph

Debit/Credit Card Acceptance

Our customer plan check portal is setup so that the Credit Card Gateway is programmed seamlessly into our portal. We use the Gateway’s API’s to take in the customer’s credit card number and perform the transaction in our portal, but completely on the Gateway’s servers. The PCI compliance is taken care of by the Gateway so that our server never sees or keeps any customer credit card information. Settlement fees from the credit card transaction would either be incurred by the County or passed on to the customer as a “Service Fee” before checkout as a part of their final invoice. It is open to negotiation as to whether the County or 84Works would be the account holder with the Merchant/Gateway and would be responsible for those monthly fees. We have experience with 3rd Party vendors such as Authorize.net, Network Merchants Inc (NMI) and PayPalPro.

Timeline for Implementation

It is important that a timeline be established before the process begins and all involved in the process follows the timeline as closely as possible. The implementation timeline includes installing the system, preparing and converting data, training users on how the system is used and trouble shooting to ensure users can be off and running after the system is installed. A typical install usually takes an average of six to eight weeks and includes the following:

• Discovery: In the discovery session, the project manager and your team gather all pertinent information and discuss in detail your requirements, structure and the steps necessary to successfully integrate the solution into your environment. This is also the start of creating the timeline and assigning responsible parties for each step of the project. After the meeting, a finished timeline with dates is forwarded for your approval. It is important that these dates be carefully reviewed, as future changes can cause delays.

• Installation: Installation is performed by our project management team.

• Data Conversion: Implementation of relevant data from your current systems. After core data is implemented, setup and configuration continues to complete this phase.

• Review and Testing: An important step in implementation is confirming that the information is accurate and business rules are working properly.

• Training: Training sessions will begin with an overview of the system and will be focused on the core aspects that prompted the purchase.

• Going Live: This is the day your investment begins to pay dividends.

Post Implementation Review: Some time after the go-live, a review of how the system is being used is necessary. Often, valuable functions are not being used most effectively or not at all. At this point, we will provide guidance and remedial training to ensure that you obtain the full value from your investment.
Baker County, Florida
RFP 2016-03
Permit and Inspection Software
Due Date: January 6, 2016

28 Hammond
Irvine • CA • 92618
800 • 255 • 5675 phone
949 • 458 • 7626 fax
james@maintstar.com
Mr. Downing:

On behalf of MaintStar, we are pleased to provide the following proposal to the Baker County for your consideration. The team at MaintStar offers this response as the manufacturer, installation, configuration, training and on going support agent.

Our proposal is valid at least 120 days from the due date. MaintStar is an industry leading developer of software for City Asset/Work Order Management and Community Development (permits, inspections, planning and zoning). With a thirty-two year track record, our products are in use by over 300 local governments throughout the United States.

The solution we are proposing is currently in use with large counties, such as Alameda County, California issuing almost 1 million Community Development activities per year, as well as smaller agencies such as the Village of Lansing which issues 3,000 permits per year. Whether large or small, our success is based on providing the utmost attention to each and every customer project. Take a moment to watch the City of Pleasanton and Microsoft® CityNext™ videos, as they provide independent, candid details on the advantages of selecting MaintStar products and services.

Each detail is given careful consideration to make your deployment a success story as well. As part of this offer, we invite the Anne Arundel County into our Direct Advantage Program, which allows the city to grow and request new features in the first industry collaboration between agency and manufacturer.

Every effort has been made to provide a complete response, in the manner requested. However, if any questions arise with any part of this response, please feel free to contact me directly. Note: Following this letter is our certificate from the State of California as a California Corporation in Good Standing, and our Certificate as a State of California SB Micro business and as such our offer can be applied to your annual state requirements for Small Business Set Aside. We welcome the team at Baker County to be part of the ultimate Community Development System.

Best Regards,

James Reid
National Sales Manager
MaintStar
Federal ID  #33-0151817
800 • 255 • 5675 x. 206 office
323 • 974 • 3309  mobile
949.458.7626 fax
james@maintstar.com
State of California
Secretary of State

CERTIFICATE OF STATUS

ENTITY NAME: MAINTSTAR

FILE NUMBER: C1328464
FORMATION DATE: 01/11/1985
TYPE: DOMESTIC CORPORATION
JURISDICTION: CALIFORNIA
STATUS: ACTIVE (GOOD STANDING)

I, ALEX PADILLA, Secretary of State of the State of California, hereby certify:

The records of this office indicate the entity is authorized to exercise all of its powers, rights and privileges in the State of California.

No information is available from this office regarding the financial condition, business activities or practices of the entity.

IN WITNESS WHEREOF, I execute this certificate and affix the Great Seal of the State of California this day of May 17, 2016.

ALEX PADILLA
Secretary of State
# Supplier Profile

State of California Certification

**Certification ID:** 60235

<table>
<thead>
<tr>
<th>Legal Business Name</th>
<th>MAINTSTAR</th>
</tr>
</thead>
<tbody>
<tr>
<td>Doing Business As (DBA) Name(s):</td>
<td>MAINTSTAR</td>
</tr>
</tbody>
</table>
| Address | 28 HAMMOND, UNIT D  
IRVINE  
CA 92618 |
| Email | louis@maintstar.com |
| Office Phone Number | 949/458-7560 |
| Business Fax Number | 949/458-7626 |
| Business Web Address | www.maintstar.com |

**Service Areas:**

**Active Certifications**

<table>
<thead>
<tr>
<th>Certification Type</th>
<th>Status</th>
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<th>To</th>
</tr>
</thead>
<tbody>
<tr>
<td>SB(Micro)</td>
<td>Approved</td>
<td>06/07/2013</td>
<td>06/30/2017</td>
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</table>
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Executive Summary

Baker County, FL
RFP No. 2016-03
Executive Summary

MaintStar enjoys a success story with over 300 local government accounts in the United States. Most of our clients are repeat customers, the strongest attestation to customer satisfaction. At MaintStar every customer is important, the key in selecting a company that sole revenue source is local government software solutions. Whether large or small, our success is based on providing the utmost attention to each and every customer project. Alameda County, California issues almost 1 million Community Development activities per year, at the same time the Village of Lansing issues 3,000 permits per year, both large and small have found their solution in MaintStar.

There are many more reasons for Anne Arundel County to select MaintStar; and for ease in reviewing we have outlined those in the tables below. First the advantages of MaintStar - the company, and secondly MaintStar CDMS - the solution.

<table>
<thead>
<tr>
<th>Advantage MaintStar</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>100% In-House Development</td>
<td>MaintStar CDMS, including every module and aspect is developed in-house by MaintStar. As such: no migration, no interface of dis-similar development teams, paths or methods. It is 100% coherently designed by the same architects and development team.</td>
</tr>
<tr>
<td>No Technology Through Acquisition</td>
<td>MaintStar clients receive the best value for the dollar. When purchasing a product from a firm that gained it's technology through corporate acquisition, a premium by customers for the costs of acquisition. No premium is paid for debt or interests with MaintStar, we developed our system 100% in-house.</td>
</tr>
<tr>
<td>Direct, Local Customer/Vendor Relationship</td>
<td>MaintStar clients communicate directly with the development and support team in the same time zone - no middle men or off-shore entanglements.</td>
</tr>
<tr>
<td>California Small Business</td>
<td>MaintStar is a certified California SBMicro Business. Anne Arundel County, may take advantage of any federal small business mandates by selecting MaintStar.</td>
</tr>
<tr>
<td>Experience</td>
<td>32 years of supplying State and Local Government Software Solutions. • No Product End of Life Notices Ever • No Default on Contract • No Default on RFP Performance</td>
</tr>
<tr>
<td>MicroSoft® CityNext™ MaintStar Leading the Pack</td>
<td>MaintStar rates top spot as MicroSoft CityNext Developer. <a href="https://www.youtube.com/watch?v=w9kKMB3bSs">https://www.youtube.com/watch?v=w9kKMB3bSs</a></td>
</tr>
<tr>
<td>Mobile Citizen™ City of Pleasanton</td>
<td>Customer video showing the advantages of MaintStar Mobile Citizen. <a href="https://www.youtube.com/watch?v=BRJlzWu2STY">https://www.youtube.com/watch?v=BRJlzWu2STY</a></td>
</tr>
</tbody>
</table>

MaintStar Ultimate CDMS

| INTEGRATION | MaintStar CDMS integrates with Finance - Alameda County MaintStar CDMS integrates with GIS - ESRI and more Partnerships MaintStar CDMS integrates with PCI compliant Credit Card Processing MaintStar CDMS integrates with MicroSoft® Office and Active Directory MaintStar CDMS integrates with MaintStar CMMS Public Works |
| MOBILITY | MaintStar CDMS 100% Web Browser. If a browser runs on the device, MaintStar CDMS supports it. |
| CONSUMER PORTAL | MaintStar CDMS offers a 100% agency configurable web portal to take all Community Development requests and process payments in a PCI compliant manner |
| DASHBOARDS | MaintStar CDMS has over 100 standard reports, and a full custom Ad Hoc custom report creator. More exciting are the Real Time - KPI based Dashboards, developed by MaintStar for all our products. No API, no partnerships, these reporting features are all developed by MaintStar. |
Customer Driven Technology

At MaintStar, we believe in customer driven technology. Working closely with our customers, we strive to develop the most functional and efficient product to service agency requirements. Many of the features and functions you will discover while evaluating our products, are innovations that we developed at the request of our customers, like Alameda County. For example, MaintStar developed a true double entry financial transactions interface to their unique posting system. In keeping with this tradition, we are offering the Anne Arundel County to become part of our Direct Advantage Program. Under this program, Pittsburgh may discover features or function not current part of the CDMS application, communicate the needs to the development team at MaintStar. MaintStar will review the requirement and include it as part of the standard product release offering.

It’s Your Community Development System

By offering a very flexible system that allows customers to create their own screen appearances, their own user defined data fields, and deployment of color and style, the system becomes your system. MaintStar CDMS has an image library, that allows agencies to load as many logos and images in which to build screens, their web portal and community development forms in order to create a look and feel that is in sync with the agency itself.

Easy to Use

20 percent of the development time at MaintStar is dedicated on ease of use. Besides accuracy and reliability, the success of any software application is the ability of the users to readily take advantage of all features and functions on a regular basis. This comes from both ease of use design, and by using consistent and regular methodology through out the application. Once an administrative user sets up a permit type, they will have all the skills necessary to set up a license type. This is achieved by using the exact same user interface, layout, wizard and operational methods.

Additionally, since this application is intended for use by the public, ease of use becomes more critical to achieve widespread acceptance and praise by the citizenry. With MaintStar CDMS, a wizard driven consumer portal, that allows the agency to collect only the required data deemed necessary, and setup ease screen for the greatest ease of use, means you will have an application that is widely accepted and praised.

Best Return on the Investment

With MaintStar we develop 100% of our product without reliance on third license agreements or through costly company acquisitions (financial costs and corporate culture costs). This allows us to sell our applications in the most cost effective manner, while remaining an expert on our technology from front to back. This also significantly reduces the cost to support and maintain the product. First, inter-working modules operate better with less interface problems. Second, upgrades are always in sync and performed in a single instance, since all parts of the system are developed in house with the same team.
Company History and Experience

Baker County, FL
RFP No. 2016-03
MaintStar was founded in 1984.

In those 32 years, we have built a customer base of over 300 clients across the United States all using our advanced software solutions. All our products are driven based on customer driven requirements, and welcome customer suggestions and feedback. Our products have evolved much in these 32 years, today we are a leader with Mobile Citizen™, an interactive mobile application that allows citizens to report problems with any city assets from anywhere from the convenience of their mobile device. Please see the City of Pleasanton video below (top).

MaintStar develops 100% of our products - no third part licensing

A unique aspect of MaintStar - and a great benefit to our customers - we have developed all our product technology. We have not purchased other companies, or incorporate a licensing of third party technology into our product line. This means several things to our customers: the system is priced most effectively (there is no additional costs associated with the cost of purchasing a company or technology), secondly we are able to design and optimize each module in how they work together.

MaintStar has strong Technology Partnerships and Achievements

We also maintain strong relationships in the technology space as an active member of Microsoft® CityNext and with ESRI® Partners program. At the recent Microsoft® CityNext Smart City Expo World Congress in Barcelona Spain, MaintStar products were a finalist for the best new product - Mobile Citizen™. These partnerships allow us to stay current on technology, and offer our clients the latest tried and true applications. The next generation of civic technology is Augmented Reality. With MaintStar and CRG™ CivicAR, your users can point a mobile device at a civic location and view the status of permits, licenses, or even see the floor plan at a construction site.

Links to More Information

Pleasanton MaintStar Mobile Citizen (top right)
https://www.youtube.com/watch?v=BRJlzWu2STY

MaintStar provides smart technology for cities (bottom right)
https://www.youtube.com/watch?v=w9kKMiIb3bSs

MaintStar connects CMMS and CDMS to Augmented Reality

MaintStar Network Partnerships
Direct Advantage Program

Customer Driven Technology

At MaintStar our focus is “Customer Driven Technology”. Customers drive our product development and feature sets. A company’s products mean nothing, if they do not fulfill the customer requirements. To achieve this, we prefer to direct relationships with our customers. The best communication is direct communication. There are no sales channels or third parties between MaintStar and the customer. Customers can speak to us about any feature they would like to see - or any problem encountered with their system - and they are speaking with the experts and the developers. This win-win relationship is a success for all.

Our System is Your System

Although the system proposed herein has been designed and manufactured by MaintStar, it ultimately becomes the customer’s system. We have designed this system to be flexible in the appearance, data fields used, and workflow so that it becomes your system at the time of implementation. These features are designed so our customers can modify the appearance and the data fields, without a MaintStar assistance or technician - it truly becomes your system. We do not stop here.

The Direct Advantage Program - Advise Us What is Missing

With Direct Advantage - during the first year of ownership, we encourage the customer to advise us of any features that are important to their success. Many features will become more apparent after in-use trials. At MaintStar we recognize this, and invite customers to share their experiences and suggestions - and assist us to build the best systems.

After a review, these features we will incorporated into our commercial product offering, so they may be taken advantage by all customers wishing the ultimate solution in Community Development Management Systems. This is the Direct Advantage Program.

A direct connection between customer and manufacturer - really nothing could be better for both.
## The MaintStar Team

<table>
<thead>
<tr>
<th>The Project Team</th>
<th>Sales Managers</th>
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<tbody>
<tr>
<td>James Reid, Regional Sales Director – Community Development</td>
<td>800.255.5675 x206 o.</td>
</tr>
<tr>
<td></td>
<td>323.974.3309 c.</td>
</tr>
<tr>
<td></td>
<td><a href="mailto:james@maintstar.com">james@maintstar.com</a></td>
</tr>
<tr>
<td>Louis Tonetti – National Sales Manager</td>
<td>800.255.5675 x213 o.</td>
</tr>
<tr>
<td></td>
<td><a href="mailto:louis@maintstar.com">louis@maintstar.com</a></td>
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<table>
<thead>
<tr>
<th>Project Management Training</th>
<th>David McElroy, Director of Training, Implementation Engineer</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>714.585.0712 c.</td>
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<tr>
<td></td>
<td><a href="mailto:david@maintstar.com">david@maintstar.com</a></td>
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<tr>
<th>Implementation</th>
<th>Alan Buth, Project Management, Director of IT</th>
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<tbody>
<tr>
<td></td>
<td>800.255.5675 x204 o.</td>
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<tr>
<td></td>
<td><a href="mailto:alan@maintstar.com">alan@maintstar.com</a></td>
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<thead>
<tr>
<th>Technical Support</th>
<th>Long Nguyen, Senior Technical Support</th>
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<tbody>
<tr>
<td></td>
<td>800.255.5675 x205 o.</td>
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<tr>
<td></td>
<td><a href="mailto:long@maintstar.com">long@maintstar.com</a></td>
</tr>
<tr>
<td></td>
<td>Stephen Li, Technical Support</td>
</tr>
<tr>
<td></td>
<td>800.255.5675 x208 o.</td>
</tr>
<tr>
<td></td>
<td><a href="mailto:stephen@maintstar.com">stephen@maintstar.com</a></td>
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<table>
<thead>
<tr>
<th>Configuration Custom Development</th>
<th>Brett Kolve, Head Programming Specialist</th>
</tr>
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<tbody>
<tr>
<td></td>
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<tr>
<td></td>
<td><a href="mailto:brett@maintstar.com">brett@maintstar.com</a></td>
</tr>
<tr>
<td></td>
<td>Leonid Orlov, Programming Specialist</td>
</tr>
<tr>
<td></td>
<td>Ram Nambiar, Programming Specialist</td>
</tr>
<tr>
<td></td>
<td>Vladimir Buskin, Chief Architect</td>
</tr>
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<tr>
<th>Escalation</th>
<th>Dimitry Poretsky, President</th>
</tr>
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<tr>
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<tr>
<td></td>
<td><a href="mailto:dp1@maintstar.com">dp1@maintstar.com</a></td>
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<tr>
<td>PM &amp; Training</td>
<td>David McElroy - Project Manager &amp; System Implementation Engineer</td>
</tr>
<tr>
<td>---------------</td>
<td>----------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| **Work History** | MaintStar - 20 years  
As a Project Manager, David practices effective communication to find more cost effective and easier solutions to complex issues. He simultaneously coordinates various departmental resources to execute contracted deadlines utilizing critical thinking, strategic planning and problem solving. He has an extensive knowledge of MaintStar, report writing, and the community development industry, and works closely with his clients to optimize their processes within MaintStar. David's technical expertise and experience working with people from a variety of professional, persona, and international backgrounds ensure a successful project from start to finish. |
| **Project Roles** | Ensures an on-time delivery of completed system  
Manages “scope creep” by effectively holding weekly/daily discussions with client  
Understands and manages client expectations  
Recommends business process decisions to client whenever reasonable  
Possesses a thorough knowledge of our software and a thorough understanding for configuring the system during each project  
Effectively facilitates regular status meeting with the Project Team  
Ensures project documents are complete, current, and appropriately documented by reviewingdeliverables prepared by team before passing off to client  
Manages daily operational aspects of a project, scope and client interaction  
Identifies necessary resources to complete projects and communicates with Technical Staff, Data Conversion, Software, Engineers, and Trainers to assign tasks to available resources while meeting the business needs of each client |
| **Experience** | David excels at one on one and group trainings. He has supervised and conducted all major training operations for MaintStar over the past 20 years. Some installations include the following: |
| **Project Experience** | City of Orange, CA | County of Clark, WA  
County of Ventura, CA | County of Santa Clara, CA  
Hillsborough County, CA | City of Alameda, CA  
County of Adams, CO | County of Washoe, NV  
County of Contra Costa, CA | City of Winter Gardens, FL  
County of Baltimore, CA | AMRI, New York |
<p>| <strong>Education</strong> | David has an MBA degree with over 20 years of system experience, and will handle implementation and training. |</p>
<table>
<thead>
<tr>
<th>Support Team</th>
<th>Long Nguyen - Senior Technical Support Engineer</th>
</tr>
</thead>
</table>

**Work History**

MaintStar - 20 years

Long Nguyen serves as one of the main contacts for all technical support questions and assists with data conversions, implementations, and report writing. He provides client support and technical issue resolution via e-mail, phone and on-line mediums. Additionally, Long helps with configuration of the various interfaces that are needed to connect to the database. He identifies issues, corrects and advises as needed on operational issues.

**Project Roles**

- Provide training to clients in the use of system and applications
- Configure software to connect to internet application servers
- Identify and correct or advise on operational issues in various computer systems
- Work independently, while successfully meeting time lines and project objectives
- Possess and execute comprehensive documentation practices
- Create and maintain detailed records using MaintStar’s problem resolution tracking system to report and ultimately conclude outstanding support requests from clients
- Assist Project Managers with the implementation of software during new client installations
- Effectively prioritize and operate pro actively
- Mental dexterity to grasp new ideas and integrate them into desired results

**Experience**

Long has over 16 years of computer related work that is geared to municipalities and public agencies. His broad exposure to many types of systems during his tenure, offers a well-rounded view for creating optimal implementations. Long is uniquely qualified to provide the highest level of support to our clients.

**Project Experience**

<table>
<thead>
<tr>
<th>City of Pleasanton, CA</th>
<th>City of Fremont, CA</th>
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<tbody>
<tr>
<td>City of Orange, CA</td>
<td>City of Timmons, Canada</td>
</tr>
<tr>
<td>City of Fairfield, CA</td>
<td>City of San Bruno, CA</td>
</tr>
<tr>
<td>City of El Paso, TX</td>
<td>City of Culver City, CA</td>
</tr>
<tr>
<td>City of Thousand Oaks, CA</td>
<td>City of Bakersfield, CA</td>
</tr>
<tr>
<td>City of Reno, NV</td>
<td>Memphis Light, Gas &amp; Water, TN</td>
</tr>
</tbody>
</table>

**Education**

Bachelor of Science – Computer Science, emphasis in Programming Methodology, and Internet Information Services, University of California Santa Barbara
### Customer References

<table>
<thead>
<tr>
<th>MaintStar References</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Reference Name</strong></td>
</tr>
<tr>
<td><strong>Contact</strong></td>
</tr>
</tbody>
</table>
| **Address**          | 141 Ridge Road  
                        | Lansing • MI • 60438 |
| **Phone/Fax**        | 708 • 895 • 7193 |
| **Email**            | grossi@villageoflansing.org |
| **Reference Name**   | County of Alameda- California (population 1.6 million) |
| **Contact**          | Bill Lepere, Deputy Director |
| **Address**          | 399 Elmhurst Street  
                        | Hayward • CA • 94544 |
| **Phone/Fax**        | 510 • 670 • 5431 |
| **Email**            | bill@scpwa.org |
| **Reference Name**   | Contra Costa County- California (population 1.1 million) |
| **Contact**          | Joe Yee, Deputy Director |
| **Address**          | 255 Glacier Drive  
                        | Martinez • CA • 94553 |
| **Phone/Fax**        | 925 • 313 • 2104 |
| **Email**            | joe.yee@pw.ccounty.us |
| **Reference Name**   | City of Fairfield (population 110,000) |
| **Contact**          | Pat Giles |
| **Address**          | 420 Gregory Lane  
<pre><code>                    | Farifeld • CA • 94533 |
</code></pre>
<p>| <strong>Phone/Fax</strong>        | 707-428-7410 |
| <strong>Email</strong>            | <a href="mailto:pgiles@fairfield.ca.gov">pgiles@fairfield.ca.gov</a> |</p>
<table>
<thead>
<tr>
<th>Reference Name</th>
<th>City of Thousand Oaks (population 130,000)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contact</td>
<td>Brian Hetherington</td>
</tr>
<tr>
<td>Address</td>
<td>2100 Thousand Oaks Blvd.</td>
</tr>
<tr>
<td></td>
<td>Thousand Oaks • CA • 91362</td>
</tr>
<tr>
<td>Phone/Fax</td>
<td>805 • 449 • 2499</td>
</tr>
<tr>
<td>Email</td>
<td><a href="mailto:bhetherington@toaks.org">bhetherington@toaks.org</a></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Reference Name</th>
<th>Ventura County General Services (population 840,000)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contact</td>
<td>Rob Harris</td>
</tr>
<tr>
<td>Address</td>
<td>800 S. Victoria Avenue</td>
</tr>
<tr>
<td></td>
<td>Ventura • CA • 93009</td>
</tr>
<tr>
<td>Phone/Fax</td>
<td>805 • 645 • 3883</td>
</tr>
<tr>
<td>Email</td>
<td><a href="mailto:rob.harris@ventura.org">rob.harris@ventura.org</a></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Reference Name</th>
<th>City of Culver City (population 40,000)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contact</td>
<td>Eric Mirzaian</td>
</tr>
<tr>
<td>Address</td>
<td>9770 Culver Blvd.</td>
</tr>
<tr>
<td></td>
<td>Culver City • CA • 90232</td>
</tr>
<tr>
<td>Phone/Fax</td>
<td>310 • 253 • 5951</td>
</tr>
<tr>
<td>Email</td>
<td><a href="mailto:eric.mirzaian@culvercity.org">eric.mirzaian@culvercity.org</a></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Reference Name</th>
<th>Baltimore County Government (population 830,000)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contact</td>
<td>Maureen Amegashie</td>
</tr>
<tr>
<td>Address</td>
<td>400 Washington Avenue</td>
</tr>
<tr>
<td></td>
<td>Towson • MD • 21204</td>
</tr>
<tr>
<td>Phone/Fax</td>
<td>410 • 887 • 8521</td>
</tr>
<tr>
<td>Email</td>
<td><a href="mailto:mamegashie@baltimorecountymd.gov">mamegashie@baltimorecountymd.gov</a></td>
</tr>
</tbody>
</table>
# Banking Reference

## MaintStar Bank Reference

<table>
<thead>
<tr>
<th>Institution</th>
<th>Bank of America</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location</td>
<td>Laguna Beach Branch</td>
</tr>
<tr>
<td>Contact</td>
<td>Judy Jeong</td>
</tr>
<tr>
<td>Phone</td>
<td>626.817.0224</td>
</tr>
</tbody>
</table>

# Perfect Record Vendor & Dossier

## MaintStar Vendor Record

<table>
<thead>
<tr>
<th>Years in Business</th>
<th>Since 1984, 32 Years</th>
</tr>
</thead>
</table>
| Vendor Performance| No Product End of Life Notices - Supporting all product sold  
|                   | No Default on Contract  
|                   | No Default on RFP Response |
| Product Ownership | 100 % - No Licensed Technology  
|                   | 100 % - In House Developed |
| Corporate Standing| 32 Years, State of California Good Standing |
| Primary Clientele | Local City and County Government  
|                   | Water Districts  
|                   | Port Authorities |
| DUNS              | 18-602-4766 |
| Fed Tax ID        | 33-0151817 |
| Key Clients       | Santa Clara County, CA  
|                   | Alameda County, CA  
|                   | Orange County, CA  
|                   | Contra Costa County, CA  
|                   | City of Pleasanton, CA  
|                   | Hillsborough County, FL  
|                   | County of Baltimore, MD |
| Total Clients     | > 300 |
| Awards            | Microsoft® CityNext™ |
| Key Partners      | Microsoft® - Business Software  
|                   | Microsoft® CityNext™ - Government Specific Software Technologies  
|                   | ESRI® - GIS Location Mapping  
|                   | CivicAR™ - Augmented Reality |
Technical Response To Requirements

Baker County, FL
RFP No. 2016-03
<table>
<thead>
<tr>
<th><strong>MaintStar - Answers to Questions</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>4.2</strong> Description of Proposed software and how the software meets the requirements of the RFP. The Software Capabilities Sheet must be completed.</td>
</tr>
<tr>
<td><strong>The capabilities sheet is attached at the end of this section.</strong></td>
</tr>
<tr>
<td><strong>4.3</strong> References – Provide a minimum of three (3) government agencies that are currently using the version of your proposed software. Provide the designated contact person’s name, title, organization, address, telephone number, and email address.</td>
</tr>
<tr>
<td><strong>References are provided as specified in the Experience and History section.</strong></td>
</tr>
<tr>
<td><strong>4.4</strong> Fee for annual software maintenance. The price shall be fixed for years 1 and 2 of the contract term. When does the initial maintenance agreement take effect? What is included in the annual maintenance agreement?</td>
</tr>
<tr>
<td><strong>MaintStar is offering a 10,000 dollar first and second year price as specified. There is a moderate increase to cover CPI over the next three years. The system is vendor hosted, and the annual fees cover hosting costs and full support agreement.</strong></td>
</tr>
<tr>
<td><strong>4.5</strong> How are software upgrades handled? Are they included in the annual maintenance agreement?</td>
</tr>
<tr>
<td><strong>The hosted MaintStar CDMS solution remains current (all software upgrades are included and automatic). A “What’s New” document is published 6 months prior to release to familiarize users with any new features.</strong></td>
</tr>
<tr>
<td><strong>4.6</strong> What are the hardware requirements to run the software at its maximum efficiency? What mobile devices will operate with the software/web portal? Are there any limitations regarding mobile device brands on the software?</td>
</tr>
<tr>
<td><strong>To meet the County’s budgetary requirements, MaintStar is proposing a fully hosted solution by the Vendor - i.e., cloud based SaaS. MaintStar can offer a premise system to mount on the customers hardware for a slight higher implementational costs, that are higher that the budgetary numbers stated in the RFP. MaintStar CDMS runs on any device, computer, tablet, smart phone that can run a browser. The system can run offline on Android, Windows and Apple mobile devices.</strong></td>
</tr>
<tr>
<td><strong>4.7</strong> Can inspectors print permits or reports in the field through a smart device and a mobile printer?</td>
</tr>
<tr>
<td><strong>Yes. MaintStar CDMS is specifically designed for this operation.</strong></td>
</tr>
<tr>
<td><strong>4.8</strong> How many users can access the web portal at the same time?</td>
</tr>
<tr>
<td><strong>Technically unlimited. The system proposed is enterprise there is no limit on concurrent users, the hardware is optimized in a hosted solution for 200 concurrent users for speed but no login limit is provided.</strong></td>
</tr>
<tr>
<td><strong>4.9</strong> Does the system allow different access levels per user? For example the Planning &amp; Zoning Department needs access to all files and 3 levels of workflow; however the Road Department only needs access to road improvement projects with 1 level of workflow. Please explain the access level and workflow ability of the software.</td>
</tr>
<tr>
<td><strong>Yes. Users are assigned in roles and user groups for organization. These roles and user groups will define their privileges and layout of the system based on their user operation. Planning and Zoning users belong to the Planning and Zoning user group and access to the files and workflows required. Road Department will have limited access as defined by Baker County.</strong></td>
</tr>
</tbody>
</table>
### MaintStar - Answers to Questions (continued)

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.10 How many sites do you have for emergency backup/data recovery in case the main server goes down? Where is the backup located?</td>
<td>MaintStar CDMS runs replicated (simultaneous parallel systems) at two hosted remote locations. IN the event of a failure at one the other location operates, and recovery of the original site is made from the operation site. This not only provides redundancy, continued availability during upgrades and servicing, and a higher performance.</td>
</tr>
<tr>
<td>4.11 How many daily users are on your site simultaneously? What kind of trunk (band width) does you facility have in accessing the database server?</td>
<td>Each tenant on the hosted system is a virtual server, speed and efficiency will not be greatly impacted by user counts on other tenants (agency’s) using our services. Traffic for Baker County will be based on Baker County user counts.. Each user will user about 18kbytes in each direction in normal use. File download and upload may be higher, but this can be throttled.</td>
</tr>
<tr>
<td>4.12 How frequently do maintenance periods occur? If there is downtime, how long does the downtime last (on average?) At what time of the day/week does scheduled maintenance normally occur?</td>
<td>This can vary, but they are always performed on weekends at evening hours. Less that 6 per year maximum. Customers experience zero down time, since the system runs replicated (see above). Any scheduled service notices the customers are advised in advance as a best business practice. We are committing to a 99.9% uptime.</td>
</tr>
<tr>
<td>4.13 What kind of software uptime do you guarantee?</td>
<td>We are committing to a 99.9% uptime.</td>
</tr>
<tr>
<td>4.14 If the contract is terminated, will the County have access to download our data for our own use?</td>
<td>Yes. Please see a five year minimum commitment in order to meet customer budgetary requirements.</td>
</tr>
<tr>
<td>4.15 Can the County access the web portal from a link on the County’s website?</td>
<td>Yes. MaintStar CDMS is specifically designed for both citizen and county employee access from a web portal that is generally integrated on the agency’s website.</td>
</tr>
<tr>
<td>4.16 Provide a list of the reports the software will generate.</td>
<td>MaintStar CDMS has 100 standard Community Development reports the full list is in the attached Dashboards and Sample reports on page 73.</td>
</tr>
<tr>
<td>4.17 Describe how the debit/credit card acceptance works. Is there a 3rd party company processing the payments through your software? Describe any settlement fees the user would pay. Are there any fees the County would pay? Who is your 3rd party vendor?</td>
<td>MaintStar CDMS has 100 standard Community Development reports the full list is in the attached Dashboards and Sample reports on page 73.</td>
</tr>
<tr>
<td>4.18 Timeline for implementation after receipt of order.</td>
<td>30-45 Days. This is based on full readiness by the agency - Form delivery (PDF of the interactive forms required), logos delivery and on time regular meetings.</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>---</td>
<td>---</td>
</tr>
<tr>
<td><strong>4.19</strong></td>
<td>Required County forms attached to this RFP. MaintStar will fully implement all required forms for Baker County permitting and inspections.</td>
</tr>
<tr>
<td><strong>4.20</strong></td>
<td>OPTION- Does the software have the ability to add other modules from your suite of software? If so, briefly describe the modules available and compatible with the current version of the proposed software. Include prices for these modules. MaintStar CDMS can fully add on and integrate with our Public Works Work Order and Asset Management Suite, and our Property Management or Business Licensing Modules. See below or Pricing Page. Asset Management - Hosted Solution - $40,000.00 First Year, Double per annum cost for hosting and service support. Property Management - Hosted Solution - $10,000.00 First Year, same per annum cost for hosting and service support. Business Licenses - Hosted Solution - $10,000.00 First Year, same per annum cost for hosting and service support.</td>
</tr>
</tbody>
</table>
SOFTWARE CAPABILITIES SHEET

Vendor name ___________________________________________________

Software name ___________________________________________________

Place an “X” in the appropriate box that describes each feature of your proposed software.

