REQUEST FOR PROPOSAL

For a cloud-based "Civic Platform" solution supporting the administration of municipal land-use, permitting, and code enforcement functions.

CITY OF BRYAN
The Good Life, Texas Style.™

RFP # 16-022
DUE DATE: March 24, 2016
@ 2:00 P.M. C.S.T.

CITY OF BRYAN
Purchasing Department
1309 E. Martin Luther King St.
Bryan, TX 77803
979-209-5500
www.bryantx.gov

Disclosure Requirements

Chapter 176 of the Texas Local Government Code mandates the public disclosure of certain information concerning persons doing business or seeking to do business with the City of Bryan, including affiliations and business and financial relationships such persons may have with City of Bryan officers. An explanation of the requirements of Chapter 176, applicable forms and a complete text of the new law are available at: http://www.bryantx.gov/departments/index.html?name=texas_ethics . If you are unable to obtain such information online, please contact the City of Bryan Purchasing Department, 1309 E. MLK St., Bryan, Texas 77803 or call (979)209-5500.

BY DOING BUSINESS OR SEEKING TO DO BUSINESS WITH THE CITY OF BRYAN, YOU ACKNOWLEDGE THAT YOU HAVE BEEN NOTIFIED OF THE REQUIREMENTS OF CHAPTER 176 OF THE TEXAS LOCAL GOVERNMENT CODE AND THAT YOU ARE SOLELY RESPONSIBLE FOR COMPLYING WITH THEM.

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INTRODUCTION

RFP# 16-022
CIVIC PLATFORM

The City of Bryan is seeking Proposal(s) from qualified firms for a cloud-based software solution supporting the administration of municipal land-use, permitting, and code enforcement functions.

It is the intent of the City of Bryan to select a single consultant to accomplish services outlined in this Request for Proposal.

Sealed proposals will be accepted until **2:00 p.m. on March 24, 2016**, and should be addressed to:

City of Bryan - Purchasing Department
Attn: Melanie Tigerina - Buyer
1309 E. Martin Luther King St.
Bryan, TX 77803
mtigerina@bryantx.gov

You may upload one (1) electronic proposal in the format prescribed herein on our website at http://brazosbid.cstx.gov/ . However, if you choose to respond in writing, one (1) original, three (3) copies and one (1) electronic version (Flashdrive, etc.) of the proposal must be returned in a sealed envelope bearing the RFP name, RFP number, and the name and address of the respondent on the outside of the envelope.

In order to ensure a fair and objective RFP process and evaluation, all questions and inquiries related to this Request for Proposal shall be addressed in writing via the Brazos Valley Online Bidding System (http://brazosbid.cstx.gov/) to the individual identified above. **The deadline for written questions and inquiries is March 11, 2016 @ 10:00 a.m.** Contact with any City of Bryan employee or official is prohibited without prior written consent from the Purchasing Department or designee. Offerors contacting any other employee(s) or official(s) without prior written consent risk elimination of their proposal from further consideration.

The RFP is on file and may be examined at the Purchasing Department Office at 1309 E. Martin Luther King Jr. Street, Bryan, Texas and may be obtained by prospective bidders by calling (979) 209-5500; also available online at http://brazosbid.cstx.gov .

The City believes that the data contained in this RFP is sufficient for the preparation of a RFP. Requests for additional information will be considered depending on the RFP time frame and the availability of the requested information. Such information will be submitted to all known firms simultaneously.

Schedule of Important Dates

The tentative schedule for this Request for Proposal is as follows:

Release and Distribute RFP to Firms	02/23/2016
Deadline for Questions and Inquiries	03/11/2016
Proposal Submission Deadline	03/24/2016
Contract Evaluations / Negotiations	May 2016
City Council Submission Date	June 2016
Earliest Award by City	10/01/2016
Contract Execution	10/03/2016

DEFINITIONS, TERMS AND CONDITIONS

Definitions
In order to simplify the language throughout this request for qualification, the following definitions shall apply:

CITY OF BRYAN/CITY – A home rule Municipal Corporation of the State of Texas.

CITY COUNCIL – The elected officials of the City of Bryan, Texas, given the authority to exercise such powers and jurisdiction of all City business as conferred by the State Constitution and Laws.

CONTRACT – An agreement between the City and a Supplier to furnish supplies or services over a designated period of time during which repeated purchases are made of the commodity or service specified.

COOPERATIVE AGREEMENT – Any governmental entity(s) that has entered into a joint interlocal purchasing cooperative agreement with the City of Bryan, Texas.

OFFEROR/VENDOR/FIRM – Organization offering a proposal in response to this RFP.

PARTICIPATING ENTITIES – The City of Bryan and any other local entity who may elect to participate in the future.

RFP – Request for Proposal

Proposals
The submitted proposal(s) must be received by the Purchasing Department prior to the time and date specified herein. The mere fact that the proposal was dispatched will not be considered; the firm must ensure that the proposal is actually delivered and received on time.

Proposals received after the date and time specified shall be returned unopened and will be considered void and unacceptable. The City of Bryan is not responsible for lateness of mail carrier, etc., and time/date stamp in the Purchasing Department shall be the official time of receipt.

Proposals cannot be altered or amended after the closing date. Alterations made before closing must be initialed by Offeror guaranteeing authenticity. Proposals may not be withdrawn after proposal closing date and Offeror so agrees upon submittal of their proposal.

Proposals will be publicly acknowledged in the Purchasing Department's Conference Room at 1309 E. Martin Luther King St, Bryan, TX 77803 at 2:00 p.m. on the date specified. Offerors, their representative(s), and interested persons may be present. The proposals received will be publicly opened but not read aloud. Proposals shall remain valid for a period of ninety (90) days from the date and time of the proposal submission deadline date of the submission deadline date, with the same terms, conditions and negotiated fee schedule.

Proposal must be submitted as instructed in the Introduction on page three (3).

By submitting a proposal, the vendor certifies that he has fully read and understands this "Request for Proposal" and has full knowledge of the scope, quantity, and quality of the services to be furnished and intends to adhere to the provisions described herein. Failure to do so will be at the Offerors own risk, and he cannot secure relief on pleas or error. Neither law nor regulations make allowance for error of omission or commission on part of Vendors.

Any proposal which does not contain all of the information requested in this RFP will be considered incomplete and may be rejected by the City of Bryan.

The City of Bryan by statue is exempt from State Sales Tax and Federal Excise Tax, and the proposal price shall not include taxes.

The Offeror shall furnish any additional information as the City of Bryan may require. The City of Bryan reserves the right to make investigation of the qualifications of the Offeror(s) as they deem appropriate.

This proposal, when properly accepted by the City of Bryan, shall constitute a contract equally binding between the successful Vendor and the City of Bryan. No different or additional terms, including the vendors' subscriber agreement, will become part of this Contract with the exception of a Change Order.

This Request for Proposal does not commit the City of Bryan to award a contract, to pay any cost incurred in the preparation of a proposal, or to procure or contract for services.

Successful offeror agrees to extend prices and terms to all entities who have entered or will enter into joint purchasing inter-local cooperation agreement(s) with the City of Bryan.

Reservations

The City of Bryan reserves the right to accept or reject any or all proposals as a result of this request, to negotiate with all qualified sources, or to cancel, in part or in its entirety, this Request for Proposal if found in the best interest of the City of Bryan. All proposals become the property of the City of Bryan.

The City of Bryan reserves the right to waive any informalities and technicalities and to accept the offer considered most advantageous in order to obtain the best value for the City. Causes for rejection of a proposal may include but shall not be limited to the Offeror's current violation of any City ordinance, the Offeror's current inability to satisfactorily perform the work or service, or the Offeror's previous failure to properly and timely perform its obligations under a contract with the City. Offeror's may be disqualified and rejection of proposals may be recommended for any (but not limited to) of the following causes: 1) Failure to use the proposal forms furnished by the City; 2) Lack of signature by an authorized representative on the Certification form; 3) Failure to properly complete the proposal; 4) Evidence of collusion among proposers; 5) Omission of uncertified personal or company check as a proposal guarantee (if Bid Bond required); or 6) Any alteration of the language contained within the RFP forms. City of Bryan reserved the right to waive any minor informality or irregularity.

The City reserves the right to retain all proposals submitted and to use any idea in a proposal regardless of whether that proposal is selected. Submission of a proposal indicates acceptance by the firm of the terms and conditions contained in this request for proposals, unless clearly and specifically noted in the proposal submitted and confirmed in the contract between the City of Bryan and the firm selected.

The City of Bryan may conduct reference checks as needed to evaluate proposals. The City may contact those listed, and inclusion of this listing in your proposal is agreement that the City may contact the named reference. The City reserves the right to contact other companies or individuals that can provide information to the City that will assist the City in evaluating the capability of the Service Provider.

Reimbursements
There is no expressed or implied obligation for the City of Bryan to reimburse responding firms for any expenses incurred in preparing proposals in response to this Request for Proposal, and the City of Bryan will not reimburse responding firms for these expenses, nor will they pay any subsequent costs associated with the provision of any additional information or presentation, or to procure a contract for these services.

Certification
RFPs must be completed and submitted as required in this document. Certification form must be fully completed. Failure to submit the certification form within the sealed RFP will result in the RFP being rejected as non-responsive.

By submitting a RFP, the Offeror's certifies that he has fully read and understands this "Request for Proposals" and has full knowledge of the scope, quantity, and quality of the services to be furnished and intends to adhere to the provisions described herein. Failure to do so will be at the Offerors own risk, and he cannot secure relief on pleas or error. Neither law nor regulations make allowance for error of omission or commission on part of Offeror's.

Communication
The City of Bryan shall not be responsible for any verbal communication between any employee of the City or City Official and any potential firm. Only written and properly submitted proposals will be considered.

Negotiations
During the evaluation process, City of Bryan reserves the right, where it may serve the City of Bryan's best interest, to request additional information or clarifications from proposers. At the discretion of the City, all firm(s) reasonably susceptible of being selected based on criteria set forth in this RFP, may be requested to make oral presentations. Each proposal must designate the person(s) who will be responsible for answering technical and contractual questions. Preliminary negotiations may be conducted with responsible Offeror(s) who submit proposals that are reasonably susceptible of being selected. At the discretion of the City, all Offeror(s) reasonably susceptible of being selected based on criteria set forth in this RFP may be given an opportunity to make a presentation and/or interview with the Selection Committee.

Vendors will be ranked in order of preference and final contract negotiations will begin with the top ranked firm. Should negotiations with the highest ranked firm fail to yield a contract, or if the firm is unable to execute said contract, negotiations will be formally ended and then commence with the second highest ranked firm, etc.

Cooperative Agreements
Successful Offeror agrees to extend prices and terms to all governmental entities that has entered into, or will enter into, joint purchasing interlocal cooperation agreements with the City of Bryan.

Disclosure
At the public opening, there will be no disclosure of contents to competing firms, and all proposals will be kept confidential during the negotiation process. Except for trade secrets and confidential information which the Vendor identifies as proprietary, all proposals will be open for public inspection after the contract award. **Proprietary information must clearly be identified by typing the word "CONFIDENTIAL" in bold fourteen (14) point font on the bottom margin and indicate what information is protected.**

<u>If Proposal Results in a Contract, the Following Terms and Conditions Will Apply:</u>
Proposers should be aware that the RFP and the contents of the successful proposal will become a part of any subsequent contractual document that may arise from this RFP. In case of discrepancy between the RFP and the Offeror's proposal, the RFP will rule.

Award of the contract shall be based on demonstrated competence and qualifications, so long as the professional fees are consistent with, and not higher than the published recommended practices and fees of the various professional associations and do not exceed any maximums provided by state law.

The contract will remain firm for a **minimum twelve (12) month period** from the date of contract award. The City of Bryan reserves the right to extend this contract for **four (4) additional one-year periods** upon mutual agreement of all parties. Contracts can be cancelled, without penalty, with thirty (30) days written notice of cancellation by the City of Bryan.

The opportunity for City of Bryan to enter into contract with the successful Offeror(s) will remain open for a period of ninety (90) days from the date and time of the proposal submission deadline date, with the same terms, conditions and negotiated fee schedule.

The City of Bryan will not accept any contract terms that require pre-payment for services, supplies or equipment. Limited exceptions may be considered for operating leases or software maintenance and support agreements. Software maintenance and support fees may not be assessed for any system that is not installed, operational and available for use by the City of Bryan.

No oral statement of any person shall modify or otherwise change, or affect the terms, conditions, or specifications stated in the resulting contract. All Change Orders to the contract will be made in writing by the Purchasing Department for the City of Bryan.

Should there be a change in ownership or management, the Contract shall be cancelled unless a mutual agreement is reached with the new owner or manager to continue the contract with its present provisions and prices. This Contract is nontransferable by either party.

Payment will be made in accordance with a negotiated fee schedule.

All invoicing shall be submitted in duplicate to the City of Bryan. If invoices are subject to cash discount, discount period is to be taken from the date of completion of order or date of receipt of invoice, whichever occurs last regardless of whether or not correct discount terms appear on invoice. All invoices are to be paid in full within 30 days after satisfactory delivery of services and billing.

No public official or City employee shall enter into a contract with the City that violates Local Government Code, Section 171.003.

The Offeror will be required to comply with all provisions of the President's Executive Order No. 11246 as of September 24, 1965.

Offerors are advised that all contracts are subject to all legal requirements provided in the City Charter and applicable City Ordinances, State, and Federal Statutes.

This Request for Proposal includes the City's Standard Form of Agreement Contract (Exhibit A). The Firm should review this agreement thoroughly. If Firm has any exceptions to the standard terms and conditions, Firm must identify any provision they are not prepared to satisfy in their proposal submission. The enclosed "Certification Authorization Acknowledgment" Form must be properly executed and provided with the sealed proposal indicating the firm's willingness to execute the City's Standard Form of Agreement Contract.

The City of Bryan operates and is funded on a fiscal year basis; accordingly, the City of Bryan reserves the right to terminate, without liability, any contract for which funding is not available. Renewal of contract will be in accordance with Local Government Code 271.903 concerning non-appropriation of funds for multi-year contracts.

Addenda

In the event of a needed change in the published RFP documents, it is understood that all the foregoing terms and conditions and all performance requirements will apply to any published addendum. All published addenda shall be signed and included with your response package as acknowledgement of the addendum. Firms are responsible for obtaining all published addenda from the City of Bryan on-line bid system at http://www.brazosbid.cstx.gov or from the City of Bryan Purchasing office. The City assumes no responsibility for the Firms failure to obtain and/or properly submit any addendum. Failure to acknowledge and submit any addendum may be cause for the proposal to be rejected. The City's decision to accept or reject any particular proposal due to a failure to acknowledge and submit addenda shall be final.

GENERAL INFORMATION

Background

The City of Bryan is located in Central Texas between Austin and Houston. The City of Bryan was incorporated in 1872. The original square-mile town site now consists of more than 43.4 square miles. The 2016 population estimate for Bryan is 82,920.

The City of Bryan is a home-rule city that operates under the Council-Manager form of government. The City provides a full range of municipal services as prescribed by statute or charter. These services include police, fire and emergency medical services, parks and recreational facilities, library services, street maintenance and construction, public improvements, general administrative services and electrical, water, sewer, and sanitation systems.

City Charter, Council minutes, Budget information, maps and a wealth of miscellaneous information about the City of Bryan can be found online at www.bryantx.gov.

INTENT AND SCOPE OF WORK

The City of Bryan is soliciting proposals for software which can support the administration of land-use, permitting, and code enforcement activities. This may also include but not be limited to the following subordinate activities: the acceptance of applications and fees, digital plans dissemination and review, two-way developer communication, inspection scheduling and execution, general case and database management, and various other common or implied development activities.

This must be a Software-as-a-Service (hereafter "SaaS" or "Solution"), cloud-based application. We understand standalone, user-licensed systems are slowly giving way to systems centrally hosted and maintained by vendors, and accessed by end-users via web browsers. This approach is entirely in tune with our realization that government must improve efficiencies while reducing capital costs and the burden of infrastructure maintenance.

This project must include the ability for customers to comprehensively interact with Planning & Development (P&D) and Permitting & Inspections (P&I) via the internet without the need to visit our offices. Customers

must have the ability to fill out applications and electronically attach any supporting documentation with the application, as well as review the status of their applications and pay for services.

The Solution must have complementary and robust mobile applications that can be used for the administration of relevant tasks by our professional staff while in the field or when working remotely, as well as by citizens for reporting code issues and making service requests from their homes or personal mobile devices.

This Solution must provide comprehensive GIS integration. Everything we do departmentally has a spatial context—it can be mapped. This Solution must complement the GIS the City of Bryan currently uses, and enhance its database and efficiencies through precise automations.

Finally, the City of Bryan desires a Solution that could ultimately serve other City of Bryan departments in the future, where related to public works, licensing, asset management and others key areas of responsibility. The City of Bryan recognizes the need to reduce the number of "stovepipe" legacy systems over time, since they too often stymie inter-departmental collaboration.

Scope of Work

This software Solution must make the City's land management, permitting, and code enforcement processes simpler to understand, more convenient to use, more efficient, and more predictable. Improvements will enhance the customer experience and increase access to information. It will also allow for increased inter-departmental collaboration.

Specific project objectives include, but are not limited to the following. For a more detailed list of requirements, reference Exhibit C "Civic Platform Requirements" document. Respondents should list any additional functionality, not included within the Civic Platform Requirements list in the appropriate section(s) or add additional grouping(s).

A. An increased level of service to our customers through an online portal that provides
    1. the ability to access relevant parcel data
    2. the ability to access relevant ordinances and departmental policies
    3. a user-friendly, browser-based interface which is easy to understand and navigate
    4. access to online applications, including digital document submission
    5. the ability to request and schedule services
    6. the ability to track service requests throughout their administration
    7. flexibility to allow for change orders or service adjustments
    8. the ability to make fee payments and capture a receipt
    9. reducing hours spent by customers in preparing and submitting applications
B. A more efficient and effective staff by
    1. reducing hours spent by staff on processing applications
    2. streamlining administrative processes
    3. digitally collaborating over project data, documents, and drawings
    4. speeding up data research associated with service requests
    5. allowing staff to work remotely, from both computers and mobile devices
    6. providing managers visibility over all staff actions across all functions
    7. offering a thorough reports tool which grants a holistic view of trends
C. A robust and secure repository for all Planning & Development (P&D) and Permitting & Inspections (P&I) data by providing
    1. a cloud-based database which is accessible from anywhere at anytime
    2. industry best-practices to ensure data integrity, security, and redundancy
    3. integration of all relevant historic P&D and P&I data

4. an interface with the City's current ESRI-based GIS

D. Allowing for complete functionality and future system growth by
   1. contracting with a reputable, experienced vendor
   2. choosing a commercial-off-the-shelf application that is updated regularly
   3. being adaptive enough to support similar processes in other City departments

Considering the requirements listed above and attached, provide a tentative comprehensive project timeline for the City's planning purposes.

Provide a fixed price proposal for each of the five contract periods for all proposed services.

Present options as appropriate.

Outline all pricing conditions, assumptions, and payment terms. Include ALL travel and expenses in the fixed fee price.

	FYE 2016	FYE 2017	FYE 2018	FYE 2019	FYE 2020
Fixed Fee Price					

SPECIAL PROVISIONS

Selection Process

A selection committee composed of Bernie Acre, Chief Information Officer, Kevin Russell, Development Services Manager, Joseph Dunn, Deputy City Manager, Jayson Barfknecht, Public Works Director and any other person(s) selected will review all proposals.

Selection shall be based on the responsible Vendor(s) whose proposal is determined to be the **best value to the City of Bryan**, considering the relative importance of the evaluation criteria listed herein.

The City of Bryan reserves the right to award contracts to **one or more vendors** submitting the best overall proposal that is deemed to best represent the desires and needs of the City of Bryan; however, it is the City of Bryan's desire to contract with only one Vendor for all services outlined in the RFP.

Qualifications of the Respondent

It is expected that the Respondent has the requisite experience, ability, capital, facilities, organization, and staff to enable the Respondent to perform the work successfully and promptly, and to commence and complete the work within the proposed costs and time frames.

Respondents must have a client base of more than twenty municipal government customers and have been actively using their respective product offering for more than five years.

Respondents shall provide a signed cover letter from a person within their company who is authorized to make contractual representations on behalf of their company.

Respondent must identify whether it is their recommendation for the City to dedicate the services of a full/part -time project manager. Respondents must provide the reasoning in favor of or against this recommendation.

Respondents shall provide a brief history and description of their company.

Respondents shall provide the names, titles, addresses, and phone numbers of at least three municipal government references to whom they have provided similar SaaS solutions to within the most recent two years.

Respondents may provide any additional information which would serve to distinguish its proposal from other competing proposals.

The City may make such inquiries it deems necessary to determine the ability of each vendor to perform the services contemplated by this RFP. Respondents shall promptly furnish all information and data for this purpose.

Respondents shall identify a primary professional staff member who will be assigned to this project if the Respondent's proposal is selected. Provide a brief statement of qualification for that staff member, including specific experience in providing this type of SaaS to a municipality.

Oral Presentations

After all proposals have been evaluated, the selection committee may require representatives of one or more of the respondents to appear and make presentations to the selection committee for the purpose of making a final evaluation and recommendation for contract award. However, the City, may in its sole discretion, award a contract without presentations, based solely on information supplied in the proposal responses.

News Releases/Publicity

News releases, publicity releases, or advertisements relating to this engagement or the tasks or projects associated with this engagement shall not be made without prior written approval from the City.

FORMAT REQUIREMENT

Requirements:

The following instructions describe the form in which proposals must be submitted.

Responses to the following items will be used for proposal evaluation. Proposals which do not contain responses to each of the requirement items will be considered incomplete and may be rejected by the City of Bryan.

Proposal documents should provide a straightforward, concise description of the Vendor's capabilities to satisfy the requirements of this RFP. Emphasis should be on completeness, clarity of content, and conveyance of the information requested by the City of Bryan. The requirements stated do not preclude Offerors herein from furnishing additional reports, functions, and costs as deemed appropriate.

You may upload one (1) electronic proposal in the format prescribed herein on our website at http://brazosbid.cstx.gov/ . However, if you choose to respond in writing, one (1) original, three (3) copies and one (1) electronic version (Flashdrive, CD-ROM, etc) of the proposal should be returned in a sealed envelope bearing the RFP name, RFP number and name and address of the respondent **on the outside of the delivery package.**

It is expected that the Respondent has the requisite experience, ability, capital, facilities, organization, and staff to enable the Respondent to perform the work successfully and promptly, and to commence and complete

the work within the proposed costs and time frames.

Respondents must have a client base of more than twenty municipal government customers and have been in business for not less than five years.

Respondents shall provide a signed cover letter from a person within their company who is authorized to make contractual representations on behalf of their company.

Respondents shall provide a brief history and description of their company.

Respondents shall provide the names, titles, addresses, and phone numbers of at least three municipal government references to whom they have provided similar SaaS solutions to within the most recent two years.

Respondents may provide any additional information which would serve to distinguish its proposal from other competing proposals.

The City may make such inquiries it deems necessary to determine the ability of each vendor to perform the services contemplated by this RFP. Respondents shall promptly furnish all information and data for this purpose.

Respondents shall identify a primary professional staff member who will be assigned to this project if the Respondent's proposal is selected. Provide a brief statement of qualification for that staff member, including specific experience in providing this type of SaaS to a municipality.

Proposal Conditions:

Submission of a proposal indicates an acceptance of the conditions contained in this RFP unless the submitted proposal clearly and specifically states otherwise.

At any time, the City reserves the right to change any aspect of, terminate, or delay this RFP, the project schedule, and/or the program which is outlined within this RFP.

The issuance of this RFP does not constitute an award commitment on the part of the City.

The City reserves the right to accept or reject any and all proposals in whole or in part, to waive any and all informalities, and to disregard all non-conforming, non-responsive or conditional proposals.

All contents in response to this RFP will become the property of the City and will form the basis of negotiations of an agreement with the successful Respondent.

Those submitting proposals do so entirely at their own expense. There is no expressed or implied obligation by the City to reimburse any business or individual for any costs incurred in preparing or submitting proposals, preparing or submitting additional information requested by the City, or participating in any selection interviews.

Each proposal will be the document upon which the City will make an initial decision, based upon the Respondent's qualifications, the Respondent's understanding of the City's scope and objectives, and the Respondent's ability to complete services anticipated by the City, as detailed within their respective proposals.

Respondents must provide responses to all requests within this RFP, and may not mark any section as confidential or proprietary in lieu of responding. However, Respondents may mark their responses as confidential or proprietary and shall receive protection from the City in accordance with local and state laws.

Proposals may be modified or withdrawn prior to the date and time specified for proposal submission by an authorized representative of the Respondent or by formal written notice.

The Respondent warrants that items to be furnished do not infringe upon any patent, registered trademark or copyright, and agrees to hold the City harmless in the event of any infringement or claim thereof.

The individual executing this RFP and the instruments referenced in it on behalf of the Respondent represents and warrants that he/she has the legal power and full authority to bind the Respondent to the terms and conditions of this RFP.

Proposals submitted shall remain valid for a period of ninety calendar days from the proposal due date.

EVALUATION FACTORS

The City of Bryan will review all proposals to determine compliance with the requirements as specified in the RFP. Only proposals which, in the opinion of the Selection Committee, meet the requirements of the RFP will be further evaluated.

Proposals that pass the preliminary review will be evaluated on how well the proposal meets the needs of the City of Bryan as described in the Firm's response to each requirement listed in the RFP. The Selection Committee will review all written proposals that meet the minimum requirements and will select what it deems to be the top two to four proposals for further review. It is important that the responses be clear and complete so that the Selection Committee can adequately understand all aspects of the proposals.

Evaluation Factors

After receipt of proposals, the City of Bryan will use the following criteria in the selection process:

Minimum Requirements	Pass / Fail
Technical Capabilities	25%
Product Form & Function / Ease-of-Use	15%
Vendor / Staff Experience & Expertise	15%
Update Regularity / Frequency	15%
References Favorable	15%
Initial & Perpetual Costs	15%

DISCLOSURE OF INTERESTED PARTIES

In 2015, the Texas Legislature adopted House Bill 1295, which added section 2252.908 of the Government Code. The law states that a governmental entity or state agency may not enter into certain contracts with a business entity unless the business entity submits a disclosure of interested parties to the governmental entity or state agency at the time the business entity submits the signed contract to the governmental entity or state agency. The law applies only to a contract of a governmental entity or state agency that either (1) requires an action or vote by the governing body of the entity or agency before the contract may be signed or (2) has a value of at least $1 million. The disclosure requirement applies to a contract entered into on or after January 1, 2016. The process as implemented by the Commission is as follows:

1. A business entity must use the application to enter the required information on Form 1295 and print a copy of the form and a separate certification of filing that will contain a unique certification number.
2. An authorized agent of the business entity must sign the printed copy of the form and have the form notarized. The completed Form 1295 and certification of filing must be filed with the city "at the time the business entity submits the signed contract" to the city.
3. The city must notify the Commission, using the Commission's filing application, of the receipt of the filed Form 1295 and certification of filing not later than the 30th day after the date the contract binds all parties to the contract.

For more information regarding how to file Form 1295, please click on the following link: https://www.ethics.state.tx.us/whatsnew/elf_info_form1295.htm .

INSURANCE REQUIREMENTS

The Contractor agrees to maintain the minimum insurance coverage and comply with each condition set forth below during the duration of this contract with the City. All parties to this contract hereby agree that the Contractor's coverage will be primary in the event of a loss, regardless of the application of any other insurance or self-insurance.

Contractor must deliver to City a certificate(s) of insurance evidencing such policies are in full force and effect within 10 business days of notification of the City's intent to award a Contract. No contract shall be effective until the required certificate(s) have been received and approved by the City. Failure to meet the insurance requirements and provide the required certificate(s) and any necessary endorsements within 10 business days **may cause the contract to be rejected**.

The City reserves the right to review these requirements and to modify insurance coverage and their limits when deemed necessary and prudent.

A. **Workers' Compensation Insurance & Employers' Liability Insurance -** Contractor shall maintain Workers' Compensation insurance for statutory limits and Employers' Liability insurance with limits not less than $500,000 each accident for bodily injury by accident or $500,000 each employee for bodily injury by disease. Contractor shall provide Waiver of Subrogation in favor of the City and its agents, officers, officials, and employees.

B. **Commercial General Liability Insurance -** Contractor shall maintain Commercial General Liability (CGL) with a limit of not less than $1,000,000 per occurrence and an annual aggregate of at least $2,000,000. CGL shall be written on a standard ISO "occurrence" form (or a substitute form providing equivalent coverage) and shall cover liability arising from premises, operations, independent contractors, products-completed operations, personal and advertising injury, and liability assumed under an insured contract including the tort liability of another assumed in a business contract. No coverage shall be deleted from the standard policy without notification of individual exclusions and acceptance by the City. The City and its agents, officers, officials, and employee shall be listed as an additional insured.