<table>
<thead>
<tr>
<th>ITEM</th>
<th>CAPABILITY</th>
<th>Yes, the software can do this function</th>
<th>No the software cannot do this function</th>
<th>With modifications, the software can do this function. Describe on a separate sheet</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Create &amp; Track Permits/Projects – Ability to create cases and associated data for permits and projects.</td>
<td>YES</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Online Document Management – Ability to create Permit and Project documents within the system.</td>
<td>YES</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Ability to store permit and project documents within the system.</td>
<td>YES</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Ability to import files of various software formats into the system. Provide a list of software formats accepted.</td>
<td>YES</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Workflow- Must be able to flow cases through a minimum of 3 individuals.</td>
<td>YES</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Workflow Approvals- The case does not forward to the next individual on the workflow until the previous person has reviewed and approved.</td>
<td>YES</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Workflow Automation – Ability to modify workflow so that reviews, inspections, statuses, and notifications can be modified both automatically or manually. County can make the changes.</td>
<td>YES</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Application Processing/Online Permits) – A user-friendy, online web portal for citizens which is easy to understand and navigate</td>
<td>YES</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>Each citizen or contractor (user) has the ability to create a user login account through the web portal.</td>
<td>YES</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>Permit applications can be made through the web portal from any internet connection or mobile device.</td>
<td>YES</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Users can process permit applications through the web portal.</td>
<td>YES</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>Users can review fee statuses through the web portal.</td>
<td>YES</td>
<td></td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>Users can make fee payments through the web portal.</td>
<td>YES</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>---</td>
<td>---</td>
<td>---</td>
<td></td>
<td></td>
</tr>
<tr>
<td>14</td>
<td>Users can get a receipt they can print off through the web portal.</td>
<td>YES</td>
<td></td>
<td></td>
</tr>
<tr>
<td>15</td>
<td>Web portal payments can be by debit or credit card.</td>
<td>YES</td>
<td></td>
<td></td>
</tr>
<tr>
<td>16</td>
<td>Web portal supports debit or credit card payments through Pay Pal.</td>
<td>YES</td>
<td></td>
<td></td>
</tr>
<tr>
<td>17</td>
<td>The web portal will show County staff that fees have been paid by the user, and a duplicate receipt can be printed, if needed.</td>
<td>YES</td>
<td></td>
<td></td>
</tr>
<tr>
<td>18</td>
<td>If the user comes in person to County offices, the software will allow acceptance of the debit or credit card, and a data entry for “cash”.</td>
<td>YES</td>
<td></td>
<td></td>
</tr>
<tr>
<td>19</td>
<td>All cashiering transactions including payments, refunds, fee calculations, fees added, fees removed, or fees modified will be auditable.</td>
<td>YES</td>
<td></td>
<td></td>
</tr>
<tr>
<td>20</td>
<td>Users can view project updates and status of their case on the web portal.</td>
<td>YES</td>
<td></td>
<td></td>
</tr>
<tr>
<td>21</td>
<td>Users can schedule inspections on the web portal.</td>
<td>YES</td>
<td></td>
<td></td>
</tr>
<tr>
<td>22</td>
<td>Fee Calculation – The software allows staff to develop custom fee variations and fee formula calculations.</td>
<td>YES</td>
<td></td>
<td></td>
</tr>
<tr>
<td>23</td>
<td>The building fees on the web portal can be changed by County staff at any time.</td>
<td>YES</td>
<td></td>
<td></td>
</tr>
<tr>
<td>24</td>
<td>Plan Submission/Revision – The software will accept digital, scaled drawings/plans and supporting documentation on the web portal.</td>
<td>YES</td>
<td></td>
<td></td>
</tr>
<tr>
<td>25</td>
<td>Plans can be submitted to the web portal through any internet connection or mobile device.</td>
<td>YES</td>
<td></td>
<td></td>
</tr>
<tr>
<td>26</td>
<td>The submitted plans can be reviewed digitally.</td>
<td>YES</td>
<td></td>
<td></td>
</tr>
<tr>
<td>27</td>
<td>The submitted plans can be redlined and saved on the web portal.</td>
<td>YES</td>
<td></td>
<td></td>
</tr>
<tr>
<td>28</td>
<td>Users can access the web portal and review redlined drawings and plans, make revisions, and resubmit.</td>
<td>YES</td>
<td></td>
<td></td>
</tr>
<tr>
<td>29</td>
<td>The software would retain and track all versions of the plans.</td>
<td>YES</td>
<td></td>
<td></td>
</tr>
<tr>
<td>30</td>
<td>The County can approve submitted plans through the web portal.</td>
<td>YES</td>
<td></td>
<td></td>
</tr>
<tr>
<td>31</td>
<td>Mobile Inspections – Ability for inspectors to use smart devices in the field to receive dispatches.</td>
<td>YES</td>
<td></td>
<td></td>
</tr>
<tr>
<td>32</td>
<td>Inspectors can map and route inspections through the software on their smart device</td>
<td>YES</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>---</td>
<td>---</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>33</td>
<td>Inspectors can schedule inspection activities on a calendar.</td>
<td>YES</td>
<td></td>
<td></td>
</tr>
<tr>
<td>34</td>
<td>Inspectors can photograph and document findings. All photos and findings must be saved in each case file.</td>
<td>YES</td>
<td></td>
<td></td>
</tr>
<tr>
<td>35</td>
<td>Inspectors can approve or deny inspections in the field on their smart device.</td>
<td>YES</td>
<td></td>
<td></td>
</tr>
<tr>
<td>36</td>
<td>Inspectors can download all assigned permit or case related inspections for the day locally to a device so that an active data connection is not required in the field to complete an inspection. Upon returning to coverage area, the offline work, including status, photos, and comments, can be uploaded to sync with the live system.</td>
<td>YES</td>
<td></td>
<td></td>
</tr>
<tr>
<td>37</td>
<td>Reporting – Includes standard reporting with the ability to query data.</td>
<td>YES</td>
<td></td>
<td></td>
</tr>
<tr>
<td>38</td>
<td>Ability to develop custom reports based on the County’s needs.</td>
<td>YES</td>
<td></td>
<td></td>
</tr>
<tr>
<td>39</td>
<td>User’s Portal – Permit and Development status will be available via online portal for 24/7 access through any internet connection or mobile device.</td>
<td>YES</td>
<td></td>
<td></td>
</tr>
<tr>
<td>40</td>
<td>The system has the ability to create and store electronic signature on inspection documents and plans.</td>
<td>YES</td>
<td></td>
<td></td>
</tr>
<tr>
<td>41</td>
<td>Software has 95% uptime. If not explain on a separate sheet.</td>
<td>YES</td>
<td></td>
<td></td>
</tr>
<tr>
<td>42</td>
<td>Do you have an API or direct database access so the County can access our data to customize our own reports?</td>
<td>YES</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
CDMS - THE ULTIMATE COMMUNITY DEVELOPMENT SYSTEM

**USER INTERFACES**

**External User - Contractor or Citizen**
- Request Permit Application
  - 2. Option Attach File(s)
  - 3. Submit Request

**Internal Users - Staff**
- Request Permit Application
  - 2. Option Attach File(s)
  - 3. Submit Request

**WORK FLOW EXAMPLES**

**PERMITS MANAGEMENT**

**External User - Contractor or Citizen**
- Request Permit Application
  - 2. Option Attach File(s)
  - 3. Submit Request

**Internal Users - Staff**
- Request Permit Application
  - 2. Option Attach File(s)
  - 3. Submit Request

**General Permits Interface**
- Agency appearance and logo
- Quick Summary of File or Case: User can collapse to save space
- Tabs for all information in the file for easy access
- Functions buttons: see on map, print forms, link or duplicate file
- Current status (color coded) and priority
- File contacts on front page for ease, applicant highlighted in green
- Parcel and Zoning Fields - User Defined
- Indication of alerts or alarms. This case credential lookup shows invalid
- Any linked files to this file will appear here of quick access
- Establish Fees
- Establish Inspections
- Assign / Schedule Inspections
- Generate Forms

**Scheduling Inspections**
- Inspector Calendar offers "Show on Map" (1) Link
- Map offers File Summary (2) and Menu (3) offers complete details back in the File

**Assign by Location (City Areas)**
- Type of Inspection (1) is connected to the City Area (2) defined on the GIS system
- is assigned to Inspector Role and Inspector (3)

**Assigning Inspections**
- Assign by Location (City Areas)
- Inspectors Calendar offers "Show on Map" (1) Link
- Map offers File Summary (2) and Menu (3) offers complete details back in the File
**USER INTERFACES**

External User - Business or Citizen

1. Login
2. Submit Request

Internal Users - Staff

3. Validate Request to Create License File
4a. Automated Workflow Processing
4b. Manual Processing
4c. Invoicing

**WORK FLOW EXAMPLES**

External User - Business or Citizen

1. Request License
2. Submit Request
3. Validate Request to Create License File
4a. Automated Workflow Processing
4b. Manual Processing
4c. Invoicing

Internal Users - Staff

5. Notification
6. Payment
7a. Pass
7b. Fail
8. Review and Approve
9. Notifications
10. Reports on Licensing
11. Finance System Final Posting

**LICENSES MANAGEMENT**

Three step wizard driven, designed to propel citizens and be easy to use.

Once data is entered for the request, citizen can print a receipt with request number for the license.

Data collected and data fields are designed by the agency based on needs and license type.

The printed out form may be simple as shown or may include agency logo and all details and data.

License Details Interface

Quick Summary of File or Case. User can collapse to save space.

Tabs for all information in the file for easy access.

Functions buttons: see on map, print forms, link or duplicate file.

Current status (color coded) and priority.

Any files with the same address to this file will appear here for quick access.

Status in color code set up by the agency.

Tabs for all information in the file for easy access.

Functions buttons: see on map, print forms, link or duplicate file.

Current status (color coded) and priority.

Any files with the same address to this file will appear here for quick access.

Status in color code set up by the agency.

License Details Interface

Quick Summary of File or Case. User can collapse to save space.

Tabs for all information in the file for easy access.

Functions buttons: see on map, print forms, link or duplicate file.

Current status (color coded) and priority.

Any files with the same address to this file will appear here for quick access.

Status in color code set up by the agency.
MaintStar CDMS can operate on any platform and hardware that support web browsing. Inspections can be performed on any mobile device, consumers can apply or check status from a smartphone, leadership can look at dashboards from a tablet.

Checklists are created as a resource, that is then assigned in an user friendly manner to the type of permit, Plan Review or Community Development activity. Inspections are assigned by GIS area and expertise, or manually via the calendar.

Once in the field inspections can be performed on a tablet (right).

Disconnected from Cellular Data Network? - That's no problem with Maintstar CDMS, synchronize later when connectivity is restored.

Meanwhile back in the office file and the inspection results are updated in real time, visible to the internal users and to the citizen on the same mobile type devices.
What is MaintStar Community Development Management System?

MaintStar CDMS is a web-based application that will manage permit, license requests; and includes processing and tracking of activities associated with these requests, including plan reviews, inspections, form generation. The customer portal, which may interface with a government web page, allows citizens to request/apply or track an exiting request.

MaintStar CDMS offers a complete Community Development solution and can be purchased and deployed in modules as needed.

A 100% Web-Based Solution

Investment in the MaintStar CDMS can be done in a variety of ways best suited to the deployment, and in-line with agency finances. MainStar CDMS is browser based and offers all the advantages of a 100% web based system.

- Fast and Easy On-boarding of Users and Departments
- Compatibility on all Platforms and Operating Systems
- Universal Access on Mobile Devices
- Current Versions for all Users
- Consumer Self-Service Portal
- Agency Website Interfacing

MaintStar CDMS works across all platforms and devices since it is 100% web-based, and designed on the latest software platforms. Above showing inspections on a smart phone and an entire permit file on a desktop.
MaintStar CDMS
List of Figures and Tables

Figure 1. MaintStar CDMS - Different Views/Workspaces for User Types. Read-Only Public View, Citizen Request View, My View for Staff. 32
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User Views - Built and Agency Customized For Types of Users

MaintStar CDMS is designed to accommodate a wide variety users and requirements.

- A non-registered user public view, allows citizens to view Community Development activity in a “read-only” mode. Here citizens self-service and self-answer questions in the region.
- A registered user requests view. Here users to apply on-line for Community Development applications such as permits, licenses, etc.
- “My View” customized for Internal Community Development Staff to process requests and handle all types of Community Development activities.

![Image](image-url)

Figure 1. MaintStar CDMS - Different Views/Workspaces for User Types. Read-Only Public View (top), Citizen Request View (middle), My View for Staff (bottom).
User Defined Data Fields

MaintStar CDMS is designed to accommodate a wide variety of agencies and work flow. As such, each of the data fields can be user defined at implementation.

For example, Credit Card Payment drop down can be implemented with three items, MasterCard, Visa, American Express. If this changes in the future to include a forth card, Discover, the dropdown can be added in an user-friendly manner by local agency staff. This type of customization requires no special training or user skills. See below.

Set Value and optional description items and SAVE.

Added drop down value is highlighted upon completion.
Look and Feel of User Screens - Customization

MaintStar CDMS allows agencies to set the appearance and layout of the screens to best accommodate their workflow and operation.

Two examples are provided below. At the top below, the setting the minimum data entry for starting a permit application and adding hidden fields is easy and user-friendly and requires no special skills. At the bottom below the look and feel presented to citizens self-servicing is completely different based on agency preference.

Figure 3. MaintStar CDMS - Screen Customizing and Configuration Panel (top). Two approaches on the citizen self-service appearance (bottom).
Links to Florida License and Credentials Information Sites

MaintStar CDMS allows agencies to configure links to code enforcement, credentials or license look up sites

In the example below, the link is made in seconds in the Admin setup and users can look up current license or credential status from an outside link while continuing to work in MaintStar CDMS. Set below to State of Florida for a "real demonstration" below.
MaintStar CDMS - File or Project Based System

MaintStar CDMS creates a file or folder for each request. This file forms a central repository for all elements for the license or permit application. From here users can easily find any particular aspect or information pertaining to the file or project. See below. Adding to the folder as the project progresses is easy with context menus. See Bottom.

Figure 5. MaintStar CDMS - File or Project/Case Based System

Staff generation of new File/Case is one-click away.

Staff creation of new items to a File/Case is one-click away.

Figure 6. MaintStar CDMS - Context Menus for Ease of Use

File navigation by tabs.

User operations buttons.

Data fields are configured for each agency based on their requirements.

ESRI ArcGIS Map data integration fields.
MaintStar CDMS - User Access and User Role Assignment

MaintStar CDMS uses a role based access system. Users are assigned to user groups, and user groups in turn support user roles. For example, Permits Processor belongs to Permits User Group, License Processor to the License User Group, a user that substitutes for both can have both User Groups to avoid creation of a third unnecessary group.

This is illustrated in the organization chart and screen shots below.

Figure 7. MaintStar CDMS - True Role-Based and User-Group Assignment of Privileges and Access.
Figure 8A. MaintStar CDMS - GIS Bidirectional Integration - Inspector Scheduling (File to GIS - Red) and (GIS to File - Blue).

Draw polygon (1) around inspections (2) and view inspections details in the file information (inspections tab) or in the calendar (3).

Inspector Calendar events (1) to Map (2) shows inspections with automatic directional routing (3).
Figure 8B. MaintStar CDMS - GIS Bidirectional Integration - Permit to Map (red) and Map to Permit (blue).

1. Identify location on map (1). Select "Create File" from drop down to create new File (2). File is created (3), geopoint and parcel is auto-populated (4).

2. Permit File (1) to map using map button. Location identified on GIS map (2) and address as List Item (3).

3. Permit File (1) to map using map button. Location identified on GIS map (2) and address as List Item (3).
MaintStar CDMS - Map Integration Inspection Assignment based on Map Area

MaintStar CDMS is fully integrated to mapping. Here inspectors are assigned by specialty and map area. When inspections are required the location and speciality we assign an appropriate inspector. Manual change is support.

Unlimited Map Areas are supported. Naturally manual assignment, or re-assignment, or availability based assignment is supported as well.

Create additional City Areas as required for each permit type. MaintStar is designed to be straightforward and easy to add and edit.

Inspector (1) assigned to City Area (2) function then to the Map (2), drawn with multi-polygon for area (3).

Figure 9. MaintStar CDMS - Inspector Assignment Based on GIS City Area
### Table 1. MaintStar CDMS - Adobe Sign (form. echoSign) - Third Party Electronic Signature Current Support

<table>
<thead>
<tr>
<th>Manufacturer</th>
<th>Application / Tool</th>
<th>Supported</th>
</tr>
</thead>
<tbody>
<tr>
<td>Microsoft</td>
<td>Dynamics CRM</td>
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</tr>
<tr>
<td>Microsoft</td>
<td>SharePoint</td>
<td>Yes</td>
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<td>Workday</td>
<td>WorkDay HCM</td>
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<td>Ariba</td>
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<tr>
<td>Apttus</td>
<td>eAgreement</td>
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</tr>
<tr>
<td>Xero</td>
<td>Xero Tax</td>
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<td>Google</td>
<td>Google Drive</td>
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<td>Dropbox</td>
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<tr>
<td>iOS</td>
<td>Apple Mobile</td>
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<tr>
<td>Android</td>
<td>Google Mobile</td>
<td>Yes</td>
</tr>
</tbody>
</table>

Figure 10. MaintStar CDMS - Electronic Signature Support
**Figure 11. MaintStar CDMS - Workflow Templates Setup and Use**

1. **Double-click event in Calendar (1)** opens the detail window (2), click on view in Workflow see bold type status in process (3).

2. **Select a Workflow Template.** Identified by type.

3. **View Workflow process visually.**

4. **Click on item to edit the Workflow Event.**

5. **View file status in the workflow here.**

6. **Click on any line item in workflow to open a detail window for the item.**
Figure 12. MaintStar CDMS - Feature Rich Calendar Tool

Unscheduled activities list. An easy way to schedule any activity that is not on the calendar.

Calendar with view options for month, week, or day.

Events are placed in Calendar with color coding for ease in identification.

Double click to open event details window for viewing or editing.

View by month, week or day. Day view shown here.
City Areas tab supports assignment of area by activity type, such as inspections.

Editing is user friendly and can be performed by your in-house staff.

City Area 1 displayed on ESRI ArcGIS map (3). City Area 3 displayed on ESRI ArcGIS map (4).

Figure 13. MaintStar CDMS - City Area Support with Full ArcGIS Integration
MaintStar CDMS - Powerful Search and Filters

MaintStar CDMS uses a similar search and filter mechanism throughout the application design. Once users are familiar with creating a search for a Permit Application, they can use the same user interface for licenses, parcels, or even reporting.

The one-click filter and find mechanism also allows users to save popular searches under their user account or as a global resource for all.

Figure 14. MaintStar CDMS - Power Search and Filtering
MaintStar CDMS - File History and Project Views

MaintStar CDMS allows users to view each event, including user name with a date/time stamp to track any event in a Community Development project file. Invaluable to track issues that are slowing the processing of an application.

For complicated zoning applications can take advantage of the Project View, here using familiar GANNT chart, users can view the workflow process and application in visual terms.
MaintStar CDMS - Status and Color Coding

MaintStar CDMS allows agencies to create their own unique status names and conditions based on their workflow and situations. The below figure illustrates the ease to add and configure a new status for the project file. The same method is replicated for Permits, Plan Reviews, Licenses Violations and Citizen requests. Color Codes may be assigned and make identification of status rather fast and completely visual.

Figure 16. MaintStar CDMS - Custom Status Creation with Color Coding
Select activity checklist is associated with.

Select specific checklist for preview or edit.

Preview to see the checklist prior to completion of editing.

Checklist used on an inspection, with color-coded results checked.

Checklist can be applied to plan review, meeting, or any type of activity - here it is attached to a Plan submittal.

Figure 17. MaintStar CDMS - Checklist Management and Association to Activities such as Inspections
MaintStar CDMS - Wizard Driven Application

MaintStar CDMS features a “wizard driven” user flow, making the system easy to use and navigate even for first time users. This makes user acceptance (citizens) and efficient user operation (internal staff) fast and easy. Below is the three step wizard used for an on-line citizen permit request. At bottom, is a four step wizard that allows internal users to receive and convert user requests into files.

Figure 18. MaintStar CDMS - Wizard Driven Application. The same easy to use interface is through the application design. At the citizen interface (top) there is a three step wizard. At the internal screen, there is a four step process to convert a request into a file (bottom).
MaintStar CDMS - Validating Self-Service Citizen Requests and File Contact Information

MaintStar CDMS features a four-step manual process to validate citizen requests and generate an application file, or a one-step automated process (below). Once the file is created, a complete list of all contacts (by their role in the project) under the contacts tab of the file.

Two methods are offered to validate a request and create the file: “One-Click” (automatic) or “Four Step” (a review process). The system “evaluates” the request and highlights the user with notices automatically. Requests are stored under a single menu item for efficient processing.

Full applicant information is available from a one-click link to the citizen record. Entry fields are designed by each agency based on the requirements and the type of permit activity. Required fields are identified with red asterisk (industry standard).

Maintenance personnel can also validate a request one-click and create the file. The “One-Click” creates a draft file for further review.

Figure 19. MaintStar CDMS - Staff Validation of Citizen Web Requests

Figure 20. MaintStar CDMS - Contacts Information Contained in File
Citizen View - Consumer Portal

- Citizens may add a new request (create application).
- Citizens may look up and find the status on a previous request.
- Color code and sort functions may locating easy and fast.

Contractor View - Consumer Portal

- Contractors may add and update credentials and check status.
- System tracks and displays current validity.
- Adding credentials is easy and can be custom configured as required.
- A file (or scan copy) can be attached for further validity.

Figure 21. MaintStar CDMS - Requests from Citizens or Contractors from the Consumer Portal
The MaintStar CDMS includes a powerful Fee Configuration system. Fees are configured in four manners (1) flat fee, (2) graduated fee, (3) formula fee, (4) or combinations of the first three. Fees may be set and given active start and end dates, in this manner fees may be pre-input into the system for activation at a later date.

**Figure 22. MaintStar CDMS - Comprehensive Fee Creation and Management**

- **Plumbing Re-Inspection**  
  - “Fee Type” - Flat  
  - Flat Value is set in Formula Window, configuration is complete.

- **Business License**  
  - “Fee Type” - Graduated Discount Components  
  - Fee Active Range is set in the date windows, based on a Prev. End Variable (active when Previous Fee disabled).

- **Disabled Veteran and Non-Profit discounts are read and applied.**

- **Manual check provided to test. Fees based on number of employees (count) calculates base fee. Then discount components are read.**

- **Electric Generator Permit**  
  - “Fee Type” Straight Formula  
  - Fee Active Range in fixed date range for one year.

- **Manual check provided to test. Test is shown.**

  - Formula based on kilowatts (per 100), then a discount component can be manually applied.
MaintStar CDMS - Processing Fees and Invoicing

**Figure 23. MaintStar CDMS - Fees and Invoicing**

- **Fees and Invoices Details Tab in the file.**
- **Functions include printing adding fees, and applying payments.**
- **All Fees are listed with complete details and links for additional information.**
- **Color coded status on fees are configured by the agency.**
- **Fees that are invoiced appear below. With equal details and links for additional information.**
- **Fees Details window allows for discount, fee adjustment and processing invoice.**
- **Invoice details window records transaction and permits invoice printing or electronic transmittals.**
- **Hardcopy or electronic copy invoice matches agency forms complete with logo.**
Fees and Invoices Details Tab in the file.

All Payments are listed with complete details and links for additional information. Color coded status on payments are configured by the agency.

Payments Details window allows for discount, fee adjustment and processing invoice.

Instant reports can be generated, including graphs (see bottom).

Transactions are processed according to agency accounting configuration. They can be viewed in a Transactions menu.

General ledger exporting and syncing summary can be viewed in full accordance with agency accounting codes.

Figure 24. MaintStar CDMS - Payments and Ledger
System Training and Documentation

Baker County, FL
RFP No. 2016-03
Best of Class Training Programs

MaintStar training department is led by David McElroy. His resume and letters of recommendation can be reviewed in the Company History and Qualifications section of this response. He is based in Ohio and is in the same time zone and part of the country as the Baker County. MaintStar offers complete product training courses, allowing customers to take full advantage of the features and operation of the Community Development and Land Management systems.

Courses focus on three areas. Internal User training for team members that will be processing permits, scheduling inspections and tracking progress including fee payments. Supervisor training is for supervision of the system and will include screen customization, data field management, permits forms management, etc. Administration training will include user access, system configuration, and integrations. Optional Train the Trainer course enhancement for agencies with internal training staff is offered as well. This course is generally provided after the trainer has completed user training.

Training Documentation includes a printed manual, which can be provided in Word™.DOC, Adobe™.PDF, or as a .HTML file that may be placed online at your agency intranet site.

MaintStar Training Objectives

<table>
<thead>
<tr>
<th>MaintStar Training Objectives</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Primary Objective</strong></td>
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<tr>
<td><strong>Secondary Overview</strong></td>
</tr>
<tr>
<td><strong>Knowledge of Documents</strong></td>
</tr>
<tr>
<td><strong>Course Refresh</strong> (24 month)</td>
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<tr>
<td><strong>New Hires</strong></td>
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<td><strong>Training Manager</strong></td>
</tr>
</tbody>
</table>
Customized CDMS Training

MaintStar offers custom training plans as well.

We have all heard, the old adage - “one shoe does not fit all”. If your agency requires special or custom training requirements, we are ready to accommodate your needs. Lay out your training requirements with our Project Manager, David McElroy and we can develop a plan that meets your needs.

CDMS Training - Train the Trainer

<table>
<thead>
<tr>
<th>Train The Trainer</th>
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</thead>
<tbody>
<tr>
<td><strong>Summary</strong></td>
</tr>
<tr>
<td><strong>Function Overview</strong></td>
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<tr>
<td><strong>Topics Covered</strong></td>
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<tr>
<td><strong>Course Duration</strong></td>
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<td><strong>Course Materials</strong></td>
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<tr>
<td><strong>Prerequisites</strong></td>
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## Internal User Training

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<thead>
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<tbody>
<tr>
<td><strong>Summary</strong></td>
<td>Training for designated staff that use the system day to day.</td>
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</table>
| **Function Overview** | Concept of File Based System  
Processing of Requests  
File Creation  
Permits  
Activities  
Processing of Inspections  
Planning and Zoning  
Code Enforcement  
Licensing (if required)  
Fee Processing and Payments  
The Calendar – Event Scheduling  
Citizens, Parcels, Addresses  
Reports  
Dashboards  
Integration with GIS (Mapping) |
| **Topics Covered** | Concept of File Based System  
Processing of Requests  
File Creation  
Permits  
Activities  
Processing of Inspections  
Planning and Zoning  
Code Enforcement  
Licensing (if required)  
Fee Processing and Payments  
The Calendar – Event Scheduling  
Citizens, Parcels, Addresses  
Reports  
Dashboards  
Mapping |
| **Course Duration** | 1 Day – 8 Hours |
| **Course Materials** | MaintStar Help Guide (Manual) |
| **Prerequisites** | Familiarity with Windows Workstation and Designated Browser. |
## Supervisor Training Class

<table>
<thead>
<tr>
<th>Summary</th>
<th>Training for designated staff that will supervise and configure the system.</th>
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<tr>
<td><strong>Function Overview</strong></td>
<td>Setup of Reference Tables and their related items such as dropdowns, checklists, activities, rooms, and departments.</td>
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<tr>
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<td>Workflow types and overview if required</td>
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<td>Statuses</td>
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<td>Fees</td>
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<td>Form Creation and Editing</td>
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<td>Delete Log</td>
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</tbody>
</table>

| **Topics Covered**                           | Setup of Reference Tables and their related items such as dropdowns, checklists, activities, rooms, and departments. |
|                                              | Workflow types and overview if required                                   |
|                                              | Statuses                                                                  |
|                                              | Fees                                                                      |
|                                              | Accounting – Transactions and Accounting Codes                            |
|                                              | Form Creation and Editing                                                 |
|                                              | Delete Log                                                                |

| **Course Duration**                         | 1 Day – 8 Hours                                                          |
| **Course Materials**                        | MaintStar Help Guide (Manual)                                            |
| **Prerequisites**                           | Familiarity with Windows Workstation and Designated Browser.             |
| **Notes**                                   | Students complete the internal user training prior to this course, to be familiar with the feature set of the MaintStar CDMS system. |
### Administrative Training Class

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<thead>
<tr>
<th>Summary</th>
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<tbody>
<tr>
<td>Function Overview</td>
<td>Creation of Administration, Internal and External users.</td>
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<td>Management of User Groups</td>
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<td>Creation and Management of User Roles and Privileges</td>
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<td>Customization and Setup of Windows and Screens</td>
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<td>System and GIS Settings</td>
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<td>Payment Methods</td>
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<td>System Email Templates and Log</td>
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<td>Prefix Index(Numbering) System</td>
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<tr>
<td>Course Duration</td>
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<tr>
<td>Course Materials</td>
<td>MaintStar Help Guide (Manual</td>
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<tr>
<td>Prerequisites</td>
<td>Familiarity with Windows Workstation and Designated Browser.</td>
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<tr>
<td>Notes</td>
<td>Students complete the internal user training prior to this course, to be familiar with the feature set of the MaintStar CDMS system.</td>
</tr>
</tbody>
</table>
Once MaintStar CMDS is installed and in use; first class assistance and on-going support is vital for the on-going success and advantages of our products. We proudly provide the following information to assist customers in obtaining the support and assistance they expect from a leading product and provider.

With our software solutions installed across the country we maintain three offices to assist with calls from any time zone.

**Office Locations**

<table>
<thead>
<tr>
<th>MaintStar Offices</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Headquarters</strong></td>
<td>MaintStar</td>
</tr>
<tr>
<td></td>
<td>28 Hammond</td>
</tr>
<tr>
<td></td>
<td>Irvine, Ca 92618</td>
</tr>
<tr>
<td></td>
<td>800.255.5675</td>
</tr>
<tr>
<td></td>
<td><a href="http://www.maintstar.com">www.maintstar.com</a></td>
</tr>
<tr>
<td><strong>Central Office</strong></td>
<td>Central US Office</td>
</tr>
<tr>
<td></td>
<td>2139 W. Cougar Rock Circle</td>
</tr>
<tr>
<td></td>
<td>St. George, Utah 84770</td>
</tr>
<tr>
<td><strong>Eastern Office</strong></td>
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</tr>
<tr>
<td></td>
<td>4961 Meade Hallow Road</td>
</tr>
<tr>
<td></td>
<td>Orwell, Ohio 44076</td>
</tr>
</tbody>
</table>

With over 300 systems installed across the country we maintain three offices to assist with clients in any time zone.
**MaintStar Applications Support Information**

- Ongoing toll-free phone & email support for technical issues
- Support for application usage questions after system training
- Annual updates & upgrades to the system with further added features, functionality and support for new network, server and operating systems

The annual cost is based upon approximately 18.5% of the software price, with an annual inflation increase. Exact pricing for Support Maintenance for the first year is included in the Pricing Proposal, enclosed with the response. It covers a 5-day, 5:00am to 4:00pm Pacific Time support schedule. Standard MaintStar procedure is to invoice for ongoing support maintenance on an annual basis.