C. **Professional Liability Insurance -** Contractor shall maintain Professional Liability (Technology Errors & Omissions) insurance covering liability for losses resulting or arising from acts, errors or omissions in rendering computer or information technology services or from programming errors, software performance, and data damage/destruction/corruption with a minimum limit of not less than $1,000,000.

D. **Cyber Liability Insurance -** Contractor shall maintain Cyber Liability insurance in the minimum amount of $1,000,000 per claim for third party losses including but not limited to: Crisis Management; Unauthorized Access/Use; Computer Virus; Denial of Service Attack; Denial of Access; Mistaken Administration of Network, Improper Transmission of Data Losses, including Contingent BI; Personal Injury for Insured's Network Communications; Libel, Cyber-Libel, Slander; Product Disparagement; Violation of Right of Privacy; Misappropriation and Plagiarism; Intellectual Property Losses; Regulatory Costs; Privacy Costs-Privacy Injury and Identity Theft; Programming Errors and Omissions Liability; Replacement or Restoration of Electronic Data; Extortion Threats; Business Income and Extra Expense; Public Relations Expense; and Security Breach Expense.

E. **Business Automobile Liability Insurance -** Contractor shall maintain Business Automobile Liability insurance with a limit of not less than $1,000,000 each accident. Business Auto Liability shall be written on a standard ISO version Business Automobile Liability, or its equivalent,

providing coverage for all owned, non-owned and hired automobiles. Contractor shall provide Waiver of Subrogation in favor of the City and its agents, officers, officials, and employees.

F. **Policy Limits -** Required limits may be satisfied by a combination of primary and umbrella or excess liability policies. Contractor agrees to endorse City and its agents, officers, officials, and employees as an additional insured, unless the Certificate states the Umbrella or Excess Liability provides coverage on a pure "True Follow Form" basis.

G. **Deductibles, Coinsurance Penalties & Self-Insured Retention -** Contractor may maintain reasonable and customary deductibles, subject to approval by the City. Contractor shall agree to be fully and solely responsible for any costs or expenses as a result of a coverage deductible, coinsurance penalty, or self-insured retention.

H. **Subcontractors -** If the Contractor's insurance does not afford coverage on behalf of any Subcontractor(s) hired by the Contractor, the Subcontractor(s) shall maintain insurance coverage equal to that required of the Contractor. It is the responsibility of the Contractor to assure compliance with this provision. The City accepts no responsibility arising from the conduct, or lack of conduct, of the Subcontractor.

I. **Acceptability of Insurers -** Insurance coverage shall be provided by companies admitted to do business in Texas and rated A-:VI or better by AM Best Insurance Rating.

J. **Evidence of Insurance –** A valid certificate of insurance verifying each of the coverages required shall be issued directly to the City within 10 business days by the successful Contractor's insurance agent or insurance company after contract award. Endorsements must be submitted with the certificate. No contract shall be effective until the required certificates have been received and approved by the City.

Renewal certificates shall be sent a minimum of 10 days prior to coverage expiration.

Upon request, Contractor shall furnish the City with certified copies of all insurance policies.

The certificate of insurance and all notices shall be sent to:
City of Bryan
Risk Management
PO Box 1000
Bryan, TX 77805
Emailed to: mquiroga@bryantx.gov

Failure of the City to demand evidence of full compliance with these insurance requirements or failure of the City to identify a deficiency shall not be construed as a waiver of Contractor's obligation to maintain such insurance.

K. **Notice of Cancellation, Non-renewal, Material Change, Exhaustion of limits –** Contractor must provide minimum 30 days prior written notice to the City of policy cancellation, material change, exhaustion of aggregate limits, or intent not to renew insurance coverage. If City is notified a required insurance coverage will cancel or non-renew during the contract period, the Contractor shall agree to furnish prior to the expiration of such insurance, a new or revised certificate(s) as proof that equal and like coverage is in effect. The City reserves the right to withhold payment to Contractor until coverage is reinstated.

L. **Contractor's Failure to Maintain Insurance –** If the Contractor fails to maintain the required insurance, the City shall have the right, but not the obligation, to withhold payment to Contractor until coverage is reinstated or to terminate the Contract.

M. **No Representation of Coverage Adequacy -** The requirements as to types and limits, as well as the City's review or acceptance of insurance coverage to be maintained by Contractor, is not intended to nor shall in any manner limit or qualify the liabilities and obligations assumed by the Contractor under the Contract.

CERTIFICATION AND AUTHORIZATION

CERTIFICATION and AUTHORIZATION:

The undersigned certifies that he has fully read **RFP # 16-022** and understands this "Request for Proposal" and has full knowledge of the scope, quantity, and quality of the services to be furnished *including the Texas Ethics Commission Certificate of Interested Parties Form 1295* and intends to adhere to the provisions described herein. The undersigned also affirms that they are duly authorized to submit this proposal, that this proposal has not been prepared in collusion with any other Vendor, and that the contents of this proposal have not been communicated to any other Vendor prior to the official opening of this proposal. Additionally, the undersigned affirms that the firm is willing to sign the enclosed Exhibit A, Standard Form of Agreement Contract.

By submitting a proposal, the vendor certifies that neither he, nor any co-owner of the organization submitting this proposal, is related to a member of the City Council of the City of Bryan within the first, second, or third degree of consanguinity (blood) or affinity (marriage).

Signed By: _____ Title:_____

Typed Name: _____ Company Name:_____

Phone No.: _____ Fax No.:_____

Email: _____

Bid Address:_____
P.O. Box or Street City State Zip

Order Address:_____
P.O. Box or Street City State Zip

Remit Address:_____
P.O. Box or Street City State Zip

Federal Tax ID No.: _____

Date:_____

END OF RFP #16-022

EXHIBIT A

CITY OF BRYAN

STANDARD FORM OF AGREEMENT CONTRACT

CONTRACT FOR

This Contract, dated _____, 2016, is between the **City of Bryan**, a Texas home-rule municipal corporation, (the City) and (the FIRM), whereby the FIRM agrees to provide the City with certain services as described herein and the City agrees to pay the FIRM for those services.

1. Scope of Services

In consideration of the compensation stated in **Paragraph 2**, the FIRM agrees to provide the City with the services as described in **Exhibit A – RFP # and Exhibit B – Insert Firms Name - Proposal to the City of Bryan** which is incorporated herein by reference for all purposes, and which services may be more generally described as follows:

“ ”

2. Payment

In consideration of the FIRM's provision of the services in compliance with all terms and conditions of this Contract, the City shall pay the FIRM according to the terms set forth in **Exhibit A and Exhibit B.** Except in the event of a duly authorized change order, approved by the City in writing, the total cost of all professional services and expenses provided under this Contract may not exceed **$** .

3. Time of Performance

A. All work and services provided under this Contract must be completed as outlined in **Exhibit A and Exhibit B.**

B. **Time is of the essence of this Contract.** The FIRM shall be prepared to provide the professional services in the most expedient and efficient manner possible in order to complete the work by the project timeline specified in **Exhibit A and Exhibit B**.

4. Warranty, Indemnification, & Release

A. As an experienced and qualified FIRM, the FIRM warrants that the information provided by the FIRM reflects high professional and industry standards, procedures, and performances. The FIRM warrants that the performance of all services under this Contract will be pursuant to a high standard of performance in the profession. The FIRM warrants that the FIRM will exercise diligence and due care and perform in a good and workmanlike manner all of the services pursuant to this Contract. Approval of the City shall not constitute, or be deemed, a release of the responsibility and liability of the FIRM, its employees, agents, or associates for the exercise of skill and diligence to promote the accuracy and competency of their services, or any document, nor shall the City's approval be deemed to be the assumption of responsibility by the City for any defect or error in the aforesaid documents prepared by the FIRM, its employees, associates, agents, or subcontractors.

B. The FIRM shall promptly correct any defective services or documents furnished by the FIRM at no cost to the City. The City's approval, acceptance, use of, or payment for, all or any part of the FIRM's services hereunder or of the scope of work itself shall in no way alter the FIRM's obligations or the City's rights hereunder.

C. In all activities or services performed hereunder, the FIRM is an independent contractor and not an agent or employee of the City. The FIRM and its employees are not the agents, servants, or employees of the City. As an independent contractor, the FIRM shall be responsible for the professional services and the final work product contemplated under this Contract. Except for materials furnished by

Sample

the City, the FIRM shall supply all materials, equipment, and labor required for the professional services to be provided under this Contract. The FIRM shall have ultimate control over the execution of the professional services. The FIRM shall have the sole obligation to employ, direct, control, supervise, manage, discharge, and compensate all of its employees or subcontractors, and the City shall have no control of or supervision over the employees of the FIRM or any of the FIRM's subcontractors.

D. The FIRM must at all times exercise reasonable precautions on behalf of, and be solely responsible for, the safety of its officers, employees, agents, subcontractors, licensees, and other persons, as well as their personal property, while in the vicinity of the Project or any of the work being done on or for the Project. It is expressly understood and agreed that the City shall not be liable or responsible for the negligence of the FIRM, its officers, employees, agents, subcontractors, invitees, licensees, and other persons.

E. Responsibility for damage claims (indemnification): FIRM shall defend, indemnify and save harmless the City and all its officers, agents, and employees from all suits, actions, or claims of any character, name and description brought for or on account of any injuries or damages received or sustained by any person or persons or property resulting from the FIRM's negligent performance of the work, or by or on account of any claims or amounts recovered under the Worker's Compensation Law or any other law, ordinance, order or decree, and his sureties shall be held until such suit or suits, action or actions, claim or claims for injury or damages as aforesaid shall have been settled and satisfactory evidence to the effect furnished the City. The FIRM shall defend, indemnify and save harmless the City, its officers, agents and employees in accordance with this indemnification clause only for that portion of the damage caused by FIRM's negligence.

F. Release. The FIRM releases, relinquishes, and discharges the City, its officers, agents, and employees from all claims, demands, and causes of action of every kind and character, including the cost of defense thereof, for any injury to, sickness or death of the FIRM or its employees and any loss of or damage to any property of the FIRM or its employees that is caused by or alleged to be caused by, arises out of, or is in connection with the FIRM's negligent performance of the work. Both the City and the FIRM expressly intend that this release shall apply regardless of whether said claims, demands, and causes of action are covered, in whole or in part, by insurance.

5. FIRM's Insurance

The Contractor agrees to maintain the minimum insurance coverage and comply with each condition set forth below during the duration of this contract with the City. All parties to this contract hereby agree that the Contractor's coverage will be primary in the event of a loss, regardless of the application of any other insurance or self-insurance.

Contractor must deliver to City a certificate(s) of insurance evidencing such policies are in full force and effect within 10 business days of notification of the City's intent to award a Contract. No contract shall be effective until the required certificate(s) have been received and approved by the City. Failure to meet the insurance requirements and provide the required certificate(s) and any necessary endorsements within 10 business days **may cause the contract to be rejected**.

The City reserves the right to review these requirements and to modify insurance coverage and their limits when deemed necessary and prudent.

A. **Workers' Compensation Insurance & Employers' Liability Insurance -** Contractor shall maintain Workers' Compensation insurance for statutory limits and Employers' Liability insurance with limits not less than $500,000 each accident for bodily injury by accident or $500,000 each employee for bodily injury by disease. Contractor shall provide Waiver of Subrogation in favor of the City and its agents, officers, officials, and employees.

B. **Commercial General Liability Insurance -** Contractor shall maintain Commercial General Liability (CGL) with a limit of not less than $1,000,000 per occurrence and an annual aggregate of at least $2,000,000. CGL shall be written on a standard ISO "occurrence" form (or a substitute form providing equivalent coverage) and shall cover liability arising from premises, operations, independent contractors, products-completed operations, personal and advertising injury, and liability assumed under an insured contract including the tort liability of another assumed in a business contract. No coverage shall be deleted from the standard policy without notification of individual exclusions and acceptance by the City. The City and its agents, officers, officials, and employee shall be listed as an additional insured.

C. **Professional Liability Insurance -** Contractor shall maintain Professional Liability (Technology Errors & Omissions) insurance covering liability for losses resulting or arising from acts, errors or omissions in rendering computer or information technology services or from programming errors, software performance, and data damage/destruction/corruption with a minimum limit of not less than $1,000,000.

D. **Cyber Liability Insurance -** Contractor shall maintain Cyber Liability insurance in the minimum amount of $1,000,000 per claim for third party losses including but not limited to: Crisis Management; Unauthorized Access/Use; Computer Virus; Denial of Service Attack; Denial of Access; Mistaken Administration of Network, Improper Transmission of Data Losses, including Contingent BI; Personal Injury for Insured's Network Communications; Libel, Cyber-Libel, Slander; Product Disparagement; Violation of Right of Privacy; Misappropriation and Plagiarism; Intellectual Property Losses; Regulatory Costs; Privacy Costs-Privacy Injury and Identity Theft; Programming Errors and Omissions Liability; Replacement or Restoration of Electronic Data; Extortion Threats; Business Income and Extra Expense; Public Relations Expense; and Security Breach Expense.

E. **Business Automobile Liability Insurance -** Contractor shall maintain Business Automobile Liability insurance with a limit of not less than $1,000,000 each accident. Business Auto Liability shall be written on a standard ISO version Business Automobile Liability, or its equivalent, providing coverage for all owned, non-owned and hired automobiles. Contractor shall provide Waiver of Subrogation in favor of the City and its agents, officers, officials, and employees.

F. **Policy Limits -** Required limits may be satisfied by a combination of primary and umbrella or excess liability policies. Contractor agrees to endorse City and its agents, officers, officials, and employees as an additional insured, unless the Certificate states the Umbrella or Excess Liability provides coverage on a pure "True Follow Form" basis.

G. **Deductibles, Coinsurance Penalties & Self-Insured Retention -** Contractor may maintain reasonable and customary deductibles, subject to approval by the City. Contractor shall agree to be fully and solely responsible for any costs or expenses as a result of a coverage deductible, coinsurance penalty, or self-insured retention.

H. **Subcontractors -** If the Contractor's insurance does not afford coverage on behalf of any Subcontractor(s) hired by the Contractor, the Subcontractor(s) shall maintain insurance coverage equal to that required of the Contractor. It is the responsibility of the Contractor to assure compliance with this provision. The City accepts no responsibility arising from the conduct, or lack of conduct, of the Subcontractor.

Sample

I. **Acceptability of Insurers -** Insurance coverage shall be provided by companies admitted to do business in Texas and rated A-:VI or better by AM Best Insurance Rating.

J. **Evidence of Insurance –** A valid certificate of insurance verifying each of the coverages required shall be issued directly to the City within 10 business days by the successful Contractor's insurance agent or insurance company after contract award. Endorsements must be submitted with the certificate. No contract shall be effective until the required certificates have been received and approved by the City.

Renewal certificates shall be sent a minimum of 10 days prior to coverage expiration.

Upon request, Contractor shall furnish the City with certified copies of all insurance policies.

The certificate of insurance and all notices shall be sent to:
City of Bryan
Risk Management
PO Box 1000
Bryan, TX 77805
Emailed to: mquiroga@bryantx.gov

Failure of the City to demand evidence of full compliance with these insurance requirements or failure of the City to identify a deficiency shall not be construed as a waiver of Contractor's obligation to maintain such insurance.

Sample

K. **Notice of Cancellation, Non-renewal, Material Change, Exhaustion of limits –** Contractor must provide minimum 30 days prior written notice to the City of policy cancellation, material change, exhaustion of aggregate limits, or intent not to renew insurance coverage. If City is notified a required insurance coverage will cancel or non-renew during the contract period, the Contractor shall agree to furnish prior to the expiration of such insurance, a new or revised certificate(s) as proof that equal and like coverage is in effect. The City reserves the right to withhold payment to Contractor until coverage is reinstated.

L. **Contractor's Failure to Maintain Insurance –** If the Contractor fails to maintain the required insurance, the City shall have the right, but not the obligation, to withhold payment to Contractor until coverage is reinstated or to terminate the Contract.

M. **No Representation of Coverage Adequacy -** The requirements as to types and limits, as well as the City's review or acceptance of insurance coverage to be maintained by Contractor, is not intended to nor shall in any manner limit or qualify the liabilities and obligations assumed by the Contractor under the Contract.

6. Termination

A. The City may terminate this Contract at any time upon **thirty (30)** calendar day's written notice. Upon the FIRM's receipt of such notice, the FIRM shall cease work immediately. The FIRM shall be compensated for the services satisfactorily performed prior to the termination date.

B. If, through any cause, the FIRM fails to fulfill its obligations under this Contract, or if the FIRM violates any of the agreements of this Contract, the City has the right to terminate this Contract by giving the FIRM **five (5)** calendar days written notice. The FIRM will be compensated for the services satisfactorily performed before the termination date.

C. No term or provision of this Contract shall be construed to relieve the FIRM of liability to the City for damages sustained by the City because of any breach of contract by the FIRM. The City may withhold payments to the FIRM for the purpose of setoff until the exact amount of damages due the City from the FIRM is determined and paid.

7. Miscellaneous Terms

A. This Contract has been made under and shall be governed by the laws of the State of Texas. The parties agree that performance and all matters related thereto shall be in Brazos County, Texas.

B. Notices shall be mailed to the addresses designated herein or as may be designated in writing by the parties from time to time and shall be deemed received when sent postage prepaid U.S. Mail to the following addresses:

The City of Bryan:	The FIRM:
Attn:	
P.O. Box 1000	
Bryan, Texas 77805	

C. No waiver by either party hereto of any term or condition of this Contract shall be deemed or construed to be a waiver of any other term or condition or subsequent waiver of the same term or condition.

D. This Contract represents the entire and integrated agreement between the City and the FIRM and supersedes all prior contracts, negotiations, representations, or agreements, either written or oral. This Contract may only be amended by written instrument approved and executed by the parties.

E. This Contract and all rights and obligations contained herein may not be assigned by the FIRM without the prior written approval of the City.

F. The FIRM, its agents, employees, and subcontractors must comply with all applicable federal and state laws, the charter and ordinances of the City of Bryan, and with all applicable rules and regulations promulgated by local, state, and national boards, bureaus, and agencies. The FIRM must obtain all necessary permits and licenses required in completing the work and providing the services required by this Contract.

G. Reimbursable or other miscellaneous expenses incurred by the FIRM shall be included in the contract price; additional payment for such expenses will not be considered.

H. The parties acknowledge that they have read, understood, and intend to be bound by the terms and conditions of this Contract.

sample

APPROVED AS TO FORM:

_____
Janis K. Hampton, City Attorney
Date: _____

CITY OF BRYAN:

APPROVED FOR PROCESSING:

_____
Bernie Acre, Chief Information Officer
Date:_____

APPROVED FOR COUNCIL:

_____
Kean Register, City Manager
Date:_____

APPROVED:

_____
Jason P. Bienski, Mayor
Date:_____

ATTEST:

_____
Mary L. Stratta, City Secretary
Date: _____

Sample

FIRM:

By:_____

(FIRMs – Corporate Seal)

Printed Name: _____

Title: _____

Date: _____

STATE OF TEXAS §
§ ACKNOWLEDGEMENT
COUNTY OF _____ §

This instrument was acknowledged before me on the _____ day of _____, 2016, by _____ on behalf of _____.

_____
Notary Public in and for the State of Texas

EXHIBIT "B"

Firms Name - Proposal to the City of Bryan

(# Pages)

EXHIBIT "C"

Civic Platform Requirements List

CITY OF BRYAN

CIVIC PLATFORM

RFP #16-022

THURSDAY, MARCH 24, 2016

CITY OF BRYAN
The Good Life, Texas Style.™

Craig Dixon
2160 Satellite Boulevard, Duluth, GA 30097
866.809.2276
Craig.Dixon@tylertech.com

tyler technologies

2160 Satellite Blvd
Duluth, GA 30097
P: 888.355.1093
F: 678.474.1002
www.tylertech.com

Thursday, March 24, 2016

City of Bryan
Melanie Tigerina

Purchasing Department
1309 E. Martin Luther King St.
Bryan, TX 77803

Dear Melanie Tigerina,

On behalf of Tyler Technologies, Inc. we respectfully submit the enclosed proposal for your evaluation and consideration in response to City of Bryan Civic Platform RFP #16-022.

Our firm has carefully reviewed the project goals, objectives and requirements delineated within the RFP and we are excited about the opportunity to work with City of Bryan on this project. We are confident that Tyler's EnerGov brings the right mix of resources, experience, and technology to foster an environment for success.

Technology

Tyler Technologies' Incode Software transforms complex City tasks and processes into a centralized workflow for efficiency, productivity and accuracy, without sacrificing data integrity. Eliminate data duplication and reduce human error with data sharing between departments with integration with other Tyler suites to create a centralized system that maintains data throughout the City.

Within just the past 2 years, Tyler's Community Development platform has been chosen by large and innovative government agencies including Los Angeles County, CA, Miami Beach, FL, North Miami Beach, FL, Newport News, VA, Kansas City, MO, and Raleigh, NC as well as many regional cities in Texas including Lubbock, Waco, Mesquite, Allen, League City, and McKinney.

We continually reinvest our resources to develop new products and features, taking advantage of current technology and fulfilling our clients' changing needs. And with our Perpetual License deployment philosophy, when you partner with Tyler Technologies you'll never have to reinvest in license fees for an upgrade. In short, your Tyler system is the best capital investment you will ever make.

Disaster Recovery Services

Losing your data and equipment need no longer signal panic over missing data, or disrupting processes. Tyler Disaster Recovery can have you back up and running your critical processes within hours. Tyler provides the servers, the operations staff, and secure storage for your data.

Utilizing our state-of-the-art data center, Tyler can transparently retrieve a copy of your data every night, thereby ensuring your critical users can always process work via modem or by traveling to one of two Tyler locations.

Hosting Option

Public sector organizations are seeing a significant shift from traditional on-premises software installations to hosted installations. Tyler's hosted services are computing resources (hardware and software) that are delivered as a service over a network. Simply put, it is another choice for delivering your data and the software that manages it.

More than 700 public sector organizations use Tyler cloud-based solutions, with nearly 40,000 public sector users relying on Tyler cloud-based systems to access the software they need to perform their jobs.

Tyler hosts software applications and client data in Tyler-owned data centers. Tyler deploys, configures, maintains and updates the software applications and related data. All you need is a browser and reliable Internet connection to access software and data from a Tyler managed data center.

Experience

Tyler's 30+ years of government focus and employee dedication enables our partner government agencies to leverage a vast network of experience and domain knowledge with every project. We are committed to this strategy and believe in utilizing our deep breadth of industry / domain experts to facilitate unprecedented innovation within the government technology marketplace.

Restrictions On Disclosure

Please note that certain sections of this response should be considered confidential and proprietary and are intended for the sole use of the City of Bryan. Confidential information includes detailed information regarding the features, functionality, and technology available from Tyler Technologies, as well as employee confidentiality and pricing schemas.

Tyler continually seeks out business partners rather than just customers, and we want you to become a Tyler partner to share in our success. Our partners, like you, understand the difference between value and cost, and want what is best for their communities. Please contact Craig Dixon, your Account Executive at 866.809.2276 or via Craig.Dixon@tylertech.com if you have any questions, or if you need additional information.

Sincerely,

Dane Womble
President – Local Government Division
Tyler Technologies, Inc.

CERTIFICATION and AUTHORIZATION:

The undersigned certifies that he has fully read **RFP # 16-022** and understands this "Request for Proposal" and has full knowledge of the scope, quantity, and quality of the services to be furnished *including the Texas Ethics Commission Certificate of Interested Parties Form 1295* and intends to adhere to the provisions described herein. The undersigned also affirms that they are duly authorized to submit this proposal, that this proposal has not been prepared in collusion with any other Vendor, and that the contents of this proposal have not been communicated to any other Vendor prior to the official opening of this proposal. Additionally, the undersigned affirms that the firm is willing to sign the enclosed Exhibit A, Standard Form of Agreement Contract.

By submitting a proposal, the vendor certifies that neither he, nor any co-owner of the organization submitting this proposal, is related to a member of the City Council of the City of Bryan within the first, second, or third degree of consanguinity (blood) or affinity (marriage).

Signed By: _____ Title: President – Local Government Division

Typed Name: Dane Womble Company Name: Tyler Technologies, Inc.

Phone No.: 800.646.2633 Fax No.: 806.797.4849

Email: craig.dixon@tylertech.com

Bid Address:	5519 53rd Street,	Lubbock,	TX	79414
	P.O. Box or Street	City	State	Zip
Order Address:	5519 53rd Street,	Lubbock,	TX	79414
	P.O. Box or Street	City	State	Zip
Remit Address:	5519 53rd Street,	Lubbock,	TX	79414
	P.O. Box or Street	City	State	Zip

Federal Tax ID No.: 75-2303920

Date: 03/17/2016

CITY OF BRYAN
The Good Life. Texas Style.

PURCHASING DEPARTMENT

February 22, 2016

ADDENDUM NO. 1

Addendum to City of Bryan Request for Propasal No. 16-022

"Cloud based "Civic Platform" solution supporting the administration of municipal land-use, permitting, and code enforcement functions."

Please be advised of the following clarifications, additions, deletions and/or changes to RFP No. 16-022 are hereby made a part of the bid documents for the above referenced project as full and as completely as though the same were included therein.

Receipt of the following information, to be included in your response of request for proposal:

- Civic Platform Requirements, Excel format and PDF format
- Record Types, Excel format

END OF ADDENDUM

This addendum shall be signed and included with your response package as acknowledgement of the addendum. Failure to acknowledge and submit any addenda may be cause for the bid to be rejected. The City's decision to accept or reject a bid due to a failure to acknowledge and submit addenda shall be final.

Vendor Acknowledgement Signature

Melanie Tigerina

Melanie Tigerina, Buyer
City of Bryan – Purchasing

1309 E. Martin Luther King St. • Bryan, TX 77803
(979) 209-5500 • Fax: (979) 209-5507
http://www.bryantx.gov/departments/?name=purchasing

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EXECUTIVE SUMMARY

CITY OF BRYAN

CIVIC PLATFORM

RFP #16-022

tyler technologies

EXECUTIVE SUMMARY

In response to the City of Bryan's RFP, Tyler Technologies is proposing its EnerGov solution. Our response reflects our understanding of your requirements and our ability to deliver the quality products and services you need for a successful project. Tyler's EnerGov solution represents the pinnacle of public sector software offering an integrated solution of comprehensive applications designed to resolve the City's complex needs.

CHOICE

Though the City of Bryan will review many choices during this evaluation process, our goal is to make your choice an easy one. With Tyler, there is no need to move from vendor to vendor, solution to solution, technology to technology. Tyler's EnerGov solution is an integral part of a community of employees, customers, and partners who all share a passion for serving the public.

As part of that community, the City will have access to all the tools needed to efficiently manage your operations. With the goal of being the last software company you ever choose, Tyler will work for and with you to consistently provide you with the broadest and most advanced public sector solutions available.

OBJECTIVES & SCOPE

At Tyler, we are uniquely qualified to meet the needs of the City through our experience, our software, and our absolute commitment to customer satisfaction. Our customers have a direct impact on the evolution of the software and the processes involved in implementing and supporting it. Each of the products and services listed in the response are represented as a description and a list of activities and assumptions. Tyler products will be implemented "off the shelf" without customization or modification, except as detailed in the response.

Tyler's EnerGov suite offers integrated applications that are specifically designed to enable governments to be more efficient, more accessible, and more responsive to the needs of their citizens. Consistent integration among EnerGov applications has always been a priority and a key benefit to organizations looking to improve their business practices. The key benefits to the system include, but are not limited to:

- Providing a single, comprehensive, and integrated solution to manage the City's business functions
- Streamlining business processes through automation, integration, and workflows
- Providing a user-friendly user interface to promote system use, productivity, and minimize the need for training
- Eliminating redundant data entry
- Providing many standard reports directly from the software with access to data through inquiry and drill down capabilities
- Providing multiple interfaces to commonly used 3rd party systems

Automate with Tyler's PLM Suite

The EnerGov Permitting & Land Management suite (PLM) serves a full spectrum of government agencies in need of managing the automation of planning & project review, permitting, enforcement, inspections, and requests. Departments and agencies utilizing the EnerGov PLM suite include:

- Community development
- Planning, building
- Code compliance
- Public works
- Transportation
- Land control
- Fire safety
- Storm water management
- Engineering

Mapping, Mobility, and Citizen Access

EnerGov GIS (ArcGIS based)

As an Esri Worldwide Partner of the Year and recipient of Esri's 2012 Mobile Technology of the Year award, EnerGov provides industry-pioneering enterprise GIS integration capable of fully leveraging an agency's GIS and introduces a new dimension of spatial capabilities to the agency and the process. EnerGov GIS provides unparalleled, out-of-the-box Esri ArcGIS integration.

iG® Workforce Mobile Platform

iG Workforce is the industry's first government platform for the next generation of mobility. EnerGov was the first software solution to offer a comprehensive and robust mobile workforce platform and family of apps that take advantage of native iOS tablet environment.