**Home Office**
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28 Hammond, Suite D
Irvine, California 92618
949-458-7560
800-255-5675
949-458-7626 FAX
www.maintstar.com
support@MAINTSTAR.COM

**An Exceptional Team**

Our support staff is an exceptional team. Many of our competitors have you deal with junior support staff, recent graduates that have few implementations and little experience to draw from. They rarely have final answers to your questions, take longer to be acquainted with your installation than to address your issue and must always escalate your situation to mid-level or senior engineers where you are likely to start all over.

The MaintStar support team is available by phone and email to assist you with any MaintStar related issue and consists of senior level personnel. Immediate support is available from 6:00am until 3:00pm, PST, Monday through Friday, through a toll-free number. In addition, our East Coast Training Center, located in Ohio, is also available to provide support for Eastern Time Zone clients – 7:00 a.m. – 6:00 p.m. EST.

Over 90% of our support issues are handled on the first phone call. Our client base states this, as a key factor in continued productivity gains with the MaintStar system. The support staff uses remote control web services, to connect to your desktop when necessary. This tool allows us to show you our desktop on your computer to demonstrate a function for you, or reverse the screen for us to see your system, if we need to look at your data to see a problem that you are having as it occurs.

Your MaintStar support engineer is there to guide you through upgrades, server changes and other tasks that will happen in the future. You will find that the support you receive for your investment in the MaintStar System is reliable and readily available to keep your operation running smoothly for many years. This is a strategic MaintStar strength that allows our client base to lower total cost of ownership again and again over time.

**Baker County - Your Specific Support Engineer**

We assign a specific support engineer to each client and the MaintStar team member becomes closely involved with your staff from the offset. They’ll understand how you work and the issues that are likely to arise. They have extensive experience with the MaintStar System and have been actively involved with our programmers through its entire development.
As described above, MaintStar is available to assist all our clients with any issue relating to the MaintStar System, or even to discuss ancillary general issues that may have an effect on the MaintStar System going forward. Since your assigned support engineer will be familiar with The Agency’s team from award of contract forward, they will not be unfamiliar with your ongoing situation, setup or uniqueness. The proper level of MaintStar support staff handle and conduct support requests and event responses. MaintStar does not rely on any partners or vendors for primary support services and The Agency can be assured that they will only contact MaintStar for all support situations.

As stated, the MaintStar Support Team is staffed with senior level engineers with a minimum of 10 years of experience. This “depth” gives them a keen understanding of client issues. MaintStar does not employ entry level personnel. Their many years of experience allow them to provide both Level 1 and Level 2 support. These contain not only technical support incidents, but also problems not resolved during the initial contact. If this is the case a Software Problem Report (SPR) is open and referred to one of our subject matter experts. They continue to work the issue to conclusion. In rare instances a Software Change Request (SCR) may be issued and after evaluating the nature, severity and cost impacts, and an optimal solution is recommended. These solutions may consist of workarounds, version patch or builds or custom engineering changes. This level 3 support is always assisted by senior MaintStar management and consulting staff. With a highly diverse array of skills and deep levels of experience, these MaintStar specialists address the highest levels of critical support for our clients nationwide.

Support Escalation Chart - Baker County

The team at MaintStar is crossed trained - for example, our Director of Training is excellent handling implementation matters. With this broad knowledge base, everyone is capable of clearly understanding the issue, and everyone becomes an escalation point. The following chart, provides the most efficient path to resolution.

<table>
<thead>
<tr>
<th>Support Escalation - Anne Arundel County</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Dedicated Support Engineer</strong></td>
</tr>
<tr>
<td>Remote &amp; On Site Support</td>
</tr>
<tr>
<td><a href="#">Steve Lu</a>, Dedicated Support Engineer</td>
</tr>
<tr>
<td>800 • 255 • 5675 x208</td>
</tr>
<tr>
<td><strong>Support Escalation</strong></td>
</tr>
<tr>
<td>Service Management</td>
</tr>
<tr>
<td><a href="#">Long Nguyen</a>, Applications Engineer</td>
</tr>
<tr>
<td>800 • 255 • 5675 x205</td>
</tr>
<tr>
<td><a href="#">Alan Buth</a>, Systems Implementation</td>
</tr>
<tr>
<td>800 • 255 • 5675 x204</td>
</tr>
<tr>
<td><strong>Software Change Request</strong></td>
</tr>
<tr>
<td>Direct Advantage Program</td>
</tr>
<tr>
<td><a href="#">David McElroy</a>, Director of Training, Product Line Management</td>
</tr>
<tr>
<td>714 • 585 • 0712 cell</td>
</tr>
<tr>
<td><strong>Software Change Escalation</strong></td>
</tr>
<tr>
<td>Interface or Application Error</td>
</tr>
<tr>
<td><a href="#">Brett Kolve</a>, Programming Specialist</td>
</tr>
<tr>
<td>800 • 255 • 5675 x203</td>
</tr>
<tr>
<td><a href="#">Vladimir Buskin</a>, Chief Architect</td>
</tr>
<tr>
<td>800 • 255 • 5675 x200</td>
</tr>
<tr>
<td><strong>Any Matter of Concern</strong></td>
</tr>
<tr>
<td>All Matters</td>
</tr>
<tr>
<td><a href="#">James Reid</a>, Regional Sales Director</td>
</tr>
<tr>
<td>800 • 255 • 5675 x206</td>
</tr>
<tr>
<td><a href="#">Louis Tonetti</a>, National Sales Director</td>
</tr>
<tr>
<td>800 • 255 • 5675 x213</td>
</tr>
<tr>
<td><strong>Unresolved Concerns</strong></td>
</tr>
<tr>
<td>All Matters</td>
</tr>
<tr>
<td><a href="#">Dimitry Poretski</a>, President</td>
</tr>
<tr>
<td>800 • 255 • 5675 x202</td>
</tr>
</tbody>
</table>
Software Upgrades

MaintStar’s annual support maintenance agreement includes annual updates to the system with further added features, functionality and support for new network, server and operating systems. Although upgrades may be offered more frequently, we annually provide 2 upgrades (on average) via a download link for the latest version of MaintStar. This annual release is not necessarily at a specific calendar point. We provide the necessary documentation and customarily walk our clients through the upgrade process. The upgrade process is at the client’s discretion, depending on time and availability. We encourage the upgrade process, so that customers do not fall behind on new

MaintStar features and their ability to increase work productivity and continue to lower the cost of ownership.

MaintStar support personnel are available to assist clients attempting to upgrade their hardware platforms or software O/S or database environments. We cannot support a customer beyond the initial stage unless they have a current Support Maintenance Agreement in effect. If no agreement is in effect, MaintStar version upgrades must be paid for at the current pricing levels.

MaintStar provides all of our own technical support from our offices in Irvine, CA. Our East Coast Training Center, located in Ohio, is also available to provide support for Eastern Time Zone clients.

Any upgrades or updates that are released during the project period are merged seamlessly into the new installed project. The updates are designed to not override any of the user’s customizing of the system. Updates and/or upgrades are available at least twice a year; however they are not scheduled at specific times.
Pricing Proposal

Baker County, FL
RFP No. 2016-03
### Baker County - Cost Proposal

<table>
<thead>
<tr>
<th>Enterprise Site Software License Fee¹</th>
<th>$10,000.00</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unrestricted Admin, Supervisor and Internal User Count and Access.</td>
<td></td>
</tr>
<tr>
<td>- Permitting</td>
<td></td>
</tr>
<tr>
<td>- Inspections</td>
<td></td>
</tr>
<tr>
<td>- Code Enforcement</td>
<td></td>
</tr>
<tr>
<td>- Planning and Zoning</td>
<td></td>
</tr>
<tr>
<td>One Year Warranty</td>
<td>Included</td>
</tr>
<tr>
<td>Direct Advantage Program</td>
<td>Included</td>
</tr>
</tbody>
</table>

### Baker County - Project Implementation

| Project Management | Included |
| One Time Setup Fee | Included |
| Export/Import Data | Included |
| Data Migration and Conversion | Included |
| Forms, Reports, Files Configuration² | Included |
| On Line Training/Implementation | Included |
| Total Project Implementation | Included |

### Baker County - Total First Year

| Total MaintStar CDMS First Year - | $10,000.00 |

### Baker County - Annual Hosting and Support - (Five Year Commitment)

<table>
<thead>
<tr>
<th>Ongoing Hosting/Support</th>
<th>Year 2</th>
<th>Year 3</th>
<th>Year 4</th>
<th>Year 5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Five Year Cost ($53,650.00)</td>
<td>$10,000.00</td>
<td>$10,800.00</td>
<td>$11,250.00</td>
<td>$11,600.00</td>
</tr>
</tbody>
</table>

¹ Permits, Licenses, Plan Review, Code Enforcement
² Includes all Form/Report Import and Configuration
External Users: Population support to 50,000 (room for plenty of growth from 28K)
## Baker County - Optional Property Management

<table>
<thead>
<tr>
<th>Enterprise Site Software License Fee&lt;sup&gt;1&lt;/sup&gt;</th>
<th>Year 2</th>
<th>Year 3</th>
<th>Year 4</th>
<th>Year 5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unrestricted Admin, Supervisor and Internal User Count and Access. All modules.</td>
<td>$10,000.00</td>
<td>Included</td>
<td>Included</td>
<td>Included</td>
</tr>
</tbody>
</table>

### Yearly Hosting and Support Costs

<table>
<thead>
<tr>
<th>Year</th>
<th>Total Five Year Cost (Year)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>$10,000.00</td>
</tr>
<tr>
<td>3</td>
<td>$10,800.00</td>
</tr>
<tr>
<td>4</td>
<td>$11,250.00</td>
</tr>
<tr>
<td>5</td>
<td>$11,600.00</td>
</tr>
</tbody>
</table>

## Baker County - Optional Business Licenses

<table>
<thead>
<tr>
<th>Enterprise Site Software License Fee&lt;sup&gt;1&lt;/sup&gt;</th>
<th>Year 2</th>
<th>Year 3</th>
<th>Year 4</th>
<th>Year 5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unrestricted Admin, Supervisor and Internal User Count and Access. All modules.</td>
<td>$5,000.00</td>
<td>Included</td>
<td>Included</td>
<td>Included</td>
</tr>
</tbody>
</table>

### Yearly Hosting and Support Costs

<table>
<thead>
<tr>
<th>Year</th>
<th>Total Five Year Cost (Year)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>$5,000.00</td>
</tr>
<tr>
<td>3</td>
<td>$5,400.00</td>
</tr>
<tr>
<td>4</td>
<td>$5,625.00</td>
</tr>
<tr>
<td>5</td>
<td>$5,800.00</td>
</tr>
</tbody>
</table>

## Baker County - Optional Public Works - Work Orders Asset Management

<table>
<thead>
<tr>
<th>Enterprise Site Software License Fee&lt;sup&gt;1&lt;/sup&gt;</th>
<th>Year 2</th>
<th>Year 3</th>
<th>Year 4</th>
<th>Year 5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unrestricted Admin, Supervisor and Internal User Count and Access. All modules.</td>
<td>$40,000.00</td>
<td>Included</td>
<td>Included</td>
<td>Included</td>
</tr>
</tbody>
</table>

### Yearly Hosting and Support Costs

<table>
<thead>
<tr>
<th>Year</th>
<th>Total Five Year Cost (Year)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>$20,000.00</td>
</tr>
<tr>
<td>3</td>
<td>$21,600.00</td>
</tr>
<tr>
<td>4</td>
<td>$22,500.00</td>
</tr>
<tr>
<td>5</td>
<td>$23,200.00</td>
</tr>
</tbody>
</table>
Attachments

Baker County, FL
RFP No. 2016-03
MaintStar products are designed using the latest technology platforms, and benefits from our more than 32 years of industry experience specifically in government software solutions. Agencies of all sizes can now take advantage of our web-based, feature-rich platforms for enhancing their municipal operations - whether asset management, public works maintenance, community development, or property management - MaintStar is the solution of choice.

Additionally, existing MaintStar clients may leverage the unique integration of using multiple MaintStar applications, since they all work together seamlessly.

Investment Strategies

MaintStar CDMS - Is available in two purchase models. Premise Ownership - the system is purchased and installed on hardware at the customers location. Hosted Subscription - the system is hosted at MaintStar and the customer pays a annual or monthly subscription fee. With our hosted solutions, you’ll is always be running the current version for all users, with minimal IT support and your IT costs shrink to zero.
MaintStar Dashboards

In today’s fast paced world, real time reporting of key performance indicators is valuable to optimize business operations. Receiving this information visually, and to quickly adjust parameters to identify under and over performing areas, has created the need for Visual Dashboards. MaintStar recognizes the importance of Dashboards as vital part of business decision making. We elected to engineer and build our own dedicated Dashboard product which connects to all our management software products.

MaintStar Technology

MaintStar Dashboard’s are engineered and manufactured by MaintStar, not licensed from a third party. This brings many advantages to our customers:

- Lower per seat costs
- Dashboards talk to our databases natively - for faster product operation - better mobile performance
- Single Dashboard site for multiple MaintStar Products - CDMS, CMMS, PMA
- Uniform software versions and simultaneously software upgrade and features releases
- Most intimate product understanding with a faster time to resolution support

MaintStar technology’s are founded on the latest technology. There is no leveraging of ten year old technology here. MaintStar Dashboard is based on 2016 technology, including databases, software libraries, and software development kits. The solution is web based, and a hosted cloud based solution, will reduce your IT resource costs. Web based dashboards can be accessed on an type of device with a browser, including smart phones, tablets, portables and workstations. System is platform and OS independent.

An Enterprise Solution

With seamless integration between our Community Development, Computer Maintenance, and Property Management Applications, the same Dashboard site can be accessed by each. Public Works, Community Development and Building groups will all use the same user friendly, highly flexible system for real time reporting and decision making. As our products and technology grows the same Dashboard module will connect to the new systems and modules as well.

MaintStar Dashboards extends the enterprise Public Works, Property Management and Community Development offerings of MaintStar

MaintStar Dashboards are directly accessed from the menu in each application.
Elegant Dashboards Reporting - Enterprise Solution

MaintStar has developed real-time Dashboards offering true KPI based reporting on Community Development activities. Easy to customize (see below) with fast quick response times, there is no better solution for monitoring your operations in real time. MaintStar has engineered and integrated both applications - CDMS and the Dashboards. Since the same engineers developed both applications inter-system communication and operation is fast and precise.

Dashboard configuration:
- Dashboards can be configured for each element in the CDMS system.
- Set your time range here.
- Time based data can be set here as well using mouse and drop and drag ease.
- User can click on any parameter to get a drill down study report.
- Customize the widget appearance by clicking settings here.
- List of items in reporting data.

MaintStar Dashboards are designed easily by users based on their unique needs. Use the chart editor to customize each dashboard widget.
MaintStar CDMS has hundreds of standard reports. Below is a listing of the most popular reports. Remember, reports may be easily customized, saved with a new name and used as often as desired. Reports may be auto-distributed, by email and based on scheduled time and day of week. Scheduled reports are easily identified by clock icon next to the report. Reports are stored in categories by the report manager.

<table>
<thead>
<tr>
<th>Standard Reports - CDMS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Activity Reports</strong></td>
</tr>
<tr>
<td>Recent Permits</td>
</tr>
<tr>
<td>Recent Permit Applications by Date/Time</td>
</tr>
<tr>
<td>Recent Inspections</td>
</tr>
<tr>
<td>Inspections by Inspector by Date/Time</td>
</tr>
<tr>
<td>Unscheduled Inspections</td>
</tr>
<tr>
<td>Inspections by Type</td>
</tr>
<tr>
<td>Closed Activities Report</td>
</tr>
<tr>
<td>Activities By Type</td>
</tr>
<tr>
<td><strong>Permit Detail Reports</strong></td>
</tr>
<tr>
<td>Permit Reports By Type/Department</td>
</tr>
<tr>
<td>Permit Approval Cycle</td>
</tr>
<tr>
<td><strong>Plan Review Reports</strong></td>
</tr>
<tr>
<td>Application Approval Cycle</td>
</tr>
<tr>
<td>Plan Review Reports by Status</td>
</tr>
<tr>
<td>Applications for Plan Review</td>
</tr>
<tr>
<td><strong>Code Enforcement</strong></td>
</tr>
<tr>
<td>Code Enforcement Reports</td>
</tr>
<tr>
<td>Code Enforcement by Violation</td>
</tr>
<tr>
<td><strong>Licensing</strong></td>
</tr>
<tr>
<td>Licenses by Type/Department</td>
</tr>
<tr>
<td>Licenses Approval Cycle</td>
</tr>
<tr>
<td>Licenses</td>
</tr>
<tr>
<td><strong>Parcel Reports</strong></td>
</tr>
<tr>
<td>Parcel Status Reports</td>
</tr>
<tr>
<td>Parcels by Area/Location</td>
</tr>
<tr>
<td>Parcel Report by Zone</td>
</tr>
<tr>
<td>Parcels Report</td>
</tr>
<tr>
<td><strong>Citizen Reports</strong></td>
</tr>
<tr>
<td>External User by Type (Citizen versus Contractor)</td>
</tr>
<tr>
<td>Citizens</td>
</tr>
<tr>
<td>Citizens by Activity</td>
</tr>
<tr>
<td>Requests Reports</td>
</tr>
<tr>
<td>Request Approval Cycle</td>
</tr>
<tr>
<td><strong>File Reports</strong></td>
</tr>
<tr>
<td>File or Project Reports</td>
</tr>
<tr>
<td>Files</td>
</tr>
<tr>
<td><strong>Financial Reports</strong></td>
</tr>
<tr>
<td>Revenues by Activity</td>
</tr>
<tr>
<td>Transactional Balances</td>
</tr>
<tr>
<td>Fees by Type/Department</td>
</tr>
<tr>
<td>Revenue by Payment Type</td>
</tr>
<tr>
<td>Invoice</td>
</tr>
<tr>
<td>Lease Fees</td>
</tr>
<tr>
<td>Utility</td>
</tr>
<tr>
<td>Profits</td>
</tr>
<tr>
<td>Unbalanced Accounts</td>
</tr>
</tbody>
</table>
Sample Report - Recent Permits

MaintStar CDMS features many standard reports, each can be adjusted by setting criteria or filtering to meet a particular need. The standard Recent Permits report is shown below. In this example, no additional filtering has been applied and the type of chart selected is a "simple pie". Notice the agency logo is automatically placed on the report, and colors are assigned to the respective permit type. Once the user is pleased with the Report Preview; the user can select the output format and print.

Recent Permits
Criteria: Application Date: 4/1/2016 to 7/1/2016

<table>
<thead>
<tr>
<th>Permit #</th>
<th>Status</th>
<th>File</th>
<th>Applicant</th>
<th>Valuation</th>
<th>Fees Due</th>
<th>Fees Paid</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Building</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PM16-0560</td>
<td>In Process</td>
<td>FL16-1042 Permit</td>
<td>Preferred Window &amp; Door</td>
<td>2856</td>
<td></td>
<td></td>
<td>3 WINDOW</td>
</tr>
<tr>
<td>PM16-0559</td>
<td>In Process</td>
<td>FL16-0981 Permit</td>
<td>DEJ's Construction</td>
<td>13800</td>
<td></td>
<td></td>
<td>KITCHEN</td>
</tr>
</tbody>
</table>

Accompanying Chart Type. Customize the Report Title.
Sample Report - Recent Inspections by Inspector

This popular standard report is shown below with an additional filter select - “by inspector”. Alternatively, this same report can be generated with a filter on - “by inspection type”. In either case, the user selects an appropriate chart type (in this sample the pie chart is selected). Users can then preview, print, email, or export the report in any one of the popular formats. As a bonus all MaintStar standard reports may be scheduled for automatic generation and delivery directly to selected users.

**Recent Inspections - Group by Inspector**

Criteria: Application Date: 4/1/2016 to 7/1/2016

![Pie chart showing inspector distribution](image)

<table>
<thead>
<tr>
<th>Activity #</th>
<th>Address</th>
<th>File</th>
<th>Created At</th>
<th>Scheduled At</th>
</tr>
</thead>
<tbody>
<tr>
<td>TJ Grossi</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Inspection</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Occupancy</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>IN15-2125</td>
<td>18507 COUNTRY LN, Pleasant Valley CA 90438</td>
<td>FL15-4859 Permit</td>
<td>10/30/2015 11:07:58 AM</td>
<td>10/30/2015 11:07:58 AM</td>
</tr>
</tbody>
</table>
Sample Report - Inspections by Inspector by Date/Time

MaintStar CDMS offers many standard reports, all organized neatly by category and available to authorized users. Here the Inspections by Inspector, was set for the Activity Year 2015 (Calendar Year 2015). The standard report feature a simple graphic (Simple Column) followed by an itemized list. Agency logo is automatically placed, and colors are assigned to the respective inspector.

### Annual Inspections By Inspector

**Criteria:** Inspection Activity Year 2014

![Annual Inspections By Inspector](image)

<table>
<thead>
<tr>
<th>Activity</th>
<th>Address File</th>
<th>Created Scheduled At</th>
</tr>
</thead>
<tbody>
<tr>
<td>Zoran Savic</td>
<td>18107 LORENZ, Pleasant Valley, CA 90438</td>
<td>FL13-0040 Permit 11/8/2013 8:54:26 AM</td>
</tr>
<tr>
<td>TJ Grossi</td>
<td>2451 RIDGE ROAD, Pleasant Valley, CA 90438</td>
<td>FL13-0236 Permit 1/5/2014 7:13:52 AM 1/16/2014 9:00:00 AM</td>
</tr>
<tr>
<td>Charles Johnson</td>
<td>2451 RIDGE ROAD, Pleasant Valley, CA 90438</td>
<td>FL14-0064 Permit 1/15/2014 11:14:36 AM 1/24/2013 9:00:00 AM</td>
</tr>
<tr>
<td>Robert Alderden</td>
<td>3454 RANDOLPH, Pleasant Valley, CA 90438</td>
<td>FL14-0044 Permit 1/17/2014 6:53:33 AM 1/17/2014 11:00:00 AM</td>
</tr>
<tr>
<td>Mark McPherson</td>
<td>3454 RANDOLPH, Pleasant Valley, CA 90438</td>
<td>FL14-0009 Permit 1/18/2014 1:39:34 PM 1/8/2013 8:54:26 AM</td>
</tr>
</tbody>
</table>

This same standard report can be easily modified to run as Inspection Activity for the week, month or day. Additionally a filter can be applied to run it for a department or Inspection Type (i.e., Electrical Residential Inspection). Note: the complete report is 198 page long, and we represent the first page above.
Sample Report - Unscheduled Inspections

Unscheduled Inspections report is displayed here with no customization and no filtering. Shown below is the filter window showing the default (standard report settings). It is a straightforward and easy process to apply filters to any standard report. Bottom is the results of the report.

Note that the options of filtering for reports is quite extensive. Date and time, status, assignee, and locations (including GIS parameters) are just some parameters provided.
Sample Report - Activities by Type

Below is a sample of the Activities by Type report. This report generates all activities by assignee, for a time range designated by the report generator. In this sample, we have generated a report for the last fiscal year, and selected the simple bar chart for the graphic. Colors are generated automatically, and the full list of reported items are below and subsequent page count.
Sample Report - Permits by Type/Department

Below is a sample of the Permits by Type report. In this example, the report was set to group on category, and the time range filter is set to report on Application Date from 11/1/2014 to 4/1/2015. The chart type was then selected as a “Stacked Column”. Colors are automatically assigned to the respective type and category. The full list of reported items appears below.
Sample Report - Permit Approval Cycle by Department

In the example below the standard Permit Approval Cycle was filter by department and no restriction on the time range. The chart type selected is "simple column". The individual records for this report, as previously shown are listed below the chart. Note in this case the final report is quite large at 1088 pages.

![Permit Approval Cycle by Department Chart]

<table>
<thead>
<tr>
<th>Activity</th>
<th>Created</th>
<th>Approved</th>
<th>Closed</th>
<th>Type</th>
<th>Status</th>
<th>Valuation</th>
<th>Fees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Building</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>FL13-0045</td>
<td>1/6/2014 8:45:04 AM</td>
<td>1/21/2014 1:56:29 PM</td>
<td>1/27/2014 6:03:00 PM</td>
<td>Residential-Roofing Closed</td>
<td>$34500</td>
<td>$500</td>
</tr>
</tbody>
</table>

| Public Works|                    |                     |                     |                       |            |           |       |
| Rural Dev.  |                    |                     |                     |                       |            |           |       |
In the example, the standard Parcel Status Report is previewed with no filtration. This report does not include a chart. This example demonstrates the ability of MaintStar to generate large reports, well over 5000 records. To accommodate these reports, a Report Generating monitor indicates the report generation status - See bottom.

Sample Report - Parcel Status

Parcel Status

Criteria: All

<table>
<thead>
<tr>
<th>Parcel Number: 302912200400000</th>
<th>Owner: C22415, PHH Mortgage, 2001 Bishops Gate Blv, Mt. Laurel, NJ 08054</th>
</tr>
</thead>
<tbody>
<tr>
<td>Area: Area3</td>
<td>City: Pleasant Valley</td>
</tr>
<tr>
<td>Country: U.S.</td>
<td>Zip Code: 90438</td>
</tr>
<tr>
<td>State: CA</td>
<td>Legal Book/Page: Map Book 21, Page 32</td>
</tr>
<tr>
<td>Legal Lot:</td>
<td>Legal Description: Northwest Quarter Section 12, Range 8 West</td>
</tr>
<tr>
<td>Latitude: 33.195299</td>
<td>Longitude: 117.246094</td>
</tr>
<tr>
<td>Census Tract: 2010</td>
<td>Subdivision: -1</td>
</tr>
<tr>
<td>Tract Number: 102</td>
<td>Municipality: Pleasant Valley</td>
</tr>
<tr>
<td>Township Range</td>
<td></td>
</tr>
<tr>
<td>Section: Northwest Quarter Section 12, Range 8 West</td>
<td></td>
</tr>
<tr>
<td>Addresses: 3347 171ST, Pleasant Valley, CA 90438</td>
<td></td>
</tr>
<tr>
<td>Description: C1</td>
<td></td>
</tr>
</tbody>
</table>

Report Monitor.
MaintStar CDMS offers a large range of finance reporting. In the example, the standard Revenue by Activity Report is generated with a filter on Permits (opposed to Licenses, Violations, etc). The chart type selected is the "simple column", and the reporting system uses default colors. The reported items are listed below the chart. Note: For all standard finance reports a summary total is presented for each activity type (see Invoices by Citizen - next page).

### Sample Report - Revenue by Activity (Permit)

![Revenue By Activity](image)

**Criteria:** Permit Applications

<table>
<thead>
<tr>
<th>Activity</th>
<th>Created</th>
<th>Closed</th>
<th>Department</th>
<th>Sub Type</th>
<th>Status</th>
<th>Valuation</th>
<th>Fees</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Revenue</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Permits</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Building</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Sample Report - Invoices By Citizen (Amount 200-2000 Dollars)

Shown below is the standard Invoices By Citizen report. This sample is generated with a filter on Total Dollar Amount (range = 200-2000 dollars). The chart type selected is a "simple pie", and the reporting system uses default colors. The reported items are listed below the chart. Note: Standard finance reports include a summary total is presented for each citizen if there is more than a single invoice.
Response to Baker County, FL Request for Proposal/Qualifications

Permit & Inspection Software for the Community Development Department

Prepared By Meritage Systems

Jim Muller-Director of Sales
Meritage Systems, Inc.
320 E Vine Drive, Suite 323
Fort Collins, CO 80524
(970) 682-3312
jmuller@meritagesystems.com
Cover Letter

Baker County Board of County Commissioners,

Meritage Systems is pleased to present our proposal to Baker County, FL for consideration. It is our intent that this package clearly shows our understanding of your needs and our capability and experience to meet and exceed them.

Meritage Systems is a separate partner company to SAFEbuilt Inc. SAFEbuilt is owned and funded by the Riverside Corp. Meritage Systems (MS), has been in business since 2009 with over 150 jurisdictions actively using the software. MS, configures, provides training, and implements the software with all follow-up and updates necessary as part of our services. A copy of our W-9, including Fed Tax ID # and References will be included as an addendum to this RFP.

This RFP is being authorized by the General Manager of Meritage Systems-Tiffany Williamson. Tiffany has over 17 years’ experience in information technology including extensive software development on multiple platforms and service lines. She also holds a Juris Doctorate from Pepperdine University School of Law. She will be available and responsible for all services outlined within this RFP.

If selected, Meritage Systems will provide a reliable, easy to learn and use, cost effective, solution for:

- Permitting/Planning: Defined by building department professionals to fit the workflow and needs in an easy to learn and use solution. ContractorConnect™ provides citizens and contractors with complete online and mobile capability to manage their complete permitting process and inspections without a visit or phone call to the permit office.
- Inspections: Our InspectorConnect™ app for iOS and Android devices provides your inspectors with complete, efficient routing and resulting capabilities. Add photos/documents, use configured QuickNotes and Voice Entry to minimize typing.
- Reporting: MyReports library has preconfigured reports for the department, permit status, inspector performance and more, as well as the option for custom reports.
- All pricing and services outlined are valid for 90 days from RFP due date of Jan 6, 2017

We look forward to the opportunity to further discuss your needs, introduce you to our team and demonstrate our system.

Best Regards,

Tiffany Williamson

Tiffany Williamson-General Manager
Meritage Systems, Inc.
320 E Vine Drive, Suite 323
Fort Collins, CO 80524
(970) 682-3312
twilliamson@meritagesystems.com
1. Table of Contents

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3. Executive Summary

Meritage Systems is proposing an affordable, no-maintenance, cloud-based system with remote and mobile capability that has been demonstrated in communities throughout the U.S. to reduce the time and hassle of the permitting process for your staff and customers.

Our understanding of the RFP is that Baker County, FL is seeking to retain a software company to provide a digital inspection solution for tracking and monitoring inspections, documents, plans and permits. Meritage Systems will provide a system that is up-to-date, comprehensive, fully integrated permitting system to improve the productivity and accuracy of your Building Division operations and transform the permitting and inspection experience for your customers to one that is modern and intuitive, accessible anywhere, anytime.

Our solution will bring new capabilities, plus provide a platform for future innovation and growth not only for the Building Department, but also for other areas within Planning and Zoning and Economic Development.

The following information summarizes the solution Meritage Systems will provide Baker County, FL.

- **Permitting Module** – Intuitive ease-of-use, configurability and complete functionality
  - All Building Division Permits (as well as the capability to address planning and other)
  - Inspections using mobile apps for iOS and Android tablets and smartphones
  - Concurrent Plan Review integrated within permitting module – connects all desired departments into the permitting process
  - Fees – calculation, cashiering, invoicing, credit card payment processing
  - Contractor Registration/Licensing
  - Business Registration/Licensing (option)

- **InspectorConnect™** – iOS and Android apps, allowing all inspection work to be completed in the field, eliminating paper and dramatically reducing calls

- **ContractorConnect™ Online and mobile permitting** for citizens and contractors to have complete management of permits: application, payment, inspection scheduling, results and complete status along the way. Eliminates calls, improves satisfaction.

- **GIS** real-time connection to eliminate typing of property and owner information and improve accuracy of permit application entry

- **Reporting** – “MyReports” advanced reporting
  - **Reports Library** of 24 pre-configured reports for department summaries, permit status, inspector performance, inspection statistic, Homebuilders report, and more.
  - Finance and County Assessor reports and data export
  - Report creator for any needed information stored within the system
  - **Custom Reports** priced individually
  - Output in screen view, PDF, CSV, EXCEL
  - Conversion of permit data from current system to Meritage Systems
We have the team and experience to deliver.

1. The solutions proposed in this RFP are utilized in ~150+ jurisdictions across the U.S., many of whom are similar in size and need as Baker County, FL.

2. We have a 100% success rate in implementation. We are confident in our ability to configure to the permitting structures and fee types of Baker County, FL. Each jurisdiction has unique permit types, workflows, fee structures, code sections, letters and reports. Our 100% success rate is due in part to our flexibility and ease of system configuration to meet the diverse needs of jurisdictions from small to large.

3. This is not an extended resource-draining, expensive implementation. The system is fully configurable and ready to deploy within a few months including hands-on training for users.

4. The system is cloud-based, and as such there is no need for expensive IT systems and maintenance. The system is designed in modern, fully supported languages and computing environments and is hosted by the top cloud hosting provider in the world.

5. Our system has experienced a 3 year Uptime of 99.99%. Any maintenance is done remotely through our cloud based system with little to no impact on Uptime and usability. More “maintenance” information described in sec-4.

If Meritage Systems is chosen as your solution provider we will work with your staff on a specific implementation process/timeline-detailed within section 5-Schedule. This process is well defined and managed in order for us to gather all needed information, train staff and allow for your review and test of the system before going live on the requested date.

Our proposal includes having a specific project lead for the permitting module and suggest Baker County would have the same. In short, it is a collaborative process with Meritage Systems leading the effort with a Baker County project lead and team.

The Meritage Systems Permitting Module also includes the capability of adding Planning & Zoning Permits. An advanced Code Enforcement Module and other enhancements are to be released mid-year 2017. It is our goal that the strength of our current offering will solidify your decision and give you a preview of additional capabilities in development. If selected, we would invite the Baker County team to provide inputs and review of any new capabilities.

In section 6-Fee’s you will find details of our proposed pricing and options including specifics of each module provided and the one time set-up fee and annual subscription fee associated with each.

This summary is a portion of the details you will find in this RFP. We look forward to meeting your team and providing a live demonstration.
4. Scope of Services/Description of Products’ Capabilities

Meritage Permit Management is a comprehensive, flexible permitting, inspection, reporting and plan review tracking system that automates the entire process and is configured to fit your existing or desired work processes. From permit creation to fee calculation, scheduling and performing inspections to issuing certificates, the system automates entry, tracking, workflow management, notifications, cashiering and reporting.

Scope of Services
Our solution will:

- Address your current system needs, bring new capabilities, plus provide a platform for future innovation and growth not only for the Building Department, but also for other areas within Planning and Zoning and Economic Development.
- Include software (cloud-based access), installation/configuration, conversion of legacy permit data, implementation and training
- Manage workflow, record keeping, inspections and reporting for all Building Division functions as identified in the RFP

Description of Product’s Capabilities

- Permit Technicians have an intuitive, efficient process for creating and managing the entire permitting process
- Workflow status, documents, and notes, are accessible to everyone in the process, with notifications to keep everyone on track
- Inspectors can annotate, add documents and photos, result inspections and complete their work in the field in real time
- Multiple departments throughout the jurisdiction can participate in the process workflow with any combination of concurrent or serial signoffs
- Citizens and contractors can initiate and manage their permits with their PC or mobile device, reducing routine phone calls and allowing the office staff to focus on other priorities
- Building Officials, accounting and assessors have report generation and data export/import for easy tracking and reporting.

Flexible Configuration: Meritage Systems will configure the workflows, permit types, documents, fee structures and terminology to fit your existing or desired processes, and ongoing modifications are included at no additional charge.

Dashboard: Each user’s dashboard is configured to their role and permission status, from Building Official and Permit Technician to Plan Reviewer and Inspector, plus all other
desired departments, connecting everyone to the process and highlighting each person’s tasks and status. Each area, such as Plan Review or Inspections, flag and notify of action needed.

**Permit Entry:** Intuitive navigation makes using the software easy for those in the office, at home, or mobile. Former, permit technicians, inspectors, plan reviewers and building officials defined the software.

**Search Permits:** Our time saving search function allows searching with just partial information on the address, permit number, owner or contractor name, or parcel ID, other.

**Integrated Fee Calculation** and Valuation Tables: Estimates, payments, cashiering.

**Inspection Assignment Ordering and Routing:** Our drag and drop inspection assignment function allows easy assignment and real-time adjustment of who is covering what inspections. Map view of inspections with ordering for best route.

**InspectorConnect™ Mobile Inspection:** Equipped with tablet, smartphone or notebook PC, your inspectors can get the job done in the field, reviewing permit history, entering notes and photos, resulting inspections, and even printing the permit card or Certificate of Occupancy.

**Quick Notes:** Add inspection comments/notes quickly and without typing by selecting from your configured list of most common violations (by trade and permit type).

**Plan Review Tracking:** Plan review steps and signoffs are integrated within the workflow configured for jurisdiction. The Drag and Drop plan review assignment is used when there are multiple reviewers. Plan reviewers have their own login and dashboard, with alerts when plans are ready for review.

**ContractorConnect® Anywhere, anytime access by your citizens and contractors to do permit application, payment, status check, and inspection scheduling and results, providing them tools to make their lives easier, while improving the productivity of your staff.**

**Reporting, Data, and GIS Connection:** Billing, Activity, Fee Payment, Performance Reports and more are available in PDF format or spreadsheet compatible file output to manage the department and communicate progress.

- Billing Output and Fee Payment reports give one-button file output for import to your accounting system
- Assessor Report gives one-button file output for import by the county assessor
- GIS interface
- Performance reports, activity reports for each type and status of permit
- Custom report creator/editor and “My Templates” section (release in Summer)

**Contractor Registration:** Contractors are entered into the database for easy auto-fill of data during permit entry. License status is tracked with out of date registrations flagged as permits are entered, eliminating the risk of non-current contractors receiving a permit.

**Email Notifications:** At key status changes, email alerts are sent as configured.

**Clone Permit Function:** The information in a permit may be “cloned” and adjusted as needed to create a new permit, saving time and adding to accuracy for repetitive permits such as a new housing developments or a series of re-roofs by one contractor after a storm.
Usability:
Because a team of building department professionals defined the software, it is known for its usability and flexibility, allowing it to be configured for jurisdictions with populations of less than 500 up to 100,000 and more with diverse staff sizes and needs.

- Three-step permit entry
- Search with 3 or more characters to quickly find permits. Auto-fills property info.
- User permissions define the Dashboard and tasks each person sees (selectable)
- Clone permit function for repetitive permit entries
- Mobile inspection on any iOS/Android systems
- Citizen and Contractor online and iOS/Android apps permitting
- No limit to number of users on the system at any one time. We currently average under 1,000 simultaneous users daily. Also, we do not access the database server directly from our offices/facilities, we remote into servers inside Amazon Web Services Virtual Private Cloud environment to access our database.

Flexibility and Productivity:
- Complete configuration of permit types, workflows by permit type, and fee structures. Includes ability to have integrated planning and zoning and other workflows/departments included in the process. Meritage Systems provides changes to workflows without charge as part of our unlimited support. Non-permitting workflows allow tracking of other processes.
- Notifications configurable for change in status, workflow step, etc. Using a simple export/mail merge process, mailing lists for notices and announcements can be easily generated for expired permits, fees owed, or past due accounts by running a report to flag the desired conditions.
- Unique capability to set up hierarchy of each jurisdiction as separate permitting entity with master entity for tracking and reporting ease
- Tracking of fees for outside service providers (inspectors, others)
- Quick Notes eliminate typing by selecting from a list of often used scheduling notes, work descriptions and inspection results by inspection type.
- Custom Application Fields. Each permit application can have custom fields’ specific to the permit type, improving accuracy and cutting down on questions.
The Meritage Permitting Dashboard
A key feature demonstrating usability is the Meritage Permitting Dashboard. It is simple and “non-techy” with easy navigation by user role on the left hand side. User roles are configured and determine which of the Navigation and blue expansion bars are presented to the user on the screen, making it even more straight forward.

- Majority of searches right from the Dashboard. Advanced search for search on owner, contractor, other
- Each section expands to provide “at-a-glance” “to-do” list configured to each user type
- Navigation areas configured for each user role
Baker County, FL

Proposal for Permit & Inspection Software

---

### My Dashboard

- **Total Active Permits:** 41
- **Total Permits Completed in Past 6 Months:** 2

<table>
<thead>
<tr>
<th>Permit Number</th>
<th>Street Address, Zip</th>
<th>Jur.</th>
<th>Permit Type</th>
<th>Correct Step</th>
<th>App.</th>
</tr>
</thead>
<tbody>
<tr>
<td>145MA-B0003</td>
<td>1529 Roanoke Rd, 31108</td>
<td>San Marino</td>
<td>Re-Roof Asphalt</td>
<td>Application Acceptance</td>
<td>02/10/2014</td>
</tr>
<tr>
<td>145MA-Z00001</td>
<td>2155 Huntington Dr, 91108</td>
<td>San Marino</td>
<td>Sign Permit</td>
<td>Application Acceptance</td>
<td>02/22/2014</td>
</tr>
<tr>
<td>145MA-B0006</td>
<td>1529 Roanoke Rd, 31108</td>
<td>San Marino</td>
<td>Basement Finish Permit</td>
<td>Permit Issued</td>
<td>02/15/2014</td>
</tr>
<tr>
<td>145MA-B0007</td>
<td>2555 Huntington Dr, 91108</td>
<td>San Marino</td>
<td>Commercial Remodel</td>
<td>Planning and Zoning Review</td>
<td>02/26/2014</td>
</tr>
</tbody>
</table>

#### Status Links Directly to Appropriate Next Action

- Permit number is shortcut to Permit Resources “one-stop shop” for all actions, info and documents

#### All Columns Sortable

---

### Plan Reviews

#### View Active

<table>
<thead>
<tr>
<th>Start Date</th>
<th>Permit #</th>
<th>Street Address, Zip</th>
<th>Jur.</th>
<th>Type</th>
<th>Status</th>
<th>Reviewer</th>
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</thead>
<tbody>
<tr>
<td>04/14/2014</td>
<td>145MA-B0009</td>
<td>1047 Midway Rd, 91108</td>
<td>San Marino</td>
<td>Residential Remodel</td>
<td>Pending</td>
<td>Gary Kaiser</td>
</tr>
<tr>
<td>04/14/2014</td>
<td>145MA-B0009</td>
<td>1047 Midway Rd, 91108</td>
<td>San Marino</td>
<td>Single Family Dwelling</td>
<td>On Hold</td>
<td>Gary Kaiser</td>
</tr>
</tbody>
</table>

---

### Inspections

#### View Up Resulted

<table>
<thead>
<tr>
<th>Date/Time</th>
<th>Permit #</th>
<th>Street Address, Zip</th>
<th>Jur.</th>
<th>Type</th>
<th>Inspections</th>
<th>Status</th>
<th>History</th>
<th>Inspector</th>
</tr>
</thead>
<tbody>
<tr>
<td>06/07 PM</td>
<td>145MA-B0001</td>
<td>1730 South San Gabriel Blvd, 91106</td>
<td>San Marino</td>
<td>Commercial Remodel</td>
<td>Foundation Reinforcing</td>
<td>Passed</td>
<td>View</td>
<td>Jill Huldehrück</td>
</tr>
<tr>
<td>06/07 PM</td>
<td>145MA-B0002</td>
<td>1730 South San Gabriel Blvd, 91106</td>
<td>San Marino</td>
<td>Single Family Dwelling</td>
<td>Construction Meter</td>
<td>Pending</td>
<td>View</td>
<td>Jill Huldehrück</td>
</tr>
<tr>
<td>06/07 PM</td>
<td>145MA-B0002</td>
<td>1730 South San Gabriel Blvd, 91106</td>
<td>San Marino</td>
<td>Single Family Dwelling</td>
<td>Foundation Reinforcing</td>
<td>Pending</td>
<td>View</td>
<td>Jill Huldehrück</td>
</tr>
<tr>
<td>06/07 PM</td>
<td>145MA-B0002</td>
<td>1730 South San Gabriel Blvd, 91106</td>
<td>San Marino</td>
<td>Single Family Dwelling</td>
<td>Water Service</td>
<td>Pending</td>
<td>View</td>
<td>Jill Huldehrück</td>
</tr>
</tbody>
</table>

---

**Change Office**

- **Dashboard**

**Quick Search**

- Permit Number
- Street Address
- From date
- To date
- Search
- All dates *(Please enter a minimum of 3 characters)*
Our GIS real-time connection for automatic population of property and owner information removes the need for tedious typing and improves accuracy. Enter 3 or more characters of the address, select from a drop down and all fields available in the GIS system are automatically entered.

GIS real-time connection:
Select from drop down to automatically populate complete and accurate property and owner information in the permit application.

Contractor information autofill from contractor data base and attached to permit.

Contractor selection with alert for expired license.
ContractorConnect™ online and mobile permitting for contractors and citizens.

Everything needed to manage all permits from application to project completion:

- Modern, intuitive interface
- Guided application process
- Apply and pay for permits on-line
- Request, cancel, reschedule inspections
- View inspection results with photos & attachments
- Check permit status anytime, anywhere
- Receive updates/notifications
- Map locations of inspections & permits
- Voice entry and QuickNotes preconfigured phrases
- Make payments: 3rd party merchant account provider used for back end CC processing. No fees to jurisdiction with small “convenience” fee to user. Multiple 3rd party vendors available for use, including PayPal.

Key Benefits include dramatic reduction in phone calls, more efficient and accurate process and improved satisfaction of your customers.
InspectorConnect™ Complete capability from the field for your inspectors:

- iOS or Android tablets and smartphones
- View on map or list and put in desired order
- Route to inspection stop using Google turn-by-turn navigation with voice
- Result inspections
- Voice Entry and QuickNotes™ preconfigured for each trade type
- Easily add photos directly from the tablet/phone camera
- Results immediately available in system, ContractorConnect™ and emailed
- Reschedule inspections
- All history, permit, property owner and contractor info readily available
- One tap to call contractor or property owner
User Training and Support

TRAINING: Our goal is to have each of your team comfortable and versed in the application prior to the live date. We accomplish this through both training sessions and multiple hands-on sessions over the course of 1-2 weeks on an off-line system with your permit types, fee structure and data prior to the launch. Rather than a canned course, we have the flexibility to adapt the training to meet your needs.

SUPPORT: Our company culture is one of customer focus for training and personalized responsive support. We have several customers who share how much that is appreciated after shifting to us from other offerings where that was not the case.

Normal support hours are 8:00 am to 5:00 pm Eastern Standard Time, Monday through Friday.

The annual service includes:

- **Cloud Hosting**: All modules operate from within physically secure facilities on secure servers with redundant power and connectivity. Multiple servers are synchronized and have automated off-site backup capabilities. Meritage Systems is hosted on Amazon Web Services, one of the foremost providers of secure, high performance and flexible systems in the world.

- **Maintenance**: All necessary infrastructure, connectivity and system applications are maintained. The system is monitored continuously for security and reliability.

- **Technical Support**: Personalized support via telephone and email is provided to answer questions, make configuration changes and give instruction on system usage. Normal support hours are 8:00 am to 5:00 pm EST, Monday through Friday. Support outside of business hours is also provided as necessary.

- **Software Upgrades**: Enhancements and improvements are made available as they are implemented ensuring the jurisdiction remains current with evolving technology.

The ongoing services ensure the jurisdiction realizes the full potential of its investment over the long-term.

An upgraded Code Compliance Module *planned for release in mid-2017* is a sophisticated and powerful software solution for managing every aspect of code enforcement. Using the existing municipal code at its core, it allows code enforcement officers to log code violations and manage the entire process to final resolution. A citizen portal and mobile apps will also be available.
5. Schedule

With our extensive experience of installing software in numerous municipalities around the country, we have developed a systematic approach that allows us to work closely with our clients to determine their requirements, integrate their processes and provide the outputs needed. Each of the steps is described below:

**Step 1: Discovery**
In the Discovery stage, Meritage Systems will work closely with your team to learn about their unique needs and expectations and the nuances of the existing and desired processes. As part of the discovery process Meritage will:

- Collect existing documents and materials
- Understand and document existing and desired workflows, permit types, and fee structures
- Identify the desired terminology and document details
- Identify desired reports
- Understand and scope the data interchange and synchronization requirements and system configuration needs (this will likely be carried out prior to the official project start)

This process gives a clear picture of your needs and how the system will be configured to meet those needs.

**Step 2: Draft Implementation**
In the Draft Implementation stage, the permitting system is configured to the desired workflows, permit types and fee structures on our off-line system.

At completion of the Draft, the system will be made available to staff members for review to ensure that it is configured as expected. Configuration changes will be made as needed based upon the feedback.

**Step 3: Implementation Readiness Review**
In the Implementation Readiness Review stage, the final configuration of the applications will be completed including adding users and permissions.

Example historical data will be loaded for a real-life run through of the permitting, planning and inspection process. Each department will be ready for testing with imported data and interfaces.

At the end of this stage, the staff designated project manager will sign off on the system design as complete.
Step 4: Team Readiness

In the Team Readiness stage, the staff is prepared in the use of the system to manage the permit process, plan reviews and code enforcement. Training and documentation are provided and jurisdiction staff works with the system to make sure they are comfortable with their individual tasks. Run-throughs with real data will be completed in offline mode. Our team is available to provide support as needed and to answer follow up questions.

Step 5: Launch

When the jurisdiction is ready to go live with the system, a final backup of the current system will be migrated for use on day 1.

Step 6: Post-Launch Support

Following the launch of the system, Meritage Systems will continue to support the jurisdiction to ensure the system meets long-term needs. Ongoing support will include: Upgrades/Revisions, Configuration changes as needed, personalized telephone and email support.

The typical implementation time is approximately 8 weeks.

<table>
<thead>
<tr>
<th>Stage</th>
<th>Tasks</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Discovery</td>
<td>Map permit types, workflows, fee structures, documents</td>
<td>3 Weeks</td>
</tr>
<tr>
<td>Draft Implementation</td>
<td>Draft system configuration of permit types, workflows and fee structures</td>
<td>2 Weeks</td>
</tr>
<tr>
<td></td>
<td>Review of permit flow with example data</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Draft review signoff</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Plan review system installation</td>
<td></td>
</tr>
<tr>
<td>Implementation Readiness Review</td>
<td>Configuration of users and permissions</td>
<td>2 Weeks</td>
</tr>
<tr>
<td></td>
<td>Customization of screens, reports, and templates</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Staff review and signoff on design</td>
<td></td>
</tr>
<tr>
<td>Team Readiness</td>
<td>Documentation</td>
<td>2-3 Weeks</td>
</tr>
<tr>
<td></td>
<td>Training</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Run-throughs with data</td>
<td></td>
</tr>
<tr>
<td>Launch</td>
<td>Systems go live</td>
<td>1 Week</td>
</tr>
<tr>
<td></td>
<td>Monitoring of progress and follow up training and modifications as necessary</td>
<td></td>
</tr>
<tr>
<td>Total Time to Launch</td>
<td></td>
<td>~8 Weeks</td>
</tr>
</tbody>
</table>
Testing Acceptance and Warranty

During the implementation process the system is configured to your permit types, workflows, and fee structure as outlined in the Implementation Process and Timeline section 7. Review of the data and configuration is done on an on-line system identical to what will be put on the live system. When your team is satisfied with the system on the training system and signs off, the live date is solidified. Any changes required before or after the live date are included in the ongoing license and support fee at no additional charge.

The Service Agreement contains a section on Warranty and Disclaimers that is in line with the industry norm for cloud-hosted applications. The complete agreement can be provided on request.

Maintenance

All maintenance of the cloud-based application solution software and hardware is the responsibility of Meritage Systems. The county is responsible for the maintenance and support of its PCs/laptops/tablets/smart phones and related software including internet browsers as well as maintaining access to the internet.

Conversion of Legacy Database

Meritage Systems has a 100% success rate importing legacy data from a broad range and age of systems. A backup file of the current system or a CSV output can be used for the transfer of data. Our process typically takes about 4 weeks from the time we receive a data file and involves mapping of the legacy system permit types, permit data and statuses to the new system.

Permitting data import steps:
Step 1: Receipt of recent backup data or CSV data export  
Step 2: Permit types completed for Meritage Permitting to allow permit mapping  
Step 3: Conversion routine completed and initial data verification  
Step 4: Data uploaded to the jurisdiction training site and verified by staff  
Step 5: Full Backup provided by jurisdiction at end of business prior to live date  
Step 6: Data ready on live site for review and use by staff prior to open of business on live date

In the event that a signed agreement is ever terminated, all data will be available for download to be used by the jurisdiction. All permit and inspections data input to the system is the property of the jurisdiction that has signed agreement.
# 6. Fee Itemization

## Pricing Summary
Below is the Not-to-Exceed budget for the one-time setup and annual support and licensing fees for Gahanna, OH. Assumptions include number of users and permit volume.

<table>
<thead>
<tr>
<th>Applications and Services</th>
<th>One-Time Set-Up Fee</th>
<th>Annual Support and Licensing Fee</th>
</tr>
</thead>
<tbody>
<tr>
<td>Permit Management: All inclusions listed below</td>
<td>$4,000</td>
<td>$5,625</td>
</tr>
<tr>
<td>Legacy Data Import: Permitting</td>
<td>NA</td>
<td>NA</td>
</tr>
<tr>
<td>Transfer of historical permit data from legacy system, assumes availability of readable data file or CSV</td>
<td></td>
<td></td>
</tr>
<tr>
<td>GIS Integration: Permitting</td>
<td>$2,500</td>
<td>$900</td>
</tr>
<tr>
<td>Business Licensing</td>
<td>$0</td>
<td>$500</td>
</tr>
<tr>
<td>ContractorConnect™ Online Permitting: PC, Smartphone and Tablet anywhere, anytime access through web browser by your citizens and contractors to do permit application, payment, status check, inspection scheduling and results.</td>
<td>$1,500</td>
<td>$1,800</td>
</tr>
<tr>
<td>Non-Preferred Merchant Account: additional fee if not a Meritage Systems preferred provider</td>
<td>$2,000</td>
<td>NA</td>
</tr>
<tr>
<td>One Day On-Site Permit System Training</td>
<td>$1,500</td>
<td>NA</td>
</tr>
<tr>
<td><strong>Total of all boxes checked</strong></td>
<td><strong>$8,000</strong></td>
<td><strong>$8,825</strong></td>
</tr>
</tbody>
</table>
### Detailed Pricing Information

The following are details of pricing found above on pricing summary page

<table>
<thead>
<tr>
<th>Permitting Modules/Features</th>
<th>Initial One-Time Set-Up</th>
<th>Annual Support and Subscription Fee</th>
</tr>
</thead>
<tbody>
<tr>
<td>Permit Management Inclusions</td>
<td>$4,000</td>
<td>$5,625</td>
</tr>
<tr>
<td>Permit Management</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Address Import Setup</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Inspections (including mobile access &amp; when available, InspectorConnect™ app for iOS and Android smartphones and tablets)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contractor Registration</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Plan Review Tracking and simple Planing / Zoning permits and workflows</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reporting and Data Import/Export</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Standard configuration of permit types, workflows per permit type, terminology, fee structures, documents and user roles and permissions. Additional fees may apply to multi-jurisdictional configurations</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Permit Docs: Standard set of Permits, CO, TCO configured with your jurisdiction logo and information. Additional custom docs at $500 per document</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Report Generator: Library of standard reports with ability to configure your own. Custom Reports priced individually</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Daily backup with rotation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Multiple Online Training sessions for startup and post startup</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Personalized support, including periodic configuration updates</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Automatic updates of new features</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total Permitting:</strong></td>
<td><strong>$4,000</strong></td>
<td><strong>$5,625</strong></td>
</tr>
</tbody>
</table>

- All pricing quoted in this proposal is valid for 90 days from Jan 6, 2017.
- This pricing term shall be for two (2) years with the option to renew on a year-to-year basis, unless earlier terminated by the Board of County Commissioners.
- Pricing provided is given our best understanding of the needs and stated number of users desired by the jurisdiction as indicated in the RFP. We will work with the jurisdiction to adjust pricing accordingly if our assumptions are incorrect.
December 26, 2016

MyGov is pleased to offer the County of Baker, FL a response to RFP-2016-03 for Permit & Inspection Software for the Community Development Department. MyGov offers a turn-key, software as a service (SAAS), web-based solution to handle daily operations for Permits and Inspections including full mobile use, an online client interface for citizens and contractors.

MyGov Headquarters

MyGov, LLC
P.O. Box 1192, Ada, OK 74821
www.mygov.us / (866) 332-4558 Voice & Fax

MyGov Products

- Permits & Inspections
- License Registration
- Code Enforcement
- Lien Tracker
- Request Tracker
- Public Works
- Online GIS
- Electronic Plan Review (July 2017)
- Asset Management (July 2017)

MyGov History

Launched in 2003, MyGov is a leading provider of hosted, web-based Community Development software to government agencies, currently servicing municipal, county and school sectors. MyGov currently provides service to 107 clients all in the public sector. There are 92 clients subscribed to the Permits and Inspections module and 64 to the License and Registration module. The percentage of clients subscribed to the modules requested is demonstration of MyGov's experience and capability in this software area. MyGov brings a comprehensive and intuitive approach to a complex process. Our goal is to exceed the expectations of every client by offering premier software and outstanding service at a great value.
MyGov Staffing

- Development - 10
- Support - 3
- Implementation - 1
- Marketing & Sales - 1
- Network Services - 1
- Accounting – 1
- Total – 17

Federal Tax ID
- 14-1857392

Business License
- MyGov holds a business license in the state of Oklahoma. This information will be provided when MyGov is selected as the software vendor.

Account Manager
- Tim Koeshall will be the designated Account Manager. Tim has over 20 years experience working in customer care and relations. He has worked for the federal government, healthcare industry and most recently as a manager for MyGov. Tim joined MyGov in 2008 and for the past eight years he has managed training and technical support for clients across the United States. Tim’s credentials include graduation from Southwest Missouri State University with a Bachelor of Science degree in 1990.

Expiration
- This proposal expires 90 days from January 6, 2017.

Sincerely,

Tim Koeshall
Account Manager
## Table of Contents

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Section 3. Client References .......................................................... 8  
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Appendix B. Order Form ............................................................... 13  
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SECTION 1 – EXECUTIVE SUMMARY

1.1 Proposed Solutions

MyGov is pleased to offer the County of Baker, FL a response to RFP-2016-03 for Permit & Inspection Software for the Community Development Department. MyGov offers a turn-key, software as a service (SAAS), web-based solution to handle daily operations for Permits and Inspections including full mobile use, an online client interface for citizens and contractors.

MyGov proposes two integrated applications: Permits & Inspections and License & Registration. These affordable solutions will provide the County of Baker, FL with a robust system that easily handles present and future needs, saves time and money, increases accountability, and provides 24-hour online service and easy access to all users.

The system also includes an intuitive interface for your citizen, called the “Online Action Center”, and for your contractor, called the “Contractor Interface”. Also included is the Location Manager which tracks parcel, ownership and legal information and comes with tool for importing and updating location information. These are included with the system at no additional cost.

1.2 Internet SAAS Model

MyGov is purely a web-based product and provides all solutions and services via the Internet. The county subscribes to the service as an annual fee. The fee covers support, maintenance, upgrades and most updates that are considered beneficial for the majority of subscribers.

1.3 Hardware Compatibility

As a browser-based solution, MyGov works with most modern devices that have a web browser, such as iPads, Android tablets, etc. MyGov includes an iPad app that works on all current versions of the iPad. MyGov currently supports the four most popular browsers: Internet Explorer, Google Chrome, Firefox and Safari. MyGov does not require any additional hardware or software. Inspectors can print permits or reports in the field using an internet capable device.

1.4 Project Management

MyGov will provide a detailed implementation timeline specifically personalized for the County, including all action items and benchmarks for both the County and MyGov. The timeline will cover all preparation work prior to training along with on-line training see Appendix D.
1.5 Fees

Proposal, Order Form and SSA are included as Appendix A, B, and C. The Annual Subscription fee shall be fixed for calendar years 2017 and 2018.

1.6 Permissions

Entry to the system is controlled by the Site Administrators. The Site Administrator grants logons, access to modules, inclusion in defined user groups (ie, Permit Clerk, Payments, Building Review and Fire Review) and permission to administrate the modules. User groups are then assigned to the defined project tasks and permissions.

1.7 Maintenance and SLA

https://www.mygov.us/terms
https://www.mygov.us/service-agreement
https://www.mygov.us/faqs

1.8 Data Download

https://www.mygov.us/terms
https://www.mygov.us/security-information
https://www.mygov.us/faqs

The Site Administrator is able to download the system data from the Database Backup tool, which will provide an SQL file.

1.9 Online Action Center

The system also includes an intuitive interface for your citizen, called the “Online Action Center”. The county will be able to embed on their website the links from their “Online Action Center”. The current MyGov Client Map and “Online Action Centers” can be viewed at https://app.mygov.us/client-map

1.10 Reports

The county has the ability to define custom reports within the Permits and Inspections module. The custom reports are begun using various standard templates and can be scheduled for automatic distribution

1.11 Online Payments

Please see Appendix E
1.12 Implementation and Training

Please see Appendix D

1.13 Adding Modules

Additional modules can be added to the account at anytime for the same subscription rate as the currently subscribed to modules. For newly requested modules a Service Order form will be provided to the county describing the Annual Subscription Fee, Module Setup and Online Training fee.  
[https://www.mygov.us/modules](https://www.mygov.us/modules)

- Permits & Inspections
- License Registration
- Code Enforcement
- Lien Tracker
- Request Tracker
- Public Works
- Online GIS
- Electronic Plan Review (July 2017)
- Asset Management (July 2017)

1.14 Technical Questions

[https://www.mygov.us/security-information](https://www.mygov.us/security-information)

MyGov collocates all servers at a [Liquid Web](https://www.liquidweb.com) facility. Liquid Web owns and operates five state-of-the-art, private data centers in Michigan, Arizona and Amsterdam, providing geographic redundancy, disaster recovery, and rapid content delivery. They are manned 24/7/365 by onsite, premium security and highly trained support technicians with some of the quickest response times in the industry. All facilities maintain strict certifications protecting the safety of your data, backed by a 100% power and network uptime SLA guarantee.

The number of daily users on MyGov and system bandwidth are not relevant to the County as MyGov scales the entire system to maintain our SLA and page loads to maintain high levels of response and speed.