EnerGov Citizen Access

EnerGov Citizen Access is an integrated constituent-facing web portal that provides your community with 24-hour access to comprehensive government services. From applying and paying for permits and licenses to requesting inspections and service requests, EnerGov Citizen Access can enable your agency to reach its services goals, and better engage a connected public via 24/7 online access.

EnerGov eReviews (Electronic Plan Review and Document Markup)

EnerGov was first to provide a comprehensive native electronic document review extension enabling government staff to work in a completely paperless and seamless workflow environment. Agencies can receive, review, mark up and collaborate on plans, projects, permit and licensing documents in the popular and standardized Adobe PDF file format. The iG reviews mobile app is also available to enable users to access digital plans, make recommendations, corrections and collaborate with other parties on the go all from the easy-to-use iPad tablet.

MyGovPay Payment Processing

EnerGov's government specific payment processing product-line – seamless and secure "out-of-the-box" integration has been developed to ensure world-class payment processing that will always be

supported and maintained. The system utilizes the technology backbone ('powered by") of EnerGov's preferred credit card processing partner.

Leading Government-Centric Automation Platform

Tyler's EnerGov Server platform is distinguished from the competitive landscape by the fact that we develop and support 100% of our products in-house. All software development, implementation, and support services are provided solely by our in-house personnel. This has enabled us to build and evolve a software platform and ecosystem that infuses employee passion for industry-specific software automation with the front line experiences our leading customers have provided. The result of this commitment is the industry's most powerful, seamless, efficient, user-intuitive, and scalable platform for government automation.

Comprehensive Software & Services

Tyler's solution is intended to upgrade the City's departments to the latest system available in today's marketplace. Tyler's EnerGov platform is distinguished from the competitive landscape by the fact that we develop and support 100% of our products in-house. All software development, implementation, and support services are provided solely by our in-house personnel. This has enabled us to build and evolve a software platform and ecosystem that infuses employee passion for industry-specific software automation with the front line experiences our leading customers have provided. The result of this commitment is the industry's most powerful, seamless, efficient, user-intuitive, and scalable platform for local government automation. Our group of seasoned consultants, trainers, product experts, and programmers bring years of local government software experience to make your transition a smooth success.

Tyler handles the following aspects of your project under a single contract:

- System Delivery
- Implementation
- Training
- Support and Maintenance
- Software Updates and Upgrades

Implementation Approach

We know that implementing a new system is not easy so we have tailored our solution to assist the City of Bryan in as many ways as possible from start to finish.

Our proposal provides a full range of services designed to help you get the most out of our products which includes:

- Project Management - Using a proven implementation methodology along with years of experience working with customers just like you, our project managers will help insure your transition to the Tyler product is a success.
- Applicable Data Conversion - With hundreds of conversions over 20 years, and staff dedicated specifically to that responsibility, Tyler Technologies has the experience and skill to effectively manage the complexities of converting data to a new technology.

- On-Site Training - Our proposal includes training to be administered on-site at City of Bryan. Our trainers and managers work together to insure that any issues that require follow-up after a training session are tracked and resolved to your satisfaction.

Training

At Tyler, our clients expect to receive the right training for their needs because learning the tools, benefits, and powerful functions is part of the process. It's a fact that fully trained clients who understand how to use Tyler products are able to do their jobs better, period.

Tyler offers multiple training options to fit your needs:

- Onsite Training
- Group Training
- User Groups
- Remote Training
- Online Training Center
- Tyler Connect

Support

The goal of the Tyler Support department is to provide expeditious technical assistance to Tyler software users in overcoming issues, understanding functionality, and recommending approaches to various scenarios. We strive to answer your questions quickly and accurately.

In addition Tyler offers technical support and ongoing educational opportunities that tie into your technical support experience. These options allow our clients to focus on their day-to-day jobs, and work more efficiently. No IT team? We can handle that! New employees? We can get them up to speed! Tyler is here to help

Tyler offers multiple ways to contact your support personnel, as well as access to thousands of users across the country who have the experience to help you utilize the software to your greatest benefit.

- LIVE telephone support during regular business hours
- Unlimited toll-free telephone support
- Online support options (FAQ, Knowledge Base, email, chat, etc.)
- Review past incidents, log new incidents, check for solutions, and update your information with the online support portal
- Remote diagnostics and fixes
- Tyler Community - Ask Questions, Get Answers, Connect with Peers, and Find New Information
- Complete documentation, linked directly from the software

Platform Options

Our solutions have been designed to support a wide variety of software platforms, hardware configurations, and database engines which ultimately allows the City to take advantage of existing investments in software and hardware systems, or choose new configurations to better serve the Coty on site. Additionally, many public sector organizations are seeing a significant shift from traditional on premise software installations to hosted installations. Tyler's hosted services are computing resources (hardware and software) that are delivered as a service over a network. Simply put, it is another choice for delivering your data and the software that manages it.

With the Tyler Hosted platform, Tyler hosts software applications and client data in Tyler-owned data centers. We deploy, configure, maintain, and update the software applications and related data. All you need is a browser and reliable Internet connection to access software and data from a Tyler managed data center. More than 1200 public sector organizations use Tyler cloud-based solutions, with nearly 40,000 public sector users relying on Tyler cloud-based systems to access the software they need to perform their jobs.

Commitment

At Tyler, we are uniquely qualified to meet the needs of the City through our experience, our software, and our absolute commitment to customer satisfaction. That commitment, along with the consistent evolution of technology and software features, has resulted in a retention rate of more than 99 percent and long-term relationships with our users. With more than 2,000 customers, this partnership is an integral part of who we are and what we do. Our customers have a direct impact on the evolution of the software and the processes involved in implementing and supporting it.

Protecting Your Investment for Years to Come

Tyler's "Evergreen" Development Philosophy insures that the City will always have industry-leading functionality that utilizes current technology. As part of our annual support fee, all enhancements to our software are provided at no additional charge. This allows our users to continue to take advantage of new advances without having to relicense the software. Additionally, these enhancements are delivered in manageable upgrades that do not require a complete reimplementation of the software.

Partnership

We want to thank the City of Bryan for the opportunity to respond to your Request for Proposal and for your time and consideration during the review process. At Tyler, we feel the evaluation and selection of new software should be as much about people as it is product, with the ultimate decision resulting in a partnership between the customer and their chosen software provider. It is our firm belief that Tyler is uniquely qualified to be that partner and more than meets the needs outlined by the City of Bryan in this document. Should you agree, we look forward to progressing to the next stage in your evaluation process.

COMPANY BACKGROUND

CITY OF BRYAN

CIVIC PLATFORM

RFP #16-022

COMPANY BACKGROUND

Tyler Technologies, headquartered in Plano, Texas, is a leading provider of end-to-end information management solutions and services for local governments. Tyler partners with clients to empower the public sector — cities, counties, schools and other government entities — to become more efficient, more accessible and more responsive to the needs of citizens. Tyler's client base includes more than 14,000 local government offices in all 50 states, Canada, the Caribbean, the United Kingdom and other international locations. These mission-critical applications provide the public sector with the ability to streamline and automate operations resulting in improved productivity and reduced costs.

With decades of exclusive public sector experience, Tyler is the market leader that provides integrated software and services; our singular focus, subject matter experts and in-depth products result in a sustainable client partnership that delivers the industry's most comprehensive solution. We provide the industry's broadest line of software products, and offer clients a single source for all their information technology needs, in several major areas: Financial & Human Resources, K-12 School Solutions, Public Safety, Courts & Justice, Property Appraisal & Tax, Permitting & Land Management, Public Maintenance Management, Citizen Services, Land & Vital Records, and Document Management.

We are known for long-standing client relationships, functional and feature-rich products, and the latest technology. In addition to software products, Tyler provides related professional services including installation, data conversion, consulting, training, customization, support, disaster recovery, and application and data hosting.

Tyler always puts its clients first. We succeed because we take our client's success seriously, and we have a proven record of delivering superior software solutions and services. The overwhelming majority of clients are up and running on time, and within budget. Whether it's developing, enhancing, and implementing our software, or providing excellent service and client support—we succeed because our clients succeed. We want clients for life. In fact, many of Tyler's first clients, across every solution, are still clients today – some with relationships that span decades.

Public Sector Focus

Tyler's business units have provided software and services to customers for more than forty years and have long-standing reputations in the local government market for quality products and customer service. Tyler is the largest company in the United States focused solely on providing software solutions to the public sector. While many of our competitors compete in multiple vertical markets, Tyler is singularly focused on the public sector. It's 100 percent of our business.

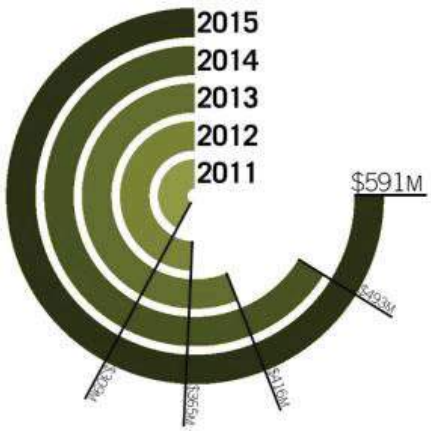
Tyler recognizes that the public sector is generally stable, risk averse, and craves community accessibility, security, and transparency. That is why local government and school entities seek reliable and efficient software and services from Tyler—a vendor who is professional, reputable, dedicated, and achieves results. Tyler has the experience to understand the unique requirements of the public sector, the necessary resources to invest in its products, and the ability to deliver quality services.

Tyler's expansive offering of professional services is designed to complement its software offerings and produce the optimum working environment for local government customers.

- Consulting
- Conversion
- Customization
- Training
- Live ongoing support
- Network management

Financial Stability

Tyler consistently maintains a solid balance sheet and strong cash flow and low debt, experiencing consistent revenue growth with 56 consecutive quarters of profitability, and a total revenue for 2015 of $591 million. While experiencing significant growth opportunities from an increase in staff and expanding territories, we anticipate additional product offerings and new technology will accelerate this growth substantially in the future. We believe a debt-free balance sheet, substantial cash reserves, and a committed customer base put Tyler in a great position in our industry to weather any unexpected turbulence in the economy.



For additional revenue information please visit www.tylertech.com

Industry Leadership

Tyler strives to provide the best client services in the industry. Our products undergo testing by trained quality assurance and certified usability analysts, therefore our clients benefit from products that work logically based upon user experience and input. We also focus our implementation and support professionals on specific groups of applications so they are able to offer more specialized services.

Our commitment at Tyler is to ensure the highest level of client satisfaction through the efforts of Tyler's most valued resource: its people. We challenge our employees to pursue new initiatives

aggressively and become industry leaders in their respective fields. Tyler employs over 2,600 individuals, many of whom are seasoned professionals with unique and proprietary skills and years of industry experience. In fact, our employee turnover rate is very low—in recent years, about half of the industry average.

Company Recognition

Tyler has again been included on Software Magazine's Software 500 ranking of the world's largest software and service providers for 2015. "We are honored to be recognized for the seventh straight year by Software Magazine," said John S. Marr Jr., president and chief executive officer of Tyler Technologies. "We have served the public sector with proven software and services for many decades and we are pleased to continue partnering with a growing portfolio of local government and school clients who rely on Tyler to help meet operational goals."

The ranking is based on total worldwide software and services revenue from the 2014 fiscal year. This includes revenue from software licenses, maintenance and support, training, and software-related services, and consulting. Suppliers are not ranked on total corporate revenue, since many have other lines of business, such as hardware. Financial information is gathered by a survey prepared by Rockport Custom Publishing, LLC. Using public documents and company input. It is published in print as well as posted online at www.softwaremag.com as both a digital edition and searchable database.

Tyler Technologies, Inc. has been named to Forbes list of Best Small Companies in America. Company rankings are based on earnings growth, sales growth and return on equity in the past twelve months and over five years, and a comparison of a company's stock performance with that of its peers. This is the eighth time Tyler has been selected. Tyler has also been included on Forbes 2015 list of Most Innovative Growth Companies.

EnerGov Solution

As a company, Tyler shares City of Bryan's vision for delivering excellent customer service through increased and enhanced access, transparency and accountability. Moreover, we have demonstrated an inexorable commitment to extensible technologies that will embrace and support both the City's current and future business requirements and technical standards.

Unparalleled Experience and Industry Focus

With over 11,000 government agency clients and over 2,500 employees, Tyler Technologies is the nation's largest provider of public sector focused software solutions. No other company comes close to providing the experience and focus that we provide and that likewise, your agency deserves. It's all we do.

Within just the past few years, Tyler's EnerGov Enterprise Server platform has been unanimously chosen by a number of leading government agencies across the United States and abroad including: *Richmond, VA, Columbia, SC, Prince William County, VA, Catawba County, NC, and the Province of British Columbia Safety Authority* to name a few. In fact, over the past five years, more agencies have chosen the EnerGov platform for enterprise permitting and land management than any other solution within the industry.

Leading Government-Centric Automation Platform

Tyler's EnerGov Enterprise Server platform is also distinguished from the competitive landscape by the fact that we develop and support 100% of our products in-house. All software development, implementation, and support services are provided solely by our in-house personnel. This has enabled us to build and evolve a software platform and ecosystem that infuses employee passion for industry-specific software automation with the front line experiences our leading customers have provided. The result of this commitment is the industry's most powerful, seamless, efficient, user-intuitive, and scalable platform for government automation.

Committed Government Partner

At Tyler, we are committed to building and maintaining professional partnered relationships with our clients. Our focus and commitment consists of constant client engagement, involvement, and input all of which play a fundamental role in the implementation and development lifecycle. Moreover, customer feedback is highly regarded in order to ensure that our solutions are always meeting the needs of our clients. It is this commitment to the customer that has aided in us maintaining the highest customer retention rate in the industry.

Commitment to Innovation

Since inception, we have been dedicated to designing, developing, and deploying industry leading innovation in the form of scalable government software solutions. The foundation of this commitment is an aggressive and continual revenue investment strategy aimed to fuel innovative product development.

Manifestations of this commitment include the introduction of the EnerGov platform in 2002 as the first commercial Microsoft .NET permitting and land management solution within the government marketplace, as well as pioneering the market release of advanced Esri ArcGIS integration, rich

internet application technology, seamless electronic plans review technology and advanced mobile workforce applications.

Dedicated Workforce

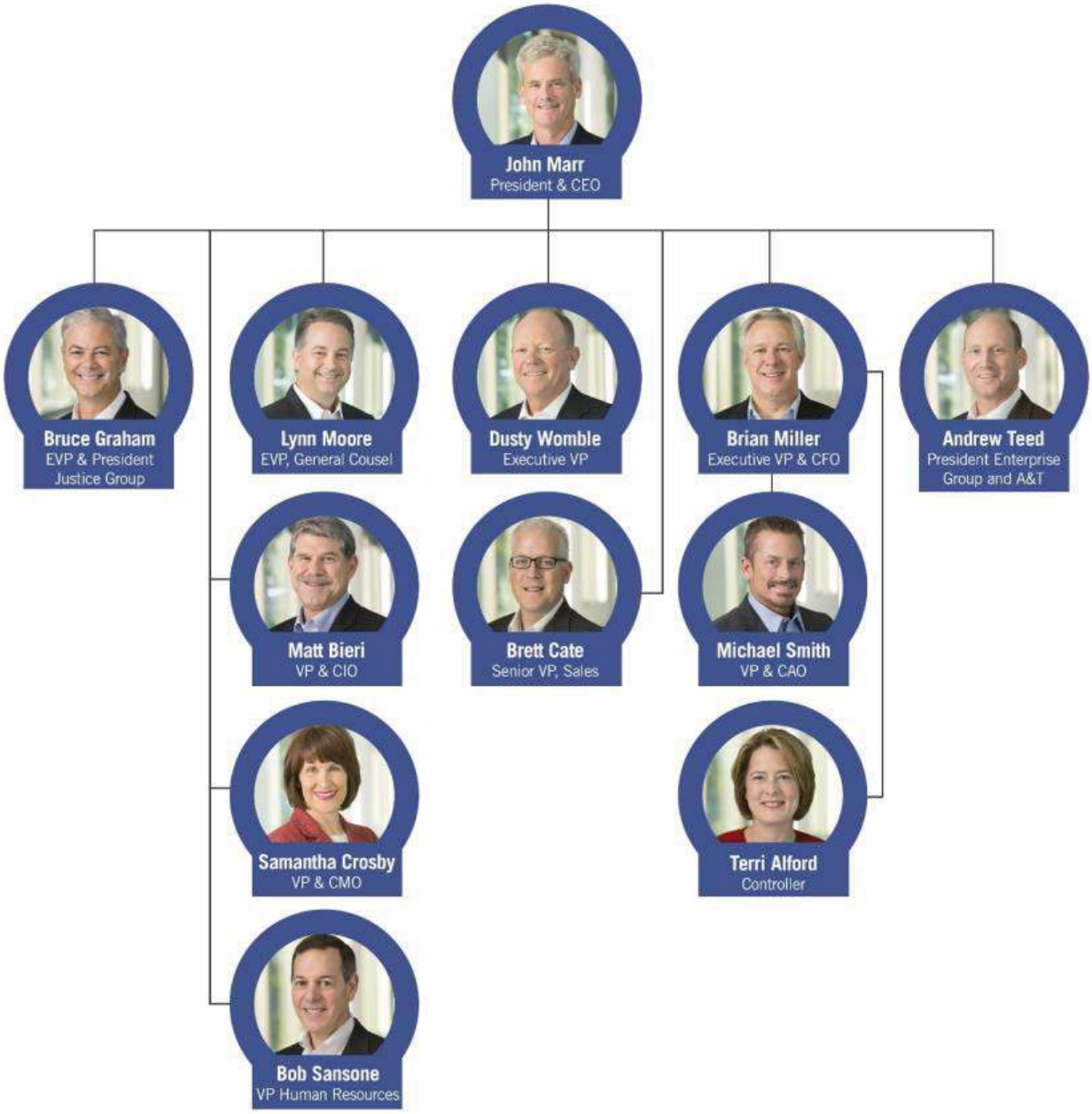
Tyler Technologies has more than 3600 employees with more than 900 of those devoted to the proposed products and services. Employees within the Tyler family share a common enthusiasm for serving organizations in the public sector.

Tyler's training and support staff for our proposed products and services includes experienced developers, installers, consultants, MBAs, industry professionals, and certified network technicians. Their commitment to excellence, quality training, and support is second-to-none.

Our Experience

Tyler Technologies' Solutions offer the widest breadth of products in the industry, the latest technology available, and an integrated system that can operate in diverse offices throughout a jurisdiction. More importantly, Tyler's vision and skill in executing that vision is what ultimately leads to a successful implementation and long-term solution for our customers. Our executive team consists of experienced industry leaders that keep our team moving, and making sure we are able to give you the tools to succeed.

Tyler Executive Team



SOLUTION OVERVIEW

CITY OF BRYAN

CIVIC PLATFORM

RFP #16-022

SOLUTION OVERVIEW

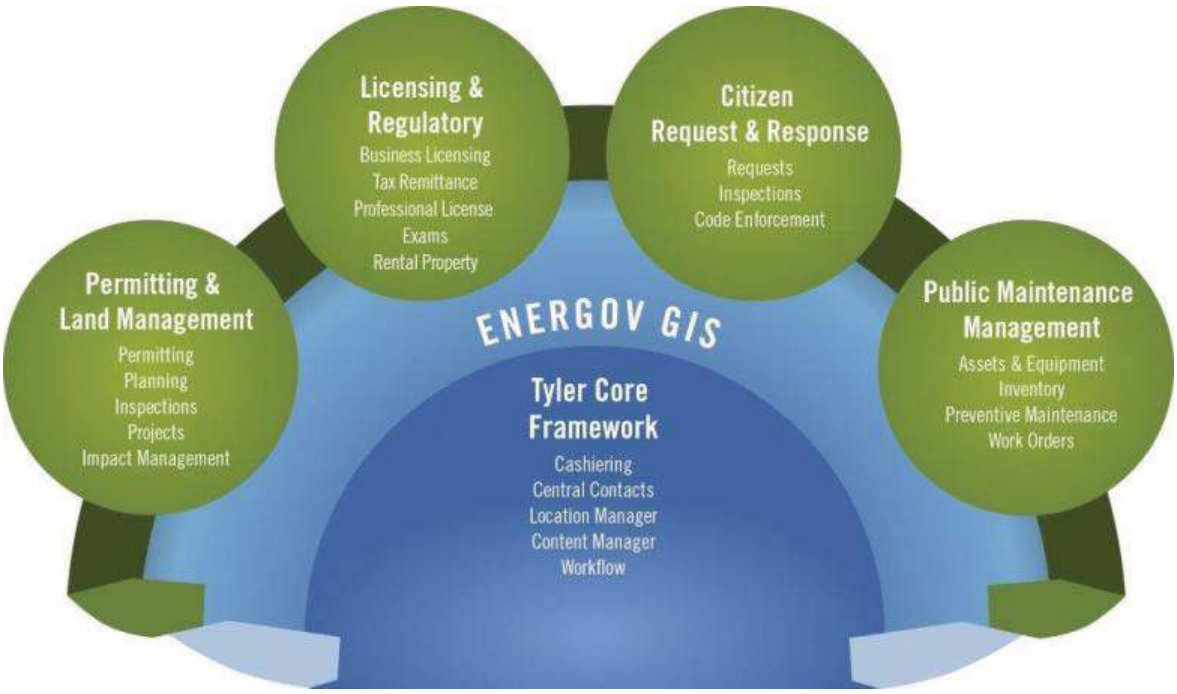
Tyler has included our responses to Exhibit C – Civic Platform Requirements located at the end of this Section of the RFP response.

ENERGOV PRODUCT OVERVIEW

Tyler Technologies is dedicated to developing, implementing, and supporting software solutions that are tailored specifically for the public sector. Our specialized expertise and experience in this area gives us the ability to provide solutions that address the varied yet unique needs of this type of organization, positioning Tyler as a leading provider of software for the public sector. Tyler's EnerGov solution assists our Clients in managing a more efficient and effective operation while empowering government to better engage their customers through enhanced access to information, processes, and services.

ENERGOV PRODUCT ECOSYSTEM

EnerGov is the industry's only 100% rich internet, browser-based enterprise application that our clients use to manage a more efficient, streamlined and citizen friendly enterprise operation.



The EnerGov product suites are specifically designed to automate and centrally connect the critical processes of land use planning and project review, permitting, code enforcement, inspections, licensing and regulatory management, asset and work order management, infrastructure management, citizen requests and more.

Built for Government

EnerGov is specifically designed to automate and centrally connect the critical business processes government agencies require related to regulatory management and the administration of infrastructure assets.

Complete Management Solution

Complete solution and full lifecycle management for automating tasks associated with critical functions such as land use planning and project review, permitting, code enforcement, inspections, licensing and regulatory management, asset and work order management, citizen requests and more.

EnerGov Highlights

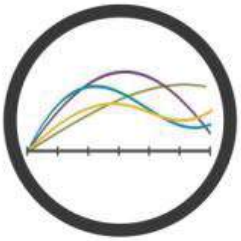
Advanced Automated Workflow

EnerGov is an enterprise management application that encompasses all aspects of the application, review, issuance and enforcement lifecycle. Central to the management process is the concept of enterprise workflow and process regulation, both of which are achieved through native workflow design tools.

Industry leading GIS Integration

EnerGov has partnered with Esri technology and actively maintains support for the latest versions of the ArcGIS platform. EnerGov provides industry-pioneering and award winning Esri-based GIS integration that introduces a new dimension of visualization, analysis and business management capabilities to Agencies like yours. EnerGov GIS adds a powerful facet to the EnerGov suite of products by enabling a GIS-centric approach to an Client's business process management.

Personalized Interface



The EnerGov Workspace is the user interface that runs in the program shell. Within the workspace, an unlimited number of customized, role-based screens can be created. The workspace includes data processing screens, widgets, search results, external web pages, and more.

Widgets

EnerGov workspaces are customized by including role-specific widgets that track and display role-relevant data. Widgets can include application shortcuts or favorites menus, commonly searched terms, system notifications, pinned or scheduled reports, or sets of data within the application.

Key Performance Indicators (KPI)

One of the strengths of role-based work stations is the ability to add KPIs relevant to the user's work processes. Whether that's a list of work orders to process, information about the status, or number of current tasks, KPIs are an instrumental part of developing a more efficient work process.

Reporting

EnerGov provides multiple reporting options as well as graphical grid construction tools which enable system users to construct customized, on-demand views and filters of performance and process data which can be used to readily identify trends, associations, performances, and relationships.

Tasks and Notifications

EnerGov enables users to stay connected and informed whether in the office or in the field through a centralized task and notification engine. Automated reminders and notifications of pending tasks / actions are routed to appropriate personnel according to the Client's prevailing workflow.

Central Contact Management

EnerGov utilizes an enterprise contact management console to catalogue and centrally track citizens and the individuals conducting business with the City. This allows the City a number of advantages including enterprise access to contact records, correspondence, fees, applications, documentation, and more.

Central Cash Management

All payments and transactions, regardless of origin, are processed through a centralized cashiering console. EnerGov provides an unprecedented level of configurability with regard to fee calculation and fee assignment. Even the most daunting fee schedules are easily configured and promoted through an intuitive graphical user interface.

EnerGov Mobile App Suite

Ready for iGovernment? Take your mobile workforce to the next level with EnerGov's Mobile App Suite— an industry-leading government platform for the next generation of mobility. Created to offer a comprehensive mobile workforce platform and native Apple iPad® application support for field users, these award-winning apps give you mobility, flexibility and stability for the information that's most important to you.

iG Inspect App

iG Inspect is a powerful Apple iPad® application that allows government field workers to quickly and easily manage inspections for buildings, land use, environmental, health, safety and compliance. iG Inspect provides comprehensive management of the daily inspection process from research, review and inspection checklists to digital signatures and printing capabilities.

iG Enforce App

iG Enforce is the industry's only comprehensive mobile application that allows government agencies to manage enforcement case workflow in the field and on the go. This workhorse complements EnerGov's powerful back office software, streamlines the enforcement process and enables staff to proactively manage cases directly from an Apple iPad®. Free your staff! Any agency worker associated with enforcement management can complete tasks in real time without being anchored to a desktop.

EnerGov Social Integration – Deliver and Interact

Stay connected to your community using the EnerGov's native social integration technology. Using social media channels like Facebook and Twitter, the City will have the ability to achieve your desired level of transparency with citizens when it comes to community development initiatives and interaction, status updates and much more.

EnerGov ePortal

EnerGov ePortal is a fully integrated component of the EnerGov system that extends its flexibility and functionality across the web. EnerGov ePortal provides your citizens with 24/7 access to permit and application-related services online. ePortal is highly configurable, which enables each district to define the specific information and processes that will be made available to your citizens on-line.

- Online Permit & Plan Submission & Payment
- Online Application Status Checks
- Online Inspection Requests & Cancellations
- Online Request Management

EnerGov OData & REST APIs

EnerGov's open data service, EnerGov OData, allows your government organization more connectivity, flexibility and transparent communication with constituents than ever before. Using OData, your IT staff can create specialized applications for the Web, mobile devices, the GIS environment and other external or community-based uses which display a personalized combination of open source data most pertinent to those you serve.

Additionally, Tyler's packaged REST-based APIs provide the requisite tools for developing intelligent interfaces between the EnerGov application and any number of 3rd party / existing line of business solutions currently in use by each agency.

Flexible Deployment – On Premise or Cloud

As a web and cloud-capable platform, EnerGov offers flexible deployment with the option of hosting and maintaining their IT infrastructure on premise, within an Client's private cloud, or within the Tyler Cloud (Tyler hosting and application availability services).

Unlimited Scalability and Superior Configurability

EnerGov is a platform technology that can be sized and scaled according to the needs and demands of each Client. Native system administration consoles provide superior configuration capabilities and the tools to automate even the most demanding process workflow.

EnerGov features dynamic built-in tools native to each software suite/module that embraces extensibility and provide our clients with the ability to define, capture and manage site-specific processes, workflows, custom forms, business rules, etc. These tools are powerful, intuitive, and accessible to authorized users and foster growth as new Client mandates and procedures are adopted and implemented.

The Future of EnerGov

Government agencies look to Tyler Technologies for industry leading solutions in the form of scalable, integrated software that make it easier for government agencies to manage their day-to-day, complex functions. We are committed to designing, developing and deploying spatially enabled software solutions that provides efficiencies for and connects all departments, mobile users and citizens alike. The foundation of this commitment is an aggressive investment in product development to extend existing functions, add innovative new features and integrate among Tyler products.