[https://www.mygov.us/service-agreement](https://www.mygov.us/service-agreement)

MyGov performs maintenance as needed during off peak times and weekends. Maintenance activity does not preclude the users from accessing and using their account.
SECTION 2 – VENDOR QUESTIONNAIRE

SOFTWARE CAPABILITIES SHEET

Vendor name: MyGov, LLC

Software name: MyGov’s Permits and Inspections, MyGov’s License and Registration

<table>
<thead>
<tr>
<th>ITEM</th>
<th>CAPABILITY</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Create &amp; Track Permits/Projects – Ability to create cases and associated data for permits and projects.</td>
</tr>
<tr>
<td>2</td>
<td>Online Document Management – Ability to create Permit and Project documents within the system.</td>
</tr>
<tr>
<td>3</td>
<td>Ability to store permit and project documents within the system.</td>
</tr>
<tr>
<td>4</td>
<td>Ability to import files of various software formats into the system. Provide a list of software formats accepted.</td>
</tr>
<tr>
<td>5</td>
<td>Workflow- Must be able to flow cases through a minimum of 3 individuals.</td>
</tr>
<tr>
<td>6</td>
<td>Workflow Approvals- The case does not forward to the next individual on the workflow until the previous person has reviewed and approved.</td>
</tr>
<tr>
<td>7</td>
<td>Workflow Automation – Ability to modify workflow so that reviews, inspections, statuses, and notifications can be modified both automatically or manually. County can make the changes.</td>
</tr>
<tr>
<td>8</td>
<td>Application Processing/Online Permits) – A user-friendly, online web portal for citizens which is easy to understand and navigate</td>
</tr>
<tr>
<td>9</td>
<td>Each citizen or contractor (user) has the ability to create a user login account through the web portal.</td>
</tr>
<tr>
<td>10</td>
<td>Permit applications can be made through the web portal from any internet connection or mobile device.</td>
</tr>
<tr>
<td>11</td>
<td>Users can process permit applications through the web portal.</td>
</tr>
<tr>
<td></td>
<td>Feature Description</td>
</tr>
<tr>
<td>---</td>
<td>-------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>12</td>
<td>Users can review fee statuses through the web portal.</td>
</tr>
<tr>
<td>13</td>
<td>Users can make fee payments through the web portal.</td>
</tr>
<tr>
<td>14</td>
<td>Users can get a receipt they can print off through the web portal.</td>
</tr>
<tr>
<td>15</td>
<td>Web portal payments can be by debit or credit card.</td>
</tr>
<tr>
<td>16</td>
<td>Web portal supports debit or credit card payments through Pay Pal.</td>
</tr>
<tr>
<td>17</td>
<td>The web portal will show County staff that fees have been paid by the user, and a duplicate receipt can be printed, if needed.</td>
</tr>
<tr>
<td>18</td>
<td>If the user comes in person to County offices, the software will allow acceptance of the debit or credit card, and a data entry for “cash”.</td>
</tr>
<tr>
<td>19</td>
<td>All cashiering transactions including payments, refunds, fee calculations, fees added, fees removed, or fees modified will be auditable.</td>
</tr>
<tr>
<td>20</td>
<td>Users can view project updates and status of their case on the web portal.</td>
</tr>
<tr>
<td>21</td>
<td>Users can schedule inspections on the web portal.</td>
</tr>
<tr>
<td>22</td>
<td>Fee Calculation – The software allows staff to develop custom fee variations and fee formula calculations.</td>
</tr>
<tr>
<td>23</td>
<td>The building fees on the web portal can be changed by County staff at any time.</td>
</tr>
<tr>
<td>24</td>
<td>Plan Submission/Revision – The software will accept digital, scaled drawings/plans and supporting documentation on the web portal.</td>
</tr>
<tr>
<td>25</td>
<td>Plans can be submitted to the web portal through any internet connection or mobile device.</td>
</tr>
<tr>
<td>26</td>
<td>The submitted plans can be reviewed digitally.</td>
</tr>
<tr>
<td>27</td>
<td>The submitted plans can be redlined and saved on the web portal.</td>
</tr>
<tr>
<td>28</td>
<td>Users can access the web portal and review redlined drawings and plans, make revisions, and resubmit.</td>
</tr>
<tr>
<td></td>
<td>The software would retain and track all versions of the plans.</td>
</tr>
<tr>
<td>---</td>
<td>---------------------------------------------------------------</td>
</tr>
<tr>
<td>30</td>
<td>The County can approve submitted plans through the web portal.</td>
</tr>
<tr>
<td>31</td>
<td>Mobile Inspections – Ability for inspectors to use smart devices in the field to receive dispatches.</td>
</tr>
<tr>
<td>32</td>
<td>Inspectors can map and route inspections through the software on their smart device</td>
</tr>
<tr>
<td>33</td>
<td>Inspectors can schedule inspection activities on a calendar.</td>
</tr>
<tr>
<td>34</td>
<td>Inspectors can photograph and document findings. All photos and findings must be saved in each case file.</td>
</tr>
<tr>
<td>35</td>
<td>Inspectors can approve or deny inspections in the field on their smart device.</td>
</tr>
<tr>
<td>36</td>
<td>Inspectors can download all assigned permit or case related inspections for the day locally to a device so that an active data connection is not required in the field to complete an inspection. Upon returning to coverage area, the offline work, including status, photos, and comments, can be uploaded to sync with the live system.</td>
</tr>
<tr>
<td>37</td>
<td>Reporting – Includes standard reporting with the ability to query data.</td>
</tr>
<tr>
<td>38</td>
<td>Ability to develop custom reports based on the County’s needs.</td>
</tr>
<tr>
<td>39</td>
<td>User’s Portal – Permit and Development status will be available via online portal for 24/7 access through any internet connection or mobile device.</td>
</tr>
<tr>
<td>40</td>
<td>The system has the ability to create and store electronic signature on inspection documents and plans.</td>
</tr>
<tr>
<td>41</td>
<td>Software has 95% uptime. If not explain on a separate sheet.</td>
</tr>
<tr>
<td>42</td>
<td>Do you have an API or direct database access so the County can access our data to customize our own reports?</td>
</tr>
</tbody>
</table>
SECTION 2 – VENDOR QUESTIONNAIRE

SOFTWARE CAPABILITIES SHEET (extended explanation)

<table>
<thead>
<tr>
<th>Item</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>General</td>
<td>In Permits and Inspections a “case” is called a project, in License and Registration the “case” is usually called a registration, permit or license.</td>
</tr>
<tr>
<td>2</td>
<td>System auto-creates receipts, permit, TCO, CO, registrations and renewals documents.</td>
</tr>
<tr>
<td>3</td>
<td>All auto-created documents are saved to the specific project or registration.</td>
</tr>
<tr>
<td>4</td>
<td>“Explanation Documents” can be required or optional elements of a project or registration. There is currently not a limitation on the file format. If there is a specific file type that is a concern please let us know and we can check.</td>
</tr>
<tr>
<td>16</td>
<td>MyGov does not support Pay Pal, please see Appendix E for online payment information.</td>
</tr>
<tr>
<td>25</td>
<td>Plans are submitted as an “Explanation Document”, and typically loaded as a “.pdf”. The Explanation Document feature is used as file transfer/storage point.</td>
</tr>
<tr>
<td>27, 28, 29</td>
<td>MyGov will be launching an Electronic Plan Review (EPR) module in July 2017 which will provide this functionality.</td>
</tr>
<tr>
<td>32</td>
<td>MyGov offers a GIS module, which would be required for the inspector to map and route.</td>
</tr>
<tr>
<td>36</td>
<td>MyGov is purely a web-based product and provides all solutions and services via the Internet. Inspectors can print an inspection/route listing if internet service is not going to be available.</td>
</tr>
<tr>
<td>40</td>
<td>An electronic signature for internal County users can be added to most auto-created documents. Customer signatures can be collected for permits if the client is in office and signs on an iPad.</td>
</tr>
<tr>
<td>42</td>
<td>The Site Administrator is able to download the system data from the Database Backup tool, which will provide an SQL file. There is no direct access to the database. The county can also download all data from the Report Generation tool and upload the data to Excel for additional data review.</td>
</tr>
</tbody>
</table>
SECTION 3 – CLIENT REFERENCES

3.1 MyGov References

• El Centro, CA
  a. Population: 43,242
  b. MyGov modules: Permits, Code, Request Tracker, Public Works, GIS
  c. Patsy Robinson
  d. 760-337-4508
  e. probinson@cityofelcentro.org

• Dyersburg, TN
  a. Population: 17,043
  b. MyGov modules: Permits, License, Code, Request Tracking, GIS
  c. Carmen Cupples
  d. 731-288-2545
  e. ccupples@dyersburgtn.gov

• Jamestown, NY
  a. Population: 30,767
  b. MyGov modules: Permits, Code, Request Tracker
  c. Vince DeJoy
  d. 716-483-7663
  e. DeJoy@cityofjamestownny.com

• Williston, ND
  a. Population: 14,716
  b. MyGov modules: Permits, Code, License, GIS
  c. Kelly Aberle
  d. 701-577-8115
  e. kellya@ci.williston.nd.us

3.2 MyGov Client Map

The current MyGov Client Map can be viewed at https://app.mygov.us/client-map
SECTION 4 - IMPLEMENTATION METHODOLOGY

4.1 Project Management

MyGov will assign a trainer who will be responsible for the basic configuration of the client system. The trainer will lead the online and onsite training sessions and perform routine follow-up with the City after the “Go-Live” date. The MyGov trainer will provide valuable consulting and coaching to the City so the best possible setup can be achieved.

4.3 Training Timeline

Please see Appendix D

4.4 Vendor Responsibilities

MyGov will be responsible for completing the setup and training activities detailed in Appendix D.

4.5 Client Responsibilities

Client will be responsible for completing the setup and training activities detailed in Appendix D. Client is responsible for internal project management and coordination with MyGov to ensure client tasks are completed and client milestones are met.
SECTION 5 – TRAINING

5.1 Training Methodology

MyGov utilizes a mix of “train the trainer” and “one to one” group training activities. The mode of training is largely dependent upon the size and configuration of the client’s organization. The Site and Module Administrators will be expected to attend all training sessions to become fully knowledgeable of the various controls within each module.

5.2 Training Requirements

Client will be responsible for completing the setup and training activities detailed in Appendix D. Client is responsible for internal project management and coordination with MyGov to ensure client tasks are completed and client milestones are met.

5.3 Post Implementation Training

Following the “Go-Live” date defined in Appendix D, the MyGov trainer will review the client account periodically to verify that the client has fully implemented all modules. If the client has questions or concerns, the online Support Ticket system is fully available to each user in the client organization. If the Support Team is not able to resolve the issue or determines the trainer is needed, the ticket will be escalated and additional online training will be scheduled.

https://www.mygov.us/support-policy
SECTION 6 – SUPPORT AND MAINTENANCE

6.1 Support Options

MyGov offers a telephone support line from 8:00am – 5:00pm CT, Monday through Friday (excluding holidays). The majority of support related issues submitted to MyGov are solved using the online ticketing. The online ticket system will be responded to 8:00am – 5:00pm CT, Monday through Friday (excluding holidays). [https://www.mygov.us/support-policy](https://www.mygov.us/support-policy)

6.2 Support Goals Response Times

• Emergency – 5 minutes
• Critical – 5 minutes
• Standard/Routine – 15 minutes

6.3 Support Goals Resolution Times

• Emergency – 1 hour
• Critical – 2 hours
• Standard/Routine – 3 days

6.4 Problem Escalation Procedures Goals

• Severity 1 – Service substantially fails – 1 hour
• Severity 2 – Substantial degradation in performance of the Service – 2 hours
• Severity 3 – Minimal to no impact on the availability or performance of the Service – 3 days

6.5 Problem Escalation Procedures Resolution

1. Trouble Ticket opened
2. Assign engineer to determine and correct the error
3. Initiate work to correct the error
4. Periodic reports on the status of the correction

6.6 System Upgrades

Includes maintenance releases, enhancements, new versions, additions and modifications to the service provided to customers under support for no additional fee.
Appendix A – Proposal

Subscription Proposal

Proposal For: Kenny Downing  
MyGov Contact: Tim Koeshall  
County of Baker  
Account Manager  
360 E Shuey Ave  
P.O. Box 1192  
Macclenny, FL 32063  
Ada, OK 74821  
(904) 259-3354  
(866) 332-4558 x4  
kennie.downing@bakercountyfl.org  
tim@mygov.us

<table>
<thead>
<tr>
<th>ANNUAL SUBSCRIPTION FEES</th>
<th>ONE-TIME FEES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Permits &amp; Inspections Module</td>
<td>$4,320</td>
</tr>
<tr>
<td>License &amp; Registration Module</td>
<td>$4,320</td>
</tr>
<tr>
<td>Code Enforcement Module</td>
<td>$0</td>
</tr>
<tr>
<td>Lien Tracking Module</td>
<td>$0</td>
</tr>
<tr>
<td>Public Works Module</td>
<td>$0</td>
</tr>
<tr>
<td>GIS Module</td>
<td>$0</td>
</tr>
<tr>
<td>Request Tracking Module</td>
<td>$0</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$8,640</strong></td>
</tr>
</tbody>
</table>

**Module Setup:** Cost per module for the initial module activation and setup.

**On-Site Training:** Limited to [0] consecutive business days as part of same trip, charged in whole day increments at $1995 per day.

**On-Line Training:** Added hours are charged in whole hour increments at $160 per hour.

**Custom Documents:** N/A

**Data Import:** N/A

**Custom Programming:** N/A

**READY TO START?**

Please complete the information below, then fax to (866) 332-4558 or email to tim@mygov.us. Upon receipt, a “Subscription Services Agreement” and detailed “Services Order Form” will be emailed to you.

**Signature:**

**Printed Name:**

**Title:**

**Date:**

**Email:**

© MYGOV - Rev. 09/30/2014

* PROPOSAL VALID FOR 180 DAYS *

PAGE 1 of 1
## ANNUAL SUBSCRIPTION FEES

<table>
<thead>
<tr>
<th>Description</th>
<th>Tier *</th>
<th>Unit</th>
<th>Activation / Billing Date</th>
<th>Price</th>
<th>Subtotal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Permits &amp; Inspections Module</td>
<td>1</td>
<td>1</td>
<td>02/01/2017</td>
<td>$4,320</td>
<td>$4,320</td>
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<tr>
<td>License &amp; Registration Module</td>
<td>1</td>
<td>1</td>
<td>02/01/2017</td>
<td>$4,320</td>
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<td>Code Enforcement Module</td>
<td>1</td>
<td>0</td>
<td>N/A</td>
<td>$4,320</td>
<td>$0</td>
</tr>
<tr>
<td>Lien Tracking Module</td>
<td>1</td>
<td>0</td>
<td>N/A</td>
<td>$4,320</td>
<td>$0</td>
</tr>
<tr>
<td>Public Works Module</td>
<td>1</td>
<td>0</td>
<td>N/A</td>
<td>$4,320</td>
<td>$0</td>
</tr>
<tr>
<td>GIS Module</td>
<td>1</td>
<td>0</td>
<td>N/A</td>
<td>$4,320</td>
<td>$0</td>
</tr>
<tr>
<td>Request Tracking Module</td>
<td>1</td>
<td>0</td>
<td>N/A</td>
<td>$4,320</td>
<td>$0</td>
</tr>
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</table>

**Total** $8,640

## ONE-TIME FEES

<table>
<thead>
<tr>
<th>Description</th>
<th>Tier *</th>
<th>Unit</th>
<th>Activation / Billing Date</th>
<th>Price</th>
<th>Subtotal</th>
</tr>
</thead>
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<td>$195</td>
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<tr>
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<td>$640</td>
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<tr>
<td>Custom Documents</td>
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<td>N/A</td>
<td>$0</td>
<td>$0</td>
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<tr>
<td>Data Import</td>
<td>1</td>
<td>0</td>
<td>N/A</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Custom Programming</td>
<td>1</td>
<td>0</td>
<td>N/A</td>
<td>$0</td>
<td>$0</td>
</tr>
</tbody>
</table>

**Total** $13,135

**FREQUENCY:** Billed Annual

**ANNUAL + ONE-TIME FEES** $9,955
Services Order Form

GENERAL NOTICES:

**Billing:** Billing begins on the "Activation / Billing" date shown above.

**On-Site Training:** Limited to [X] consecutive business days as part of same trip charged in whole day increments at $1995 per day.

**On-Line Training:** Added hours are charged in whole hour increments at $160 per hour.

**Renewals - Annual:** This order renews for additional 1 year period, unless either party provides the other with written (including email) notice of non-renewal at least 30 days prior to the renewal date.

**Price Changes:** The Annual Subscription Fee listed on this order shall be fixed for calendar years 2017 and 2018. MyGov reserves the right to change prices and tiers annually with an effective date of January 1st. MyGov will communicate any rate change one year prior to the effective date. Continued use after the effective date constitutes acceptance of the rate changes.

**Terms:** This order is governed by the terms of the Subscription Services Agreement between the parties, which terms are incorporated into this order for all purposes. If there is a conflict between the terms of this order and the agreement, this order governs. This order and the agreement are the entire agreement between the parties, and they supersede and replace all prior and contemporaneous negotiations, agreements, representations and discussions regarding this subject matter. Only a signed writing of the parties may amend this order. This order is the confidential information of MyGov.

SIGN TO EXECUTE ORDER:

<table>
<thead>
<tr>
<th>County of Baker, FL (Customer)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Signature:</td>
</tr>
<tr>
<td>Printed Name:</td>
</tr>
<tr>
<td>Title:</td>
</tr>
<tr>
<td>Date:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>MyGov, LLC (MyGov)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Signature:</td>
</tr>
<tr>
<td>Stephen Burnsworth</td>
</tr>
<tr>
<td>Title:</td>
</tr>
<tr>
<td>Project Manager</td>
</tr>
<tr>
<td>Date:</td>
</tr>
<tr>
<td>12/26/2016</td>
</tr>
</tbody>
</table>
Subscription Services Agreement

This agreement is between MyGov, LLC, an Oklahoma corporation (MyGov), and the customer agreeing to these terms (Customer). It is dated as of the date MyGov signs below.

1. SOFTWARE-AS-A-SERVICE

This agreement provides Customer access to and usage of an Internet based software service as specified on a service order (Service). As part of using the Service, Customer may invite third parties (example, contractors, citizens, users) to use and access the Service. These third parties will be required to agree to the MyGov Terms of Service when they register with the Service.

2. USE OF SERVICE

2.1 Customer Owned Data. All data uploaded by Customer remains the property of Customer, as between MyGov and Customer (Customer Data). Customer grants MyGov the right to use the Customer Data solely for purposes of performing under this agreement. During the term of this agreement, Customer may export its Customer Data as allowed by functionality within the Service. Additional information regarding data exports is located at this FAQ site www.mygov.us/FAQ's.

2.2 Contractor Access and Usage. Customer may allow its contractors to access the Services in compliance with the terms of this agreement, which access must be for the sole benefit of Customer. Customer is responsible for the compliance with this agreement by its contractors.

2.3 Customer Responsibilities. Customer (i) must keep its passwords secure and confidential; (ii) is solely responsible for Customer Data and all activity in its account in the Service; (iii) must use commercially reasonable efforts to prevent unauthorized access to its account, and notify MyGov promptly of any such unauthorized access; and (iv) may use the Service only in accordance with the Service’s Online Help Desk and applicable law.

2.4 MyGov Support. MyGov must provide customer support for the Service under the terms of MyGov’s Customer Support Policy (Support) which is located at www.mygov.us/support-policy and is incorporated into this agreement for all purposes.

2.5 Demo Use. If Customer has registered for a demo use of the Service or uses a demo service, Customer may access the Service for a limited time period. The Service is provided AS IS, with no warranty during this time period. All Customer data will be deleted after the demo period.

3. SERVICE LEVEL AGREEMENT & WARRANTY

3.1 Warranty. MyGov warrants to Customer: (i) that commercially reasonable efforts will be made to maintain the online availability of the Service for a minimum of availability in any given month as provided in the chart below (excluding maintenance windows, force majeure, and outages that result from any Customer or third party technology issues); (ii) the functionality or features of the Service may change but will not materially decrease during any paid term; and (iii) that the Support may change but will not materially degrade during any paid term.

<table>
<thead>
<tr>
<th>Availability Warranty</th>
<th>Credit</th>
</tr>
</thead>
<tbody>
<tr>
<td>98%</td>
<td>3% of monthly fee for each full hour of an outage (beyond the warranty)</td>
</tr>
</tbody>
</table>

* Maximum amount of credit is 100% of the fee for such month.

3.2 LIMITED REMEDY. Customer’s exclusive remedy and MyGov’s sole obligation for its failure to meet the warranty in 3.1 above will be for MyGov to provide a credit for the applicable month as provided in the chart above (if this agreement is not renewed, then a refund), for the month; provided that Customer notifies MyGov of such breach within 30 days of the end of that month.
3.3 DISCLAIMER. MYGOV DISCLAIMS ALL OTHER WARRANTIES, INCLUDING, WITHOUT LIMITATION, THE IMPLIED WARRANTIES OF MERCHANTABILITY, TITLE AND FITNESS FOR A PARTICULAR PURPOSE. WHILE MYGOV TAKES REASONABLE PHYSICAL, TECHNICAL AND ADMINISTRATIVE MEASURES TO SECURE THE SERVICE, MYGOV DOES NOT GUARANTEE THAT THE SERVICE CANNOT BE COMPROMISED. CUSTOMER UNDERSTANDS THAT THE SERVICE MAY NOT BE ERROR FREE, AND USE MAY BE INTERRUPTED.

4. PAYMENT

Customer must pay all fees as specified on the service order, but if not specified then within 30 days of receipt of an invoice. Customer is responsible for the payment of all sales, use and other similar taxes. This agreement contemplates one or more orders for the Service, which orders are governed by the terms of this agreement.

5. MUTUAL CONFIDENTIALITY

5.1 Definition of Confidential Information. Confidential Information means all non-public information disclosed by a party (Discloser) to the other party (Recipient), whether orally or in writing, that is designated as confidential or that reasonably should be understood to be confidential given the nature of the information and the circumstances of disclosure (Confidential Information). MyGov's Confidential Information includes without limitation the Service (including without limitation the Service user interface design and layout, and pricing information).

5.2 Protection of Confidential Information. The Recipient must use the same degree of care that it uses to protect the confidentiality of its own confidential information (but in no event less than reasonable care) not to disclose or use any Confidential Information of the Discloser for any purpose outside the scope of this agreement. The Recipient must make commercially reasonable efforts to limit access to Confidential Information of Discloser to those of its employees and contractors who need such access for purposes consistent with this agreement and who have signed confidentiality agreements with Recipient no less restrictive than the confidentiality terms of this agreement.

5.3 Exclusions. Confidential Information excludes information that: (i) is or becomes generally known to the public without breach of any obligation owed to Discloser; (ii) was known to the Recipient prior to its disclosure by the Discloser without breach of any obligation owed to the Discloser; (iii) is received from a third party without breach of any obligation owed to Discloser, or (iv) was independently developed by the Recipient without use or access to the Confidential Information. The Recipient may disclose Confidential Information to the extent required by law or court order, but will provide Discloser with advance notice to seek a protective order.

6. MYGOV PROPERTY

6.1 Reservation of Rights. The software, workflow processes, user interface, designs, know-how, and other technologies provided by MyGov as part of the Service are the proprietary property of MyGov and its licensors, and all right, title and interest in and to such items, including all associated intellectual property rights, remain only with MyGov. Customer may not remove or modify any proprietary marking or restrictive legends in the Service. MyGov reserves all rights unless expressly granted in this agreement.

6.2 Restrictions. Customer may not (i) sell, resell, rent or lease the Service or use it in a service provider capacity; (ii) use the Service to store or transmit infringing, unsolicited marketing emails, libelous, or otherwise objectionable, unlawful or tortious material, or to store or transmit material in violation of third-party rights; (iii) interfere with or disrupt the integrity or performance of the Service; (iv) attempt to gain unauthorized access to the Service or their related systems or networks; (v) reverse engineer the Service; or (vi) access the Service to build a competitive service or product, or copy any feature, function or graphic for competitive purposes.

7. TERM AND TERMINATION

7.1 Term. This agreement continues until all service orders have terminated.
7.2 Mutual Termination for Material Breach. If either party is in material breach of this agreement, the other party may terminate this agreement at the end of a written 30-day notice/cure period, if the breach has not been cured.

7.3 Temporary Suspension. MyGov may temporarily suspend access to the Service if amounts past due are not paid within 10 days of notice from MyGov. This notice may be sent via email.

7.4 Return of Customer Data.
   - Within 30-days after termination, upon request MyGov will make the Service available for Customer to export such data as provided in Section 2.1 or will provide a backup of the data in its native database format.
   - After such 30-day period, MyGov has no obligation to maintain the Customer Data and may destroy it.

7.5 Return MyGov Property Upon Termination. Upon termination of this agreement for any reason, Customer must pay MyGov for any unpaid amounts, and destroy or return all property of MyGov. Upon MyGov’s request, Customer will confirm in writing its compliance with this destruction or return requirement.

7.6 Suspension for Violations of Law. MyGov may temporarily suspend the Service or remove the applicable Customer Data, or both, if it in good faith believes that, as part of using the Service, Customer has violated a law. MyGov will attempt to contact Customer in advance.

8. LIABILITY LIMIT

8.1 EXCLUSION OF INDIRECT DAMAGES. MyGov is not liable for any indirect, special, incidental or consequential damages arising out of or related to this agreement (including, without limitation, costs of delay; loss of data, records or information; and lost profits), even if it knows of the possibility of such damage or loss.

8.2 TOTAL LIMIT ON LIABILITY. MyGov’s total liability arising out of or related to this agreement (whether in contract, tort or otherwise) does not exceed the amount paid by Customer within the 12 month period prior to the event that gave rise to the liability.

9. INDEMNITY

9.1 Defense of Third Party Claims. MyGov will defend or settle any third party claim against Customer to the extent that such claim alleges that MyGov technology used to provide the Service violates a copyright, patent, trademark or other intellectual property right, if Customer, promptly notifies MyGov of the claim in writing, cooperates with MyGov in the defense, and allows MyGov to solely control the defense or settlement of the claim. Costs. MyGov will pay infringement claim defense costs incurred as part of its obligations above, and MyGov negotiated settlement amounts, and court awarded damages. Process. If such a claim appears likely, then MyGov may modify the Service, procure the necessary rights, or replace it with the functional equivalent. If MyGov determines that none of these are reasonably available, then MyGov may terminate the Service and refund any prepaid and unused fees. Exclusions. MyGov has no obligation for any claim arising from: MyGov’s compliance with Customer’s specifications; A combination of the Service with other technology where the infringement would not occur but for the combination; Use of Customer Data; or Technology not provided by MyGov. This section contains Customer’s exclusive remedies and MyGov’s sole liability for intellectual property infringement claims.

10. GOVERNING LAW AND FORUM

This agreement is governed by the laws of the State of Oklahoma (without regard to conflicts of law principles) for any dispute between the parties or relating in any way to the subject matter of this agreement. Any suit or legal proceeding must be exclusively brought in the federal or state courts for Pontotoc County, Oklahoma, and Customer submits to this personal jurisdiction and venue. Nothing in this agreement prevents either party from seeking
injunctive relief in a court of competent jurisdiction. The prevailing party in any litigation is entitled to recover its attorneys' fees and costs from the other party.

11. OTHER TERMS

11.1 Entire Agreement and Changes. This agreement and the service order constitute the entire agreement between the parties and supersede any prior or contemporaneous negotiations or agreements, whether oral or written, related to this subject matter. Customer is not relying on any representation concerning this subject matter, oral or written, not included in this agreement. No representation, promise or inducement not included in this agreement is binding. No modification of this agreement is effective unless both parties sign it, and no waiver is effective unless the party waiving the right signs a waiver in writing.

11.2 No Assignment. Neither party may assign or transfer this agreement or a service order to a third party, except that this agreement with all service orders may be assigned, without the consent of the other party, as part of a merger, or sale of substantially all the assets, of a party.

11.3 Independent Contractors. The parties are independent contractors with respect to each other.

11.4 Enforceability and Force Majeure. If any term of this agreement is invalid or unenforceable, the other terms remain in effect. Except for the payment of monies, neither party is liable for events beyond its reasonable control, including, without limitation force majeure events.

11.5 Money Damages Insufficient. Any breach by a party of this agreement or violation of the other party's intellectual property rights could cause irreparable injury or harm to the other party. The other party may seek a court order to stop any breach or avoid any future breach.

11.6 No Additional Terms. MyGov rejects additional or conflicting terms of any Customer form-purchasing document.

11.7 Order of Precedence. If there is an inconsistency between this agreement and a service order, the service order prevails.

11.8 Survival of Terms. Any terms that by their nature survive termination of this agreement, for a party to assert its rights and receive the protections of this agreement, will survive.

<table>
<thead>
<tr>
<th>County of Baker, FL (Customer)</th>
<th>MyGov, LLC (MyGov)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Signature:</td>
<td>Signature:</td>
</tr>
<tr>
<td>Printed Name:</td>
<td>Printed Name:</td>
</tr>
<tr>
<td>Title:</td>
<td>Title:</td>
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<tr>
<td>Date:</td>
<td>Date:</td>
</tr>
<tr>
<td>Address:</td>
<td>Address:</td>
</tr>
</tbody>
</table>

Title: Project Manager

Date: 12/26/2016

Address: P.O. Box 1192
Ada, OK 74821
Appendix D – Training Plan

Baker County, FL
MYGOV TRAINING PACKET

Sent: 12/26/16
To: Kennie Downing

Install Date: 01/29/17
Proposal ID #: FL-Baker County-20161226

INDEX:
- Required Items Checklist Page 2
- Implementation Plan Page 3

Module Legend (MD)
- PI - Permits and Inspections
- CE - Code Enforcement
- LR - License and Registration
- PW - Public Works
- LT - Lien Tracker
- RT - Request Tracker
- GIS - Geographic Information System
- LM - Location Manager

Phase (Action) Legend
- SA - Site Administration
- OLT - Online Training
- TEST - Client Testing
- OST - Onsite Training
- SA - Site Administration
- MS - Module Setup
- CLIENT - Client Action

QUESTIONS?
Call Tim Koeshall at (866) 332-4558 or tim@mygov.us

© MYGOV - Rev. 11/21/2014
## REQUIRED ITEMS

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<tr>
<th>#</th>
<th>x</th>
<th>Phase</th>
<th>Module</th>
<th>Action</th>
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<tbody>
<tr>
<td>1</td>
<td></td>
<td>CLIENT</td>
<td>SA</td>
<td>Required Items</td>
<td>2/1/17</td>
<td>* Client returns Order Form and SSA</td>
</tr>
<tr>
<td>2</td>
<td></td>
<td>CLIENT</td>
<td>SA</td>
<td>Required Items</td>
<td>2/1/17</td>
<td>* Client returns Billing Information</td>
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<tr>
<td>3</td>
<td></td>
<td>CLIENT</td>
<td>SA</td>
<td>Required Items</td>
<td>2/8/17</td>
<td>* A good quality digital logo</td>
</tr>
<tr>
<td>4</td>
<td></td>
<td>CLIENT</td>
<td>SA</td>
<td>Required Items</td>
<td>2/8/17</td>
<td>* A good quality digital banner (100 x 750 px)</td>
</tr>
<tr>
<td>5</td>
<td></td>
<td>CLIENT</td>
<td>SA</td>
<td>Required Items</td>
<td>2/8/17</td>
<td>* A good quality, digital copy of letterhead</td>
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<tr>
<td>6</td>
<td></td>
<td>CLIENT</td>
<td>LM</td>
<td>Required Items</td>
<td>2/8/17</td>
<td>* An Excel, CSV or DBF file of parcel records</td>
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<tr>
<td>7</td>
<td></td>
<td>CLIENT</td>
<td>LM</td>
<td>Required Items</td>
<td>2/8/17</td>
<td>* A list of all zoning districts</td>
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<tr>
<td>8</td>
<td></td>
<td>CLIENT</td>
<td>ALL</td>
<td>Required Items</td>
<td>2/8/17</td>
<td>* Return &quot;Module Setup Information&quot;</td>
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<td></td>
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<td>PI</td>
<td>Required Items</td>
<td>2/8/17</td>
<td>* A list of all permit types</td>
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<tr>
<td>10</td>
<td></td>
<td>CLIENT</td>
<td>PI</td>
<td>Required Items</td>
<td>2/8/17</td>
<td>* A list of all permit fees and account numbers</td>
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<td>11</td>
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<td>CLIENT</td>
<td>PI</td>
<td>Required Items</td>
<td>2/8/17</td>
<td>* A list of contractor types and license requirements</td>
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<td>CLIENT</td>
<td>PI</td>
<td>Required Items</td>
<td>2/8/17</td>
<td>* A copy of all permit application forms</td>
</tr>
<tr>
<td>13</td>
<td></td>
<td>CLIENT</td>
<td>PI</td>
<td>Required Items</td>
<td>2/8/17</td>
<td>* Return import file for Contractor and License data</td>
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<tr>
<td>14</td>
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<td>CLIENT</td>
<td>LR</td>
<td>Required Items</td>
<td>2/8/17</td>
<td>* A list of all license types and requirements</td>
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<tr>
<td>15</td>
<td></td>
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<td>LR</td>
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<td>2/8/17</td>
<td>* A list of all license fees and account numbers</td>
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<tr>
<td>16</td>
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<td>CLIENT</td>
<td>LR</td>
<td>Required Items</td>
<td>2/8/17</td>
<td>* A copy of all registration application forms</td>
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# MyGov Training Packet

## IMPLEMENTATION PLAN (Week - 0)

<table>
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<th>Zone</th>
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<td></td>
<td></td>
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<td>1/29/17</td>
<td>ET</td>
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<tr>
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<td></td>
<td>CLIENT</td>
<td>SA</td>
<td>Proposal</td>
<td>1/29/17</td>
<td></td>
<td></td>
<td></td>
<td>* Client returns executed Proposal</td>
</tr>
<tr>
<td>2</td>
<td></td>
<td>SA</td>
<td></td>
<td>Order Form and SSA</td>
<td>1/30/17</td>
<td></td>
<td></td>
<td></td>
<td>* MyGov sends Order Form and SSA</td>
</tr>
<tr>
<td>3</td>
<td></td>
<td>CLIENT</td>
<td>SA</td>
<td>Order Form and SSA</td>
<td>2/1/17</td>
<td></td>
<td></td>
<td></td>
<td>* Client returns Order Form and SSA</td>
</tr>
<tr>
<td>4</td>
<td></td>
<td>CLIENT</td>
<td>SA</td>
<td>Billing Information</td>
<td>2/1/17</td>
<td></td>
<td></td>
<td></td>
<td>* Client returns Billing Information</td>
</tr>
<tr>
<td>5</td>
<td></td>
<td>SA</td>
<td></td>
<td>Account Activated</td>
<td>2/1/17</td>
<td></td>
<td></td>
<td></td>
<td>* MyGov activates Account</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Week 2</td>
<td>2/5/17</td>
<td>ET</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td></td>
<td>OLT</td>
<td>SA</td>
<td>Initial Conference</td>
<td>2/5/17</td>
<td>9:00 am</td>
<td>ET</td>
<td>0.75</td>
<td>* Initial Conference</td>
</tr>
<tr>
<td>2</td>
<td></td>
<td>OLT</td>
<td>SA</td>
<td>Site Admin Intro</td>
<td>2/5/17</td>
<td>9:45 am</td>
<td>ET</td>
<td>0.25</td>
<td>* Site Admin</td>
</tr>
<tr>
<td>3</td>
<td></td>
<td>CLIENT</td>
<td>SA</td>
<td>Site Admin</td>
<td>2/5/17</td>
<td></td>
<td></td>
<td></td>
<td>* Client Enters User Accounts</td>
</tr>
<tr>
<td>4</td>
<td></td>
<td>SA</td>
<td></td>
<td>Training Plan</td>
<td>2/5/17</td>
<td></td>
<td></td>
<td></td>
<td>* MyGov sends &quot;Training Plan&quot;</td>
</tr>
<tr>
<td>5</td>
<td></td>
<td>CLIENT</td>
<td>SA</td>
<td>Required Items</td>
<td>2/8/17</td>
<td></td>
<td></td>
<td></td>
<td>* Client returns &quot;Required Items&quot;</td>
</tr>
<tr>
<td>6</td>
<td></td>
<td>CLIENT</td>
<td>SA</td>
<td>Online Payment</td>
<td>2/8/17</td>
<td></td>
<td></td>
<td></td>
<td>* Client obtains Authorize.net</td>
</tr>
</tbody>
</table>

|    |   |       |    | Week 3                        | 2/12/17 | ET       |      |           |                                                      |
| 1  |   | SA    |    | Setup Activity                | 2/12/17 |          |      |           | * MyGov Begins System Setup                           |
| 2  |   | SA    |    | Setup Activity                | 2/16/17 |          |      |           | * MyGov Completes Initial Setup                       |

## ONLINE TRAINING ATTENDEES

### Mandatory Attendance

#### Administrative
- Site and Module Administrators
- Department Directors
- Administrative Assistants, Permit Clerks, Payment Clerks
- Plan Reviewers
- GIS Technicians

#### Field
- Inspectors (Building, Fire, Police, etc)
- Officers (Code, Zoning, Health, etc)
- Public Works (Supervisors, Foremen, Crew Leader, etc)

### Optional Attendance
- IT and Finance Personnel
## IMPLEMENTATION PLAN (Week - 4)

<table>
<thead>
<tr>
<th>#</th>
<th>x</th>
<th>Phase</th>
<th>MD</th>
<th>Action</th>
<th>Date</th>
<th>Time</th>
<th>Zone</th>
<th>Time (hr)</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td>OLT</td>
<td>LR</td>
<td>User Training</td>
<td>2/20/17</td>
<td>9:00am</td>
<td>CT</td>
<td>1.0</td>
<td>* Level 1 Training</td>
</tr>
<tr>
<td>2</td>
<td></td>
<td>OLT</td>
<td>PI</td>
<td>User Training</td>
<td>2/20/17</td>
<td>10:00am</td>
<td>CT</td>
<td>1.0</td>
<td>* Level 1 Training</td>
</tr>
<tr>
<td>3</td>
<td></td>
<td>OLT</td>
<td>LM</td>
<td>User Training</td>
<td>2/21/17</td>
<td>9:00am</td>
<td>CT</td>
<td>0.5</td>
<td>* Module Admin Training</td>
</tr>
<tr>
<td>4</td>
<td></td>
<td>OLT</td>
<td>GIS</td>
<td>User Training</td>
<td>2/21/17</td>
<td>9:30am</td>
<td>CT</td>
<td>0.5</td>
<td>* Module Admin Training</td>
</tr>
<tr>
<td>5</td>
<td></td>
<td>TEST</td>
<td>ALL</td>
<td>Client Testing</td>
<td>2/20/17</td>
<td>9:00am</td>
<td>CT</td>
<td></td>
<td>* Client Testing All Modules</td>
</tr>
<tr>
<td>6</td>
<td></td>
<td>OLT</td>
<td>LR</td>
<td>First Review</td>
<td>2/22/17</td>
<td>9:00am</td>
<td>CT</td>
<td>1.0</td>
<td>* Review Level 1 Testing</td>
</tr>
<tr>
<td>7</td>
<td></td>
<td>OLT</td>
<td>PI</td>
<td>First Review</td>
<td>2/22/17</td>
<td>10:00am</td>
<td>CT</td>
<td>1.0</td>
<td>* Review Level 1 Testing</td>
</tr>
<tr>
<td>8</td>
<td></td>
<td>TEST</td>
<td>ALL</td>
<td>Client Testing</td>
<td>2/22/17</td>
<td>9:00am</td>
<td>CT</td>
<td></td>
<td>* Client Testing All Modules</td>
</tr>
</tbody>
</table>
### IMPLEMENTATION PLAN (Week - 5)

<table>
<thead>
<tr>
<th>#</th>
<th>x</th>
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<th>MD</th>
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<th>Time</th>
<th>Zone</th>
<th>Time (hr)</th>
<th>Notes</th>
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<tbody>
<tr>
<td>1</td>
<td></td>
<td>OLT</td>
<td>LR</td>
<td>User Training</td>
<td>2/26/17</td>
<td>9:00 am</td>
<td>CT</td>
<td>1.0</td>
<td>* Level 2 Training</td>
</tr>
<tr>
<td>2</td>
<td></td>
<td>OLT</td>
<td>PI</td>
<td>User Training</td>
<td>2/26/17</td>
<td>10:00 am</td>
<td>CT</td>
<td>1.0</td>
<td>* Level 2 Training</td>
</tr>
<tr>
<td>3</td>
<td></td>
<td>TEST</td>
<td>ALL</td>
<td>Client Testing</td>
<td>2/26/17</td>
<td></td>
<td></td>
<td></td>
<td>* Client Testing All Modules</td>
</tr>
<tr>
<td>4</td>
<td></td>
<td>OLT</td>
<td>LR</td>
<td>Second Review</td>
<td>2/28/17</td>
<td>9:00 am</td>
<td>CT</td>
<td>1.0</td>
<td>* Review Level 2 Testing</td>
</tr>
<tr>
<td>5</td>
<td></td>
<td>OLT</td>
<td>PI</td>
<td>Second Review</td>
<td>2/28/17</td>
<td>10:00 am</td>
<td>CT</td>
<td>1.0</td>
<td>* Review Level 2 Testing</td>
</tr>
<tr>
<td>6</td>
<td></td>
<td>TEST</td>
<td>ALL</td>
<td>Client Testing</td>
<td>2/28/17</td>
<td></td>
<td></td>
<td></td>
<td>* Client Testing All Modules</td>
</tr>
<tr>
<td>7</td>
<td></td>
<td>OLT</td>
<td>LR</td>
<td>Final Meeting</td>
<td>3/2/17</td>
<td>9:00 am</td>
<td>CT</td>
<td>1.0</td>
<td>* Final Review of Testing</td>
</tr>
<tr>
<td>8</td>
<td></td>
<td>OLT</td>
<td>PI</td>
<td>Final Meeting</td>
<td>3/2/17</td>
<td>10:00 am</td>
<td>CT</td>
<td>1.0</td>
<td>* Final Review of Testing</td>
</tr>
<tr>
<td>9</td>
<td></td>
<td>TEST</td>
<td>ALL</td>
<td>Clear Data</td>
<td>3/2/17</td>
<td></td>
<td></td>
<td></td>
<td>* City Deletes Test Data</td>
</tr>
<tr>
<td>10</td>
<td></td>
<td>LIVE</td>
<td>ALL</td>
<td>Go-Live Date</td>
<td>3/5/17</td>
<td></td>
<td></td>
<td></td>
<td>* Go-Live Date</td>
</tr>
</tbody>
</table>
Appendix E – Online Payment

Online Payments Setup

This document explains how to setup your MyGov account for credit and debit card payments. To begin, select the merchant provider you prefer, either Option A or Option B. When you receive online payments, the merchant provider moves the money from the payment gateway to your bank account. For the quickest and easiest implementation, Option A is recommended.

OPTION A: Using the Recommended Provider

To setup your account using the preferred provider, follow these steps:

Step 1: Submit Online Application

Go to the link below, and click the “Start Application” button. Complete the simple online form and “Submit Application”. This notifies “Pace Payments” (Pace), the preferred provider, who will then contact you and help you gather the needed information. They will prepare the needed forms, and return them electronically for signature.

https://www.mygov.us/why-mygov#Online_Payments

Step 2: Sign Paper Forms

Electronically sign and submit the forms and required documentation. Once received, here is what Pace will do for you:

- Pace will complete your Visa and MasterCard applications and submit them for approval.
- Once approved, Pace will create your merchant account number and register your agency with Visa and MasterCard.
- Pace will setup your required “Authorize.net” account. This is MyGov’s “Payment Gateway”, which approves or declines credit card payments.
- Once Pace has finished your Authorize.net account, they will email you instructions as well as call you to help you create your login and security questions and finish any remaining setup work.

*If you have any questions for Pace, contact them at sales@paceps.com or call (888) 494-5959.

Step 3: Send Authentication to MyGov

Once logged in, you will need to retrieve these two authentication values and send them to MyGov:

- API Login ID
- Transaction Key
You can get these values by going to Authorize.net > Account > Settings > Security Settings > General Settings > API Login ID and Transaction Key. Send them to support@mygov.us. In this email, please also tell us if you want to charge a "Convenience Fee", and if so, the desired rate (see "Charging Convenience Fees" below).

**Step 4: Setup MyGov Account**

Once MyGov has received your authentication information, we will activate your online payments tool and setup your convenience fee, if applicable, then let you know that it is time to setup your MyGov account as follows:

- **Add Convenience Fee Account Number** - If you are charging this fee, then go to MyGov > Site Admin > Credit & Debit Card. Enter and "Save" your convenience fee "Account Number". This number is assigned by your finance department and usually represents the GL account number from your finance software.

- **Activate Online Payments Per Module** - Next, turn "ON" or "OFF" each module where you wish to accept credit and debit card payments.

- **Set Charge Limits for Permits Module** - If you are using the "Permits" module, then go to PI > Module Administration > Online Payment Limits. Under "credit card limit" select "Unlimited" if you are charging a "Convenience Fee". If you are paying your own charges, then you may choose to set a limit for each permit type, such as "10000". This would set a $10,000 limit for credit and debit card transactions.

**OPTION B: Using Your Own Provider**

You can still use the online payment options in MyGov even if you don’t use our preferred provider; but it will take a bit more work. To do this, follow these steps:

**Step 1: Qualify Merchant Provider**

Start by contacting your current provider to make sure they can interface with Authorize.net. If they cannot, you must use the preferred provider.

If your current provider can interface with Authorize.net, then make sure your existing merchant account accepts online payments. If it does not, then your provider will need to set you up an online payment account, or you will need to use the preferred provider. Also, keep in mind that if your provider already accepts online payments, you may want to get a new account to keep your online MyGov payments separate from your other online payments.

*Skip to Step 4 if you already have an Authorize.net account.*

**Step 2: Get an Authorize.net Account**

Authorize.net is the payment gateway that approves or declines credit card payments and is the only gateway that interfaces with MyGov. To apply, use the link below:
Online Payments Setup - 3

http://www.authorize.net/

* Make sure that the Authorize.net account type is “ecommerce” or “card not present”. No other account types are valid for online payments.

Step 3: Activate your Authorize.net Account

When the account is created, you will receive an email to activate your account. You will be led through a few security questions, including confirming the account number and routing number. Once activated, setup your account as desired.

* Do not elect to receive receipts from Authorize.net. Your receipts will generate from MyGov, and the duplicate receipt from Authorize creates confusion.

Step 4: Send Authentication to MyGov

Once you have finished setting up your Authorize.net account, send these two authentication values to MyGov:

- API Login ID
- Transaction Key

You can get these values by going to Authorize.net > Account > Settings > Security Settings > General Settings > API Login ID and Transaction Key. Send them to support@mygov.us. In this email, please also tell us if you want to charge a “Convenience Fee”, and if so, the desired rate (see “Charging Convenience Fees” below).

Step 5: Setup MyGov Account

Once MyGov has received your authentication information, we will activate your online payments tool and setup your convenience fee, if applicable, then let you know that it is time to setup your MyGov account as follows:

- Add Convenience Fee Account Number - If you are charging this fee, then go to MyGov > Site Admin > Credit & Debit Card. Enter and “Save” your convenience fee “Account Number”. This number is assigned by your finance department and usually represents the GL account number from your finance software.

- Activate Online Payments Per Module - Next, turn “ON” or “OFF” each module where you wish to accept credit and debit card payments.

- Set Charge Limits for Permits Module - If you are using the "Permits" module, then go to PI > Module Administration > Online Payment Limits. Under "credit card limit" select "Unlimited" if you are charging a "Convenience Fee". If you are paying your own charges, then you may choose to set a limit for each permit type, such as "10000". This would set a $10,000 limit for credit and debit card transactions.

The above information is confidential and intended only for the person or persons requesting such information and shall not be reproduced, transmitted or distributed to any other party without the written consent of mygov.
Other Recommended Options

We highly recommend that you obtain card readers and charge a convenience fee as explained below:

Card Readers

Card Readers will save you a lot of time by auto-completing the card number field and expiration date. We recommend you get one for each computer receiving payments. When purchasing a reader, make sure that it has these features:

- Plugs in via USB connection
- Uses “Keyboard Emulation”

We recommend one that requires no setup, such as the Magtek Dynamag. If you buy this reader, when it arrives, plug it into an available USB port on your computer, go to a payment page (like in PI), select “Credit / Debit Card” and swipe a card. It should read automatically with no setup.

* Card readers are available from Pace. Contact them at sales@paceps.com or call (888) 494-5959.

Charging Convenience Fees

A convenience fee is an easy way to offset the swipe fees charged by the credit card companies. In MyGov, you can set a flat rate (called a base rate), a percentage rate or both. We highly recommend that you set a flat rate to cover the small transactions, and a percentage rate to cover the larger transactions. An optimal rate for most agencies to cover cost is a $1.00 base rate, plus 3%.

You should set a starting rate and have a plan to reevaluate it at set intervals to see if the fee is collecting enough to cover your online expenses. Then, adjust the rate as needed. Please note that you can change your convenience fee at any time by contacting MyGov support.

Have questions? Submit a Support Ticket, call support at (866) 332-4558 or email support at support@mygov.us.
Appendix F – Module Brochures

Key Features

- Quick Implementation
- Intuitive and Easy to Use
- Fully Customizable
- Work Anytime, Anywhere
- Work With Anyone
- E-Solutions and Online Payments
- “To Do” Lists and Notifications
- Project Notes and Pictures
- Full Project Tracking and Management
- Reporting and Archiving
- Data Security and Backups
- Support and Upgrades Included

Key Benefits

CONNECT EVERYONE ONLINE

- Customers / Clients
- Contractors
- Consultants
- Government Agencies
- General Public / Officials
- Remote Jobsites / Offices

COMPARING COSTS

When comparing MyGov with other applications, there is no comparison. MyGov saves you time and money.

Save Time

- System Maintenance & Updates
- Web Hosting & Monitoring
- Security
- Archiving
- Data Backups
- Technical & Customer Support

Save Money

- No Upfront Investment
- No Software Purchases
- No Hardware Purchases
- No Licenses and Upgrades
- No Support Contracts
- No Long-Term Obligations

For additional information, visit us online at www.mygov.us or call us toll free at 866.332.4558.
3 engineers, 2 architects, 1 contractor, 5 subs, 4 reviewers and 3 inspectors in 14 different locations ... organize that.

Wouldn’t it be nice to have a single interface where everyone could collaborate?
Where you can look at a project and know everything that you need to know?
Well, you can. Experience a solution where everyone works seamlessly together online.
Oh, and by the way, “yes”, you can afford it.

Top 5 Collaboration Tools:

1. Contractor Interface
   Allow your contractors to work with you online requesting permits, inspections, paying fees, reading and responding to review and inspection notes, uploading needed items, etc. Of course, if you get lonely, you can always make them come to your permit counter.

2. Plan Reviews
   Manage plan reviews across departments, buildings and agencies. Collaborate on a single interface where everyone has a transparent view of review notes, statuses and response times. Email or print an overview of all reviews for interested parties or Development Committees. No more hunting through email, network drives, and manilla folders to find what you need. Just click your mouse and poof! There it is. Every time.

3. Mobile Inspections
   Auto-assign inspectors by inspection type or inspection load. Each inspector can use their inspection list to create inspection routes and print tickets. Or, go paperless and take your laptop or touch-screen to the field. Got a smart phone? Use the free mobile interface.

4. License Check
   Allow contractors to select subs from your approved list. Keep them for selecting subs with license issues. Stop permit and inspection requests by checking key expiration dates such as state license, local registration, general liability and worker’s compensation.

5. Inspections IVR
   You already get a full contractor interface, but some people just hate computers. Well, every contractor has a phone. So, give them an IVR (Interactive Voice Response) and allow them to request inspections and get results by calling our toll free inspection line.

Top 10 Key Features
- Online Contractor Interface
- Online Permits / Payments
- Automated Workflow & To Do's
- Plan Review Tools
- Inspection Tools
- Continuous License Monitoring
- Quick Reports / Exports
- Mobile Inspections
- Inspections IVR
- Activity History by Address

Simple
Affordable
Web Based

Request a Demo
online at www.mygov.us
5,000 licensed contractors - and 5,000 renewals are due out in 2 days... good luck.

Wouldn't it be nice to click a button and get 5000 renewal letters? Better yet, what if all 5000 could renew online? Pay online? Update their own information or upload needed files like their insurance policy? What if they were automatically stopped from requesting permits or inspections because their policy expires?

Well, in our world, this happens every day. Join us and get a solution, not just software.

Top 5 Automations:

1. **Online Applications**
   - Allow your contractors to request new licenses or renew old ones online. When applying, make contractors complete required fields, upload needed information or pay online.

2. **Renewal Notices**
   - Create custom notice letters and / or emails and have them auto-generate a set number of days before or after the license expiration date.

3. **License Check**
   - Automatically block permit and inspection requests based on the expiration of state licenses, local licenses, general liability or workers' compensation insurance.

4. **License History**
   - See the entire license history from a single page including the original application and all renewals along with attached documents, such as insurance or state licenses.

5. **Automated Workflow**
   - Auto-route new license and renewal requests to the appropriate users. Create custom steps to be completed, information to collect and fees to charge. Set warnings for steps taking too long, and auto-notify users with the "To Do" list or auto-email notifications.

Top 10 Key Features

- Online Applications
- Workflow Management & To Do's
- Automated Application Assignment
- Automated Renewal Notices
- Citizen / Contractor Interface
- Continuous License Monitoring
- License Validation / Stop Work
- Transparent License History
- Mail Labels
- Custom License Documents

Simple Affordable Web Based

Request a Demo

online at www.mygov.us
Permits & Inspection – Project Page

Electrical Permit

**ID#: ICE-16-033**
**Started:** 03/11/16
**Time:** 3d 22h

**Project Description (edit)**
- test

**Address (edit) (view)**
138 Hartwick Ln.
Little Elm, TX 75068

**Tenant (edit) (view)**
Bobby Smith

**Legal (edit) (view)**
Little Elm Townsite Bk H Lot 4RA

**Owner (edit) (view)**
Amor Bhattacharya
PO Box 1359
Little Elm, TX 75068
ph: (123) 123-1234

**Contractor (edit)**
Robert Crescent
Crandall Homes
1400 North Riverfront Blvd, 12
Dallas, TX 75207
(972) 872-9852 phone
(972) 872-9851 fax
(972) 631-9945 mobile
miller@mygov.us

**Property Information (edit) (view)**

Documents
- Application Form

INFO FIELDS
- Electrical - # of Receptacles: 59
- Electrical - # of Switches: 59
- Project Valuation: 10000

**Permit (issue date):** Mar 11, 2016 12:02 pm
**Expires on:** Jul 12, 2016 12:04 pm

**STEPS**
- **1. Application Check Electrical**
  - 03/11/16 (Started)
  - 03/11/16 (Approved)
- **2. Electrical Review**
  - 03/11/16 (Started)
  - 03/11/16 (Approved)
- **3. Payment Due**
  - 03/11/16 (Started)
  - 03/11/16 (Completed)
- **4. Issue Permit**
  - 03/11/16 (Started)
  - 03/11/16 (Approved)
- **5. Electrical Breaker Box**
  - 03/11/16 (Started)
  - 03/11/16 (Completed)
- **6. Electrical Grounding**
  - 03/11/16 (Started)
  - 03/11/16 (Completed) 3d 22h
- **7. Electrical Final**
  - Not Ready

**Archive Project**
- Not Ready

**Fees**
- **$607.50**

**Payments**
- **$607.50**

**Amount Due**
- $0.00
License & Registration – Homepage

Contact Registration
Welcome, John Miller

My Applications 4
Reviews 4
My Inspections 0
My Notices 7

Module Administration
Add Application
Quick-Add Registration
Applications
Registrations
Print Jobs
Payments
Inspections
Reviews
Archived Applications
Estimate Fees
Download Forms
Mail Notice History
Registration Listing / Mail Labels

Active Registrations 7

Expiring Registrations
Registrations 2 6
State License 1 2
General Liability 2 3
Workers Compensation 1 2

Renew / Renewing
Registrations 5 0
Potential $ 400.00 $0.00

Scorecard
Since January 01, 2016

Back
RFP 2016-03
Permit & Inspection Software for the Community
Development Department
Baker County
FLORIDA

Friday, January 6, 2017

prepared by
The Schneider Corporation
120 1/2 W. New York Avenue
DeLand, FL 32720
www.schneidercorp.com  386.826.7352
January 6, 2017

Kennie Downing, County Manager  
Baker County, Florida  
55 N. 3rd Street  
Macclenny, FL 32063

Dear Mr. Downing,

I am very excited about this opportunity to work with Baker County on your permit and inspection software project. When responding to this Request for Proposal (as well as addendums 1 through 4), Schneider will leverage our existing relationship, initial research, and knowledge of existing data to lower the cost of the Permitting™, as well as reduce the amount of duplication to benefit Baker County.

The Schneider Corporation a Women Business Enterprise (WBE), was founded in 1962, based on the principles of high quality and excellent client service. Schneider provides creative solutions for land, infrastructure, and facilities projects that help increase revenue, lower costs, and mitigate risk. The Schneider Corporation (Fed Tax ID #35-1071991, our business license can be found in Section 5: Required Forms) acquired qPublic in 2014. This move allows us to continue and expand the innovation and customer service you have come to expect from qPublic and The Schneider Corporation. Our company is now the largest e-government provider of local government public access GIS, web hosting services in the country with **nearly 600 local government clients in 26 states**. What this means to Baker County is that you now have one of the largest e-government and GIS providers in the country in your backyard. Baker County needs a partner that is growing and driving the technology market. The Schneider Corporation is that partner. With our expanded base, we will be able to provide you many new services, products, and solutions now and into the future.

As a technology leader, Schneider provides innovative, industry-leading solutions to help organizations get the most from their limited resources, with creative product solutions such as Geogear™ (desktop GIS Lot and Parcel maintenance tools), qPublic.net™ and Beacon™ (local government information for the web), Permitting™ (cloud-based permitting and workflow management), and IDAM™ (damage assessment tools) to name a few. In addition to publishing a large portfolio of client focused applications and solutions, Schneider also develops and maintains a wide range of internal products designed to create efficiencies utilized by our project teams and greatly valued by our clients.

Currently, The Schneider Corporation has 23 communities using our Permitting™ software across the country and nearly 600 local government clients in 26 states supported by our technology division. Schneider is currently supporting e-government solutions for 24 counties in Florida. By delivering advanced permit and inspection services, we provide highly flexible and powerful decision-support systems that empower our clients with modern technology, enabling users to conduct county business online.

Your Project Management Lead will be Mike Mohrhauser, GISP. Mike is a Certified GIS Professional with over 16 years of industry experience with GIS analysis, software development, and system implementation. His career has included roles as a software developer, technical project manager, and supervisor of the product development team. Mike works closely with clients to provide technical expertise for integrating GIS into their current administration systems. Mike manages the development of new software products and web solutions as well as custom application development projects. Mike has been involved with Permitting™ since Schneider’s initial design of Permitting™.

Mike understands the permitting workflow better than anyone in the industry. Working with dozens of different government clients, Mike has worked with many different departments and department heads in getting their Permitting™ system up and running. His experience with workflow management, online permitting staging, and department guidance is unmatched.
Schneider’s clients have been recognized for many national and local special achievements GIS awards and County Achievement Awards for GIS. We are past recipients of the “Esri New Partner of the Year” and “Esri Foundation Partner of the year” as the world leader in GIS software. Most recently, The Schneider Corporation won the 2016 TechPoint Mira award for corporate innovator of the year, which honors excellence and innovation in technology and is one of the tech sector's most anticipated annual events.

"We couldn't have done it without all your help and dedication to us. Schneider has helped Marshall County take the latest technology, shape it into a cost efficient way to meet the best needs of our community, with the least amount of investment, producing the greatest amount of gain. It is a great team and I enjoy working with each and everyone of you. I look forward to working on our future projects with all of you. Thank you again, to the whole Schneider staff."

- Shawnda Wenino, —Marshall County, IN Past GIS Director

This proposal is valid for 90 days from the due date of the RFP. Please, call me if you have any additional questions or concerns.

Sincerely,

John Cox | Business Development Manager
Client Liaison
The Schneider Corporation
317.826.7352 | john@qpublic.net

Jeff Corns, GISP | Executive Vice President
Authorized Negotiator
The Schneider Corporation
317.826.7171 | jcorns@schneidercorp.com
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Section 1

Permitting™ Description and Software Capabilities Sheet
Section 1—Permitting™ Description and Software Capabilities Sheet

**Description of Proposed software and how the software meets the requirements of the RFP. The Software Capabilities Sheet must be completed.**

Schneider’s e-government Permitting™ solution is a web-based technology that eliminates many challenges faced by local government organizations in managing permit applications, vendor registration, and code enforcement. By streamlining workflows, reducing or eliminating the need for office visits, increasing and automating communication and information access to all involved parties, and allowing for online payments, this solution is becoming an extremely popular choice for organizations across the country. We are excited to propose our e-government Permitting™ solution to benefit your community.

Our Permitting™ solution is a new innovation to help communities streamline and track all types of permits throughout their lifecycle. Permitting™ can dramatically reduce the time it takes to generate permits and improves customer satisfaction with easy 24/7 access. Schneider’s e-government Permitting™ solution is completely web-based, which eliminates the need for costly hardware and software purchases and upgrades. Permitting™ does not require any additional hardware or software. If you can access the Internet on your PC, laptop, iPad, tablet or smart phone, you can access Permitting™ anywhere. The multitudes of benefits cover both your permitting office and applicant.
SOFTWARE CAPABILITIES SHEET

Vendor name: The Schneider Corporation
Software name: Permitting™

Place an “X” in the appropriate box that describes each feature of your proposed software.

<table>
<thead>
<tr>
<th>ITEM</th>
<th>CAPABILITY</th>
<th>Yes, the software can do this function</th>
<th>No the software cannot do this function</th>
<th>With modifications, the software can do this function. Describe on a separate sheet</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Create &amp; Track Permits/Projects – Ability to create cases and associated data for permits and projects.</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Online Document Management – Ability to create Permit and Project documents within the system.</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Ability to store permit and project documents within the system.</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Ability to import files of various software formats into the system. Provide a list of software formats accepted.</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Workflow- Must be able to flow cases through a minimum of 3 individuals.</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Workflow Approvals- The case does not forward to the next individual on the workflow until the previous person has reviewed and approved.</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Workflow Automation – Ability to modify workflow so that reviews, inspections, statuses, and notifications can be modified both automatically or manually. County can make the changes.</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Application Processing/Online Permits) – A user-friendly, online web portal for citizens which is easy to understand and navigate</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>Each citizen or contractor (user) has the ability to create a user login account through the web portal.</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>Permit applications can be made through the web portal from any internet connection or mobile device.</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Users can process permit applications through the web portal.</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ITEM</td>
<td>CAPABILITY</td>
<td>Yes, the software can do this function</td>
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<td>---------------------------------------------------------------------------</td>
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<td>----------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>12</td>
<td>Users can review fee statuses through the web portal.</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>Users can make fee payments through the web portal.</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>14</td>
<td>Users can get a receipt they can print off through the web portal.</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>15</td>
<td>Web portal payments can be by debit or credit card.</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>16</td>
<td>Web portal supports debit or credit card payments through Pay Pal.</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>17</td>
<td>The web portal will show County staff that fees have been paid by the user, and a duplicate receipt can be printed, if needed.</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>18</td>
<td>If the user comes in person to County offices, the software will allow acceptance of the debit or credit card, and a data entry for “cash”.</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>19</td>
<td>All cashiering transactions including payments, refunds, fee calculations, fees added, fees removed, or fees modified will be auditable.</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>20</td>
<td>Users can view project updates and status of their case on the web portal.</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>21</td>
<td>Users can schedule inspections on the web portal.</td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>22</td>
<td>Fee Calculation- The software allows staff to develop custom fee variations and fee formula calculations.</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>23</td>
<td>The building fees on the web portal can be changed by County staff at any time.</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>24</td>
<td>Plan Submission/Revision – The software will accept digital, scaled drawings/plans and supporting documentation on the web portal.</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>25</td>
<td>Plans can be submitted to the web portal through any internet connection or mobile device.</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>26</td>
<td>The submitted plans can be reviewed digitally.</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ITEM</td>
<td>CAPABILITY</td>
<td>Yes, the software can do this function</td>
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<td>--------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>27</td>
<td>The submitted plans can be redlined and saved on the web portal.</td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>28</td>
<td>Users can access the web portal and review redlined drawings and plans, make revisions, and resubmit.</td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>29</td>
<td>The software would retain and track all versions of the plans.</td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>30</td>
<td>The County can approve submitted plans through the web portal.</td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>31</td>
<td>Mobile Inspections – Ability for inspectors to use smart devices in the field to receive dispatches.</td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>32</td>
<td>Inspectors can map and route inspections through the software on their smart device</td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>33</td>
<td>Inspectors can schedule inspection activities on a calendar.</td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>34</td>
<td>Inspectors can photograph and document findings. All photos and findings must be saved in each case file.</td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>35</td>
<td>Inspectors can approve or deny inspections in the field on their smart device.</td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>36</td>
<td>Inspectors can download all assigned permit or case related inspections for the day locally to a device so that an active data connection is not required in the field to complete an inspection. Upon returning to coverage area, the offline work, including status, photos, and comments, can be uploaded to sync with the live system.</td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>37</td>
<td>Reporting – Includes standard reporting with the ability to query data.</td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>38</td>
<td>Ability to develop custom reports based on the County’s needs.</td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>ITEM</td>
<td>CAPABILITY</td>
<td>Yes, the software can do this function</td>
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<td>----------------------------------------</td>
<td>-----------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>39</td>
<td>User’s Portal – Permit and Development status will be available via online portal for 24/7 access through any internet connection or mobile device.</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>40</td>
<td>The system has the ability to create and store electronic signature on inspection documents and plans.</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>41</td>
<td>Software has 95% uptime. If not explain on a separate sheet.</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>42</td>
<td>Do you have an API or direct database access so the County can access our data to customize our own reports?</td>
<td>X</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Explanations**

<table>
<thead>
<tr>
<th>ITEM</th>
<th>CAPABILITY</th>
<th>With modifications, the software can do this function. Describe on a separate sheet</th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td>Ability to import files of various software formats into the system. Provide a list of software formats accepted.</td>
<td>In general, the system can allow users to upload files from any software format. Examples include Image/Doc (PDF, TIF, JPG, DOCX, etc.); Data files (XLSX, MDB, SQL Server, iSeries, db, shp, File Geodb, CAD, etc.).</td>
</tr>
<tr>
<td>16</td>
<td>Web portal supports debit or credit card payments through Pay Pal.</td>
<td>Integration with PayPal will require additional payment processor integration services. Current system is compatible with 3 payment</td>
</tr>
<tr>
<td>21</td>
<td>Users can schedule inspections on the web portal.</td>
<td>Current system includes the ability for a user to choose a date and time, from a calendar control, and submit an appointment request which can be emailed to a designated recipient at the County. The email includes an ics file attachment to add the appointment to MS Outlook or other ics compatible calendar. Capabilities for more advanced online inspection scheduling (e.g. availability checking) is expected for a mid 2017 software update.</td>
</tr>
<tr>
<td>42</td>
<td>Do you have an API or direct database access so the County can access our data to customize our own reports?</td>
<td>An API, or direct access to the database for live queries, is not available, however, County users may download all data records for any permit type at any time.</td>
</tr>
</tbody>
</table>
Section 2

References
Section 2—References

References – Provide a minimum of three (3) government agencies that are currently using the version of your proposed software. Provide the designated contact person’s name, title, organization, address, telephone number, and email address.