Our EnerGov product development teams understand that your business is more than approving plans, issuing permits, enforcing ordinances and maintaining public infrastructure. EnerGov products are designed to help you meet your ultimate goals of guiding orderly growth, promoting safety and livability, fostering economic vitality and encouraging community collaboration. The future direction for Tyler's EnerGov software leverages the latest web technologies, spatial capabilities and industry standards while remaining focused on your goals to help you attain the success you require.

Input to our product roadmap comes from several sources. Current customers provide suggestions through a collaborative enhancement request forum within our Tyler Community. Another source of influence comes from prospective or new customers who identify new scenarios with specific pain points that can be solved by leveraging or enhancing functionality within EnerGov. Lastly, Tyler employees continually monitor industry and technology trends and proactively respond to the changing needs of the market resulting in the innovation, functionality and flexibility you come to expect from EnerGov software.

Documentation & Online Help

Tyler's application documentation is online and includes end-user functions for all applications in the EnerGov suites. The documentation includes a table of contents, index, key word search, and bookmark capabilities. Users have the ability to print topics on their own, e-mail specific topics an associated topics, and ability to contact support directly from within the application or via Online Help. And, they have linked access to Tyler Community where clients ask support questions, query the knowledge base for frequently asked questions, and participate in user group discussions. Tyler Community also includes release notes for the most current version, and archived release notes for previous versions, in addition to Database Diagrams and Data Dictionaries. Video, audio, and online presentations are coming soon on our customer website for EnerGov applications.

Permitting & Land Management

Automate land use planning, project review, permitting, inspections and the management of impact cases and objects with the EnerGov Permitting and Land Management Suite. With this multi-dimensional software, urban planning is easily done with the click of a mouse or touch of a screen. Your processes will be more efficient and communication will be on the way up while data errors will plunge. That means revenue has the potential to spike, and your return on investment may be captured sooner than you think.

Manage Your Workflow

You will experience unparalleled flexibility in automating your organization's permitting, regulatory land use and enforcement processes when you deploy the Permitting and Land Management Suite. Superior configurability options allow for even the most complex business processes and workflows to be managed throughout the entire process lifecycle in a quick and efficient manner. Stop just tracking data, and start realizing the benefits and efficiencies that managing with EnerGov affords.

Manage Objects

When you struggle with permitting equipment such as boilers, elevators and objects in a right-of-way that may have no address associated with them, think EnerGov. Our Object Management module helps uniquely identify these items and trace them through the permitting process.

Manage Impact Cases

Finances and permitting oversight can be a challenge to manage while you are regulating construction projects, and disparate systems can quickly turn project management into a difficult task. Impact Management solutions from EnerGov help you manage conditions of approval that impact project delivery so compliance is insured and revenue collections are more timely.

Reduce Error, Liability And Increase Revenue

Automating with EnerGov's Land Management Suite is a smart investment that can minimize human error and limit your agency's liability as it relates to permitting and regulatory land use. Flexible enough to take charge of escalation procedures and required operational steps, it is also solid enough to perform accurate jurisdictional GIS and decision-making analysis across the agency. With EnerGov Land Management, you never have to worry if conditions and land use requirements are maintained or enforced, or if corresponding information is tracked.

Streamline Your Operation

We realize resources can be scarce, and that makes it tough to manage the process of regulating and enforcing in a timely manner. EnerGov's Land Management Suite assists in this process by streamlining and automating many of the time-consuming processes from intake to task and field inspection routing or creating a fully automated regulatory environment.

Permitting & Land Management Suite

EnerGov's flexible system allows you to customize business processes for varying departments while maintaining the integrity of working within one, centralized system. Records in EnerGov can be directly linked to your GIS data, allowing users the ability to see important land-data and make more informed decisions. Tracking plan submittals and their associated reviews, organizing revisions, scheduling meetings and hearings, verifying contractor licenses, issuing permits, collecting fees, and managing the inspection process are tools that will help you streamline your process. EnerGov's ability to manage conditions, holds, GIS information, and historic data help to create a clear picture of the work being managed.

Project & Land Use Management

From smaller local projects to large-scale land development, Permitting & Land Management's Project Management module keeps related permits constantly accessible during the project management phase. Parameters for the number and type of allowable plans or permits can be easily controlled, and conditions for each are easily established in accordance with local ordinances.

- Group related permits, plans, and code enforcement activity into one Project. Manage and view the status of the overall project, along with being able to see key details of associated records and easily access full record history.
- Track time spent on the project that can be used for reporting and/or to calculate fees.
- Create parent and child project hierarchies to manage critical relationships between multiple projects.
- Enhanced search capabilities allowing users to search by both current and historic project names.
- View all associated records in a timeline and map format using our project genealogy tool. Provides users with a visual display of the project's history and progress.

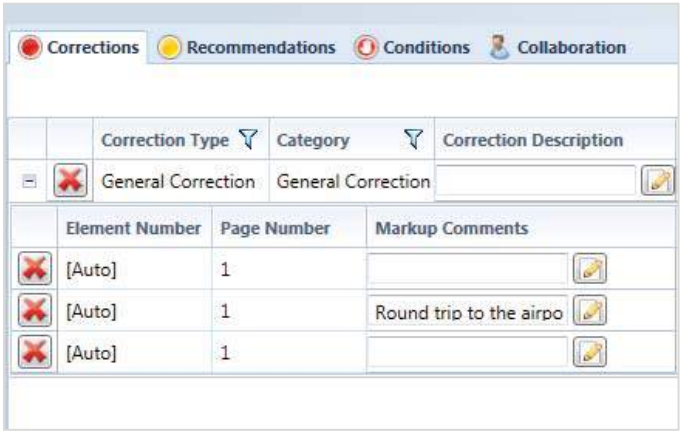
Plan Management

All types of plans at any project level can now be assessed with electronic plan review functionality. While actions within the workflow may be limited based on the type of record you are displaying, your productivity certainly won't be. And if you need to measure public outreach, review and hearing processes, it's no problem since the Plan Management module tracks all actionable items from meetings and hearings.

- Create highly-customized workflow to manage the most complex to the simpler day-to-day tasks completed by the planning department. Color-coded and automatic versioning of the workflow helps planning managers view the progress of a project and track what the next steps are.
- Create meetings and hearings that will display on a centralized calendar. Track staff members and the public who have been invited and record history and notes. The calendar is also visible online for citizens to see what upcoming meeting and hearings they have scheduled with the jurisdiction.
- Use GIS tools to create mailing lists that can be linked to the plan record to send public notices.
- Generate documents and reports, such as public notices and letters, using the information entered on your centralized EnerGov record.

- Manage the submission of documents and subsequent reviews. Clearly marked and versioned workflow items tracks dates, comments, and outcomes.

- A variety of routing options allow you to determine how item review assignment should occur. Popular options include GIS Zone-to-Reviewer assignment, departmental load balancing, or using pre-determined review teams.
- Electronic Plan Reviews allows citizens to upload files through a portal. The files are added directly to the associated record.
- Plan Reviewers can manage their reviews through user-friendly workstations. Reviewers can add corrections from a library of codes. When using eReviews, reviewers can link their markups directly to corrections.
- Share submittal results with involved parties through citizen portals or through correction letters that can be generated directly from EnerGov.

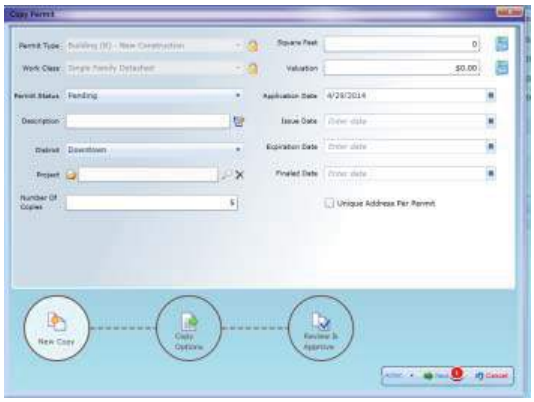


Permit Management

In a perfect world, approvals would come exactly when you need them. EnerGov's permit software helps your agency deal with the reality of project details and cycles by color coding differing versions of plan review submittals and inspections so that project history can be tracked and fee revenue can be collected or recaptured.

- Create permits directly from a user-friendly GIS-viewer. EnerGov can display relevant GIS data on specific records to automatically fill in fields, add requirements to workflow, or create alerts.

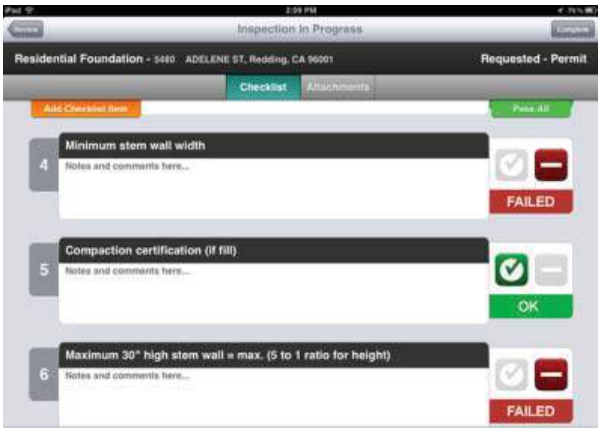
- Utilize the permit record to create a complete, historical picture of what work was applied for, on what property, and who it is associated to. Automatic history-tracking is applied to all records to create a full story. Ability to track notes, meetings, emails and phone calls to add to this historic data.
- Customize workflows to manage the submittal, review, approval, issuance, inspection, and finaling processes for your various departments. Due dates and assigned to fields allow multiple departments to interact with a single record seamlessly.
- Advanced fee calculation and cashiering options allow tracking payments made on records, billing contacts, and to easily retrieve invoice and receipt information. Widgets and advanced search screens allow managers to track overall fees collected to date to provide a comparison of revenue to date this year compared to last year.
- Automatically verify contractor and subcontractor licenses at the time of application and at permit issuance.
- Utilize conditions of approval and holds to prevent actions from happening on the permit unless certain milestones have been reached or critical issues have been addressed. Helps the users by providing the data up-front and minimizes the risk of errors.
- Associate cash or performance bonds to permit records. Manage partial and full releases accordingly.
- Save time on data entry by copying permits when someone is applying for multiple of the same type of permit.
- Extend the life of a permit automatically based on active inspection requests.
- Renew permits using customized renewal cycles to generate and pay invoices and to extend the permits' expiration date.
- Upload and view (if user security allows) attachments associated to the permit.
- Use documents, reports, widgets, and searching tools to capture critical information regarding history and trends. Plot search results on the map to view the data from a new point-of-view.



Inspections

Are you looking to take a greener approach to inspection management? Tyler can help. By receiving and scheduling inspection requests electronically, your office will see a significant decrease in phone calls and foot traffic, all interested parties will stay updated and communication will increase while you shuffle less paper. Field workers can also manage the inspection cycle through EnerGov's mobile applications and keep everyone updated in real time or as soon as connectivity is available.

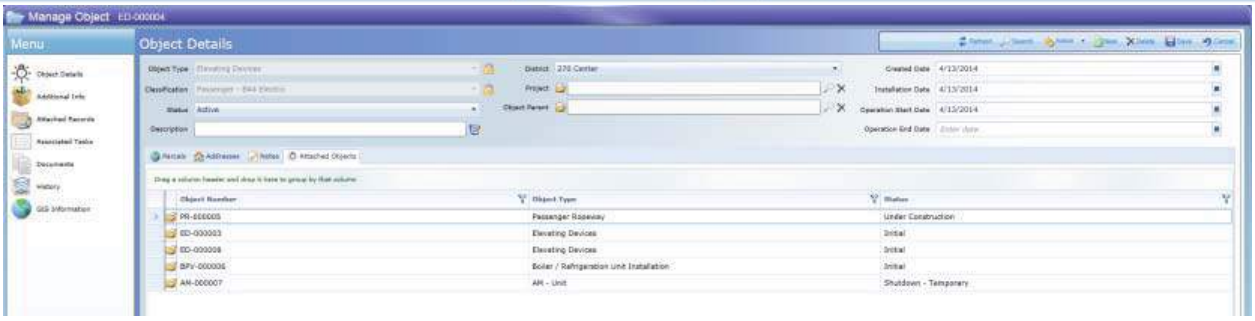
- Empower citizens to request inspections through a citizen portal or through an automated phone system (IVR). Flexible configuration options allow you to further define how many inspections can be request for a day, cut-off times to request inspections for the following day, and much more!
- Easily track which inspections are associated to different projects—visible statuses, version, and inspector notes help track the inspections' history.
- Utilize a variety of scheduling and assignment options including the ability to auto-schedule inspections, assign inspections using load-balancing, use GIS to assign inspectors to zones, and many other options.
- Workspaces designed specifically for inspectors to view the work that's assigned to them, add notes, and update statuses. Inspectors also have quick links to see associated project and parcel history.
- Our iG Inspect product allows inspectors to view inspections in the field, including previous inspection history. Inspectors can take notes, update status, take pictures, and email reports directly from the field.



Object Management

While a lot of permits and plans are associated to an address and/or parcel, sometimes you may need to permit against an object such as an elevator. Objects can be linked directly to a permit, plan, or to other objects.

- Track the status of the object independently. Review the status of each associated object on the originating permit or plan record in a user-friendly grid.
- Create a hierarchy of objects between parent objects and children objects to efficiently manage the connection between multiple objects.
- Track and manage critical dates such as created date, installation date, and operation start and end dates.
- Capture information specific to each type and classification of object using standard and customizable fields.



Impact Management

Managing fees and conditions as a result of impact cases such as Rezoning and Special Use Permit approvals can be time-consuming and littered with oversights. The Impact Management module eases the load by automatically adding impact fees and conditions to applicable permits or plans. An overall impact case will track the associated records by recording total money collected to date, the number of records impacted, and much more!

- Empower those interacting with customers to have the most updated and dependable information possible already reflected on the records they are working with. Impact Management will add relevant fees and conditions to the associated records, allowing employees to spend their time where it counts.
- Draw impact polygons on the map using EnerGov user-friendly GIS viewer. An impact case can be associated to this polygon to define what type of conditions will be applied to parcels intersecting this area.
- Track the overall progress of the impact case with statuses, dates, attached records, and conditions, and how much money has been collected to date.
- Add multiple monetary and non-monetary conditions to an impact case. Customize when the conditions should apply to associated records and how to assess the conditions.
- Use fee allocation tools to automatically total how much money has been collected to date, how funds have been allocated, and the remaining funds balance.
- Flexibility and advanced impact fee setup options including adjustments based on inflation.

Citizen Request & Response Suite

EnerGov's Citizen Request and Response Suite specializes in automating the management of citizen requests and complaints, enforcement cases, investigations, escalations, inspections, citations, hearings and adjudications. Streamlined and interconnected services, heightened communication and a well-managed workflow system are the hallmarks that make this solution stand above the rest. Departments and agencies that benefit include code compliance, 311/call centers, community improvement, fire marshal, public works, neighborhood services, public safety, environmental health and much more.

Benefits to your staff:

- Point-and-click administration interface with extensive configuration tools — no scripting necessary
- Global updates that can be quickly and easily changed
- Submittals, requests and payments updated in real time
- Prompts and required fields designed to steer applicants to appropriate permit types and prevent incomplete submittals

Benefits to your constituents:

- Powerful search capabilities utilizing both Esri® GIS and EnerGov data
- Ability to start and save permit or plan applications for submittal at a later date
- Online inspection requests allow contractors to request multiple inspections from numerous job sites in a single screen
- Shopping cart feature gives contractors the ability to add multiple itemized invoices at various times and across multiple devices to pay at their convenience

Manage Your Workflow

EnerGov's Citizen Request and Response Suite is designed to enhance your operation by optimally managing regulatory case processes and providing unparalleled flexibility in automating your organization's constituency engagement. Superior configurability options allow for even the most complex citizen engagement and regulatory escalation workflow systems to be managed throughout their entire lifecycles.

Streamline and Provide Enhanced Services

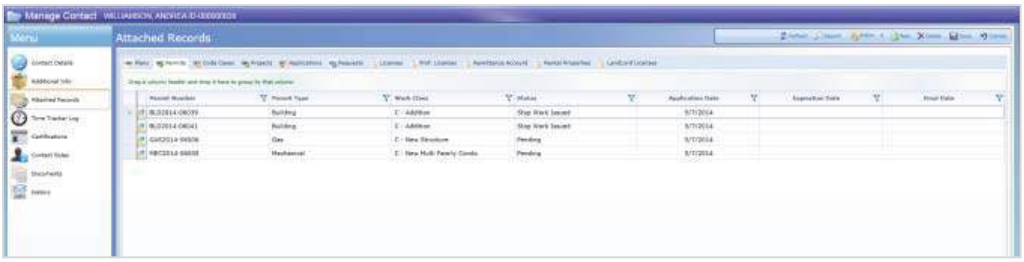
Providing effective code regulation and enforcement can be a daunting challenge for many agencies struggling with insufficient resources. EnerGov's Citizen Request and Response Suite streamlines and automates many of the time-consuming processes. From service requests, task and field investigation routing and regulatory review, to creating a paperless, fully automated citizen engagement and regulatory environment, EnerGov gives your staff and your constituents the tools they need.

Connect Departments, Processes and Citizens

EnerGov's Citizen Request and Response Suite, powered by a central database, empowers agencies to better connect departments, processes, citizens and services. Leveraging the advanced architecture of the EnerGov Enterprise Server, this system is easily integrated with a full range of hardware, software and citizen-connected functions customized to your agency. Want enhanced collaboration, communication and a substantial return on investment? EnerGov is your solution.

Improve Efficiencies

The EnerGov Enterprise Server framework includes Tyler's powerful Enterprise Contacts Manager that was specifically designed to provide centralized management and a single point of entry for all regulatory business modules, details, actions and events. From tracking constituent requests to case management for regulatory compliance, EnerGov simplifies the process.



Citizen Request and Response Suite:

Citizen Request Management

Citizen requests and complaints can now be easily managed with the help of EnerGov's Citizen Response System. Reports of potholes, overgrown lots, damage to public facilities or other issues can be reported by citizens through a web portal, along with the location and any pictures or notes taken. Government staff can then assign inspections, work orders and code enforcement action, making citizen responsiveness as easy as a click.

- Online portal allows citizens to submit complaints and/or requests. As an administrator, you have the flexibility to customize options such as allowing anonymous complaints, requiring a specific address, or allowing individuals to submit a general location.
- Utilize activity and inspection tools to track the steps taken to address the complaint.
- Built-in fields to determine the assignment of the complaint, the priority, and critical dates help prioritize daily responsibilities, enabling you to better serve the public.
- Easily escalate a complaint/request into a full code case. EnerGov will automatically copy relevant information onto the code case so you don't have to re-enter the same data.

Compliance/Enforcement Management

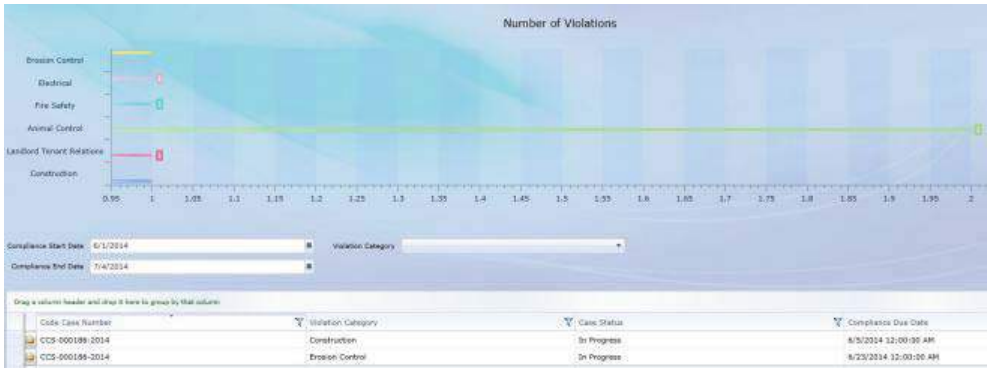
From investigation to citation, hearing and adjudication, Tyler supports you in the code enforcement process. Cases can originate from an accurate, Esri-based parcel or point and be entered into the workflow system. Fees can also be attached to each case regardless of whether it's a single or recurring incident.

- Highly customizable workflow that allows multiple violations to be associated to one code case. Each violation can be resolved independently and has its own set of compliance dates, priority, fees, notes, and status.
- Ability to extract data from the code case into customizable reports to generate notices, letters, and reports regarding the history of the code case.
- Assignments on the code case can be managed on the overall code case and on individual inspections and tasks, allowing multiple individuals and departments to have ownership in the process.
- Advanced security settings allow contacts on code cases to be hidden from the public and from internal staff.
- Batch update code cases to change the assigned to, contacts, status, and more. Batch update widget allows administrators to monitor the progress of updates and easily view impacted records.
- Widgets and advanced searching tools empower code officers and managers to know what violations are approaching their compliance dates, what their workload looks like, and items they need to follow-up on.
- Ability to see code cases associated to the parcel and/or contact directly on each code case.

Inspections Management

Inspection requests are as close as the palm of your hand. With EnerGov's Inspection Request System, it's as easy as dialing a phone number, entering simple scheduling information and submitting a callback number. Citizens stay informed and your office remains well-organized with decreased office calls and paperwork.

- Create inspections related to a complaint or code cases, allowing a complete history of site visits and inspections to be tracked on one record.
- Track how many times an inspector or officer has visited the site with automatic versioning in the workflow.
- Workspaces designed specifically for inspectors to view the work that's assigned to them, add notes, and update statuses. Inspectors also have quick links to see associated project and parcel history.
- Additional tools to track all of the correspondence used to resolve issues from emails, phone calls, posted notices, walk-in inquiries and much more.



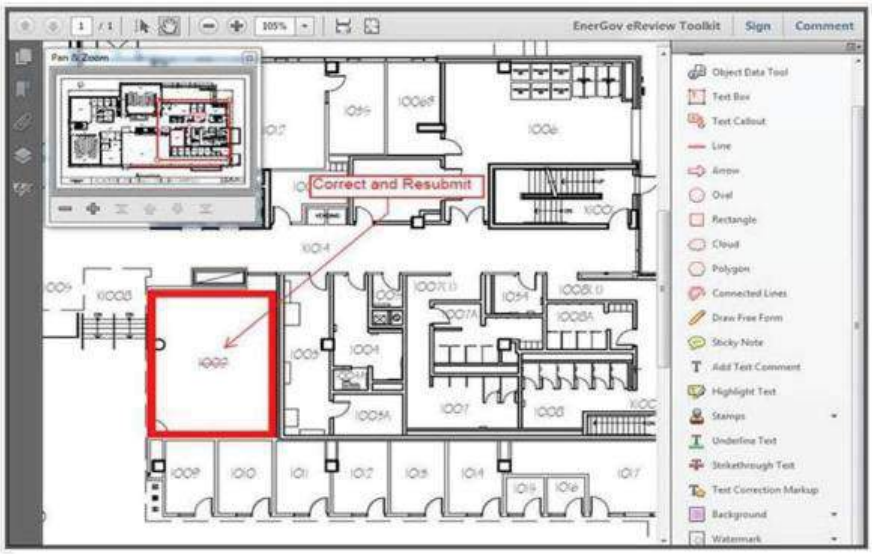
eReviews

Powerful Electronic Plan Review Automation

EnerGov's eReviews extension adds a unique and powerful dimension to the EnerGov platform. This technology allows your agency's plan review and submittal process to be managed within a browser-based, paperless environment and easily interfaces with the Permitting & Land Management, Licensing & Regulatory and Asset Management Suites. Users also enjoy collaborative interaction with constituents through seamless integration into EnerGov's Public ePortal. More importantly, eReviews allows agencies to link the digital review process to GIS (via EnerGov GIS based on Esri's ArcGIS Server) to allow for geospatial viewing, interaction and reporting. EnerGov's eReviews is your answer to a more effective review process.

System Features

- Paperless Plan Submission Process
- Powerful and Seamless Workflow Collaboration within the EnerGov Regulatory Process
- Digital Markups and Approval Stamps
- Analyze Files with Version Overlay Comparisons
- Calibration, Scaling and Snap Functions for Measurements
- Version Control/Comprehensive Audit Trail
- "Approved" Plans Published for Field Inspector Access
- Plans Archived for Agency and Emergency Retrieval
- Departmental Permission and much more



Please input the corresponding letter of the available response codes for each requirement. Where indicated by all response codes other than “Y”, the Vendor should insert text statements into the corresponding requirement column. Unanswered requirements or requirements with multiple response codes will be scored as “N” (Not Available).

All items marked with response codes of “C”, “I” and “T” also require pricing to be indicated on the pricing forms. Comments provided to requirements herein shall not indicate any pricing.

Response Code	Definitions
Y	**This requirement currently exists in the proposed system and is either satisfied out-of-the-box or through configuration of the system performed during the implementation.**
C	**This requirement mandates customization of the source code of the system. Customization involves additional pricing to satisfy the requirement. Please insert corresponding details in the Comment column and applicable pricing in the Cost Proposal.**
I	**This requirement requires an interface to the proposed system at an additional cost. Please insert corresponding details in the Comment column and applicable pricing in the Cost Proposal.**
T	**This requirement or portions thereof are satisfied through third party systems including reporting software. Please insert corresponding details in the Comment column and applicable pricing in the Cost Proposal.**
R	**This requirement is met by the proposed system’s reporting tools or by fully integrated third party report writers.**

N **This requirement cannot be met by the system or is not applicable. Comments optional.**

General Specifications

#	Requirement	Response Code	Comment
GEN-1	System generates date/time stamping of transactions.	Y	
GEN-2	System generates letters, reports and notifications automatically and email to recipients.	Y	
GEN-3	System has built-in spell check for all comment boxes.	Y	
GEN-4	System allows an administrator to configure the dictionary within the system that drives the spel check functionality.	Y	
GEN-5	System employs customized fields and/or pull down lists to facilitate data entry.	Y	
GEN-6	System has its own set of tools to allow agency staff to modify the system as needed without having to call upon the vendor or outside technical resources.	Y	
GEN-7	System seamlessly integrates with similar data in other vendor modules.	Y	
GEN-8	System displays only those modules and pull-down menus that the user is authorized to access.	Y	
GEN-9	System allows a system administrator to inactivate or reactivate a user's permissions at any time.	Y	
GEN-10	System logs off an inactive user after a specified period of time, determined and controlled by the system administrator.	N	
GEN-11	Staff overrides designated workflow tasks at any time providing they have the necessary capabilities based on user control tables.	Y	
GEN-12	System has available security that can be applied to end users for checking and marking documents related to electronic document review.	Y	
GEN-13	System provides easy access to documents by supporting hyperlinks to these documents.	Y	
GEN-14	System makes status information available 24/7 via the Internet to interested parties within government agencies and the public.	Y	
GEN-15	System selects standard information from pull down lists to simplify data entry and provides the ability to input standard comments, such as inspection results.	Y	
GEN-16	System allows the initiation and potential completion of an application or case when a specific address is not available or required.	Y	
GEN-17	System allows the user to define case types with a user-defined sequence of tasks and case data for each type.	Y	
GEN-18	System allows for the creation of a system-generated and unique project number and project name for each permit, license or other case type under which other activities may be associated.	Y	
GEN-19	System displays historical information about each case, project or other record type and viewable by authorized staff.	Y	
GEN-20	System maintains, sorts, searches, retrieves, and reports on key information about property, including Parcel ID.	Y	
GEN-21	System provides convenient service and accurate information retrieval to the public via remote on-line access. Specify how this is accomplished.	Y	EnerGov's Citizen Self Service Portal provides the ability for the public to access real-time information from the EnerGov application through a mobile device, laptop, smartphone, or any other device through a browser. Citizens can submit applications, requests and other services, in addition to access to searching on information made available by the City.
GEN-22	System allows multiple cases, projects and other records to be associated with a property or address.	Y	
GEN-23	System relates all pertinent information to a particular property - permits, liens, licenses, permits, enforcement actions, etc.	Y	
GEN-24	System re-assigns queued tasks from one staff member to another.	Y	

GEN-25	System issues permits and licenses to businesses, facilities, activities and individuals.	Y	
GEN-26	System assigns multiple locations to one permit/license.	Y	
GEN-27	System tracks and accommodates approvals from various departments including date of approval, person approving, and comments.	Y	
GEN-28	System reprints licensees, permits and other case-outputs on demand.	Y	
GEN-29	System workflow electronically routes and automatically notifies, via email, each reviewer on a queue that an approval for an application or renewal or other task is pending	Y	
GEN-30	System tracks the amount of time individuals or departments spend on each application and/or renewal in total and by appropriate subsets of activity.	R	This functionality can be met through a custom report developed in Crystal Reports.
GEN-31	System flags applications and renewals that have outstanding pre-defined issues.	Y	
GEN-32	System allows for internal and external notes associated with each customer file.	Y	
GEN-33	System emails renewal reminders to all applicants, licensees and others citizens who have upcoming expiration deadlines.	Y	
GEN-34	System complies with ADA Section 508 standards for end users with disabilities. Please describe your compliance.	Y	EnerGov's Citizen Self Service Portal complies with ADA Section 508 standards. The back office does not.
GEN-35	System displays content in multiple languages. State language availability.	Y	EnerGov's Citizen Self Service Portal has the ability to display text in English or Spanish. Other languages can be added by the client if necessary. The back office is only available in English.
GEN-36	System offers agency hosted or vendor hosted applications.	Y	
GEN-37	System includes functional online help documentation for system users.	Y	
GEN-38	System includes context sensitive help that is displayed based on the location of the mouse or cursor.	Y	EnerGov's Custom Field Editor provides the ability for users to configure "field tips" for all custom fields which allow users to get a field tip when they hover over a field.
GEN-39	System provides users with an integrated, consistent “look and feel” user interface to minimize training and administration.	Y	
GEN-40	System provides detailed and comprehensive user and administrative manuals and documentation.	Y	
GEN-41	System provides the ability for configuration of workflow by use of a drag and drop graphical tool.	N	
GEN-42	The graphical workflow tool provides for previewing the workflow as a diagram and for employing fonts and colors to make the workflows more apparent and easy to read	N	
GEN-43	System has user configurable menus and screens (by role or individual).	Y	
GEN-44	System allows for custom home page definition per individual user preferences. Various components of the system can be viewed/accessed through the home page (based on user security privileges).	Y	
GEN-45	System allows for home pages to view and manage all assigned activities to that individual user (i.e. pending applications for review, pending inspections, permits requiring plan checks, etc.).	Y	
GEN-46	System has GUI appointment calendaring with multi-inspector schedule viewing, or seamlessly links to same	N	
GEN-47	System allows managers to view all of their staffs work schedules and assigned activities.	Y	
GEN-48	System allows each department the ability to configure custom fields for each of the permit/license applications (min. of 20 custom fields per permit type)	Y	
GEN-49	System allows owning departments to view status on all of their applications throughout the review process including but not limited to staff assigned, status of service level agreements, etc	Y	
GEN-50	Applicants can view pending applications for the status, additional step in the process and comments from reviewing departments.	Y	

GEN-51	System attaches documents and photos on any case, action level, or parcel. System time stamps all such attachments. System also attaches address and parcel identifier to photos.	Y	
GEN-52	System allows non-system documents and photos to be “attached” to addresses and other system records for easy viewing, including but not limited to MS Office application documents and files, .jpgs, .gifs, .pdf.,.txt,. rtf.,.bmp .	Y	
GEN-53	System allows users to attach photos to applications and letters.	Y	
GEN-54	System allows records and applications to be partially created and completed at a later time by initial creator or other authorized users. Incomplete records are not viewable by unauthorized users.	Y	
GEN-55	System provides for email or letter follow-up or status notifications to be made in batch for records and applications These batch processes can also automatically update records with new statuses, compliance dates, etc.	Y	
GEN-56	System allows the user to define escalation workflow rules based on definable work criteria.	Y	
GEN-57	System allows authorized user to assign one or more roles to a user and the geographic area(s) they work in (such as inspectors responsible for a certain district, zone, etc.).	Y	
GEN-58	System allows specific fields to be editable and others to be non-editable.	Y	
GEN-59	System interface requires user confirmation for operations that result in the deletion of any system record, or function that was created by that user. Records should be marked as inactive and an audit trail should exist.	Y	
GEN-60	System provides for easily going back and forth to view, create or modify records from anywhere within system.	Y	
GEN-61	System interface allows the user to preempt activity on the system for another activity, with the ability to return to the original activity	Y	
GEN-62	System allows authorized users to create records on behalf of other users (such as office staff creating violation records for inspectors, office staff abating violation records for inspectors, etc.)	Y	
GEN-63	System provides for spellchecking of text entered by the user when creating or modifying records, letters, etc. Authorized users can create and modify words in spellchecker	Y	
GEN-64	System can prohibit records from being created without valid Agency addresses.	Y	
GEN-65	System provides a method for easily identifying bottlenecks and problem areas throughout the permit lifecycle (application, construction inspection, close-out, certificate of occupancy), as well as other lifecycles.	Y	
GEN-66	System integrates with a GIS system to validate parcels, addresses, owners and zoning.	Y	
GEN-67	System defines minimum of 20 different geographic areas (minimum of 15 characters) of the Agency that have specific work requirements (i.e. code compliance, conservation districts)	Y	
GEN-68	System allows pending work assignments can easily and quickly display and print on a map. In addition to districts, mapping can be for all open or pending work or a specific record type, districts in division, and/or block or census tract(s) or defined polygon. Records past due (overdue) are plotted in different colors from other pending work.	Y	Advanced searches can be plotted on the map. EnerGov does not currently support colors based on status.
GEN-69	System automatically flags properties, and/or sends out advisory notification when ownership change information is received from the Agency's system.	N	EnerGov manages property ownership changes by auto-prompting the new owner when new cases are created.
GEN-70	System provides easy query of property related records by address, also-known-as address, street, taxkey, district(s), record #, owner name, contractor, etc. For those queries that would yield more than one record, user additionally can choose to query by relevant date field ranges, and to sort by address and relevant date fields depending on type of record.	Y	

GEN-71	System searches and displays all historical information recorded on a particular property (prior permits, complaints, periodics, code violations, use, description, etc.) This information shall be broken down by building, unit, etc.	Y	
GEN-72	System provides method for modifying inspector district boundaries and for moving records from one district to another, by criteria such as census tracts and blocks.	T	This functionality would be delegated to the management of the City's ESRI ArcGIS.
GEN-73	System provides for authorized users to create report templates for inspection forms, contact letters, certificates, bills or any other form templates using any field in system.	R	EnerGov provides about 250 standard out of the box reports that come delivered with the application. Any additional reports would be developed in Crystal Reports and added into the application.
GEN-74	System accesses property ownership history from other data sources	N	
GEN-75	System prints records (w/ attachments) for board reviews, etc	Y	Attachments must be opened in order to print.
GEN-76	System allows renewal dates for Special Use/Variance zoning appeals to be defined manually or calculated from a number of months.	Y	
GEN-77	System tracks all activities concerning violations, permits, complaints and code enforcement. This includes inspections and attempted inspections; contacts with owners, contractors, landlords and tenants; letters; phone calls; emails, court enforcement, billing, etc. performed by inspectors and other employees. Reports can easily be generated which list all such activities in chronological order for any violation, permit, periodic, complaint and code enforcement record in system.	R	EnerGov provides the ability to report off any information managed within the application. Certain reports may require development of a custom report.
GEN-78	System supports association of inspection with an individual who may be different then the property owner. System has the ability to track information regarding licenses, inspections, and violation by operator and to review all establishments linked to an operator.	Y	
GEN-79	System tracks changes in operator and requires re-licensing and re-inspection when operations for an establishment change hands.	Y	
GEN-80	System exports all data in a format (access, excel, tab delimited, html, etc.) that can be imported and analyzed using statistical analysis software. System allows a user based on defined roles to specify fields and date ranges of data for export.	Y	
GEN-81	System creates custom reports and adhoc queries by the user. Please specify how each type is accomplished.	Y	Tyler-EnerGov utilizes Crystal Reports for development of custom reports, which may be added into the EnerGov application, and generated through the application. The custom report is developed a single time and will pull all applicable information from the EnerGov Application into the report when generated. Adhoc queries may be generated at any time through the EnerGov Comprehensive searches, which are available for all modules to generate extensive queries. These queries may be saved, shared, mapped to GIS, and export to excel, csv, or Word.
GEN-82	System displays a minimum of 3 years of inspection history in real time for each type of inspection performed at a property.	Y	
GEN-83	System automatically schedules and re-inspects a property based on routine inspection results where violations were identified.	Y	
GEN-84	System transfers a license/permit to a new location without a change of ownership.	Y	
GEN-85	System edits/modifies out-of-compliance items and codes identified during an inspection.	Y	
GEN-86	System defines/codifies inspection results for each type of inspection.	Y	
GEN-87	System reports multiple violations for each element of an inspection.	Y	
GEN-88	System supports management and tracking of approved variances for inspection elements.	Y	
GEN-89	System simultaneously reviews and displays license/permit, inspection, and complaint data and results for a selected property.	Y	
GEN-90	System provides a public web portal that displays inspection results based on user-provided search criteria.	Y	

GEN-91	System's batch functionality configures on a job-by-job basis to execute at any time during the day.	Y	
GEN-92	System allows users to modify screen layouts to optimize a user's experience.	N	
GEN-93	System views inspectors' availability, schedules inspections and reschedules/rearranges inspections all within a calendar interface in the back office.	N	
GEN-94	System is offered in multiple foreign languages.	N	

Web Portal Specifications

#	Requirement	Response Code	Comment
WEB-1	System provides a seamlessly integrated web portal for citizens, applicants and others.	Y	
WEB-2	System provides administration of the web portal from consoles within the back office product and does not require access to or editing of technical files on the web server (i.e. no requirement for CSS, HTML, ASPX, etc. skills)	Y	
WEB-3	System receives payments online by credit cards and e-checks.	Y and N	EnerGov Citizen Self Service provides the ability to integrate with Tyler's MyGovPay product; this application requires no custom programming and enables payments to be processed by any merchant bank in the United States. MyGovPay currently does not currently support e-Checks.
WEB-4	System accepts forms filled online.	Y	
WEB-5	System accepts documents of any file type.)List any limitations or exclusions.)	Y	Limitations are configurable by the City.
WEB-6	System must not require a redirect of the online user to a third party merchant's site for paymen processing.	Y	EnerGov Citizen Self Service integrates with Tyler's MyGovPay product for processing online payments. This visual flow is inside the current web browser; a separate browser tab is not created when checking out online.
WEB-7	System provides online ability to complete permits and other types of applications 24/7.	Y	
WEB-8	System displays key permit information online.	Y	
WEB-9	System schedules and reschedules inspections.	Y	
WEB-10	System accesses permit information and status updates online.	Y	
WEB-11	System allows public users to lodge complaints and to access code enforcement information online, both named and anonymously	Y	
WEB-12	System accepts contractor license information online.	Y	
WEB-13	System obtains minor trade and sub permits online.	Y	
WEB-14	System allows customers to initiate applications online for further processing and validation by staff without re-entry of information.	Y	
WEB-15	System provides field-level help, watermarks, and directions for all data entry sections on the web portal to assist end users.	N	EnerGov Citizen Self Service does not have field level help for every data entry field. However, an online Help tool is available for jurisdictions to enable, which provides textual descriptions on how to use the various components within each feature.
WEB-16	System allows public users to attach electronic documentation to complete application requirements.	Y	
WEB-17	System web application is PCI-DSS certified.	Y	
WEB-18	System allows applicants to view building violation comments.	Y	
WEB-19	System allows applicants to electronically view all related activities of a project, permit, license, enforcement, complaint or other record type.	Y	
WEB-20	System displays Holds, Conditions, and Notices that may exist on a project, permit, etc.	Y	
WEB-21	System allows applicants to request all required inspections that have been made available for them to schedule.	Y	
WEB-22	System provides residents and business owners to report, review and research application and licensing information, including history, from inception to conclusion	Y	
WEB-23	System requires users to register before making portal information available to them. (Except in the case of anonymous code enforcement requests.)	Y	
WEB-24	System web portal accepts and links all supporting electronic documents associated with the application.	Y	

WEB-25	System calculates fees on the web portal so that applicants and others can estimate fees prior to the submission of an application.	C	EnerGov Citizen Self Service currently does not have the ability to display estimated fees prior to the submission of the application. However, this item can be customized.
WEB-26	System schedules, reschedules and cancels inspections on the web portal.	Y	External users have the ability to "request" inspections on the web portal and submit requests for inspection reschedules.
WEB-27	System allows for access to view inspection results and inspection comments on the web portal.	Y	
WEB-28	System allows access to renew business licenses and permits on the web portal.	Y	
WEB-29	System web portal has a “shopping cart” feature allowing citizens to make a single payment to include all fees due. This feature allows multiple transactions to be paid with a single payment.	Y	
WEB-30	System web portal allows users to access reference contacts of designated contact types when making applications for permits, licenses and other record types.	Y	
WEB-31	System web portal announcements can be posted to members of the public.	Y	
WEB-32	System allows applicants to save, resume and make changes to the application before submission.	Y	
WEB-33	Once the permit application, registration, or recording form has been submitted, the system calculates fees associated with information entered on the application, verifies a contractor is currently licensed, verifies the address is valid, accepts on-line payment, records payment in cash system, accepts electronic signature of customer, approve, deny or hold for staff review, and if approved, assigns permit number.	Y	EnerGov can be configured to support multiples types of ways in which permit and plan applications can be completed. For example, if a permit type in EnerGov is configured for the Internet Apply Type to be set to "Simple", for a single-use garage sale permit as an example, CSS will allow for the user to apply for the permit, validate the address, verify an electronic signature approval via a checkbox approval, accept the online payment, and assign a permit number. In addition, EnerGov also has the ability to support "Pay First" and "Review First" models; in a pay first scenario, the user pays the invoiced fees up front, but the permit is not issued at the time of the online application as with "Simple". Finally, EnerGov also provides the ability to support a "Review First" model; in this scenario, the user does not pay any fees at the time of the application, and the jurisdiction reviews the information first.
WEB-34	System provides on-line internet access to all public records, including permit, complaint, violation, recording, etc.	Y	
WEB-35	System web portal provides global search capabilities.	Y	
WEB-36	System web portal allows users to search for a property and see all related records to that property (permits, plans, inspections, code cases, etc.) without having to go to individual search screens to access each of those records.	Y	EnerGov Citizen Self Service provides the ability for users to access one Search tool from which results can be displayed across multiple modules (permits, plans, and inspections) on the same screen at the same time. Users do not have to access individual search screens to find information.

Permitting, Planning, and Zoning Specifications

#	Requirement	Response Code	Comment	
PPZ-1	System issues and tracks multiple permits and cases associated with one location.	Y		
PPZ-2	System captures addresses and an unlimited amount of information regarding buildings, parcels, zoning and other land management data.	Y		
PPZ-3	System captures Legal Descriptions.	Y		
PPZ-4	System captures proposed project descriptions.	Y		
PPZ-5	System links or relates one or more developments together.	Y		
PPZ-6	System accepts applications and related documents in unlimited electronic formats as attachments to records.	Y		
PPZ-7	System allows the agency to determine the size and format of any document submitted through the web portal.	Y		
PPZ-8	System users can attach documents to applications by applicants and others through the web portal.	Y		
PPZ-9	System tracks an application's life cycle status (pending, accepted, revised, response letter, etc.).	Y		
PPZ-10	System automatically assigns a application prefix and number (case number) based on the type of request (e.g., unique prefix for each type of case).	Y		
PPZ-11	System checks and validates the property address and ownership against an internal or external database (including GIS if applicable).	Y		
PPZ-12	System provides logical and easily viewable association between master and any subsidiary permits or other unrelated case types.	Y		
PPZ-13	System attaches multiple documents to the permit application or other case or record type.	Y		
PPZ-14	System clones a permit or other case type containing information to create subsequent and similar permits/cases.	Y		
PPZ-15	System provides connectivity to the Texas Department of Licensing and Regulation database to ensure accurate and timely updates on contractors' licensure.	Y	EnerGov could support this functionality if Texas has a web service to call.	AW
PPZ-16	System allows staff to conduct the electronic review of submitted documents (plans, etc.) with redline capabilities and employing side-by-side viewing of documents.	Y	This functionality is supported through the EnerGov eReview application used in conjunction with Blue Beam Revu and Adobe Pro.	
PPZ-17	For the electronic document review functionality, the system assigns documents outside of the workflow, to filter and categorize documents and to view the history of all reviews and comments.	Y		
PPZ-18	The functionality of electronic document review provides for side-by-side and overlay comparison capabilities.	Y	This functionality is supported through the EnerGov eReview application used in conjunction with Blue Beam Revu and Adobe Pro.	
PPZ-19	The electronic document review ability extends to allowing documents to be directed to reviewers that exist outside of the configured workflow.	Y		
PPZ-20	System determines and tracks plan review steps and department comments based on permits or other application types.	Y		
PPZ-21	System electronically routes permits and cases for review, approval and inspection management.	Y		
PPZ-22	Partial address information may be employed to locate an address from the land management repository (either internal or external).	Y		
PPZ-23	System allows concurrent plan review by multiple departments and outside agencies and to allows them to input plan review results and comments.	Y		
PPZ-24	System allows selected standard plan review comments to be modified. Modifications will only be applicable for that particular occurrence.	Y		
PPZ-25	System allows the user to add non-standard plan review comments or copy/paste from other external outside sources (i.e., Word, SharePoint, Internet, etc.).	Y		
PPZ-26	System tracks the location of plans in the review pipeline.	Y		

PPZ-27	System allows administrative rights to edit, move, delete and add any file or folder to the electronic plan review system.	N	
PPZ-28	System's electronic plan review electronically compares any two sheets of plans and notate the differences between the two sheets.	Y	This functionality is supported through the EnerGov eReview application used in conjunction with Blue Beam Revu and Adobe Pro.
PPZ-29	System records and retains parcel parentage and genealogy data. Allows information from parent parcel to be carried forward to parcels created from parent.	Y	
PPZ-30	System links or unlinks or relates individual records together to create parent/child and/or master/subordinate relationships.	Y	
PPZ-31	System attaches sets of conditions to a record based on record type.	Y	
PPZ-32	System supports resubmissions of documents by parent/child relationships.	Y	
PPZ-33	System uploads multiple documents simultaneously.	Y	
PPZ-34	System can alert applicants and others that a document is available for review.	Y	
PPZ-35	System tracks changes made to conditions of approval in its audit log.	Y	
PPZ-36	System provides for permit corrections to trigger approvals or distribution re-routing to applicable departments.	Y	
PPZ-37	System logs revised submissions and notifies reviewers that changes have been	N	
PPZ-38	System allows for the reviewer to manually place holds or notes into the record that are not visible to the customer.	Y	
PPZ-39	System creates the permit and calculates fees when plan review is complete and can include selected comments and conditions from reviewers.	Y	
PPZ-40	System allows for online credit card payment and as payment is received, permit number and transaction information (time and date of payment, amount of payment, permit type and transaction number) is recorded on the permit copy. Permit is made available to the system in real time.	Y	
PPZ-41	Cashier system records all payment transactions, and allow records to be exported in common format (.CLS, .XLS, etc.)	Y	
PPZ-42	Authorized staff can add permanent annotations to the permit record. Examples of this include address changes or revised occupancy application information.	Y	
PPZ-43	System allows for corrections to final records, such as change of address.	Y	
PPZ-44	System generates real-time information that allows applicants and customers and staff to check the status of a plan review via a web portal using a unique user ID.	Y	
PPZ-45	System manages electronic plans submitted.	Y	
PPZ-46	System allows viewing and printing of the attached documents/plans on an application.	Y	
PPZ-47	System allows reviewers to make changes to attached documents/plans supporting the corresponding application and track such changes.	Y	
PPZ-48	System allows modification of format, conditions, and notes on applications and records.	Y	
PPZ-49	System deals with multiple contractors and application types for each trade on each project.	Y	
PPZ-50	System separately tracks multiple projects or programs and their associated permits, inspection activity, orders, etc. that exist at the same property address or other identifier.	Y	
PPZ-51	System allows the owning department to assign inspectors to specific records or applications.	Y	
PPZ-52	System allows for certain applications to be issued without a valid street address (ex. permits in the right of way).	Y	
PPZ-53	System allows the applicant to identify their preferred medium of communication throughout the process (e-mail, fax, hard copy via mail).	Y	
PPZ-54	System issues and tracks partial, temporary and provisional certificates of occupancy.	Y	
PPZ-55	Owning departments can modify the default routing list for an individual permit as conditions require.	Y	
PPZ-56	System allows the real time routing list to be defined to include outside agencies not affiliated with the Agency.	Y	

PPZ-57	System automatically routes the assigned application to all identified departments once the application has been authorized by the owning department.	Y	
PPZ-58	System allows specific activities to commence simultaneously without hindering the permitting process.	Y	
PPZ-59	Once a permit application is complete all users can view the permit application and supporting documents according to their assigned roles and privileges.	Y	
PPZ-60	Owning departments can define what information is required for each of their corresponding permit applications.	Y	
PPZ-61	Owning department can define the business rules/workflow to be followed for their permit/license workflows (time constraints, sign-offs, reviewers, required documentation, fees, forms, etc.).	Y	
PPZ-62	System manages an electronic submission of drawings and review of such electronic files.	Y	
PPZ-63	System utilizes the criteria defined during creation of a record to determine approval process/requirements in its workflow element. This will include department and agency approval responsibilities.	Y	
PPZ-64	System notifies the owning department by automatically posting to the specified user's To Do List when a time sensitive event occurs (i.e. state statute mandated requirement to record a document is approaching).	Y	This functionality is configurable through configuration tools built inside of the application including the Intelligent Object Engine and the Intelligent Automation Agent.
PPZ-65	System tracks and processes application fees.	Y	
PPZ-66	System views and prints the attached documents/plans supporting the corresponding application.	Y	
PPZ-67	System allows reviewers to make changes to attached documents/plans supporting the corresponding application and track such changes.	Y	
PPZ-68	Owning department can create their own unique workflow process for the review and approval of their specific record types.	Y	
PPZ-69	System links companion files to one another. For example, a project requires a zoning change, vacation, and land division. All three records should be linked together.	Y	

Inspections Specifications

#	Requirement	Response Code	Comment
INS-1	System schedules online inspections through the web portal and through the back end system.	Y	
INS-2	System displays inspection route to staff personnel in the office and in the field and offer inspectors the ability to change their planned routes during the day	Y	
INS-3	System provides a calendar for scheduling daily inspections that can be queried and included in reports.	N	
INS-4	System defines inspection checklists by specific permit type and inspection item.	Y	
INS-5	System allows inspectors to enter inspection results in the field and reference applicable codes to append comments and specific details or documents (e.g., photographs)	Y	
INS-6	System provides daily schedules for inspections and supports schedule modifications by authorized parties.	Y	
INS-7	System allows applicants to request all required inspections through the web portal that have been made available for them to schedule.	Y	
INS-8	System tracks inspection data and ensure accountability of staff. Specify how this is accomplished.	Y	
INS-9	System obtains signatures while on inspection (signature pad).	Y	
INS-10	System configures inspection Checklists for each type of inspection.	Y	
INS-11	System Checklists (e.g. Punch List) track agency-definable status such as Partial Pass, N/A, Pass, Fail, etc.	Y	
INS-12	System allows for the standard inspection comments/violation codes to be modified and all such modifications will only be applicable for that specific occurrence.	Y	
INS-13	System allows the authorized user to add non-standard inspection comments/violation codes.	Y	
INS-14	System schedules, reschedules and cancels inspections on the web portal.	Y	
INS-15	System allows for access to view inspection results and inspection comments on the web portal.	Y	
INS-16	System generates historical views of previous Checklists allowing for the comparison of current results and scores.	Y	
INS-17	System displays selected inspection comments to the field and/or to the public through the web portal.	Y	
INS-18	System defines required inspections by type of permit and complexity.	Y	
INS-19	System schedules re-inspections based on a designated due date.	Y	
INS-20	System schedules a temporary certificate of occupancy re-inspection based on an expiration date.	Y	
INS-21	System allows for manual override or rescheduling of automated inspection requests, with provisions of automated notification to the inspector, permittee, owner, and electronic record.	Y	
INS-22	System allows field personnel to schedule an inspection from the field.	Y	
INS-23	System notifies the owner, permittee and supervisor if a field inspector cancels a scheduled inspection.	Y	
INS-24	System provides access to the agency codes/ordinances in electronic format.	Y	
INS-25	System tracks all permit status changes and record them in an audit log.	Y	
INS-26	System generates a reminder list of upcoming inspections based on due dates.	Y	
INS-27	System supports periodic fire inspections of all commercial and multifamily structures.	Y	
INS-28	System accommodates different field and workflow requirements for each type of periodic inspection.	Y	
INS-29	System fees are calculated based on prescribed tables and formulas.	Y	

INS-30	System allow inspection requests to be auto-forwarded to outside partner agencies. (Electric, water, natural gas, etc.)	Y	

Code Enforcement Specifications

#	Requirement	Response Code	Comment
CE-1	System tracks inspections and violation data with its user audit trail.	Y	
CE-2	System tracks code complaints from complaint inception to conclusion, including liens and the ability to generate ad hoc reports necessary to identify trends, report on objectives, and monitor workload measures.	Y	
CE-3	System provides residents and business owners with the ability to report, review and research property information, including complaints and complaint history, from inception to conclusion, including a record of any code compliance liens and cases by property	Y	
CE-4	System creates, alerts and maintains the need for annual fire inspections.	Y	
CE-5	System creates and maintain unique code cases specific to distinct types of violations and infractions.	Y	
CE-6	System tracks all enforcement remediation related activities, such as lot clearing, graffiti, etc. in the case that such efforts will be invoiced to property owners.	Y	
CE-7	System supports issuance of violations in the field by inspection staff.	Y	
CE-8	System allows inspectors in the field to record, enter inspection, and research data into a case with minimal manual input.	Y	
CE-9	System researches property and owner information to complete inspections and issue violations.	Y	
CE-10	System identifies violations by parcel and address if applicable.	Y	
CE-11	System automatically tracks each case, calendar each step in the process and alerting officers, when needed, for key steps until case is closed/resolved.	Y	
CE-12	System automatically engages a lien process if a fine is not paid within a specific timeframe.	Y	
CE-13	System creates and maintains unique code cases specific to distinct types of violations and infractions.	Y	
CE-14	System tracks all aspects of liens including collections, tasks, hearings, court cases, outcomes, etc.	Y	
CE-15	System allows inspectors and other field users to search prior premised history on property with code violations and to use GIS mapping for display of such violations if desired.	Y	
CE-16	System restricts access to the complainant information based on user login and security settings.	Y	
CE-17	System automatically routes all web portal registered complaints/possible code violations to the appropriate department or individual based on the type of complaint	Y	
CE-18	System provides for online complaint submissions to be system-assigned a complaint number, auto-acknowledgement, and ticklers for follow-up.	Y	
CE-19	System allows a pre-identified list of users to request inspections on specific properties (i.e. customer service, city council members, etc.). List can have 'hidden' pre-defined priority codes assigned to their requests.	Y	
CE-20	System enables authorized supervisors to reassign work to other staff and to track those assignments under an audit trail.	Y	
CE-21	Security provides management team access to all complaints for review, updates and (re)assignment.	Y	
CE-22	System generates inspection requests by type of buildings (such as vacant buildings) on a predefined schedule.	Y	
CE-23	System tracks and assigns actions to external agency vendors for example grass cutting, trash removal, inoperative vehicle removal, building boarding, building demolition. System tracks task assignment, completion, invoicing and lien assignment.	Y	

CE-24	System tracks all activities associated with Agency demolition of structures on private property. Activities include raze files and orders, utility cutoffs, contracting bid process, contract award, monitoring of the demolition, and the verification and signoff of the work performed by the contractors to demolish the building and reseed the property	Y	
CE-25	System allows for code complaints to be submitted by residents anonymously via the internet.	Y	
CE-26	System allows for code enforcement officers to attach photos and other documents to a case ticket.	Y	
CE-27	System provides calendar reminders to support the re-inspection of open tickets.	Y	
CE-28	System allows for unlimited updates to current and past enforcement tickets.	Y	

Mobile Specifications

#	Requirement	Response Code	Comment
MA-1	System provides a seamlessly integrated application specifically designed for inspections and other field-related duties.	Y	
MA-2	Mobile app supported by wireless connectivity to the Internet and those where system data can be saved to the field device for downloading upon return to the office.	Y	
MA-3	Mobile app is compatible with iOS, Android and Windows platforms for mobile devices (e.g., smartphones, tablets)	Y	IG Inspect is compatible with all platforms. IG Enforce is compatible with iOS.
MA-4	Mobile app is easily accessible from the mobile's corresponding app store and a link from the agency's website.	Y	
MA-5	Mobile app provide a method of attaching to the record, electronic image(s) from the mobile device's camera or from an existing library of images.	Y	
MA-6	Mobile app are map-based and utilize location-aware technology. Requestor must be able to make more precise adjustments or enter a street address for more accurate location reporting.	Y	
MA-7	Mobile app enters the inspection disposition in the field and update system data in real time.	Y	
MA-8	Mobile app prints documentation in the field.	Y	
MA-9	Mobile app researches information such as prior inspections from field devices.	Y	
MA-10	Mobile app displays all the inspections related to a permit or other case type in the field.	Y	
MA-11	Mobile app interfaces with handheld devices and laptop computers to upload and download information for daily inspections. Specify all supported platforms.	Y	
MA-12	Mobile app provides GIS in the field for assisting in accomplishing field research and inspections.	Y	
MA-13	Mobile app provides access to maps and related property information through a map service while in the field.	Y	
MA-14	Mobile app captures time and mileage to be associated to a department or budget.	Y	
MA-15	Mobile app allows users full access to all relevant information for their assigned permits or applications.	Y	
MA-16	Mobile app allows users to enter notes and report any code violations that may be identified during an inspection.	Y	
MA-17	Mobile app electronically links external sources of information, including passing a parcel identifier, x-y coordinate or other information needed to lookup and supply information relative to the location or characteristics of the suspected violation.	Y	
MA-18	Mobile app allows users to schedule follow-up appointments.	Y	
MA-19	Mobile app synchronizes with the core system through wireless connectivity.	Y	
MA-20	Mobile app stores entered data when connections are lost and seamlessly connect and reconnect wireless network coverage is available automatically.	Y	
MA-21	Mobile app supports seamless roaming between broadband networks; agency owned wireless hot spots, and other agency network facilities.	Y	
MA-22	Mobile app has predefined and modifiable Checklists based on the inspection and/or complaint type.	Y	
MA-23	Mobile app starts a record (permit, complaint, etc.) in the field in the online or offline mode.	Y	
MA-24	Mobile solution stores both photos and videos.	Y	