**MARSHALL COUNTY, INDIANA**
Lori Lowry, Secretary of Plan Commission & Board of Zoning Appeals
112 West Jefferson, Room 301
Plymouth, In 46563
loril@co.marshall.in.us
574-935-8540

**DES MOINES COUNTY, IOWA**
Austin Roelfs, GIS Coordinator
513 North Main
Burlington, IA 52601
roelfsa@dmcounty.com
319-753-8759

**SHELBY COUNTY, IOWA**
Tony Buman, Zoning Administrator
612 Court Street
Harlan, IA 51537
tbuman@shco.org
712-755-5718 x5
Section 3

Proposal Fee & Annual Software Maintenance Fee
Section 3—Proposal Fee & Annual Software Maintenance Fee

Proposal fee to include full installation, implementation, and training on the proposed software. Fee for annual software maintenance. The price shall be fixed for years 1 and 2 of the contract term. When does the initial maintenance agreement take effect? What is included in the annual maintenance agreement?

We are proposing a Software-as-a-Service (SaaS) subscription to Schneider’s e-government Permitting™ solution.

Included Services:
1. Administrative account setup and deployment.
2. Four, two-hour on-line training sessions to introduce client to the administrative functions of the system, as well as how to begin to set up their first workflows.
3. Toll free phone support.

Optional Services:
1. Research, setup, and configuration of existing permitting workflows (done on a time and materials basis).

System functionality will include the following:
1. Support multiple stage workflows that allow input and tracking of permit application and inspections data by multiple user types (public users, local government staff, service providers, and other related third party organizations).
2. User role based security and access control to manage system users and enable workflow stage access based on user type.
3. Ability to add auto-generated email notifications to specific users at each stage of a permit workflow.
4. Administrative interface for your workflow project setup and configuration.
   a. Create and edit unlimited number of workflow projects (each permit type will be represented as a workflow project).
   b. Create and edit unlimited number of stages for each workflow project.
   c. Create and edit unlimited number of data entities for each stage.
   d. Create instructions text for each data entity, with ability to embed HTML content such as hyperlinks.
   e. Modify stage sequencing, and group stages for parallel activation.
   f. Restrict visibility of workflow projects and stages to admin users only.
   g. Ability to generate test permit applications when modifying workflow projects, and publish workflow updates to the live system when modifications are complete.
   h. Ability to “unpublish” a workflow project so that no new permits will be allowed to be created by users.
   i. Clone project capability to create a new workflow project based on an existing workflow project.
   j. Configure permit fees for each workflow project. Fees may be dynamically calculated based on user inputs.
   k. Configure workflow stage skipping based on user entered inputs on dropdown lists and checkboxes.
   l. Project Summary page with detailed outline of each workflow project.
   m. Print template editing interface to allow your admin users to configure templates for printable, completed permit applications.
5. Multiple supported data entity types for data entry forms, including the following:
   a. Short text box
   b. Long text box (Comments)
c. Date
d. Document attachment (with file browser)
e. Fee
f. Lookup (dropdown list)
g. Number
h. Static HTML label
i. Checkbox

6. Document upload capabilities to allow users to attach multiple electronic files to permit records at each stage of a permit workflow.

7. Your community website branding to allow the community to provide a header logo image and contact information from the organization.

8. Interactive mapping interface with basic mark-up tools to allow users to sketch and label information about the permit application on your existing GIS map and aerial photography.

9. Task List page to allow users to view permit applications in progress based on the following criteria:
   a. Permit applications waiting for my input
   b. Permit applications waiting for input/approval from other users
   c. Permits waiting for my approval
   d. Permits with unpaid fees currently due

10. Integration with your community’s existing Beacon™ online portal to utilize existing property and GIS data for permit processing, search and report capabilities. Shared data elements are limited to Professional’s existing Guidepost UPM data model.

11. Contractor Registration Interface
   a. Allows system users to register as a contractor with CLIENT.
   b. Admin interface to setup contractor types and registration fees
   c. Maintains a database of CLIENT’s registered contractors, including the following information.
      i. Contractor Type
      ii. Business Name
      iii. Street Address
      iv. City
      v. State
      vi. Zip
      vii. Contact Name
      viii. Contact Title
      ix. Contact Business Phone
      x. Contact Cell Phone
      xi. Contact Email Address
      xii. Company Web Address
      xiii. Status
      xiv. Registration length (in months)
      xv. Effective Date
      xvi. Expiration Date
      xvii. Renewal Date
      xviii. Workers Comp. Expiration Date
      xix. Bond Expiration Date
      xx. Liability Insurance Expiration Date
      xxi. Registration Fee Payment status
      xxi. Notes
      xxiii. Attached Documents
System Hosting and Maintenance:
The Schneider Corporation web data server environment includes a redundant/fail over power system, multiple power sources and long term generator power, and multiple entry points for Internet bandwidth from different providers for increased reliability. Services include maintained integration between the Permitting™ system and the client’s Beacon™ data sources (if available) to ensure current source data; daily Permitting™ system data backups; ongoing system updates to ensure compatible functionality and security with the latest web browser technologies. Services also include monitoring of The Schneider Corporation web servers on a 24/7 basis; however, because of infrastructure issues beyond the control of The Schneider Corporation professionals, web services are not guaranteed to be available 24 hours per day, 7 days per week.

Optional - Data Migration Services:

Legacy System Data Migration Services - $5,250
Schneider will import data from your existing legacy permitting system into Schneider’s Permitting system under this agreement under the following expectations:

1. Data from your Legacy System will be imported, from the existing Legacy System Database to Schneider’s SQL Server based system, in its existing database structure. Schneider will not attempt to reprocess the data to make it fit into workflows that are developed in the new system.
2. Schneider assumes location based permit data in the Legacy System includes a reference to a parcel (Parcel ID number). If not, Schneider will need to develop a custom search interface for this system.
3. Schneider will develop a history report that allows the user to view a list of permits that pertain to an individual parcel, including permits from both the legacy and new systems.
4. Schneider can develop additional custom reports with data from the Legacy System, but it may require additional costs that will be approved under subsequent agreements.

Based on Schneider’s previous legacy permit system integration projects, we anticipate this task taking 30 hours to import data from the legacy system and develop a history report. Any effort beyond 30 hours will require T&M based services under a new agreement.

Optional – System Configuration Setup Services:

Fixed Fee Setup Services – $2,500
Schneider will provide up to 20 hours of technical support services to assist your staff with setup, configuration, deployment and usage of the Online Permitting System for your community’s desired permit types. This will include hands-on configuration of permit workflows by Schneider’s staff, based on your community’s definition of workflow stages and data entities for each permit type.

Hourly Setup Services – Upon completion of Fixed Fee Setup Support Services, Schneider will provide technical support services, as needed, and upon written request, to assist with setup, configuration, deployment and usage of the Online Permitting System your community’s desired permit types. Hourly support services will be invoiced monthly, based upon the Hourly Fee Schedule in Attachment B of Schneider’s Professional Services Agreement.

Optional – Implementation Data Services

Option 1: Basic Implementation: $10,000
• Kickoff meeting (web-based)
• Workflow template starter package (Building Permit, Septic Permit, Driveway/Road Cut Permit)
• 4, two hour training sessions (web-based)
• 1, 4-day on-site workflow development workshop (must be consecutive days)
Option 2: **Standard Implementation**: $25,000
- Kickoff meeting (web-based)
- Workflow template starter package (Building Permit, Septic Permit, Driveway/Road Cut Permit)
- Bi-weekly management of system @ 2 days per month
  - Development and publication of workflows
  - Respond to technical support questions from staff and public users
  - Bi-weekly management of workloads and workflows

Option 3: **Expanded Implementation**: $50,000
- Kickoff meeting (web-based)
- Workflow template starter package (Building Permit, Septic Permit, Driveway/Road Cut Permit)
- Weekly management of system @ 1 day per week
  - Development and publication of workflows
  - Respond to technical support questions from staff and public users
  - Weekly management of workloads and workflows

**Permitting Investment:**

<table>
<thead>
<tr>
<th>Cost</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>$3,000</td>
<td>Site training, initiation and setup which includes: Four, two-hour on-line training sessions and integration with qPublic.net™ (if available) and System Configuration Setup Services</td>
</tr>
<tr>
<td>$12,000</td>
<td>Annual hosting and maintenance</td>
</tr>
</tbody>
</table>
Section 4

Questions 4.5—4.18
Section 4—Questions 4.5-4.18

4.5 How are software upgrades handled? Are they included in the annual maintenance agreement?

Ongoing software upgrades and enhancements are included in the annual maintenance agreement. These upgrades are done at Schneider’s discretion, but are based on requests from our user community, new technology integration, browser and device compatibility maintenance, and competitive product capabilities.

For major system updates, Schneider will provide demonstrations via online webinars, and enhancement documentation, prior to release. Whenever possible, we will allow our clients to try the software prior to making any major updates live. All client specific workflows and data will be migrated, for no additional cost, during any major upgrade of the software.

Minor enhancements are made routinely, with weekly to monthly releases. Clients are notified by email of any new functionality enhancements.

4.6 What are the hardware requirements to run the software at its maximum efficiency? What mobile devices will operate with the software/web portal? Are there any limitations regarding mobile device brands on the software?

The software can run optimally on any device with a current web browser (e.g. Google Chrome, Firefox, Safari, Internet Explorer). Preferred mobile devices for the current version of Permitting™ would be full sized tablet devices (8” to 11” screen). Responsive design development for mobile phone devices is in progress, with an expected release in Qtr 2, 2017.

4.7 Can inspectors print permits or reports in the field through a smart device and a mobile printer?

Yes, as long as the device’s web browser can print to the mobile printer, and the device can open PDF’s.

4.8 How many users can access the web portal at the same time?

Unlimited.

4.9 Does the system allow different access levels per user? For example the Planning & Zoning Department needs access to all files and 3 levels of workflow; however the Road Department only needs access to road improvement projects with 1 level of workflow. Please explain the access level and workflow ability of the software.

The system does allow different access levels per user. Each user may be assigned to a User Role, by a County site admin user. As you define workflows in the system, each step of the workflow may be assigned to a user role (e.g. public user, P&Z Department user, Road Department user, etc.). When the workflow reaches that step, users in the assigned role will have access to open and enter information at that step. The system also has user groups, which controls access to specific workflows and reports.
4.10 How many sites do you have for emergency backup/data recovery in case the main server goes down? Where is the backup located?

There are 3 servers hosting the virtual machines that power Permitting providing automatic redundancy in case of hardware failure. Data backups are located in two geographically separate data centers in the Indianapolis, Indiana area. Database backups are taken every 15 minutes.

4.11 How many daily users are on your site simultaneously? What kind of trunk (band width) does you facility have in accessing the database server?

The current system averages around 150 daily users, which may all be on the site simultaneously. Internet bandwidth: 100 Mbps, expandable to 1 Gbps to support growth.

4.12 How frequently do maintenance periods occur? If there is downtime, how long does the downtime last (on average?) At what time of the day/week does scheduled maintenance normally occur?

General scheduled maintenance includes monthly server OS updates, which require a reboot – lasting < 5 minutes. Our system administrator performs this maintenance around 5:00am Eastern Time, on Saturday. This maintenance generally occurs once a month, unless there are urgent security-related patches.

4.13 What kind of software uptime do you guarantee?

We have no official guarantee for software uptime, however, our product uptime has been consistently above 99%, for over a decade, with all of Schneider’s SaaS products. Our web data server facility includes a redundant/fail over power system, multiple power sources and long term generator power, and multiple entry points for Internet bandwidth from different providers for increased reliability.

4.14 If the contract is terminated, will the County have access to download our data for our own use?

Yes. The County has access to download all data records for any permit type from the software, whenever you’d like.

4.15 Can the County access the web portal from a link on the County’s website?

Yes, and we can provide query string parameters that you may use to more directly link users into the system, such as linking users to the beginning of your building permit application workflow if they click a link to “Apply for a Building Permit” on the County website.

4.16 Provide a list of the reports the software will generate.

Permit Fee Recipient Summary – Breakdown of fees collected for each designated recipient/department for a user defined time period.
Daily Fee Summary – Report listing all individual fee transactions in the system, for your organization, for a user defined time period.

Order Payment Summary – Report listing all user payments through the system, with links back to each receipt.

Data Export – User defines the permit type, status (completed, in progress, denied, voided), start date, end date, and any or all available data fields associated with that permit type to export to a MS Excel xlsx file.

4.17 Describe how the debit/credit card acceptance works. Is there a 3rd party company processing the payments through your software? Describe any settlement fees the user would pay. Are there any fees the County would pay? Who is your 3rd party vendor?

The Schneider will integrate your Permitting site with a 3rd party PCI compliant payment processor. Our preferred payment processor is Value Payment Systems (VPS). When an applicant pays permit application fees online, they are redirected to a page on the VPS system to enter payment information. After the transaction is accepted, the user clicks a ‘Continue’ button to return to the Permitting application. VPS transaction fee rates are published on our Terms of Service web page, under Value Payment Systems Terms and Conditions - http://schneidercorp.com/termsofservice/

Schneider can also integrate your site with another 3rd party PCI compliant payment processor, if you have a different preferred provider. We have a one-time integration development cost of $1,500 to integrate with another 3rd party payment processor for your site.

4.18 Timeline for implementation after receipt of order.

After 30 days from when the contract is signed, the County has the following options:

Option 1: Basic Implementation: $10,000
- Kickoff meeting (web-based)
- Workflow template starter package (Building Permit, Septic Permit, Driveway/Road Cut Permit)
- 4, 2-hour training sessions (web-based)
- 1, 4-day on-site workflow development workshop (must be consecutive days)

Option 2: Standard Implementation: $25,000
- Kickoff meeting (web-based)
- Workflow template starter package (Building Permit, Septic Permit, Driveway/Road Cut Permit)
- Bi-weekly management of system @ 2 days per month
  - Development and publication of workflows
  - Respond to technical support questions from staff and public users
  - Bi-weekly management of workloads and workflows

Option 3: Expanded Implementation: $50,000
- Kickoff meeting (web-based)
- Workflow template starter package (Building Permit, Septic Permit, Driveway/Road Cut Permit)
- Weekly management of system @ 1 day per week
  - Development and publication of workflows
  - Respond to technical support questions from staff and public users
  - Weekly management of workloads and workflows
4.20 OPTION- Does the software have the ability to add other modules from your suite of software? If so, briefly describe the modules available and compatible with the current version of the proposed software. Include prices for these modules.

Software does not have additional modules.
Section 5

Required Forms
State of Florida  
Department of State

I certify from the records of this office that SCHNEIDER ENGINEERING CORP. is an Indiana corporation authorized to transact business in the State of Florida, qualified on April 24, 2007.

The document number of this corporation is F07000002208.

I further certify that said corporation has paid all fees due this office through December 31, 2016, that its most recent annual report/uniform business report was filed on April 5, 2016, and that its status is active.

I further certify that said corporation has not filed a Certificate of Withdrawal.

Given under my hand and the Great Seal of the State of Florida at Tallahassee, the Capital, this the Third day of January, 2017

[Signature]

Secretary of State

Tracking Number: CU8191210288

To authenticate this certificate, visit the following site, enter this number, and then follow the instructions displayed.

https://services.sunbiz.org/Filings/CertificateOfStatus/CertificateAuthentication
Baker County Board of County Commissioners

Permit and Inspection Software for the Community Development Department

RFP 2016-03
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January 6, 2017

Mr. Kennie Downing  
Baker County Board of County Commissioners Administration Office  
55 N. Third Street, Macclenny, Florida 32063

Subject: Permit and Inspection Software RFP 2016-03

Dear Mr. Downing,

ViewPoint Government Solutions is pleased to submit this proposal to the Baker County Board of County Commissioners for permitting and inspection software for the Community Development Department.

We understand that the County seeks to replace existing manual processes for permitting and inspections with a software system that represents best practices in permitting, inspections, code enforcement, and business licensing.

ViewPoint is a leader in permitting, licensing, and code enforcement software for county governments, with solutions that are user friendly, intuitive, and easy to implement. In our 20-year history, we have continuously worked to move government forward through technology.

Working with our extensive client base, we have developed the most user-friendly and flexible permitting technology on the market. Our extensive knowledge of permitting operations and best practices informed every element of system design and development. The result is a system that accommodates the complexity of permitting, while making the process more intuitive for both local governments and their applicants.

We are confident that our technology, implementation process, and project team will exceed your expectations as we put in place a system that allows your county to provide exceptional service to your businesses and residents and make processes simpler and faster for your employees.

Sincerely yours,

Bassil Silver, COO

This proposal is valid for 90 days from the due date of the RFP.

Federal tax ID number: 04-3285149
Executive Summary

Baker County is seeking a comprehensive solution for permit and inspection management. ViewPoint is the leading provider of permitting and licensing software for the public sector.

Over 20 years, we’ve attained a 100% track record of success in helping cities and counties achieve innovation. Our commitment to building cutting-edge technologies allows us to be nimble in serving our clients — developing new features based on their feedback and expanding to help more and more functions perform better.

ViewPoint is a permitting leader
For over 20 years, ViewPoint has been at the forefront of government technology. In that time, we’ve developed a deep understanding of permitting and licensing operations. And now, we’re helping cities and counties embrace process efficiency and citizen engagement with ViewPoint Cloud, our all-in-one solution for permitting, licensing, and code enforcement.

Cutting-edge technology for Baker County Board of County Commissioners
ViewPoint Cloud is not like other government software. It’s built on a modern technology framework, so it’s lightning-fast, highly-available, and plays nice with other modern cloud systems. It’s professionally-designed, so buttons, fields, and features are just where you’d expect. And it’s modular, so simple permits and complex, multi-stage projects all follow one uniform framework.

A plan for success in 6-8 months
ViewPoint’s cross-functional implementation teams work with your department staff to coordinate all aspects of the implementation project. Our dedicated implementation team will work with Baker County Community Development Departmental staff to prepare a change management plan, configure the system, train users, and roll out new and improved service both internally and for the public.
Company Profile
110+ Government Customers 3,000,000+ Permits Processed Annually
A 20-year legacy of performance

ViewPoint Government Solutions was founded in 1995 with a mission to help government agencies work better using technology.

At every stage, ViewPoint has been at the forefront of government technology. At first, we leveraged GIS technology to improve municipal decision-making with better geospatial data. We then shifted to produce software to help cities and counties manage community development internally. And now, we’re helping communities embrace process efficiency and citizen engagement with ViewPoint Cloud, our all-in-one solution for permitting, licensing, and code enforcement.

The best technology for government

Much of the software used by government lags perceivably behind the best tools used by the private-sector. With ViewPoint Cloud, we’ve closed that innovation gap. In 2013, we undertook an ambitious project to reimagine permitting and licensing using the cutting-edge technologies that power the modern web we know and love. Leveraging a deep commitment to design, we ensure everything we deliver to our users is the best in the industry.

Our cutting-edge technology platform allows us to be nimble in serving our clients – developing new features based on their feedback and expanding to help more and more functions perform better.

A nationwide movement

In 20 years, we have a 100% track record of success in helping communities achieve innovation. From our headquarters in Boston, we serve over one hundred cities, counties, states, and regional agencies from coast to coast. Our team has a deep understanding of municipal issues and how to solve them, and we pride ourselves on our commitment to supporting our clients.

The ViewPoint community shares more than just software – they share a commitment to use technology to constantly improve the way they do business in service of their citizens, their employees, and the community at large.
Executive Team

Nasser Hajo
**Chief Executive Officer**

Nasser is an experienced government consultant with a track record of success in implementing ways to improve internal and public-facing local government operations. Nasser is an original co-founder of ViewPoint and has devoted over 20 years of service to local governments. He holds a degree in civil engineering from Northeastern University.

Bassil Silver
**Chief Operations Officer**

Bassil is a veteran operative at the intersection of government and technology, developing new ways to increase government efficiency and overseeing the rapid growth of ViewPoint as the company expanded nationwide. He holds a degree from the Berklee School of Music.

Alex Pajusi
**Chief Technology Officer**

Alex is a formally-trained technologist with a specialty in design thinking. His research and design over several years led to the development of ViewPoint Cloud and the proliferation of nimble permit management for cities of all sizes. He holds a degree from McGill University in Montreal.
Our History

For 20 years, ViewPoint has been helping municipal governments solve their biggest challenges. At each stage, we’ve leveraged our institutional knowledge while always looking toward the next opportunity for innovation.

1995
ViewPoint founded as a GIS consulting firm, working to bring GIS technology to municipalities

2006
ViewPoint develops ViewPermit, a pioneering enterprise system for municipal permit management

2007
Connecticut’s 40-city Capitol Region Council of Governments partners with ViewPoint to build one of the first regional ePermitting systems

2013
ViewPoint Cloud redefines permit management by making it simple, fast, and user friendly for citizens and city employees

2014
ViewPoint moves to new Boston headquarters while expanding nationwide

2015
The 100th city adopts ViewPoint for faster, easier permitting

The State of Rhode Island partners with ViewPoint to build the nation’s first statewide ePermitting system
Working together for what’s Next

ViewPoint Cloud is a Microsoft CityNext solution for state and local government. The CityNext initiative brings people-first solutions for the new digital urban age to state and local government entities.

Being a CityNext solution means we bring meaningful digital transformation to our government customers worldwide using low-risk, high-speed implementation methods.

It also means we’ve built the power of the Microsoft Cloud right into ViewPoint, so your data is always available and always secure.

Learn more at microsoft.com/citynext
We were honored to land on this year’s GovTech 100 index of the most innovative companies serving the public sector.

Although this is the first year they’ve given an award for that, we’ve been at it for 20 great years.

And in 20 years, we’ve learned what it takes to serve government agencies. We’ve honed our creative impulses at the intersection of government and technology, and we’ll never stop making life better for local government.

We look forward to many more shared successes ahead.
ViewPoint Cloud

The world’s most advanced permitting & licensing technology
ViewPoint Cloud is not like other government software. It’s built on a modern technology framework, so it’s lightning-fast, highly-available, and plays nice with other modern cloud systems. It’s professionally-designed, so buttons, fields, and features are just where you’d expect. And it’s modular, so simple permits and complex, multi-stage projects all follow one uniform framework.

We took the way the best companies work, and turned it into great software for your community.

With ViewPoint Cloud, you can adapt any citizen service process to allow online submission, routing, approvals, payments, and document issuance, all from a centralized digital record. Its intelligent workflow engine takes all of the manual work out of processing a citizen request or internal directive. And with built-in activity feeds, departments get a whole new way to see what’s going on around them, and what requires their attention.

ViewPoint Cloud’s powerful reporting engine makes it easy to generate predetermined or custom-built performance reports.

It’s all built on the power of the Microsoft Cloud, so it’s safe, secure, and available anywhere you have a web browser.

The future of government is here, and it looks like this.
How may we help?

Access service information and apply online – right from here

Development

Building Inspections

Code Enforcement
Offer superior citizen service

ViewPoint Cloud includes the ability to enable online submission of any application form. Say goodbye to stacks of paper and status inquiries, and let citizens apply, pay, and track their requests online.

Provide a one-stop service portal
The Storefront customer service portal allows you to educate constituents about service information and submission requirements. Applicants can submit applications, pay fees online, and message reviewers.

Offer automated status updates
Customers get automatic email notifications of any activity on their application, reducing status inquiry volume. Customers can also track the status of their application in real-time.

Communicate with customers
Message applicants right within the platform to document requests for missing documentation, progress updates, and other customer correspondence. Applicants can message you back with information, feedback, or compliments. It’s all documented, all in one place.

90% approval
Constituents give ViewPoint-powered agencies an average 90% approval rating
Building Permit – Residential Permit

Building Department Review
Your approval is required.

Approve  Reject  Skip  Discuss

Applicant
Chuck Contractor
617-577-9000
@chuck@bayviewcons...
Top Applicant  Good Standing

Location
84 South Main Street
Tax Exempt
Owner
Main Street Partners LLC

Attachments

Building Plans.pdf
Uploaded October 13th by Chuck Contractor

Construction Details

Project Description *
Building a new two-story residential addition 100ft x 50ft.

Type of Property: *
Residential

Project Cost - All labor and materials. (Including ALL MEP's) *
$ 225,000
Achieve high performance

ViewPoint Cloud’s workflow engine lets you determine the steps that happen once an application is submitted. Whether there are two steps or twenty, the workflow ensures every request goes where it needs to go, exactly when it needs to get there. With automated notifications, activity tracking, and performance metrics, you’ll experience a whole new way to work.

Streamline multi-department workflows
Every record has a workflow where post-submission activity is recorded. Let each submission flow electronically from intake to departmental reviews, automatically assigning to the next available employee. And ensure that no permit is ever issued before all required approvals are complete.

Approve with a click
When it’s your turn to approve, it’s easy to make a decision with big, color-coded buttons. If something isn’t quite right, you can halt progress and send a message to the appropriate party for resolution. All activity is kept in one central place so nothing gets lost.

See who’s doing what
With approvals reports, you get a birds-eye view at all active approvals in your department. Easily see any unassigned or overdue work. If you need to manually reassign a workload to someone else, just click and type a new name right in the report. The new reviewer will automatically be notified.

5x faster
Communities who switch to ViewPoint process permits up to 5 times faster
# Permit Fee

Processing will proceed upon payment.

<table>
<thead>
<tr>
<th>Payment Method</th>
<th>Fee Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Credit Card</td>
<td>Credit Card: $14.46 processing fee</td>
</tr>
<tr>
<td>Cash/Check</td>
<td>Cash/Check: No processing fee</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Permit Fee</td>
<td>$400.00</td>
</tr>
<tr>
<td>Planning Application Fee - Flat</td>
<td>$50.00</td>
</tr>
<tr>
<td>Fee by Property Type</td>
<td></td>
</tr>
<tr>
<td><strong>Total Fee Amount:</strong></td>
<td>$450.00</td>
</tr>
<tr>
<td><strong>Total Due:</strong></td>
<td>$450.00</td>
</tr>
</tbody>
</table>

- **Pay**
- **Waive Payment**

Say something about this...
Automate revenue collection

Build fee schedules into ViewPoint Cloud to calculate automatically. Let citizens pay anytime, anywhere with a credit card, and easily reconcile all transactions daily with Accounting. It’s full-cycle revenue management, integrated right into your permit process.

Accept online payments 24/7

In addition to cash and check payments, enable anytime online payment via credit card so applicants can pay without coming in to City Hall. Online payments are built right in to ViewPoint Cloud, so there’s no need for a merchant account. (You can keep your existing credit card infrastructure at the cashier’s office, if applicable.)

ViewPoint Cloud supports Apple Pay

Automate fee calculation

Reduce errors and simplify fee collection by having ViewPoint calculate fees automatically according to your schedules. Authorized users can override automatic calculations, and you can build next year’s fee schedule in advance without disrupting operations.

Reconcile with accounting

The built-in Ledger records all payments and refunds with their corresponding General Ledger account, letting you easily import transactions into your Finance and Accounting system. An optional integration can automate your daily import.

With ViewPoint Cloud, there’s no need for an online merchant account – online payments with direct deposit are built right in.
Gain powerful data insights

Understand departmental performance like never before with ViewPoint Cloud’s built-in analytics engine. With progress reports, graphs, and performance metrics, you’ll always know how things are going and what’s falling behind.

Track progress at-a-glance
Record status reports let you see the status of all permit applications in real-time. See what was completed and what’s still in progress for any given timeframe.

Explore trends over time
Built-in graphs let you see permit and inspection counts throughout the week, month, or any timeframe you choose. See when the busiest and quietest times of the month were, and be prepared when requests spike.

Measure departmental performance
Examine approval times for each permit and take action to reduce bottlenecks. Easily report on department activity, and track as average processing times fall over time thanks to process improvements.

Build, save, and share reports
Use simple built-in reporting tools to configure the reports you rely on every day. Save them for later use, or export them to Microsoft Excel for advanced customization. Share reports with others to make sure everyone is always on the same page.
Digitize plan review

Replace rolls of paper plans with a fully-digital plan review process. With the right hardware, software, and ViewPoint Cloud, your team can receive, review, and collaborate on plans and then communicate changes to the applicant.

**Receive and manage plans electronically**
Let applicants submit plans electronically during or after initial submission. Manage plan revisions right from ViewPoint Cloud’s built-in document management.

**Markup, comment, and revise**
Use Adobe Acrobat, BlueBeam Revu, or any other document markup tool to draw, comment, and markup plans either individually or with others on your local network. Then upload back to ViewPoint to share with the applicant. All stakeholders are automatically notified when new plans are attached.

**Collaborate on plan changes**
Message applicants right within the platform to communicate about plan revisions. Keep all correspondence in one place to make sure everyone is on the same page during the plan review process.

ViewPoint recommends the Microsoft Surface Studio for immersive on-screen electronic plan review
28164

Building Permit – Residential Permit

Inspection (Initial/Footing/Framing)

Alex Pajusi

November 14, 2016

Framing
Masonry
Fire and Draftstopping
Swimming Pool
Initial

Pass
Pass
Pass
Pass
Pass

Fell
Fell
Fell
Fell
Fell

Initial
Failed on Nov 14th 2016, 2:51 pm by Alex Pajusi
Fail due to inadequate safety measures onsite. Follow up in 14 days

Footing
Passed on Nov 14th 2016, 2:51 pm by Alex Pajusi

Say something about this...
Streamline Inspections

Simplify schedule management and reduce manual data re-entry with ViewPoint Cloud. Let citizens request the date of their inspection according to your availability, and let ViewPoint automatically assign the next available inspector. And with inspections on a tablet, your inspector’s workload just got a lot lighter.

Enable online inspection requests
When it’s time for an inspection, let citizens request the date they prefer. Assign inspectors manually, or automatically. And if there’s any need for a date change, the applicant will automatically be updated via email.

Conduct inspections on a tablet
Save time during the inspection by recording results digitally from a tablet onsite. They’ll be immediately available within ViewPoint Cloud, and the applicant will be able to view the results.

Issue letters and take action in the field
In one click, authorized inspectors can issue letters of violation, certificates of occupancy, fines and fees, and additional requirements. ViewPoint Cloud puts the full power of the workflow engine in your field operations.

50,000 inspections
ViewPoint powers over 50,000 digital inspections annually
28268 + Add to a project

Citizen Complaint – Exterior Maintenance

Verification of issue and assignment
Your approval is required.

Approve  Reject  Skip  Discuss

Location
900 Southeast Douglas Avenue

In Violation
Owner
Michael Smith

Attachments

Unkempt lawn.jpg
Uploaded November 10, 2016 by Carl Anderson

Details on issue

Provide a written description of the violation
Description of Violation *
Neighbor’s lawn is unkempt and full of trash

List any steps taken by you to remedy the issue

Have you contacted the violator? *
Code Enforcement

Code enforcement and permit staff can finally get on the same page with integrated operations in ViewPoint Cloud. See the full permit and violation history of any property, manage violations internally, and let citizens submit complaints anonymously online.

Accept online complaints
Citizens can submit complaints online right from the Storefront, the same place they find all other online services in ViewPoint Cloud. You can enable either named or anonymous complaints, and decide the level of follow-up after the fact.

Manage field and office operations
Handle internal actions and field inspections on code enforcement cases from a centralized workflow. Ensure procedures are followed and record all action taken on a case. And issue letters, fines, and follow-up actions.

Get the full picture of any property
See the full history of permits, licenses, inspections, and code violations on any property from a centralized profile page. Get owner info and even see street-level imagery of the property, where available.
Control and audit system access

ViewPoint Cloud’s granular user access architecture lets you fine-tune user access by permit or license type. In addition, you can determine what aspects of your operations are visible to the public, and which are restricted. With the built-in activity log, all actions are logged in a central place for easy auditing.

Determine granular user access rights
From each permit or license type’s settings, you can determine which users or groups can view, edit, and administer records of that type. In addition, you can dictate who has authority to approve any step in a permit’s workflow.

Determine public access
ViewPoint Cloud is built for public access, with high security in mind. For each permit or license type, decide whether the public can apply online, and whether the public can view records of that type.

View logs of all system activity
Every action in ViewPoint Cloud is logged in the Activity Log. Administrative users can access this log at any time and filter by activity or record to see who is doing what, and ensure full compliance.
**SOFTWARE CAPABILITIES SHEET**

**Vendor name:** ViewPoint Government Solutions, Inc.

**Software name:** ViewPoint Cloud

Place an “X” in the appropriate box that describes each feature of your proposed software.

<table>
<thead>
<tr>
<th>ITEM</th>
<th>CAPABILITY</th>
<th>Yes, the software can do this function</th>
<th>No the software cannot do this function</th>
<th>With modifications, the software can do this function. Describe on a separate sheet</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Create &amp; Track Permits/Projects – Ability to create cases and associated data for permits and projects.</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Online Document Management – Ability to create Permit and Project documents within the system.</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Ability to store permit and project documents within the system.</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Ability to import files of various software formats into the system. Provide a list of software formats accepted.</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Workflow- Must be able to flow cases through a minimum of 3 individuals.</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Workflow Approvals- The case does not forward to the next individual on the workflow until the previous person has reviewed and approved.</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Workflow Automation – Ability to modify workflow so that reviews, inspections, statuses, and notifications can be modified both automatically or manually. County can make the changes.</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Application Processing/Online Permits) – A user-friendly, online web portal for citizens which is easy to understand and navigate</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>Each citizen or contractor (user) has the ability to create a user login account through the web portal.</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>Permit applications can be made through the web portal from any internet connection or mobile device.</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Users can process permit applications through the web portal.</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>Users can review fee statuses through the web portal.</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Description</td>
<td></td>
<td></td>
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<tr>
<td>---</td>
<td>-----------------------------------------------------------------------------------------------------------------------------</td>
<td>---</td>
<td></td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>Users can make fee payments through the web portal.</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>14</td>
<td>Users can get a receipt they can print off through the web portal.</td>
<td>X</td>
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<td>15</td>
<td>Web portal payments can be by debit or credit card.</td>
<td>X</td>
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<tr>
<td>16</td>
<td>Web portal supports debit or credit card payments through Pay Pal. <strong>We use a solution called Stripe</strong></td>
<td></td>
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<td>17</td>
<td>The web portal will show County staff that fees have been paid by the user, and a duplicate receipt can be printed, if needed.</td>
<td>X</td>
<td></td>
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</tr>
<tr>
<td>18</td>
<td>If the user comes in person to County offices, the software will allow acceptance of the debit or credit card, and a data entry for “cash”.</td>
<td>X</td>
<td></td>
<td></td>
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<tr>
<td>19</td>
<td>All cashiering transactions including payments, refunds, fee calculations, fees added, fees removed, or fees modified will be auditable.</td>
<td>X</td>
<td></td>
<td></td>
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<tr>
<td>20</td>
<td>Users can view project updates and status of their case on the web portal.</td>
<td>X</td>
<td></td>
<td></td>
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<tr>
<td>21</td>
<td>Users can schedule inspections on the web portal.</td>
<td>X</td>
<td></td>
<td></td>
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<tr>
<td>22</td>
<td>Fee Calculation- The software allows staff to develop custom fee variations and fee formula calculations.</td>
<td>X</td>
<td></td>
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<tr>
<td>23</td>
<td>The building fees on the web portal can be changed by County staff at any time.</td>
<td>X</td>
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<td>24</td>
<td>Plan Submission/Revision – The software will accept digital, scaled drawings/plans and supporting documentation on the web portal.</td>
<td>X</td>
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<tr>
<td>25</td>
<td>Plans can be submitted to the web portal through any internet connection or mobile device.</td>
<td>X</td>
<td></td>
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<tr>
<td>26</td>
<td>The submitted plans can be reviewed digitally.</td>
<td>X</td>
<td></td>
<td></td>
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<tr>
<td>27</td>
<td>The submitted plans can be redlined and saved on the web portal.</td>
<td>X</td>
<td></td>
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<tr>
<td>28</td>
<td>Users can access the web portal and review redlined drawings and plans, make revisions, and resubmit.</td>
<td>X</td>
<td></td>
<td></td>
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<tr>
<td>29</td>
<td>The software would retain and track all versions of the plans.</td>
<td>X</td>
<td></td>
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<tr>
<td>30</td>
<td>The County can approve submitted plans through the web portal.</td>
<td>X</td>
<td></td>
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<tr>
<td>31</td>
<td>Mobile Inspections – Ability for inspectors to use smart devices in the field to receive dispatches.</td>
<td>X</td>
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<td>32</td>
<td>Inspectors can map and route inspections through the software on their smart device</td>
<td>X</td>
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<td>No.</td>
<td>Description</td>
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<td>-------------</td>
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<tr>
<td>33</td>
<td>Inspectors can schedule inspection activities on a calendar.</td>
<td>X</td>
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<tr>
<td>34</td>
<td>Inspectors can photograph and document findings. All photos and findings must be saved in each case file.</td>
<td>X</td>
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<td>35</td>
<td>Inspectors can approve or deny inspections in the field on their smart device.</td>
<td>X</td>
<td></td>
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<tr>
<td>36</td>
<td>Inspectors can download all assigned permit or case related inspections for the day locally to a device so that an active data connection is not required in the field to complete an inspection. Upon returning to coverage area, the offline work, including status, photos, and comments, can be uploaded to sync with the live system.</td>
<td>X</td>
<td></td>
<td></td>
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<tr>
<td>37</td>
<td>Reporting – Includes standard reporting with the ability to query data.</td>
<td>X</td>
<td></td>
<td></td>
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<tr>
<td>38</td>
<td>Ability to develop custom reports based on the County’s needs.</td>
<td>X</td>
<td></td>
<td></td>
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<tr>
<td>39</td>
<td>User’s Portal – Permit and Development status will be available via online portal for 24/7 access through any internet connection or mobile device.</td>
<td>X</td>
<td></td>
<td></td>
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<tr>
<td>40</td>
<td>The system has the ability to create and store electronic signature on inspection documents and plans.</td>
<td>X</td>
<td></td>
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<tr>
<td>41</td>
<td>Software has 95% uptime. If not explain on a separate sheet.</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>42</td>
<td>Do you have an API or direct database access so the County can access our data to customize our own reports?</td>
<td>X</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Customers & References

“City staff determined that ViewPoint is the best and most cost effective option to meet the City’s e-permitting needs and objectives”

Joel Rosen, Director of Community Development
City of Buena Park, CA
Connecting Rhode Island in a Nationwide First

ViewPoint Cloud powers the nation’s first statewide E-Permitting platform in Rhode Island.

When Rhode Island decided to build a groundbreaking statewide ePermitting system, they turned to ViewPoint for our expertise in large-scale government transformation.

Over the past several months, we’ve worked together to bring state agencies and cities together in ways never before possible, and we’re just getting started.

Learn more at permits.ri.gov
Customers

Representative list, Florida and regional installations bolded

<table>
<thead>
<tr>
<th>Client</th>
<th>State</th>
<th>Population</th>
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<td>Capitol Region Council of Governments</td>
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Baker County Board of County Commissioners
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<td>City of Mission Hills</td>
<td>Kansas</td>
<td>3,554</td>
</tr>
</tbody>
</table>

Visit viewpointcloud.com/customers to learn more
References

Shawn Selleck  
**Project Manager, State of Rhode Island**  
Shawn oversees the State of Rhode Island’s groundbreaking Statewide ePermitting program and works closely with ViewPoint’s implementation team to successfully onboard all Rhode Island communities.  
(401) 824-9662  
shawn.selleck@ode.ri.gov

Pauline Yoder  
**Special Projects Manager, Connecticut Capital Region Council of Governments (CRCOG)**  
In April 2010, Pauline lead the launch of a regional online permitting and licensing program to provide efficiency, transparency, and civic engagement to CRCOG’s member communities.  
(860) 522-2217 ext 245  
pyoder@crcog.org

Joseph Dipasqua  
**Building Official, Dunedin, Florida**  
Joseph has led the initiative to bring better permitting to Dunedin as part of the city’s strategic plan to improve citizen services.  
(727) 298-3193  
jdipasqua@dunedinfl.net
Pricing
Software Pricing

ViewPoint Cloud pricing is based on annual departmental permit volume with two plans. With **Perform**, you get everything you need to streamline permitting, licensing, and code enforcement and accept online submissions. By adding **Inspect**, you get integrated full-cycle inspection management.

<table>
<thead>
<tr>
<th>Perform</th>
<th>Inspect</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accept online requests, route through workflows, manage approvals, collect payments, and issue permits.</td>
<td>Add public inspection requests, inspection scheduling, mobile field inspections, and inspection reporting.</td>
</tr>
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**Price Per Department**

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<th></th>
<th>500</th>
<th>1K</th>
<th>2K</th>
<th>3K</th>
<th>5K</th>
<th>8K</th>
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<td>$7,500</td>
<td>$10,000</td>
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<td>$4,000</td>
<td>$6,000</td>
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<td>$10,000</td>
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</table>

**When is the software fee due?**

ViewPoint Cloud software charges are payable upon contract execution.
Get the most out of ViewPoint Cloud with our professional implementation services.

<table>
<thead>
<tr>
<th>Service</th>
<th>Cost</th>
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<tbody>
<tr>
<td>Department Onboarding (Required)</td>
<td>$3,000</td>
</tr>
<tr>
<td>Your implementation team will assist with the implementation of software and build your first record type.</td>
<td></td>
</tr>
<tr>
<td>Record Type Setup</td>
<td>$2,000</td>
</tr>
<tr>
<td>Have ViewPoint configure your department’s additional Record Types according to information and materials you provide. Price is per Record Type.</td>
<td></td>
</tr>
<tr>
<td>Process Improvement Consultation</td>
<td>TBD</td>
</tr>
<tr>
<td>Work with a ViewPoint permitting process expert before implementing ViewPoint Cloud to ensure your department adheres to best practices and documented processes as you move online.</td>
<td></td>
</tr>
<tr>
<td>Onsite Support</td>
<td>$3,000</td>
</tr>
<tr>
<td>Have ViewPoint come on-site for a full day of training and implementation supervision with your department staff. Price is per day, plus travel and expenses.</td>
<td></td>
</tr>
<tr>
<td>Data Migration</td>
<td>TBD</td>
</tr>
<tr>
<td>Migrate legacy data to ViewPoint Cloud.</td>
<td></td>
</tr>
</tbody>
</table>
Extend ViewPoint Cloud with integrations to other cloud-based or on-premise systems.

### Assessor System
- **Setup Fee**: $2,000
- **Annual Fee**: $2,400

Have ViewPoint integrate your Master Address Table for a weekly import of all location information. This will replace the automated Google Maps Address Search.

### Esri ArcGIS
- **Setup Fee**: $1,000
- **Annual Fee**: $1,200

Have ViewPoint integrate with your ArcGIS Server. This will replace Google maps views with your published ESRI map.

### Contractor License Verification
- **Setup Fee**: $1,000
- **Annual Fee**: $1,200

Have ViewPoint integrate with your contractor database to import licensed contractor information.

### Accounting & Finance
- **Setup Fee**: $2,000
- **Annual Fee**: $2,400

Import transactions from ViewPoint Cloud into your finance/accounting system.

**Why do integrations have both a setup fee and a recurring charge?**

Since every organization uses different tools, your implementation team builds each integration customized to your exact system environment. The legacy technology that powers most of these systems requires that we build and maintain a custom uplink to the cloud for each one, meaning that we host and support that integration and make necessary upgrades when the integrated system changes.
**Vendor name:** ViewPoint Government Solutions, Inc.

**Software name:** ViewPoint Cloud

### Investment Line Items

<table>
<thead>
<tr>
<th>Product</th>
<th>Product Description</th>
<th>Product Code</th>
<th>Total Price</th>
</tr>
</thead>
</table>
| **Starter 1000 Records** | Starter Record Plan for 1000 records per year  
- Unlimited Users  
- Support & Maintenance  
- All Hosting & Storage  
- All Upgrades & Upgrades | Annual Recurring | $6,000.00 |
| **Master Address Table Integration** | Integrate your Master Address Table into ViewPoint Cloud for a weekly import of all location information. This will replace the automated Google Maps Address Search. It will be the municipalities responsibility to provide ViewPoint with the file initially and ongoing for any updates.  
Requirements: A clean master address table including all of the community’s location information and must contain the parcel properties latitude/longitude coordinates. If Geocoding is required additional costs will apply. | Annual Recurring | $2,400.00 |
| **Contractor Integration Support** | Integrate ViewPoint Cloud with your contractor database to import licensed contractor information.  
- Small municipality discount (under 4,000 pop.) - 25% off monthly dues.  
- Requirements: A clean contractor database including all information to be included on application forms. | Annual Recurring | $900.00 |
| **Online Setup Success Course** | Expert assistance from a ViewPoint consultant. Intended for 1-3 administrators, this program will take approximately 3 weeks, during which time you will gain an expert understanding of the software as you tailor the system to suit your community. Sample curriculum includes:  
- Defining citizen service goals  
- Developing an online permitting strategy  
- How to customize forms and workflows  
- Testing & Training best practices | One Time | $3,000.00 |
| **Master Address Table 1 time import** | Import all of your location information from your Master Address Table into ViewPoint Cloud. This will replace the automated Google Maps Address Search.  
Requirements: A clean master address table including all of the community’s location information and must contain the parcel properties latitude/longitude coordinates, as well as at least 1 unique ID field. ViewPoint does not take responsibility for ‘dirty’ data. If Geocoding is required additional costs will apply. | One Time | $2,000.00 |
| **Contractor Integration** | Integrate ViewPoint Cloud with your contractor database to import licensed contractor information. | One Time | $1,000.00 |

**Total Investment from Items Above**

| Total Price | $15,300.00 |

**Fee for annual software maintenance.** $9,300.00

The price shall be fixed for years 1 and 2 of the contract term.

**When does the initial maintenance agreement take effect?** At contract execution. A sixty day grace period can be instituted and placed on to the end of the 12 month agreement.

**What is included in the annual maintenance agreement?** All support and maintenance, all hosting and unlimited storage, all upgrades and updates, unlimited County staff licenses.

**How are software upgrades handled?** Are they included in the annual maintenance agreement? Upgrades are automatically provided and are included in the annual fees.
What are the hardware requirements to run the software at its maximum efficiency? Any web enabled device.

What mobile devices will operate with the software/web portal? Are there any limitations regarding mobile device brands on the software? None

Can inspectors print permits or reports in the field through a smart device and a mobile Printer? Yes

How many users can access the web portal at the same time? Unlimited

Does the system allow different access levels per user? Please explain the access level and workflow ability of the software. Within ViewPoint Cloud users/groups can be given, No Access, View, Edit, Administrator access privileges.

How many sites do you have for emergency backup/data recovery in case the main server goes down? Where is the backup located? ViewPoint Cloud uses the Microsoft Azure Cloud. Microsoft handles all the backup/recovery functions. Microsoft maintains 3 data centers strategically located across the United States.

How many daily users are on your site simultaneously? What kind of trunk (band width) does you facility have in accessing the database server? We serve 10,000+ users. We leverage the Microsoft Cloud platform for scalable application architecture.

How frequently do maintenance periods occur? If there is downtime, how long does the downtime last (on average?) At what time of the day/week does scheduled maintenance normally occur? We update on a quarterly update with no downtime.

What kind of software uptime do you guarantee? 99.9% uptime.

If the contract is terminated, will the County have access to download our data for our own use? Yes.

Can the County access the web portal from a link on the County’s website? Yes

Provide a list of the reports the software will generate. Reporting is unlimited. Municipality users can report on any field in the database.

Describe how the debit/credit card acceptance works. Is there a 3rd party company processing the payments through your software? Describe any settlement fees the user would pay. Are there any fees the County would pay? Who is your 3rd party vendor? ViewPoint Cloud uses Stripe to manage all payments. The applicant pays all fees, there are no fees incurred by the municipality to have an eCommerce solution.

Timeline for implementation after receipt of order. We project a 14-week implementation process which you can see in more detail in the Implementation Plan section of this proposal.
Technical Specifications
System Security

The Microsoft Cloud
The Microsoft Cloud provides a high-security home for your mission-critical operations. With datacenters positioned across the country, Microsoft offers best-in-class 99.9% reliability for system uptime.

Secure HTTPS Access
Every communication in ViewPoint Cloud is encrypted with 256-bit HTTPS encryption. This ensures protection against unauthorized access or eavesdropping, and gives you peace of mind when using ViewPoint Cloud.

PCI Compliance
Our solution is PCI-DSS compliant, making it simple and safe to accept online payments. Credit card information is never stored in ViewPoint Cloud.

Automated backup and failover
Thanks to the power of the cloud, your data is constantly backed up automatically. In the event of a problem, we can immediately restore access to your most recent backup so you never lose data.
**Technology Platform**

**ViewPoint Cloud is a cloud-based, vendor hosted system.**

Client-side application use requires a modern web browser that supports HTML5, CSS3, and Javascript. This includes Firefox, Google Chrome, Opera, Safari, and Internet Explorer 10+.

Data is backed up and georeplicated in real time on the Microsoft Azure Cloud platform to allow for seamless disaster recovery.

System upgrades are delivered periodically to client environments over-the-air, with no maintenance necessary by client IT staff.

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**System Diagram**

- **Client**
  - HTML5 and Javascript Web Frameworks

- **API**
  - ViewPoint Logic & Data APIs, Rapid Search Service, and Secure Access Service

- **Database**
  - Microsoft SQL and File Storage, backed up continuously

- **Infrastructure**
  - Microsoft Cloud nationwide data center network
Support & Maintenance
SUPPORT BY THE NUMBERS

1 hr. typical inquiry response time

150 inquiries answered each month

99.9% target monthly system uptime

10k users served
Getting Help

Our deep commitment to customer support makes digital transformation easy on your department. With access to a wealth of help videos and articles, you’ll never be at a loss with product functionality. Our robust user community is always willing to lend their advice, and when you need to speak to a ViewPoint team member, we’re there to help.

Email and Phone Support
We’re available 24/7 via email and Monday-Friday from 8:00am-5:00pm over the phone for any urgent issues. Our first-response time for any issue is same-business-day.

<table>
<thead>
<tr>
<th>Email</th>
<th>Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Available 24/7</td>
<td>8:00am - 5:00pm EST</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Tier 1</th>
<th>Tier 2</th>
<th>Tier 3</th>
<th>Target Resolution</th>
</tr>
</thead>
<tbody>
<tr>
<td>Urgent</td>
<td>1 hour</td>
<td>2 hours</td>
<td>4 hours</td>
</tr>
<tr>
<td>High</td>
<td>2 hours</td>
<td>4 hours</td>
<td>8 hours</td>
</tr>
<tr>
<td>Medium</td>
<td>2 days</td>
<td>5 days</td>
<td>5 days</td>
</tr>
</tbody>
</table>

Escalation Matrix
Support requests are escalated depending on the severity of a problem.

Help Center & User Community
Our Help Center includes everything you need to know to become a ViewPoint Cloud expert. It’s a great place to start to familiarize yourself with functionality, and we’re always adding new videos and articles.

The ViewPoint user community helps each other solve digital transformation issues together. When you’re not sure about a workflow or best-practice, we can connect you with community leaders who can offer advice and help your community excel.
Settings

- Users
- Groups
- Categories & Record Types
- General
- Inspection Types
- Activity Log
Making Changes

ViewPoint Cloud’s built-in settings give you unprecedented control over making changes to your system configuration. With simple, visual tools and a drag-and-drop interface, it’s easy to change anything in just a few clicks.

Change forms and workflows
The intuitive configuration design tools in ViewPoint Cloud let you drag and drop to change forms, workflows, fees, documents, and more. There’s no need to hire a programmer or contact us to make changes to your configuration.

Determine public access
You maintain full control over public access settings, so you can start by processing things internally, and then move gradually to online self-service as you feel comfortable. A flick of a switch turns public access on or off for each record type.

Add new permit or license types
When you’re ready to expand your platform, or just experiment with new capabilities, you can add new permit or license types right from the system settings. Everything you need to configure a new permit or license type is accessible to administrative users.
Data Portability

We believe in data portability, and we try to make it as easy as possible for you to access any of your data, at any time. Using built-in reports, you can export most data to CSV for easy archival. And if you want a full archive of your ViewPoint Cloud data, just ask and we will provide it.

Data Export
Export data on-demand in CSV format from within ViewPoint Cloud’s reports. Most data can be exported this way.

Full Archive
Upon request, we can provide a full archive of your ViewPoint Cloud data in CSV or SQL formats.

With ViewPoint Cloud, you own the data you create. We make it as easy as possible to export and archive your data.
System Upgrades

The ViewPoint Cloud team is passionate about putting the latest technologies to work for government agencies. That’s why we never stop iterating to build the best permitting platform available. We combine user feedback with qualitative and quantitative research methods to continuously develop new and improved features and rapidly deliver them to users.

The always-improving system for government

We release monthly system upgrades to improve system performance and introduce new functionality. Most of our upgrades come from user feedback. If you have an idea to make permitting better, we’ll build it.

Zero-maintenance upgrades

Since ViewPoint Cloud is accessed in a web browser, you’re always automatically using the latest version. Whenever we release an upgrade, there’s no maintenance required on the part of IT staff. You’ll just be prompted to reload the page to receive the upgrade.

Upgrade notifications

Each time we release an upgrade, we will notify all users by email with a detailed list of enhancements and changes. We include images and animations where appropriate, so everyone understands what’s new. If you need to get in touch with us, you can simply reply to the email.

“When we provide feedback to ViewPoint—making a suggestion for a change to be considered—it’s amazing how in 4-6 weeks there’s a new release and the change is there. They’ve really listened to the end users … and they incorporate it into the product when they can. That’s very impressive to us.”

Tim Smith, Fire Marshal
Town of Orange, CT
Project Plan

Implement modern online permitting and licensing with ViewPoint Cloud
Implementation Overview

We work one-on-one with each department according to the following methodology:

**Step 1: Process Design**
Work with your implementation team to map each departmental permit/license process and assess adherence to best practices. Collect all application forms, permits, letters, and fee schedules associated with each permit type for use in ViewPoint Cloud.

**Step 2: System Configuration**
Your implementation team will work with you according to the project scope to configure permit/license types in your ViewPoint Cloud environment. Any data integrations and migrations will be configured. Upon configuration, you’ll have the ability to test each permit/license to ensure satisfaction.

**Step 3: Train users & plan rollout**
Your client success manager will work with you to determine a change management plan for your department. Communicate upcoming changes to your department and have them try out their new system, and discuss plans for internal and public rollouts.

**Step 4: Go Live & publicize**
On Go Live day, you’ll have the whole ViewPoint team at your disposal to help your department transition to a better way of working. We’ll also help you publicize your new system internally and to the public using traditional and social channels. Success!
Your Configuration

We will configure online citizen access, internal processing, and inspection management for the following departments and services:

### Building Department

<table>
<thead>
<tr>
<th>House Permit</th>
<th>Modular Permit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pool Permit</td>
<td>Plumbing Permit</td>
</tr>
<tr>
<td>Roof Permit</td>
<td>Shed Permit</td>
</tr>
<tr>
<td>HV-AC Permit</td>
<td>Other Building Permits</td>
</tr>
<tr>
<td>Electrical Permit</td>
<td></td>
</tr>
</tbody>
</table>
When implementing e-permitting projects, we find it best to take an individualized approach – setting up one department at a time – to ensure each project component is successful. ViewPoint Cloud’s agile architecture makes this approach well-suited to enabling rapid deployment and maximizing ROI.

This approach requires a Community Project Manager (CPM) to work with the ViewPoint Implementation Team to bring each project component online. The CPM is typically a lead user in the department who will coordinate the implementation on the department’s behalf.

Upon contract signing, we propose the following schedule based on our best-practice e-permitting implementation process:

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**Phase 1: Template the Building Department**

In Phase 1, the Community Project Manager will gather application forms and permit documents to prepare to configure Building permitting. ViewPoint Implementation Team will provide administrator training to the CPM, and will work with the CPM to create a template for all permit application forms and permit documents within ViewPoint Cloud.

**Estimated time: 6 weeks**

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**Phase 2: Configure Building Workflows**

In Phase 2, the CPM and the ViewPoint Implementation Team will document all workflows, fee schedules, and inspection processes. These will then be configured within the ViewPoint Cloud environment.

**Data Migration**

Additionally, during this time the community may provide data from their legacy system to be imported into ViewPoint Cloud. Data may also be imported later if necessary.

**Estimated time: 4 weeks**

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**Phase 3: Train Building Staff and Launch**

In Phase 3, the CPM and ViewPoint Implementation Team will provide training to department users. Users will gain familiarity with the system and ensure accuracy of system configuration. The department will then launch ViewPoint Cloud and begin realizing the benefits of cloud e-permitting.

**Estimated time: 4 weeks**
Project Team

ViewPoint’s cross-functional implementation teams work with your department staff to coordinate all aspects of the implementation project. Your Customer Success Manager will be your main point of contact during the implementation phase, and the following team members will ensure your implementation success:

Valeria Amato
Customer Success Manager

Valeria is a veteran client services professional who takes a personalized approach to each implementation. Recently, Valeria oversaw the successful launch of Statewide ePermitting in Rhode Island. As customer success manager, she oversees all aspects of your implementation.

Seth Greenlaw
Community Manager

Seth is a committed community builder who works to ensure your departmental staff feel comfortable in their day-to-day operations with ViewPoint Cloud. After go-live, he is your staff’s main point of contact.

Carl Anderson
Sr. Municipal Relationship Manager

Carl is a compassionate account manager with a wealth of experience in government solution-building. Carl will ensure the long-lasting strength of your community relationship with ViewPoint and explore new ways to improve operations over time.
Jocelyn Mathiasen
**Process Designer**

Jocelyn is an experienced local government manager with a strong track record of identifying and implementing ways to improve local government operations. She will lead your Process Improvement Consultation prior to system implementation.

Darshan Shakya
**Product Engineer**

Darshan is a leading engineer in the field of government technology, developing new features to help agencies work better and engage with their citizens. His engineering prowess helps turn community feedback into high-performance features.

Ashley Jamerson
**Data Engineer**

Ashley is an expert data engineer who has migrated dozens of communities to ViewPoint from legacy systems of all sorts. Her creative approach to data management ensures ViewPoint systems offer fast, reliable data access from anywhere in the world.

Rachel Keyser
**Researcher**

Rachel’s background in public policy lends her a keen eye for public-sector research and analytics. She can help your community measure and publicize your improvement efforts and build trust with your community through data.
Data Migration

Legacy System → ViewPoint Cloud

ViewPoint will migrate your legacy system’s data to ensure operational continuity and data retention. Moving your old data to ViewPoint Cloud gives you access to that data in ViewPoint Cloud reports and analytics. Keep in mind that any incomplete or incorrect data will remain so post-migration.

Our Data Migration methodology ensures high accuracy and satisfaction:

**Step 1: Initial data snapshot**
Department staff provide ViewPoint with an initial export of the legacy system data. ViewPoint implementation team will map the legacy data to the new target system.

**Step 2: Initial import**
ViewPoint implementation team will program the migration and import the provided data into a test environment.

**Step 3: Review and confirm**
Department staff reviews the imported data to ensure completeness and accuracy, and can make any changes to the way data is migrated.

**Step 4: Final import and seamless cutover**
Immediately prior to Go-Live, ViewPoint will make a final data import to include any data created since the previous import. This ensures seamless cutover from the legacy system to ViewPoint Cloud with no risk of data loss.
Integration Summary

Assessor
Link permit applications to parcels from your Master Address Table

Esri ArcGIS
Show Esri layers on your permit maps

Licensed Professional
Auto-validate contractor licenses

Finance & Accounting
Send permitting transaction data to your General Ledger
Integration

Link permit applications to parcels from your Master Address Table, putting ownership and parcel data right in ViewPoint Cloud.

**How it Works**

- Parcel data from the assessor system is synced on a weekly basis
- Properties are created or updated in ViewPoint Cloud based on new data received
- New permit applications will auto-fill property owner information for the chosen address
- Departmental reviewers can see parcel data, owner information, and custom attributes like tax delinquency on a permit application or location page in ViewPoint Cloud
- Assessors gain visibility into the permit and license history of any parcel, and can track new permit applications
- Citizens gain easy access to public-record assessor data online in the Storefront web portal
Integration

Mashup permitting data with GIS layers on your Esri map within ViewPoint Cloud.

**How it Works**

- A link is established between your Esri ArcGIS geometry service and ViewPoint Cloud
- Your Map reports will display your Esri map with all default layers visible
- Show permits or inspections on the map according to the filters in ViewPoint Cloud to build custom map reports overlayed on Esri GIS data
Integration

Licensed Professionals

Simplify license verification by choosing a licensed professional directly from your state, county, or local license database when creating a new application.

How it Works

- License data from the source system is synced on a weekly basis.
- Configure which permit types require an auto-validated license, and whether a valid and current license is required to submit new applications.
- New permit applications will ask the applicant to search for a professional, and will auto-fill license information for the chosen professional.
- Departmental reviewers can see licensee information and expiration date on each submitted permit application, and have confidence that the license is valid without verifying an external source.
Integration

Finance & Accounting

Automatically sync transactions from ViewPoint Cloud to your accounting system for easier reconciliation.

How it Works
- ViewPoint configures a transaction file to match the input needed by your accounting system
- This file is auto-generated daily at 11:59pm
- The file is placed in an interim location accessible by the Finance system
- The finance system imports the file and registers all associated transactions
- The file is overwritten the next day with new information, and the import cycle repeats
User Training
For Administrators

ViewPoint Cloud training starts with administrators – the departmental or IT leaders who will administer ViewPoint Cloud for their organization.

**Sample training agenda:**

<table>
<thead>
<tr>
<th>Topic</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>System basics</strong></td>
<td>Familiarize users with the basic system layout and operation</td>
</tr>
<tr>
<td><strong>Administering ViewPoint Cloud</strong></td>
<td>Creating and modifying all attributes of permit and license configurations, including forms, workflows, fees, documents, and user access.</td>
</tr>
<tr>
<td><strong>Processing records</strong></td>
<td>Working with records in ViewPoint Cloud, including approving, denying, issuing permits, collecting payments, conducting inspections, and making changes to permits.</td>
</tr>
<tr>
<td><strong>Reporting</strong></td>
<td>Building ad-hoc reports, exporting to Microsoft Excel, and saving reports for later</td>
</tr>
</tbody>
</table>
Hi Mary!

You are now a member of the world's most advanced citizen service platform, ViewPoint Cloud.

You join hundreds of civic leaders just like you, driving continuous improvement through technology.

Curious what good e-government looks like? Watch a quick introduction:

Get Started
End-user training is conducted in cooperation with departmental leaders, who are best positioned to communicate the process changes coming to their daily work. Through online resources, videos, and interactive help, end-users are educated on all operating procedures within ViewPoint Cloud.

Sample agenda:

**System basics**
Familiarize users with the basic system layout and operation

**Processing records**
Working with records in ViewPoint Cloud, including approving, denying, issuing permits, collecting payments, conducting inspections, and making changes to permits.

**Reporting**
Building ad-hoc reports, exporting to Microsoft Excel, and saving reports for later