GIS Specifications

#	Requirement	Response Code	Comment
GIS-1	System supports ESRI ArcGIS platforms	Y	
GIS-2	System connects to the ArcGIS Server to get GIS information and verifies this information using the GIS addressing system.	Y	
GIS-3	System displays GIS and select property in lieu of entering an address.	Y	
GIS-4	System queries using ESRI GIS tools.	Y	
GIS-5	System uses GIS browsing that will pinpoint location of permits, cases, etc. by number, address, owner name, and/or parcel number.	Y	
GIS-6	System can display GIS information on an embedded web map (e.g. Agency's map services, ArcGIS Online basemaps, etc.)	Y	
GIS-7	System initiates an activity in the system from GIS Base Map (e.g., permit application, planning application, open a code case, schedule inspection, etc.)	Y	
GIS-8	System turns GIS layers on and off. System allows user control of layers.	Y	
GIS-9	System launches the GIS tool within the application.	Y	
GIS-10	System launches the GIS tool standalone.	Y	
GIS-11	System selects and performs actions on properties geospatially, one or many, through a map screen (go from map to property/parcel) using tools for various types of selection, e.g., point and click, multi-select, etc.	Y	
GIS-12	System displays selected properties geospatially on a map (go from property/parcel to the map).	Y	
GIS-13	System shows all addresses associated with a parcel or multiple parcels.	Y	
GIS-14	System shows permit records organized by individual address within that parcel/parcels.	Y	
GIS-15	System identifies records pertaining to site-related work (property record) separately from building-related work (GIS coordinates), i.e. permits for flagpoles or driveways - not associated with a building address.	Y	
GIS-16	System imports information from the Agency's GIS RDBMS database automatically, e.g., permit setup, and manually, e.g., staff search and import.	Y	EnerGov does not import data from GIS. Data is accessed in real time.
GIS-17	System automatically updates addresses based on updated information in external data sources.	Y	
GIS-18	System has no limit to the number of layers allowed for viewing within the web portal.	Y	

Financial Transaction Specifications

#	Requirement	Response Code	Comment
FIN-1	System provides effective dating of all financial transactions completed in the system including an audit trail tracking all financial actions including modifications to financial elements and data.	Y	
FIN-2	System loads, tests, and stores revised fee schedules to be implemented in the future.	Y	
FIN-3	System directly links payments received to the Agency's financial system.	T	EnerGov can perform a flat file transfer to the agency's financial system or EnerGov can provide an API which Bryan may use to develop an integration with their financial system.
FIN-4	System provides integration with Sungard HTE/NaviLine so as to update financial records in real-time as transactions take place.	T	EnerGov can perform a flat file transfer to the agency's financial system or EnerGov can provide an API which Bryan may use to develop an integration with their financial system.
FIN-5	System handles all transactions involving bonds and bond refunds and to relate them to permits and other types of applications.	Y	
FIN-6	System calculates fines and interest.	Y	
FIN-7	System can reverse a transaction and all related allocations and record this action permanently as part of the system audit trail.	Y	
FIN-8	System tracks and automatically calculates all fees related to the permitting, planning, zoning, licensing and enforcement processes at any point dictated by the business rules	Y	
FIN-9	System calculates fees based on configured fields.	Y	
FIN-10	System generates invoices by any combination of the following criteria: use, square footage, number of seats, number of beds, number of units, number of X, etc.	Y	
FIN-11	System automatically determines fees from codes based on business rules defined by the code ordinances.	Y	
FIN-12	System tracks all transaction history (renewals, bills, payments, penalties, late fees, etc.) associated with a business/individual.	Y	
FIN-13	System provides receipts as part of the payment process in real time.	Y	
FIN-14	System allows authorized users to waive and void permitting and other fees and have all such changes reflected as part of the system audit trail.	Y	
FIN-15	System tracks and accounts for all current and historical financial related transactions collected through the system.	Y	
FIN-16	System is PCI-DSS certified for financial transactions.	Y	

Reporting

#	Requirement	Response Code	Comment
REP-1	System must have seamless integration with one of three industry-standard report writers (Cognos, Crystal, and SSRS).	Y	Crystal
REP-2	System provides an ad hoc reporting tool to enable non-technical users to quickly and easily create, generate, display and print basic reports from the application software with built-in charts/graphs and deep links to the record directly in the system	Y	EnerGov advanced search screens allow for this functionality.
REP-3	System users can save and edit the current query or current report settings once a report has been built.	Y	EnerGov advanced search screens allow for this functionality.
REP-4	System saves reports built with the report module for future printing. Access to that repository can be determined by system administrators.	Y	
REP-5	System directs report output to a specific printer or file, or to a screen.	Y	
REP-6	System exports output in formats that can be further manipulated by multiple third party applications such as PDF, Excel, Word, or MS Access.	Y	
REP-7	Reports can be generated from all system data fields as needed.	Y	
REP-8	System customizes reports, letters, correspondence and other printed outputs derived from the system database.	Y	
REP-9	System prints letters as well as original or duplicate permits or permit cards.	Y	
REP-10	System provides a library of standard reports (i.e. canned reports).	Y	
REP-11	System allows searches by wild cards, based on security permissions.	Y	
REP-12	System allows end users to create, edit, save and delete their own search criteria or parameters.	Y	
REP-13	System has an internal reporting tool which provides for multiple levels of security to control access to reports and reporting tools.	Y	
REP-14	System allows access for search for cases, permits violations, complaints, licenses and other applications by address, parcel number, record number and owner/ business/contractor name.	Y	
REP-15	System allows for searching records that may include discontinued or disabled record types.	Y	
REP-16	System conducts searches on multiple levels of related records hierarchy.	Y	
REP-17	The ad hoc report writer requires no technical knowledge of MS SQL or Oracle to allow end users to create queries or reports.	Y	
REP-18	Reports created using the report writer provide for interactive linking and drill-down as well as the ability to export data to all popular file formats	Y	
REP-19	System provides searchable notes fields by key word across all records/modules/departments including by date and user.	Y	As long as the notes are in custom fields, they are searchable.
REP-20	System sorts/filters all reports by user defined parameters (geographical zoning areas, inspector, inspection territory etc.).	Y	
REP-21	Financial reports can be defined and selected by a date or date range of activity.	Y	
REP-22	System allows users to print notices, etc. in the field from their mobile devices to a field/remote printer.	Y	This function requires connectivity.
REP-23	System allows users to send notices of non-compliances electronically from the field.	Y	
REP-24	System allows users to build their own reports and create templates for recurring reports.	Y	
REP-25	Owning departments can check the status on all of their active/inactive records.	Y	
REP-26	System can report on all communications and comments on a permit application.	Y	
REP-27	System and its mobile version provides work management tools for users to review work status on all assigned permits, work load and schedule of appointments	Y	
REP-28	System evaluates the optimal route for field staff to travel between appointments for a day's activity prior to scheduling time for appointments while also accommodating appointments set through auto scheduling.	Y	

REP-29	System allows for appropriate records retention schedules and ease of retrieval for open records requests.	N	EnerGov does not have a records retention schedule as we feel that is best maintained through a document management system, but the system does allow for easy retrieval of records for open records requests

Technical Specifications

#	Requirement	Response Code	Comment
TECH-1	System is 100% web-based and web-accessed.	Y	
TECH-2	System operates on Windows and OSX.	Y	
TECH-3	System operates on multiple browsers including Explorer, Chrome, Safari, and Firefox.	Y	EnerGov is currently in the process of changing its user interface to HTML5 which is compliant on all browsers named.
TECH-4	System supports the VMWare virtual server environment.	Y	
TECH-5	System is supported by a cloud database which is backed-up daily to a physically separate location.	Y	If EnerGov hosts the data, this requirement is applicable.
TECH-6	System provides a centralized data dictionary that fully describes table structure and appropriate levels of metadata.	Y	
TECH-7	System database can interoperate with MS-SQL Server.	Y	
TECH-8	System utilizes a middle tier web service to access backend database and the Application resides in a multiple N-tier environment.	Y	
TECH-9	The Tier 1 and 2 are capable of running in a virtually hosted server environment.	Y	
TECH-10	The Tier 1 and 2 application/system components are capable of running in a load balanced server configuration.	Y	
TECH-11	System is installed with a production environment and a separate test environment that can simulate actual operating conditions for all functions and uses.	Y	
TECH-12	System is designed for object driven data entry.	Y	
TECH-13	System uses network logon credentials to assign permissions.	Y	
TECH-14	System can receive converted and migrated historical information from the existing and current system.	Y	
TECH-15	System leverages Microsoft Word and Microsoft Excel and employs MS Outlook for issuing ad hoc and automated emails.	Y	EnerGov can be configured to send emails to Outlook.
TECH-16	System in both agency- and vendor-hosted options provides a minimum of 99.9% uptime excluding scheduled maintenance.	Y	
TECH-17	The vendor provides a Software Development Kit (SDK) to allow staff and others to customize and configure new applications based on the vendor's system.	Y	EnerGov can provide APIs architected in JSON Restful Service.
TECH-18	System SDK is designed to allow citizens and other interested parties to develop new iOS, Android and Microsoft apps.	Y	If the city wishes to expose the APIs to the public, this is possible.
TECH-19	System provides for an Application Programming Interface (API) or Web Services interface for processing third party electronic payments.	Y	
TECH-20	System provides the ability to support extraction and publishing of single record types or an entire environment.	Y	More information is needed to understand this requirement.
TECH-21	System supports and is compliant with Service Oriented Architecture (SOA).	Y	
TECH-22	System supports and is compliant with Section 508 EIT standards.	N	EnerGov's citizen facing website is Section 508 compliant. The EnerGov back office does not have this functionality.

Security Specifications

#	Requirement	Response Code	Comment
SEC-1	System has role-based security where users can be assigned multiple roles – modify, view, or to restrict access control.	C	EnerGov has role based security and would be willing to customize the software to allow users to be assigned multiple roles.
SEC-2	System provides adequate security functions to handle web-based transactions without compromising the integrity of the system.	Y	
SEC-3	System Administrator must be able to add, change, and cancel permissions for the system access.	Y	
SEC-4	Multiple sessions are supported on a single machine.	Y	
SEC-5	Multiple sessions with a single login credential is supported.	Y	More information is needed to understand the what the city is trying to do.
SEC-6	Audit trail contains a date/time stamp to the nearest second.	Y	History is tracked on records and contains a date and time stamp.
SEC-7	Audit trail records are not modifiable.	Y	History on records cannot be modified.
SEC-8	System provides access to audit trails for authorized users based upon the user's security profile.	N	
SEC-9	Authorized users have the ability to print audit trail information.	Y	This can be accomplished through a custom report.
SEC-10	System administrators have the ability to grant specific users with certain administration rights such as granting access rights/permissions to other users.	Y	
SEC-11	System allows access/security configuration settings by department (including giving access rights to specific permits, records and functions of the system.	Y	
SEC-12	System tracks all transaction history associated with a business/ individual.	Y	

HARDWARE & TECHNICAL

CITY OF BRYAN

CIVIC PLATFORM

RFP #16-022

Technical Services & Requirements

Tyler provides not only best-in-breed software and services, but we also strive to provide you with hardware and IT Services to effectively and efficiently run your systems. If you choose to purchase hardware through Tyler, we can provide stellar support, high-quality hardware, and an abundant array of optional services.

Dedicated Support Staff

Tyler has a team of IT support personnel that is passionate about providing hardware, networking, and IT support services. When you turn to us, your needs are met by knowledgeable technicians, an experienced team, proven partnerships, and our ability to get the job done. Tyler employs Industry Certified Technicians that hold certifications including:

- Microsoft Certified System Engineer (MCSE)
- Microsoft Certified Professional (MCP)
- CompTIA A+ Certification
- CompTIA Network+ Certification
- SSPA Certified Support Professionals (CSP)

Partnerships

Tyler has acquired relationships with the top hardware distributors to allow us to provide our clients with the best products to serve your community. Because Tyler has access to multiple resources, we can provide you with a system that will fit your needs, and your budget. Tyler is Certified Partners and Certified Resellers of:

- Microsoft (ISV)
- Cisco
- IBM
- Citrix
- Dell
- HP

Implementation

Our clients can count on Tyler to provide thorough hardware implementation services for all hardware purchased through us. Tyler provides remote set-up services for all clients, and on-site services at an extra charge. We can build every aspect of the site's network infrastructure, as well as install servers, PCs, and peripheral units. Regardless of the client's IT levels of expertise, our dedicated team can help you.

Network Services

Tyler offers Network Support services that are designed to help you cover routine maintenance issues and problems that may arise on Tyler Supported Systems.

- New Employee Setup
- Troubleshooting
- Error Diagnosis

- Adding New Computer Systems
- Printer Help

Optional Services

System Management

Tyler's optional System Management services combine some of the most popular services into one package. These combined services provide the peace of mind to you and your IT staff.

- Remote Helpdesk
- Backup Assistance
- Network Protection Services
- Reduced rate for on-site assistance

With this service, Tyler maintains computers, servers, printers, and networking devices on your EnerGov network. You benefit from knowledgeable and experienced technicians providing you with expert technical support and data backup assistance—all without the expense, personnel overhead, and management issues of additional IT staff.

Problem resolution is made fast and convenient by utilizing Bomgar technology to connect to your desktop, allowing us to see what you are seeing. Take advantage of real-time technical troubleshooting for many questions.

- Computer system operating system and hardware issues
- Network assessment, design, and implementation
- File and print server setup and management
- Microsoft Exchange messaging environment
- Network security
- Remote access & virtual private networking (VPN) clients
- Internet connectivity

Application Availability Services – DDRS plus Hosting

Tyler has created a disaster recovery service that not only protects our clients' data from loss during a disaster, but also includes data integrity checks, quick restoration of data processes, and remotely hosted data during an emergency. These features will help you to get back on your feet quickly, and maintain productivity during a time of chaos.

3RD Party Warranty Information

Tyler is an authorized reseller of all hardware proposed to our clients; however we do not provide warranties solely through Tyler. All warranty information can be obtained through the product manufacturer's website. Tyler does provide information on extended warranties through specific product vendors. For complete details on Tyler's warranty policy, please see Tyler's Terms and Conditions within this response.

Tyler Hosted System Requirements

Tyler Technologies' Hosted Solution is designed to operate on networks and operating systems that meet certain requirements. Systems that do not meet the required specifications may not provide reliable or adequate performance, and Tyler cannot guarantee acceptable results. This should include a reliable Internet connection provided by your ISP.

Workstation

Component	Requirement
Hardware	Microsoft Windows Certified PC
Processor	Pentium Core 2 Duo
Memory	2 GB
Disk Space	5 GB available disk space
Operating System	Windows 7 Professional or Windows 8 Professional, 8.1[1]
Network	Gigabit Ethernet
Network Environment	Latest Windows Updates

1 Windows 95/98/ME, XP Home, and Vista Home editions and workgroup or peer-to-peer networks are not supported.

Bandwidth

Item	Specification
Citrix Reciever[2]	Average Usage – 30kpbs per connection
Web Browser Client[3]	Average Usage – 150kpbs per connection
Imaging Client[4]	Average Usage – 300kpbs per connection
Eagle Client[5]	Average Usage – 150kpbs per connection

Based on your identified usage above, Tyler requires the specified amount of dedicated bandwidth for upload as well as the same bandwidth for download at a minimum.
2 Citrix Receiver is necessary for all core applications with the exception of Eagle..
3 Web Browser clients are necessary for Eagle and Infinite Visions Web Portal.
4 Imaging clients are for those users that will be scanning images into Eagle, TCM and Public Safety.
5 Eagle Client is for non-scanning users in Eagle and TCM.

Browser Compatibility

Eagle products are compatible with these browsers:

Web
○ IE 9-11[6] ○ Chrome[6] ○ Firefox[6] ○ Safari

6 These browsers are tested regularly for compatibility; others are not tested regularly but are supported.

Peripherals

Cashiering Equipment

Equipment	Model
Receipt Printer	Epson TM-6000IV
Label Printer	Zebra Thermal Transfer Printer GK420T
Card Swiper	Magtek Mini Swipe Reader
Cash Drawer	MediaPLUS Automated Cash Drawer with USB or APG Vasario Cash Drawer BL1616
Check Scanner	Canon CR-180

Epson 6000 Thermal Receipt Printers require USB ports but can be configured for Ethernet with optional adapters. An approved ETS-encrypted mag stripe reader is required for card reading.

Court Equipment

Equipment	Model
Signature Pad	Topaz Signature Pad T-L462, or T-LBK462-BSB-R
Camera	Logitech C310HD WebCam

Printer Compatibility Chart

Your printer must meet these requirements to be compatible with Eagle.

Printer Type	Reports	Forms	Additional Criteria
Any Laser Printer[7]	☑	☑	PCL 5 or above

7 Dot matrix printers are not supported. HP Printers are highly recommended.

Scanner Compatibility Chart

Scanner Brand	Scanner Model	
Canon	DR-5010C DR-2510C DR-4010C DR-3010C DR-M160 DR-M140 DR-6030C	DR-X10C DR-7550C DR-6050C DR-9050C DR-7580 DR-9080C
Fujitsu	Fi-6110 Fi-6670 Fi-6240Z Fi-6130Z	Fi-6140Z Fi-6230Z Fi-6770
Graphtex	CS500 Pro[13]	
Hewlett Packard (HP)	ScanJet 8250[13] ScanJet 8350[13]	ScanJet 8390[13]
Panasonic	KV-S2045C[13]	
Xerox	Documate 152[13]	

13 Not fully supported—These scanners have not been tested in our lab. They are in use by one or more customers and may have issues that have not been reported.

Managed Hosted Solution

With our Managed Hosting Solution, we will host and manage your Tyler software applications from our facilities. We will provide the ongoing support, maintenance, and upgrades of the applications, hardware, and operating systems.

With this solution you receive clear, concise documentation, defining all aspects of the relationship. You will receive a Contract and Service Level Agreement stating measurable expectations of performance.

Benefits of a Hosted Solution

The over-riding benefit to clients is the ability to have others outside their organization manage and administer the expensive and complex computing environments used today — something that is increasingly important to our clients.

More and more organizations like yours are turning to SaaS and other cloud computing services because of this benefit — reducing large upfront hardware, software, server, and licensing costs and eliminating their responsibility for maintaining databases or operating systems. According to Darrell West, director of the Center for Technology Innovation at the Brookings Institution, a large percentage of public sector IT costs get sunk into hardware, software, and storage.

Your organization can save between 25 and 50 percent of those costs by moving to the cloud. Governing magazine also suggests that the cost-saving potential to government organizations is huge. “Thanks to the cloud, government won’t be stuck with obsolete legacy systems and outdated hardware that require expensive maintenance…Unlike many technological advancements, cloud computing can provide a quick, dramatic return with limited investment.”

Tyler Data Center

Tyler maintains two SaaS data centers operating under a continuous improvement model whereby the hardware, software and technical infrastructure are constantly being reviewed and optimized for performance and stability. New client acquisition, utilization and advancements in technology all influence changes in the data center configuration. Our investments include industry-leading solutions from:

- Microsoft®
- IBM®
- Cisco®
- Liebert®
- Caterpillar

System and Security Administration

Tyler performs daily administrative tasks. We address the installation, upgrade, support, and file maintenance of your Tyler software applications, database servers, operating systems, database, application files, and image files. Tyler provides secure data transmission paths from each client workstation to Tyler MHS servers. User IDs, passwords, and application access rights for the VPN and your Tyler software applications are administered by Tyler with the Client’s final approval.

Tyler Technologies maintains a baseline IT Security Policy that is communicated to and acknowledged by all employees. Tyler may include detailed industry best practices if desired by the Client. In addition, we conduct and document SIRP tests on quarterly basis based on NIST standards.

IT Security Policy

Security Incident Response Procedures
Procedure Highlights:
(1) Discovery
(2) Investigation
(3) Notification
(4) Response
(5) Recovery
(6) Follow-up

Hosting Operations follows security best practices dictated and defined by the three assurance audits that Tyler Technologies are subject to. SOX-404 Financial and IT General Controls, PCI Security Council PA-DSS/PCI-DSS, and the AICPA SSAE-16 SOC 1 Type 2.

Tyler's Responses to Typical Hosting Questions

Q. What kind of computer and Internet connection do users need to use SaaS?
A. System requirements vary slightly for each Tyler product and can be found on our website. In general, our products can be supported and configured on commonly used machines.
Although bandwidth requirements are low, a high speed Internet connection is required. Dial-up modems may work but will not provide ideal performance.

Q. Do users have to install any programs on their computers to access their SaaS-hosted database and software applications?
A. Certain applications require software to be loaded on your users' computers, such as an ActiveX® control which is a small add-on program used on the Internet. If software is required, our Tyler SaaS team can help with the installation.

Q. How does your data center utilize multiple ISPs to prevent telecommunications outages in the event your primary ISP goes down?
A. Tyler's data centers not only utilize multiple ISPs, but are also designed so that bandwidth is drawn from different hub locations. Multiple ISPs and multiple hub sources mitigate the risk of a data center Internet outage.

Q. What measures do you have in place for a power outage?
A. The SaaS data center is equipped with battery back-ups in the event of a power loss. During a sustained outage a diesel generator supplies power. The equipment is tested weekly.

Q. How often do you perform backups?
A. Nightly backups are stored off site.

Q. What about physical security?
A. The Yarmouth, Maine, data center is always locked, requiring key card access only by authorized personnel. Our Dallas, Texas, data center is co-located at DataBank. This facility is manned by a guard 24 x 7 and includes keycard and biometric security tools in place.

Q. Do you rely on any sub-contractors or third parties to administer the SaaS application and database servers?
A. No, Tyler recognizes the importance and value of having experienced staff support and administer the SaaS infrastructure.

Q. Does your company own and have complete control of the data center that hosts the SaaS servers?
A. Tyler owns the building where the Yarmouth, Maine, data center is located. Tyler does not own the DataBank building in Dallas, Texas, but we own all of the equipment located there.
DataBank provides a locked cage, air cooling, Internet services and power. They do not administer or provide any equipment that is used to run Tyler hosted applications.

Tyler's Secure Data Bank

With more than 30 years of industry experience, Tyler provides a unique combination of services to meet the specific needs of state and local government. Our SaaS offering is a full-service SaaS, meaning we own, administer, and support all hardware and applications. Our commitment to full service means that Tyler doesn't rely on sub-contractors. We have a team of Tyler employees who are dedicated solely to SaaS operations.

Tyler maintains two SaaS data centers operating under a continuous improvement model whereby the hardware, software and technical infrastructure are constantly being reviewed and optimized for performance and stability. New client acquisition, utilization and advancements in technology all influence changes in the data center configuration. Our investments include industry-leading solutions from:

- Microsoft®
- IBM®
- Cisco®
- Liebert®
- Caterpillar

Data Security

Tyler takes security very seriously. We use a multitude of different security solutions to ensure secure communications including Virtual Private Network (VPN) devices, software VPNs and HTTPS. Network engineers work closely with application teams to ensure security practices are employed throughout the entire product lifecycle.

Redundancy

When we built our SaaS infrastructure the goal was simple: no single point of failure. Our investments in every facet of the project include multiple devices set up for high availability and failover. The disk sub-system uses fully redundant drive arrays that prevent downtime due to a failed disk drive. We have multiple Internet providers at both of our data centers in Yarmouth, Maine, and Dallas, Texas, leaving their respective states through different routes. An Uninterruptible Power Supply (UPS) provides seamless failover to a diesel generator in the event of a power outage. In the event of a catastrophic failure at one facility, our disaster recovery plan assures that all critical processes continue uninterrupted at the second data center.

An audit of Tyler's SaaS data center, sponsored by one of Tyler's SaaS clients, was performed by IBM Global Services. The audit was conducted to formally document the redundancy and fault tolerance capabilities of the data center and its operational procedures. It's clear — Tyler takes its SaaS services

very seriously. Our professional staff is trained and knowledgeable in all aspects of SaaS administration, our facility is state-of-the-art and our attention to our clients is unrivalled.

The Data Banks

- Tier III Plus datacenter
- Carrier Neutral – over 20 ISPs
- Owned and operated by DataBank
- Nuclear Fallout / Tornado Shelter

Physical Access

- 7 x 24 on-site security staff
- Gated private parking lot
- Separate visitor parking
- Card and bio-metric access

Compliance

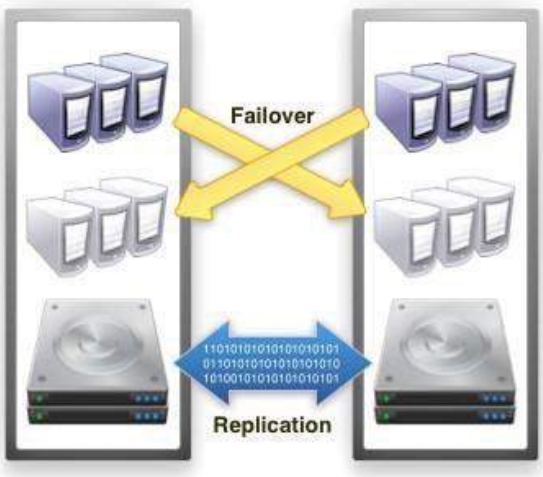
- EU Safe Harbor
- SAS 70 Type II / SSAE 16

Service Availability

- VMWare HA
- Citrix HA
- Infrastructure HA

Datacenter Availability

- Active / Active Datacenters
- SAN level data replication over MPLS*
- Geographically dispersed clientele*



Supported Clients

- Windows XP/Vista and Windows 7
- Mac OS X
- iPad, iPhone, Android Devices*

Supported Devices

- Dynamic printer support*
- Local disk access
- Twain compliant devices*
- Windows Image Acquisition*

Protecting Your Data

- SAN level snapshots
- Disk to Disk Backups
- SAN level replication*

Tyler Cloud-Based Solutions

Tyler cloud-based systems empower you to deliver more services, more efficiently, to more citizens, at a lower up-front cost.

Benefits

Connectivity/Reliability/Availability

- We ensure connectivity through secure, fault tolerant, enterprise-class data centers designed to provide the highest levels of availability.
- In many instances we allow clients to determine timing of upgrades and enhancements to avoid disruptions.
- Increased remote access capability allows clients to accommodate alternative work arrangements.

Security

- We minimize security risks by controlling user access and securing data.
- We provide certified and compliant data center and security practices.

Data Ownership

- We support clear ownership of data — clients own their data.

Predictable Cost

- We offer fixed quarterly costs for term of contract — unique in the market place.
- Sharing hardware allows clients to use highly optimized servers with state-of-the-art redundancy at a fraction of the cost.

Disaster Recovery

- The burden of backups and restoring software and data shifts from you to us.
- We include disaster recovery as a standard feature, not an add-on.

Why Choose Tyler? Tyler's Cloud-Based Offerings

Cloud computing isn't new to Tyler. In fact, Tyler began offering cloud-related services in 2000, hosting software and client data in our data center and providing access to clients on a subscription basis. Tyler took the best features and functionality of cloud computing to develop a cloud-based offering designed specifically for the unique needs of the public sector.

Today we offer proven cloud-based options for virtually all of our products, and we remain committed to offering the most effective and efficient software delivery methods to our clients, whether online or on site.

Your needs drive Tyler's IT architecture, not the other way around. We use a hybrid cloud infrastructure that provides client access to software and data.

Why Cloud Computing?

Thousands of users rely on Tyler cloud-based systems.

Public sector organizations are seeing a significant shift from traditional on-premises software installations to cloud-based installations. So what is all the fuss about the cloud? Users and vendors alike confuse the conversation by using the term "cloud" in different ways. Cloud computing is the use of computing resources (hardware and software) that are delivered as a service over a network (typically the Internet). Simply put, it is another choice for delivering your data and the software that manages it.

More than 700 public sector organizations use Tyler cloud-based solutions, with nearly 40,000 public sector users relying on Tyler cloud-based systems to access the software they need to perform their jobs.

Tyler hosts software applications and client data in Tyler-owned data centers, and clients contract to use the software on a subscription basis. Tyler deploys, configures, maintains and updates the software applications and related data. All you need is a browser and reliable Internet connection to access software and data from a Tyler managed data center.

Cloud-based delivery provides the same programs our traditional clients are running on premise.

IMPLEMENTATION

CITY OF BRYAN

CIVIC PLATFORM

RFP #16-022

CITY OF BRYAN

The Good Life, Texas Style.™

tyler technologies

IMPLEMENTATION

A successful implementation of Tyler products requires building a strong link between Tyler Technologies and the City of Bryan with designated personnel from both organizations making up a cohesive team. The team functions most effectively when all members are committed to the project and contribute equally toward its success; open and consistent communication between all team members is essential.

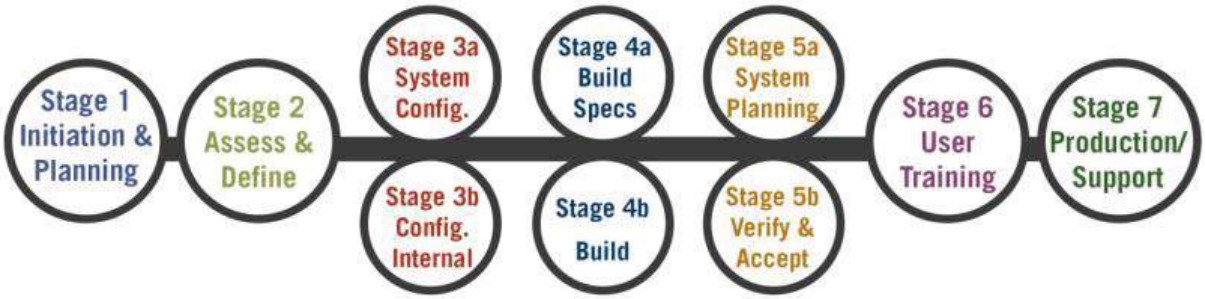
Tyler's staff has the experience and the expertise to organize the project and manage it properly for our customers. From the initial implementation of the Tyler software to maintenance and support long after the implementation is complete, Tyler will take responsibility for all aspects of the project. We assist with each crucial step to facilitate the change to Tyler making it as effortless as possible.

ENERGOV IMPLEMENTATION METHODOLOGY

EnerGov will deliver its services by employing its proven methodology. EnerGov's implementation process is a project roadmap that guides the project from inception to deployment, thereby increasing the chances of successfully implementing EnerGov software products. Project delivery through execution of EnerGov's implementation life cycle is described below.

PROVEN APPROACH

EnerGov utilizes a proven staging or phased implementation approach. A methodology of this nature is preferable because it embraces an exhaustive examination of various interdepartmental issues such as best practices, policies, and procedures, each of which must necessarily be evaluated and considered prior to implementation. Moreover, this approach ensures that process specific details are mastered prior to each subsequent stage. A formalized sign off process, defined by deliverable, is the key to a successful implementation.



STAGE 1: INITIATION & PLANNING

Prior to the EnerGov team beginning systems configuration, EnerGov and the City take proper precautions to carefully plan and define project expectations. During the Initiation stage, project contracts and the SOW are reviewed, project planning activities are completed and steps are taken to instill end user acceptance early on. Project Initiation typically begins a few weeks to a month (depending on City readiness) before the project's assess & define phase ensues.

STAGE 1 OBJECTIVES:

- Kickoff event and Training certifications

- Software delivered
- Review roles and responsibilities, review the contract and review project scope.
- EnerGov pre-planning and City process collection to prepare for future business analysis.
- Finalize staffing allocation assignment for the project teams.
- Review the communication plan and project logistics including communications norms, status reporting, issue and risk management, work locations, etc.
- Review and document formal deliverable signoff procedures.
- Review infrastructure requirements and preparation (with designated City technical staff).
- Drafting of preliminary baseline project.
- Review and adjust project scope based on additional findings, if necessary. Requires City stakeholders to accept each deliverable before the project is advanced.

Stage 2: Assess & Define

The Assess and Define stage involves onsite and offsite comprehensive business process assessment and analysis, change management assessment and systems assessment and analysis. The goal of the Assess and Define stage is to examine and analyze the City's current business process (Assess) and translate findings into a defined & documented future state process (Define) for best automating the unique processes of the City.

Stage 2 Objectives:

- Comprehensive review and analysis of the City's business process to be automated.
- Translate and refine the assessment into a defined & documented process. This documentation will serve as a basis for configuration of EnerGov's system configuration.
- Work with City's Project Manager and team to refine and firm the project plan.
- Perform a gap analysis between EnerGov's standard reports (letters, documents, reports) key performance indicators, and existing document output requirements.
- Confirm sufficient report development services have been quoted and are available.
- Build a master list of the reports to be specified and developed post-Assess & Define stage.
- Conduct prototype sessions and communicate software capabilities when required.
- Assess and identify any project risks or hardware and infrastructure requirements.
- Determine integration strategy with EnerGov Data Service, Development, and Project Team
- Define and detail system integrations and provide final resource and final fixed cost assessment for any integration deliverables previously considered pre-analysis estimates. Any amount over the original proposed pricing will require an official City contract modification and change order.
- Work with City to determine data migration strategy, ensure all required data to be converted is within project scope and all conversion resource estimates are accurate.
- Provide final fixed cost assessment for data conversion.
- Review and adjust project scope (amend SOW/Contract) based on additional findings, if necessary.

Stage 3: Configuration & Testing

The System Configuration stage consists of configuring the EnerGov system around the requirements collected and established during the assess and define stage and documented within the project definition documentation. Data conversion, development or configuration of interfaces, and report development are also included here. Internal system reviews are also performed with EnerGov's executive review committee.

3A Objectives: System Configuration

- Configuration of the purchased software around the requirements collected and established within the project definition documentation
- Collaborative onsite system reviews sessions for configuration validation

3B Objectives: Configuration – Internal Test

- Conduct initial operational test to ensure that Tyler has the information and configurations necessary to complete report development and data conversions
- Confirm basic system configuration to ensure proper operation

Stage 4: System Build

After the system has been configured, it is ready for reports, integration, converted data, and any customization that the City may require. EnerGov offers an extremely configurable product that will fit a large range of client's needs, however some customization may be necessary. Our experienced implementation professionals will help you to define the required customizations and integrate them into the system.

4A Objectives: Build Specifications

- Define custom report requirements
- Define and map data conversion requirements
- Define integration specifications
- Define and map, based on provided API's, interface requirements

4B Objectives: Build

- Write Custom Reports per defined requirements
- Import data from Data Conversion Template Database (DCT-DB) into master EnerGov database
- Development of scoped and defined integrations

Stage 5: Acceptance Validation & Testing

This phase of the EnerGov project is a necessary component as it relates to administrative knowledge transfer and the validation of the system configuration and due diligence of systems readiness to production migration. This phase also helps ensure the key individuals are trained and the customer has the capabilities of best reacting to ongoing and future changes in business process and configuration requirements (post production).

5A Objectives: System Acceptance Planning

- Create test scripts based on pre-determined functionality requirements criteria
- Provide system overview and administrator training for power users (i.e. customer testers, administrators and IT)
- Conduct testing and system validation for promotion to end user training

5B Objectives: Verification and System Acceptance

- Test and signoff on each delivered business process, suite or component based on criteria and scope
- System ready for production and promoted to a production and/or training environment

- "Ready for production" means that items that are not features enhancement or bugs that will allow the customer to move forward to User Training (Stage 6) and then go-live are addressed

Stage 6: User Training

This stage of the EnerGov project is designed to facilitate maximum knowledge transfer with regard to utilizing the EnerGov System. With an application as dynamic and configurable as EnerGov, it is imperative that an equally configurable and dynamic training program be provided that is tailored to each City's unique business processes, workflows and terminology.

As such, EnerGov employs highly talented and specialized trainers that build adaptable training solutions geared around the needs of each business process. EnerGov can custom-fit end user training programs to meet the specific needs of a City; from train the trainer to comprehensive end user training programs.

Stage 6 Objectives:

- Professional Classroom and Onsite Training Services

Stage 7: Production & Production Support

This stage of the EnerGov project is comprised of onsite production and post production support and consultative advice immediately following the production of the EnerGov software. This is also a transition period in which EnerGov will transfer from the project team to the EnerGov account services (assigned account manager) realm.

Stage 7 Objectives:

- Comprehensive Onsite Go-Live and Post Production Support
- Final Data Conversion Cutover
- Transition to EnerGov Support

Project Management Approach and Methodology

EnerGov performs ongoing project management services throughout the implementation in order to plan and monitor execution of the project in accordance with deliverables. Project Management includes the following tasks:

- Project plan management
- Project document management using Microsoft SharePoint
- Issue log management and escalation
- Status reporting
- Change order management
- Project workspace management
- Resource management
- Executive project oversight via Executive Director and Project Review Committee

Project Management Methodology

EnerGov Project Managers adhere to a 10 Step management philosophy to ensure that every project is successful and completed on time and on budget. Fundamental principles to this approach include the following tasks:

Clear Definition of Project

Project Managers understand that a clearly defined and communicated Project Plan is an essential element in the deployment of "Enterprise Wide" software applications. Prior to any work or deliverable determination, Project Managers work in conjunction with each City's corresponding project manager to clearly understand what the project will deliver, when it will be completed, who will provide the associated deliverables, how the deliverable will be accomplished, and when payment milestones occur.

Resource Management

In conjunction with the work definition, Project Managers will properly schedule and budget all necessary resources to ensure deliverables and project milestones are reasonably attainable. Utilizing past project management experience and sound best business practices, Project Managers will methodically assemble a complete Project Plan developed specifically for your implementation.

Schedule Management

Upon finalizing the work and creating the plan, Project Managers will manage the schedule and any budgetary constraints and adjustments throughout the lifecycle of the project. The Project Manager's goal is to ensure all previously communicated project deliverables and timelines are either adhered to, or that all exceptions are clearly communicated, analyzed, and properly adjusted with the City's Project Managers or stakeholders. All projects have weekly reporting statistics and periodically scheduled Project Manager meetings to ensure proper communication throughout the project progression.

Issues Management

An issue is essentially a problem that would impede the progress of the project. Project Managers are trained to clearly identify all issues with the associated project, log the issues, create issue resolution, and communicate on a regular basis with City Project Managers (weekly) the updated status of all outstanding issues.

Change Management

Essential to every implementation is the ability for Project Managers to manage project changes whether it's a scope change, configuration change, or a more simple general change. All changes are identified and immediately communicated to Client Project Managers through a prescribed change order request form which must be signed and agreed to prior to change implementation and before project plan or deliverable adjustments are performed.

Communication Management

Project Managers are responsible for all project communication at each Client desired level. In conjunction with the Project Plan and with the City, project management assistance, Tyler Project

Managers will deliver a clear and concise communication plan which will identify appropriate personnel and their communication needs.

Risk Management

Project Managers are to identify the risk events for a project and then establish a Risk Management Plan to manage the risk event and minimize their effects on the project plan and schedule. Additional risk identification will occur throughout the project on a scheduled basis, typically monthly, or at the completion of a project deliverable or milestone.

Project Team Management

Project Managers are fully responsible for the EnerGov Project Team assignment, development, and training to ensure all project milestones are attainable. This includes, but is not limited to team acquisition, classes, cross-training, conflict resolution, motivation, etc.

Quality Management

First and foremost to any project is for the Project Manager and the EnerGov Project Team to have a clear understanding of each of the City's requirements and expectations. Once these have been established, the Project Manager will work to provide appropriate metrics so quality can be measured at multiple levels within the project and at project completion. It's critical to determine the City requirements, metrics, and expectations at all levels, i.e. project management, IT, departmental, stakeholder, etc. to enable a holistic quality measurement for the project upon completion.

Metric Management

Project level metrics are important and essential for Project Managers and EnerGov Project Teams to accurately measure quality and drive process improvements across the board. Ultimately this information is used to create a set of best practices and standards that are beneficial to current and future projects.

Risk Mitigation & Management Tools

EnerGov Project Managers utilize an internal project management software tool to document potential risks to the project. This tool provides the ability to capture and categorize specific risk metrics such as: business impact, technical impact, schedule impact, and cost impact (all of which contribute to formulating the prioritization weight) as well as any constraints or barriers to effective mitigation. As risks are identified and qualified by the project team, they are communicated to designated City stakeholders through several channels including weekly status calls, status reports and risk matrix and MS SharePoint.

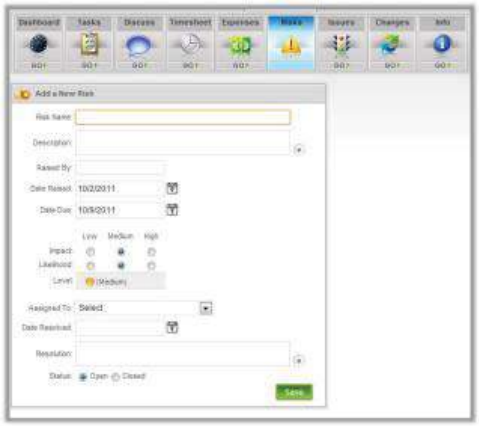
EnerGov Project Managers have the authority to address any project risks identified that do not deal with contract or functionality requirements (i.e. process changes etc.). EnerGov's designated Executive Sponsor is required to engage, review and resolve all project risks dealing specifically with contract and functionality requirements

Status Reports: Following the first on-site visit, EnerGov Project Managers create and distribute weekly status reports to the City apprising stakeholders of the project's status. These reports are provided by end of business each week.

Microsoft SharePoint: MS SharePoint is a tremendous tool for communicating and cataloging project metrics. EnerGov Project Managers create a unique SharePoint site for each City and use this site to collect and communicate project information from inception to production.

Common metrics include:

- Project Documentation
  - Report samples
  - Workflows & Visio diagrams
  - Weekly Status Reports
- Acceptance Testing Items
  - Configuration changes requested
  - Import changes requested
  - Integration changes requested
  - Report changes requested
- Open Tasks / Issues
- Open Risks / Resolutions



Change Management

EnerGov appreciates the challenges that accompany the deployment of a new enterprise system and is dedicated to assisting each City with the change management process to ensure a successful implementation. As a company, we embrace the following principles and utilize each in an effort to mitigate potential change management issues:

- Start to Finish: Change management must begin early on and extend through, and beyond, the transition to the new system. Creating a sense of urgency & ownership early on is absolutely essential to a successful implementation.
- Integrated and Holistic Approach: Change management strategies must be integrated into overall project management and not treated as a separate and distinct effort. Additionally, since most agencies are experiencing multiple changes at any given time during the project, change strategies and efforts should be managed in a holistic way.
- Collaborate & Leverage Strengths, Experience: Working collaboratively with our clients ensures that their internal capabilities, organizational knowledge, relationships and City, as well as EnerGov's experience and expertise in navigating the change, are effectively leveraged. Moreover, collaboration and engagement are essential to building support, establishing ownership and gaining buy in from all affected users.
- Engage & Rely Upon Key Stakeholders: Identifying and empowering representatives from primary stakeholder groups is fundamental to an effective change program, allowing the project team to obtain critical feedback on City needs and change acceptance at key milestones.
- Build on Established Change Methodology: EnerGov builds on an City's established change methodology, if and where it exists, and supplements it with our base approach, best practices and experience. Our intent is not to subvert or undermine what may already work within the client's organization, but to supplement and strengthen it where possible.
- Create Frameworks and Build capability: The most successful projects are those that build lasting capability within the City, allowing internal resources to support and engender lasting change.

Process Reengineering

Process mapping is one of the most critical aspects of the implementation lifecycle and includes a comprehensive review and analysis of the existing business processes along with the subsequent definition of how those processes might be changed in light of the new technology. It is critical that designated and empowered personnel be involved and engaged during this stage of the implementation in order to provide EnerGov team members with requisite detail for the transition from previous processes to what may be.

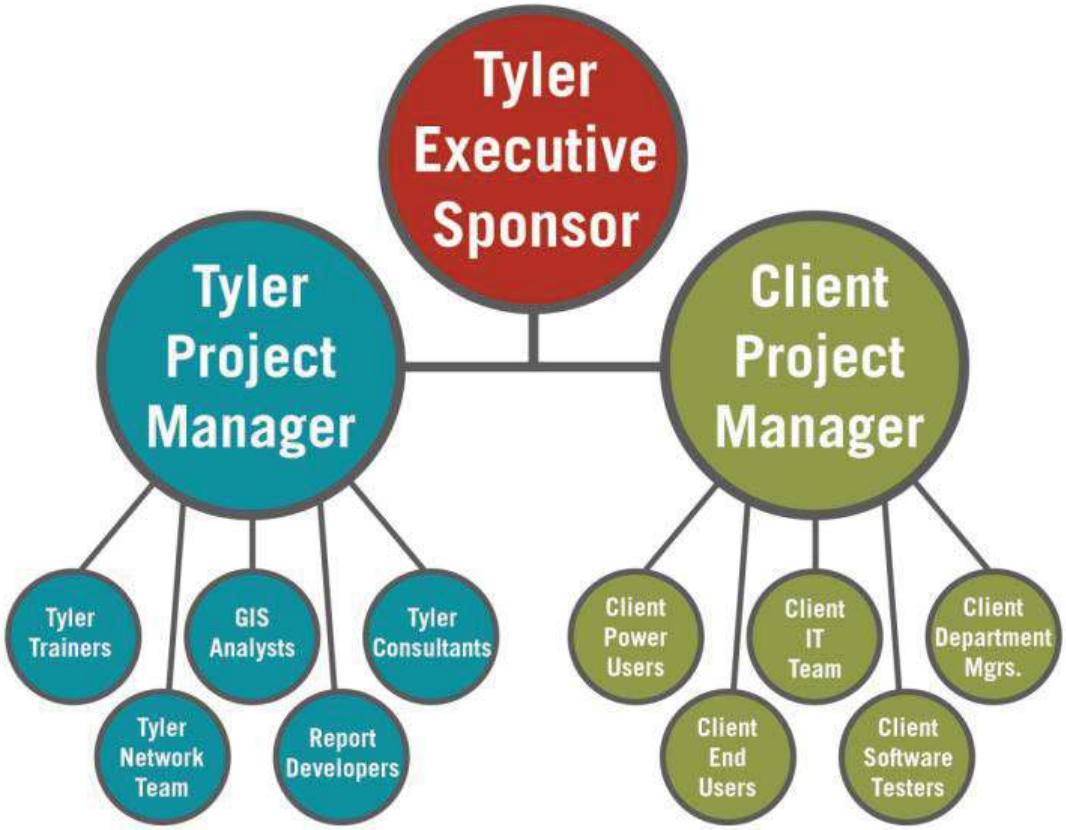
While EnerGov will be a driving force with regard to business process change and best practices recommendations in light of new system capabilities. The responsibility for adopting and promoting the proposed changes ultimately rests with the City and its designated project team members and executives. Moreover, it will be internal staff that will continue to "carry the torch" in a post-production environment.

Project Teams & Responsibilities

Tyler's implementation team works closely with the City's employees to ensure the most efficient installation, training, and go-live. Our team will be able to assess the City's needs during Phase 1 of the Implementation process, and assign the best team to meet those needs. Regardless of the City's personnel numbers, experience levels, or geographic locations, Tyler is able to train your employees effectively, and implement a system that best fits your needs.

Tyler's Executive Sponsor oversees the entire implementation process from beginning to end, and is ultimately responsible for the overall success of the Implementation process, as well as the final hand-off to Support. A Tyler Project Manager is assigned, and serves as a single point of contact with the Client Project Manager. From there, the Project Manager assigns tasks to different members of the implementation team, selected based on the needs of the City.

Additionally, the City's employees will be responsible for certain aspects of the implementation. A Client Project Manager will be named, who will take lead on the implementation process, who will be the primary contact for the Tyler Project Manager and Implementation communication. The City's team will be able to assign power users, and regular users, and attend training courses that correspond with their specific roles. If the City has an in-house IT team, that team will assist Tyler's Network Team with the installation and setup of any on-site hardware. If there is no IT personnel, Tyler's Network Team can handle the setup, and assist the City with any Network Support issues.



Some tasks and titles shown, for both teams, may be combined under one person or split into a small team depending on the simplicity or complexity of the Implementation.

Data Conversion

EnerGov's Data Services Team has extensive experience with data mining, conversion, migration etc. and has successfully converted over 50 unique systems and every major RDBMS. In fact, 99% of all EnerGov deployments involve legacy data analysis, conversion and importation. EnerGov has reviewed all data sources as identified by Agency and will utilize the following conversion approach and protocol to complete the task.

Protocol

From a high level, EnerGov's standard protocol with regard data conversion, analysis, development, testing, and deployment (cutover) involves several project team members to varying degrees and in various capacities including: EnerGov Project Manager, EnerGov Business Analyst, EnerGov Systems Analyst, EnerGov Data Services. While the eventual process can vary, the following tasks represent the fundamental components / benchmarks associated with the conversion and migration process:

Business Impact Analysis & Discovery

Identification of business and operational requirements that impact the migration process; consultation with key agency stakeholders to ensure that all necessary business requirements are factored into subsequent migration planning; communicating definitions and expectations regarding conversion process; obtaining data in non-proprietary, readable format from agency for subsequent analysis by EnerGov Data Services.

- Comprehensive review and evaluation of legacy system data with specific attention to general data quality, viability, and identification of overt "scrubbing" necessities
- Identification and refinement of all business process data to be migrated (IT staff defines allowable downtime and migration schedule in light of prevailing policies)
- DBA / system administrators define application and database requirements
- Security and compliance groups define any and all applicable compliance requirements

Data Mapping & Design

Comprehensive mapping and migration of legacy data into EnerGov .NET system framework; item-by-item road map defining specific rules which will be applied during the conversion process and how data is moved into the framework; a combination of migration mandates and best practices will govern the layout of the destination storage environment; custom utility / executable development (if applicable) for data transfer (both one-time and on-demand).

Creation of Migration Plan

Migration plan functions as the blueprint for the migration implementation, specifying Agency expectations, defining project deliverables, and identifying migration methodologies to be used; critical inputs to the migration plan include the following:

- Business and Operational Requirements
- Data (to be migrated) with associated attributes
- Available Migration Tools
- Application Best Practices

Provisioning

Destination environment is prepared for data move (governed by system configuration business process / rules developed and established by EnerGov Project team in conjunction with key agency stakeholders).

Pre-Migration Test

Sample data loaded, tested, reviewed, and validated against agency-defined business process scenarios with key agency stakeholders in order to ensure data quality, viability, and operability in light of agency mandates (acceptance testing); testing results dictate the necessity of any and all modifications or alterations to the Migration Plan required to fulfill agency-specific requirements.

Migration and Cutover

Data testing, validation, and confirmation are complete; source / legacy data is moved to destination (EnerGov 9 framework); cessation of legacy application contingencies is achieved.

Migration Validation

Validation of post-migration environment; confirmation that all agency expectations and mandates have been satisfied accordingly.

General Methodologies & Standards

Data Scrubbing and Purification

EnerGov recommends utilizing intermediary Staging Tables to facilitate the data purification process. This methodology has several advantages including simplifying the data clean-up / scrubbing tasks by providing a stratified, intermediary tier – between the source and destination environment – in which to operate; renders data validation efforts more seamless and typically more successful

Data Mapping

As noted above, utilizing intermediary Staging tables to facilitate the data mapping process (and subsequent conversion) can be quite beneficial. This methodology has several advantages worth noting including: simplification of data clean-up / scrubbing tasks by providing a stratified, intermediary tier – between the source and destination environment – in which to operate; renders data validation efforts more seamless and typically more successful; promotes an environment in which iterative imports – a fundamental conversion task - are easier to perform and execute. One consideration to note: this method typically will require more involvement from agency personnel in the initial stages of the conversion lifecycle and is not necessarily suitable if technical resources are limited.

Initial Data Load

EnerGov commonly develops highly specialized import utilities to facilitate the data extraction, conversion & transfer process for the specific agency. Initial data loads occur during pre-migration testing when sample data is loaded and subsequently tested, reviewed, and validated against agency-defined business process scenarios with key agency stakeholders in order to ensure data quality, viability, and operability in light of agency mandates (acceptance testing); testing results dictate the necessity of any and all modifications or alterations to the Migration Plan required to fulfill agency-specific requirements.

Data Integrity, Verification & Validation Rules

As noted above, EnerGov's data integrity and validation efforts begin early on in the conversion process, specifically during the initial Business Impact and Data Discovery. This effort involves the identification of both business and operational metrics that impact the migration process, consultation with designated agency stakeholders to ensure that all necessary business requirements are factored into subsequent migration planning, and communicating / collecting definitions and expectations regarding the conversion. Rules and metrics collected through this exercise are subsequently used to define and construct validation scripts and reports to target specific metrics / attributes of source data to confirm data quality, data counts / volume, data auditing.

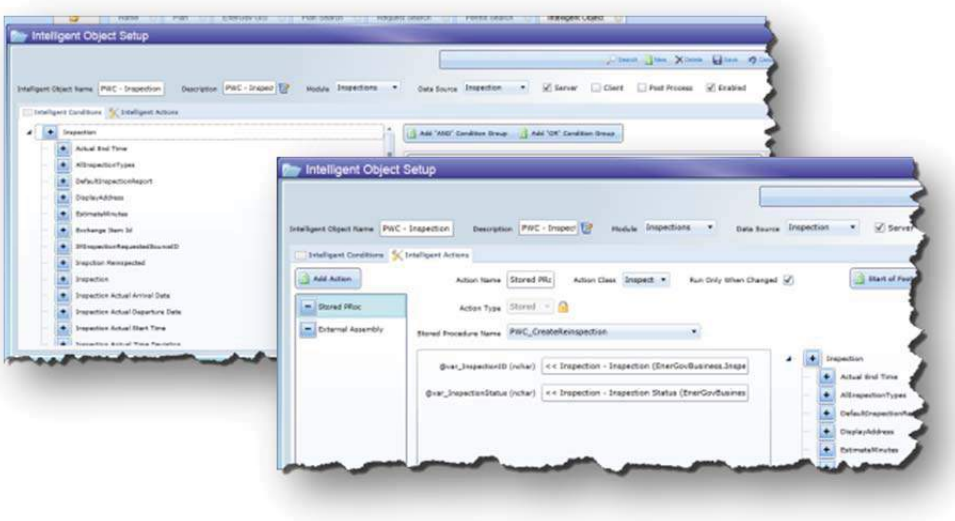
Integrations & Interfaces

EnerGov is a proponent of data sharing and collaboration. Moreover, the inherent design and service-oriented architecture (SOA) of the EnerGov application provides an extensible framework for interoperability, a critical component to the eventual success of this project. While the exact method of integration can vary depending upon the availability of published API's, EnerGov commonly utilizes the following tools to facilitate system interfaces and access to external or third party data sources.

Web Services including:

- WCF (Windows Communication Foundation)
- SOAP (Simple Object Access Protocol)
- REST (representational state transfer)

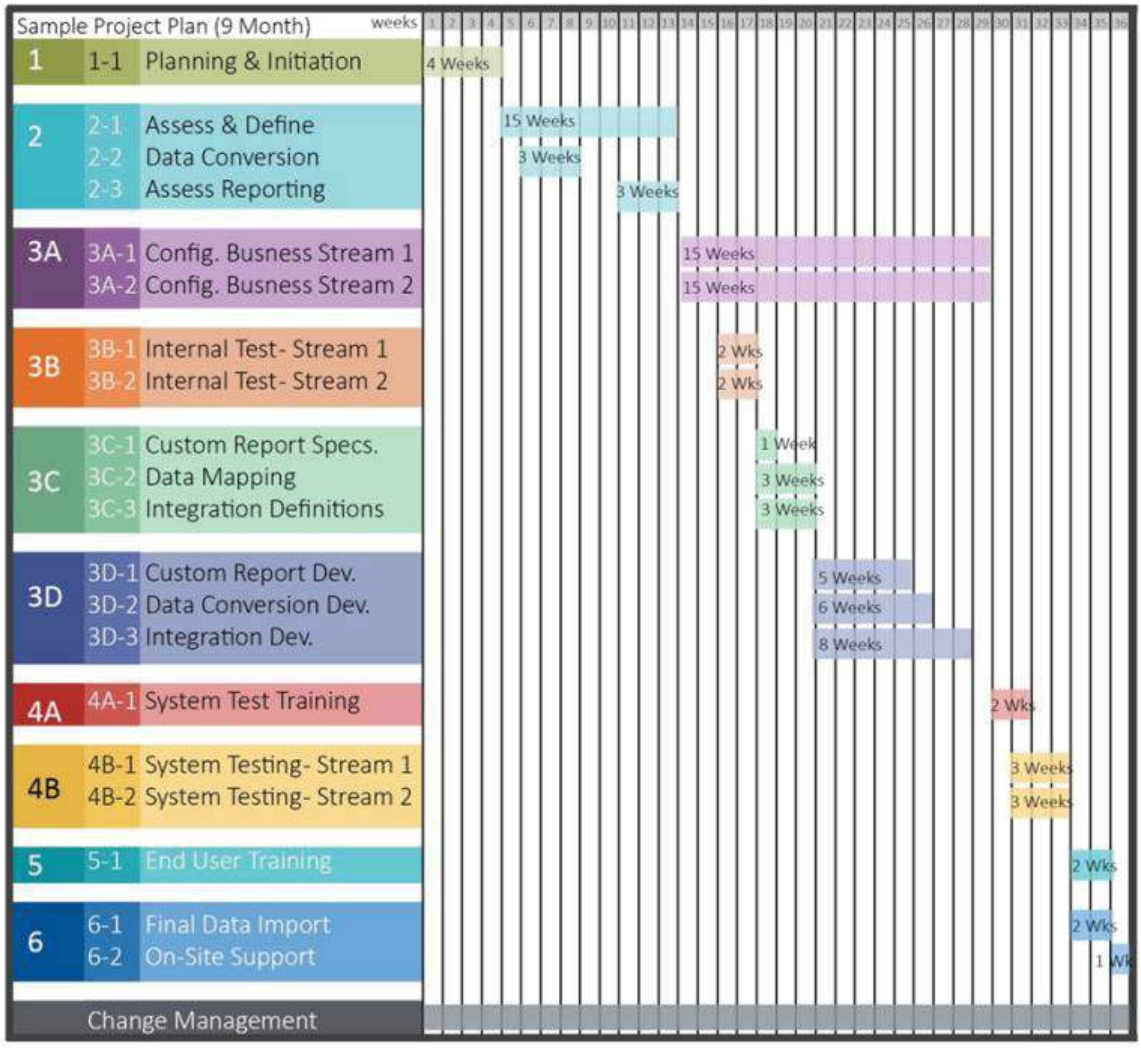
EnerGov IOE™: Internal tool for invoking external assemblies, compilations



Project Schedule

Upon execution of the contract, Tyler and the City will collaborate during the project planning and initiation stage to determine a start date for services to be rendered. Upon initiation of these services, EnerGov shall work with the City to collaboratively define a baseline or preliminary project schedule/plan. Given the fact that project schedules are working documents that change over the course of the project, EnerGov shall work closely with the City to update, monitor, agree, and communicate any required changes to the project schedule.

Tyler has provided a sample project plan here based on the information given in City of Bryan's RFP.



Implementation Responsibility Matrix

Stage 1: Planning & Initiation

TYLER	AGENCY	Task Description
✓		Conduct Planning/Initiation Introductory Phone Call
	✓	Assign Project Team Members
	✓	Provide/Assign facilities for Tyler on-site activities
✓		Identify non-working days (i.e. vacations, holidays, etc.)
	✓	Define procurement and configuration plan for necessary hardware, non-EnerGov systems software and networking infrastructure by the Agency as specified by Tyler's Hardware / Infrastructure requirements documentation
	✓	Provide Tyler remote access (when needed) to required server for Tyler software installation and system configuration
✓		Deliver and review Process and Configuration Collection Templates
✓		Create SharePoint site to manage project deliverables, documents, UAT and other aspects of the overall implementation
✓		Deliver and review Project Status Report Template
✓		Deliver and review Sample Signoff Form
✓		Deliver and review GIS requirements and best practices documentation
✓		Deliver and review Data Conversion Template Database (DCT-DB), ERDs and usage documentation
	✓	Prepare programs/databases for integration
✓		Identify and document project risks and resolutions
✓		Amend project scope/SOW as needed
✓		Deliver and review Project Plan
✓	✓	Other tasks as identified
✓		Deliver Project Planning & Initiation Stage Sign Off to Agency
	✓	Return Project Planning & Initiation Stage Sign Off to Tyler

Stage 2: Assess & Define

TYLER	AGENCY	Task Description
	✓	Identify Case Types (i.e. Permit Types, Plan Types, Inspection Types, etc.)
✓		Scope and document business processes to be implemented (i.e. Workflows, Automation, GeoRules, etc.)
	✓	Return Process and Configuration Collection Templates to Tyler
	✓	Deliver ArcGIS base map service(s) to Tyler
✓		Develop Project Definition Documents to include comprehensive collection of business processes, configuration and other details identified during this Stage
✓		Deliver and review Project Definition Documents
✓	✓	Other tasks as identified
✓		Deliver Assess & Define Stage Sign Off to Agency
	✓	Return Assess & Define Stage Sign Off to Tyler

Stage 3: Configure & Review

TYLER	AGENCY	Task Description
Stage 3A – System Configuration		
	✓	Deploy Pre-production environment to house the configuration system as defined and reviews by Tyler's Hardware / Infrastructure requirements documentation
✓		Configure the software based upon definition established in the previous Assess & Define stage
✓		Perform ongoing with customer as configuration progresses
	✓	Deliver populated Data Conversion Template Database (DCT-DB)
✓		Complete Basic Configuration Reviews
✓		Deliver System Configuration Stage Sign Off to Agency
	✓	Return System Configuration Stage Sign Off to Tyler
Stage 3B – Internal Test		
✓		Provide users logins for key Customer staff
	✓	Conduct basic system configuration testing/retesting walkthrough
	✓	Record testing results in SharePoint
✓		Resolve any system issues identified
✓	✓	Other tasks as identified
✓		Deliver Internal Testing Stage Sign Off to Agency
	✓	Return Internal Testing Stage Sign Off to Tyler
Stage 3C – Build Specifications		
	✓	Populate Data Conversion Template Database (DCT-DB)
✓		Deliver and review list out-of-the-box standard reports, documents, dashboards and search consoles in order to identify any gaps in report coverage that may require custom report development
	✓	Deliver Report Specifications (must include the formula for any field calculations/summaries) and PDF samples for any required custom reports (if necessary)
✓		Deliver Custom Report Development estimate (hours and cost) and accompanying Change Order (if necessary)
	✓	Deliver API's for any integrations that require them (if necessary)
✓		Develop integration specifications
✓		Deliver and review integration specifications to Agency
✓		Produce custom programming specifications and deliver to EnerGov R&D (if necessary)
✓	✓	Other tasks as identified
✓		Deliver Build Specifications Stage Sign Off to Agency

	✓	Return Build Specifications Stage Sign Off to Tyler
Stage 3D - Build		
	✓	Deliver and review populated Data Conversion Template Database (DCT-DB) with EnerGov Data Services team member(s)
✓		Import data into EnerGov master database from populated Data Conversion Template Database (DCT-DB)
✓		Produce, deliver and review internally tested import of legacy data into EnerGov master database
✓		Produce, deliver and review internally tested custom reports per defined requirements (if necessary)
✓		Produce, deliver and review internally tested integrations per defined requirements
✓		Provide and review the documented cut over strategy
✓	✓	Other tasks as identified
✓		Deliver Build Stage Sign Off to Agency
	✓	Return Build Stage Sign Off to Tyler

Stage 4: Acceptance Verification & Testing

TYLER	AGENCY	Task Description
Stage 4A – System Acceptance Planning & Training		
✓		Produce, deliver and review agency specific training materials
✓		Coordinate training logistics and schedule
	✓	Provide facilities suitable to training needs
✓		Provide, if requested by Customer, Tyler's training lab
	✓	Deliver fully configured database for pre-User Training data import to EnerGov
	✓	Populate Data Conversion Template Database (DCT-DB) with latest iteration for User Training
✓		Conduct pre-User Training import of data from Data Conversion Template Database (DCT-DB) in master EnerGov database and deliver to Agency
	✓	Deploy fully configured and imported master EnerGov database into the Production testing environment
✓		Conduct training
✓	✓	Other tasks as identified
✓		Deliver User Training Stage Sign Off to Agency
	✓	Return User Training Stage Sign Off to Tyler
Stage 4B – Verification and System Acceptance		
✓		Resolve identified System Acceptance Testing issued identified
	✓	Retest until Acceptance criteria are met or full hours consumed
✓	✓	Other tasks as identified
✓		Deliver Verification and System Acceptance Stage Sign Off to Agency
	✓	Return Verification and System Acceptance Stage Sign Off to Tyler

Stage 5: End User Training

TYLER	AGENCY	Task Description
✓		Produce, deliver and review agency specific training materials
✓		Coordinate training logistics and schedule
	✓	Provide facilities suitable to training needs
✓		Provide, if requested by Customer, Tyler's training lab
	✓	Deliver fully configured database for pre-User Training data import to EnerGov
	✓	Populate Data Conversion Template Database (DCT-DB) with latest iteration for User Training
✓		Conduct pre-User Training import of data from Data Conversion Template Database (DCT-DB) in master EnerGov database and deliver to Agency
	✓	Deploy fully configured and imported master EnerGov database into the Production testing environment
✓		Conduct training
✓	✓	Other tasks as identified
✓		Deliver User Training Stage Sign Off to Agency
	✓	Return User Training Stage Sign Off to Tyler

Stage 6: Production & Go-Live

TYLER	AGENCY	Task Description
	✓	Deliver fully configured database for Production data import to EnerGov
	✓	Populate Data Conversion Template Database (DCT-DB) with latest iteration for Production
✓		Conduct Production import of data from Data Conversion Template Database (DCT-DB) in master EnerGov database and deliver to Agency
	✓	Deploy fully configured and imported master EnerGov database into the Production environment
✓		Provide onsite pre and post production support
✓		Define support logistics and schedule
✓		Assist customer as production issues arise
	✓	Provide technical and functional user support
	✓	Develop and maintain post-production issues list in SharePoint
	✓	Ensure key/critical personal are present and available to participate
✓	✓	Other tasks as identified
✓		Deliver Production & Production Support Stage Sign Off to Agency
	✓	Return Production & Production Support Stage Sign Off to Tyler

City Project Team Roles

The following tables include information surrounding the City's Project Team resources, roles and expectations. Given that each project is unique, these metrics can vary based upon the final agreed upon Statement of Work.

Project Team Role	Typical Tasks
Stakeholder Committee	This committee is formed by executive or managerial staff of every effected business group to be implemented. Typical individuals Include a committee of the following: CIO / Community Development Director / Finance Director / CBO / Planning Director / Public Works Director etc. Responsibilities include: ○ Ensure proper change management and leadership to departmental staff. ○ Determine beneficial process change through automation as it is presented cross-departmentally. ○ Monitor project from high level.
Project Sponsor	This role is typically an executive or managerial sponsor of either the IT group or a dominate business group that is ultimately responsible for the success of the project. Typical positions: IT Director / Department or Division Director Responsibilities include: ○ Ultimate responsibility for the success of the project; serves as project champion. ○ Creating a positive environment that promotes project buy-in. ○ Driving the project through all levels of the City. ○ High-level oversight throughout the stages of the project; ROI initiatives oversight.
Project Manager	This role is typically a non-business group member (IT or support staff) of the City's project team. Typical positions: IT or applications support project manager Responsibilities include: ○ Serve as coordinator of the City's Implementation team / subject matter experts. ○ Assist in managing the project scope, deliverables and timeline with assistance from the EnerGov Project Manager. ○ Ensure that the project team stays focused, tasks are completed on schedule, and that the project stays on track.

	○ Develop and maintain the project resource plan in conjunction with the EnerGov Project Manager. ○ Schedule and coordinate project tasks with assistance from the EnerGov Project Manager. ○ Coordinate the City's Implementation team resources with all departments. ○ Participate in daily project activities and track progress on project tasks. ○ Hold meetings with project stakeholders to update on project status and to reach verdict on any escalated process decisions that need to be made.
Departmental System Administrators	A user representative for each affected department is typically appointed for the entire lifecycle of the implementation; sometimes serve in conjunction with Technical lead as ongoing configuration support or "Systems Administrator" post production phase of the EnerGov system. Typical positions: Departmental or division subject matter expert and typically a direct member of the business group or of the business applications support group. Responsibilities include: ○ Being trained on the EnerGov .NET system at a System Administration level. ○ Being fully engaged in the business analysis system configuration, reviews and UAT activities. ○ Assist internal efforts towards the creation of reports, interfaces & conversions. ○ Actively participate in the full implementation of the EnerGov software solution. ○ Serve as ongoing departmental or division system configuration support post the production phase of the project
Departmental Business Leads	A user representative for each affected department must be appointed for the entire lifecycle of the implementation. Assigning competent business leads to assist in the project is highly recommended and can often determine the success of the implementation for their respective areas. These Business Leads are typically transitioned into EnerGov "Power Users". Typical positions: Departmental or division "power user" and member of the business group. Responsibilities include: ○ Attending assessment workshop sessions. ○ Willing and able to gather data and make decisions about business processes. ○ Assist as a knowledge-base in the creation of

	specifications for reports, interfaces & conversions. ○ Review and test the system configuration.
Technical Lead	A technical individual from the Information technology group that is responsible for the technical infrastructure support of the implementation and to serve as ongoing technical infrastructure support post the production phase of the EnerGov system. Typical positions: Network / IT Administrator Responsibilities include: ○ Primary responsibility for the technical environment during the software implementation ○ Ensure that servers, databases, network, desktops, printers, are available for system implementation and meet minimum standards ○ Work with EnerGov's technical personnel during implementation ○ Maintain the testing and production databases ○ Install software updates and releases ○ Act as the primary technical resource for troubleshooting technical problems ○ Establish and maintain backup, archival, and other maintenance activities
Legacy System Administrators	An individual / business expert familiar with legacy system functions and specifically any that will interface with the EnerGov platform.
GIS Administrator	Assists during the analysis, setup & testing portions of the EnerGov deployment; involvement is Stage specific; provide ongoing maintenance related to map service publication
Report Writers	A technical individual familiar with database design and the EnerGov database schema; reports and report needs change over time and thus we recommend maintaining at least 1 report developer.
Testing Resources	Combination of business and technical resource / knowledge pool; primarily involved in developing and maintaining testing strategies post production and over time as updates and service packs are delivered by EnerGov.

City – Post Production Considerations

EnerGov has included a sample model of recommended resources (both business and technical) to aid in the planning process. Given that all projects are unique this model should be used as a guideline and **not necessarily as a definitive or mandatory list**.

City Project Team Role	FTE Quantify	Tasks	Skills / Min Experience	Hours per Month	Duration (weeks, months)
Stakeholder Committee	High Level ~ 0.05	*general task description has been included below table	Business / Technical	~8	Total project estimated @ 10 - 12 months
Project Sponsor	Engaged ~ 0.1	*general task description has been included below table	Technical / Business	~16	Total project estimated @ 10 - 12 months
Project Manager	Heavily Engaged ~ 1	*general task description has been included below table	Business / Technical	~160	Total project estimated @ 10 - 12 months
Departmental System Administrators	Heavily Engaged ~ 1 per department	*general task description has been included below table	Business / Technical	~160	Total project estimated @ 10 - 12 months
Departmental Business Leads	Heavily Engaged ~ 1 per department	*general task description has been included below table	Business	~160	Total project estimated @ 10 - 12 months
Technical Lead	Stage Specific Engagement ~ 0.25	*general task description has been included below table	Technical	~40	Total project estimated @ 10 - 12 months
Legacy System Administrators	Stage Specific Engagement ~ 0.5	*general task description has been included below table	Business / Technical	~80	Total project estimated @ 10 - 12 months
GIS Administrator	Stage Specific Engagement ~ 0.25	*general task description has been included below table	Technical	~40	Total project estimated @ 10 - 12 months

Report Writers	Post Production ~ 0.5	*general task description has been included below table	Technical	~80	Ongoing / Post Production
Testing Resources	Post Production ~ .25 per department	Post production testing strategy and ongoing support	Business / Technical	~80	Ongoing / Post Production

EnerGov Project Team Experience

A successfully installed system is not based solely on the offered functionality, but also on the expertise, experience, and clarity of both EnerGov and City's Project Team. With over 120 successful government implementations within the last five years, and as the only vendor to successfully implement a true 4-tier web based system, EnerGov has managed more contemporary implementations than any vendor in this market space. As such, the City can be confident that the eventual success of this project will leverage years of experience and highly trained service professionals.

EnerGov Project Team Resumes

*Sample resumes included - Project Managers, trainers, consultants, and other team members are selected only after contracts have been signed and returned to Tyler. Once we have fully analyzed your situation we will provide you with the implementation team best suited to your needs. We believe that this is an important step to the implementation process, and would appreciate your patience as we make this crucial decision.

Name	Wendy S.
Title	Training Manager
Education	Georgia Gwinnett College
Tenure	Employee since 2013
Previous Titles	Software Trainer
Experience	Wendy started as a Software Trainer where she successfully trained over 25 clients. She was promoted within a year to Training Manager where she now oversees a team of 7 trainers. She oversees initial client meetings, customizing client schedules, manages trainer scheduling, create end-user documentation and client specific manuals, Connect 2015 conference committee, Certification Classes for ongoing education and internal on-going training.
Reference Projects	**Prince William County, VA** Dave Ghysen Project Manager Dghysen@pwcgov.org **Kansas City, KS** Jerry Buckman Project Manager Jerry.buckman@kcmo.org **Raleigh, NC** Frank Jacquez IT Land Management Program Manager Frank.jacquez@raleighnc.gov **Fauquier County, VA** Kim Johnson Chief/Zoning & Development Services Kim.johnson@fauquiercounty.gov

Name Chris T.

Title PMO Manager

Education University of Georgia, Bachelor's Degree in Education

Tenure Employee since 2008

Previous Titles
Implementation Manager
Project Manager
Senior Solutions Consultant
Implementation Consultant
Trainer

Experience Chris is our PMO manager who sets and oversees the protocol as it pertains to deploying and configuring all products in the EnerGov Product Line. He also is responsible for the standardization of all customer facing deliverables.

Chris has successfully overseen 40+ projects for EnerGov since joining in 2008, providing hands-on implementation of software rollout, configuration, data conversion, report development, training, and other deliverables. He is proficient in all SQL versions, Office Products, and Crystal Reports and the industry as a whole.

Technology SQL, HTML, XML, XAML Databases: SQL Server 2000/2005/2008/2012, OS Environments: Windows (All Platforms), Crystal Reports (All Versions) Development Environments: Visual Studio 2005/2008/2010, .NET, MS Silverlight

Reference Projects

Laguna Beach, CA
Ann Marie McKay
Administrative Assistant to the Director
Community Development Department
ammckay@lagunabeachcity.net

Polk County, IA
Jacqueline A. Hibbard
Budget Analyst
Jacque.Hibbard@polkcountyiowa.gov

Fauquier County, VA
Deb Bookwalter
Information Technology
Deb.Bookwalter@fauquiercounty.gov

Redding, CA
Toni Duquette
Systems Analyst/Programmer
tduquette@ci.redding.ca.us

Lewiston, ME
Peter Parker
PParker@lewistonmaine.gov

Name Mohamad M.

Title	Implementation Manager
Education	University of Delaware, Bachelors of Science in Computer Engineering
Tenure	Employee since May 2009
Previous Titles	Principal Implementation Consultant Project Manager Implementation Consultant Trainer
Experience	As an Implementation Manager, Mohamad is responsible for leading 4 project teams to the success of a project's full implementation lifecycle. He is also responsible for the development and professional growth of not only team members that fall under his reign, but also that of the team members under other implementation managers within EnerGov. Having been involved in all facets of the company's divisions such as report writing, QA, as well as research and development specifications, "Mo" is well equipped to provide a well-rounded approach and provide experience to all that have been involved. He has also been pivotal in shaping the future of the implementation department by mentoring the Principal Implementation Consultants on how to implement the product, utilize their team effectively, as well as have greater industry knowledge in order to successfully implement the EnerGov Solution.
Technology	PL/SQL, SQL Server Databases: SQL Server 2005/2008R2/2012, Oracle 10g/11g OS Software: Expert in Microsoft Office and Crystal Reports
Reference Projects	**Cambridge, MA** Scott Hamilton Project Manager shamilton@cambridgema.gov **Yuma, AZ** Allen Hook *Project Manager* IT Department Allen.Hook@Yumaaz.gov **Sioux Falls, SD** Debra Gaikowski Project Manager dgaikowski@siouxfalls.org **Hilton Head, SC** Jill Foster *Project Manager* Community Development JillF@HiltonHeadislandsc.gov

Name	Jason D.
Title	Implementation Manager
Education	Georgia State University, Masters of Business Administration
Tenure	Employee since 2010
Previous Titles	Implementation Consultant Training Manager
Experience	Jason is an implementation manager in which he oversees the deployment of new products, services and projects including installations of hardware, software, networking, and cloud services. Jason has worked on numerous EnerGov projects in varying capacities since joining our team in 2010. He has proved efficient at providing hands-on implementation of software rollouts, configuration, data conversion, report development, training, and other deliverables. He is proficient in all SQL versions, Office Products, and the industry as a whole.
Technology	SQL Databases: SQL Server 2008/2012
Reference Projects	**San Luis Obispo, CA** Eric Geddes DBA egeddes@slocity.org **Gaithersburg, MD** Brian Helms IT bhelms@gaithersburgmd.gov

Name	Ben B.
Title	Project Manager
Education	University of Georgia, Degree in Computer Information Systems PMP Certification – Project Management Institute (Cert. No. 1700493)
Tenure	Employee since 2012
Previous Titles	Implementation Consultant Configuration Specialist
Experience	As a project manager, Ben is responsible for managing the success of a projects full implementation lifecycle. Having been involved in all facets of the company's divisions such as report writing, QA, as well as research and development specifications, Ben is well equipped to provide a well-rounded approach to project management. He has also been pivotal in shaping the future of the implementation department by mentoring newer consultants on how to implement the product, as well as have greater industry knowledge in order to successfully implement the EnerGov Solution.
Technology	CSS, SQL, HTML, XML, Databases: SQL Server 2008/2012, OS Environments: Windows (All Platforms), Crystal Reports (All Versions) Development Environments: Visual Studio 2005/2008/2010, .NET, MS Silverlight
Reference Projects	**Redding, CA** Toni Duquette Systems Analyst/Programmer tduquette@ci.redding.ca.us **Prince William County, VA** Rosa Moran Systems Developer rmoran@pwcgov.org

Name	David J.
Title	Conversion Development Lead
Education	University of Memphis , Bachelor's Degree in Computer Science
Tenure	Employee since 2011
Previous Titles	Conversion Development
Experience	David has worked for Tyler since 2011. Since that time, David has successfully converted dozens of legacy data systems and data sources into the EnerGov database including all Accela products including KIVA, Permits Plus, Tidemark and Accela Automation as well as Sungard HTE and over 10 other systems. For the past five years, data conversion and integration services has been his primary focus in the company. David handles everything from initial data analysis and mapping oversight to the development and execution of the final conversion. In addition to data conversions, David also develops integration applications for special cases that arise, such as financial and document integrations.
Technology	Programming Languages: C#, Visual Basic, SQL, HTML, XML Databases: SQL Server, Oracle 10g/11g/12c, MySQL, MS Access OS Environments: Windows (All Platforms) Development Environments: Visual Studio 2005/2008/2010/2013, .NET
Reference Projects	**Cambridge, MA** Scott Hamilton Project Manager shamilton@cambridgema.gov **Fauquier, VA** Kim Johnson Chief/Zoning & Development Services Kim.johnson@fauquiercounty.go **Pomona, CA** ○ Mark Lazzaretto Community Development mark)lazzaretto@ci.pomona.ca.us

Name	Yanfen L.
Title	GIS Analyst
Education	University of Georgia, Ph.D. in GIS
Tenure	Employee since 2015
Previous Titles	Tenured Associate Professor in GIS GIS Analyst
Experience	Yanfen has over twenty years of experience in GIS. She is proficient in all versions of ESRI software including Arc/Info, ArcView, ArcGIS Desktop, ArcGIS Online, and ArcGIS Server. As a tenured associate professor, she taught Web GIS, GIS Database Design, Advanced GIS, and Cartography, and advised seven master theses in GIS. She has administered three ArcGIS Servers for seven years, and has advised students designing and publishing effective and efficient GIS services and developing web applications. At Tyler, Yanfen created GIS data and published services for EnerGov Land and Public Maintenance Management (PMM) projects, and provided GIS consulting service.
Technology	GIS: ArcGIS Server, ArcGIS Desktop, ArcGIS Online, ArcGIS Server API for JavaScript and Flex, Google Maps JavaScript API, Google Earth API, Python, Visual Basic, SQL, HTML Databases: Oracle, SQL Server, MySQL, MS Access
Reference Projects	Principal investigator of two web GIS awards for U.S. Fish & Wildlife Service. Supported Town of Kiawah Island, SC for maps hosted on ArcGIS Online Constructed a knowledgebase for *The National Map* Led the Underground Utility project for Shanghai, China Developed an Intranet GIS for the Shanghai Municipal Government. Provided GIS service to the City of New Bern, NC on the PMM project Participated in a NIMA (NGA) Littoral Warfare Database project. Participated in the Base Geographic Database project for Shanghai, China

TRAINING

CITY OF BRYAN

CIVIC PLATFORM

RFP #16-022

tyler technologies

Training Plan

With an application as dynamic and configurable as EnerGov, it is imperative to provide an equally configurable and dynamic training program adaptable to the City's unique business processes, workflows and terminology. As such, we offer adaptable training solutions to meet your agencies needs depending on various factors from facilities and budgetary constraints to staff size and geographical location.

Training Options

EnerGov Fundamentals Pre-Implementation Training (Recommended)

The optional, but highly recommended, EnerGov Fundamentals training opportunity gets your Power Users comfortable with the EnerGov system, language, and processes before implementation begins. This allows users on your team to better engage with the EnerGov trainers during regular training hours, and empowers your staff with experience and a more complete understanding of the system. Many of our clients take advantage of the EnerGov Fundamentals option because it eases the transition during implementation and training, garnering better results and a greater understanding of new processes. Tyler is pleased to offer this introductory training option built for the needs of each of our clients.

Benefits of this model:

- Learn general EnerGov terminology
- Experience the basic functionality of EnerGov
- Explore the configuration options of EnerGov
- Encourage client-side discussions of desired configuration
- Discover some of the software capabilities available for consideration
- Improve communication between Tyler and the client through software knowledge

EnerGov-Lead Functionality Training (Recommended)

This approach to training is ideal for end-users seeking an individualized experience with EnerGov and consists of small classroom training with members of your organization led by a designated EnerGov Software Trainer. This method is an in-depth and expansive exploration of the EnerGov system, resulting in greater comprehension and retention of system features and functionality. The Functionality Training model requires EnerGov Software Trainers be on-site for the full duration of training followed immediately by on-site Go-Live support. This ensures that there is no gap between the completion of training and the live launch of EnerGov as the primary application, reducing the chance of diminished training knowledge and experience.

Benefits of this model:

- Dedicated training with each system user
- One-on-one and small group environments
- Custom designed training curriculums
- Consistent and effective training methodologies
- Average of 10 training hours per user

Train the Trainer

This approach to training is best suited for agencies with budgetary restrictions or those that have experienced staff comfortable with leading and implementation training programs. Our experienced Software Trainers will work closely with pre-determined Power Users to ensure that they are well versed in all aspects of EnerGov and that they feel comfortable transferring that knowledge to their peers. In addition to training your Power Users on the application itself we'll cover how to utilize EnerGov's training materials to ensure a complete and successful training at the next level.

The Train the Trainer model requires EnerGov Software Trainers be on-site for a shorter amount of time, typically half that of EnerGov-Lead Training model, followed by several weeks of off-site Trainer support capped off with on-site Go-Live support.

Benefits of this model:

- Powers Users become immediate stakeholders in the success of EnerGov
- Training between the Power Users and peers creates a comfortable environment
- Reduced learning times and more flexible training scheduling

Training Materials

EnerGov provides a standard set of training materials to ensure effective and efficient training of your system. Typically, Tyler arrives with an Objective Sheet, which gives an outline of each training course, the type of content, and course outcomes and objectives for end-users. User Guides are available for all end-users who will participate in training. Additionally, Set-Up Guides are available for administrators, who will be able to set up and change settings for the system after go-live. All of the above mentioned training materials are available to the City electronically, and may be locally printed for your use. Sample training materials will be provided upon request.

- Objective Sheets
- User Guides
- Set-Up Guides

Scheduling & Attendance

EnerGov prefers a classroom and curriculum approach for on-site training with measurable benchmarks to ensure knowledge transfer, comprehension, and retention. In coordination with the EnerGov project manager, the City will choose from a pre-defined list of classes and create a schedule for when those classes will be offered. It is the responsibility of the City's Project Manager to select the participants for each course that will be offered. EnerGov's Training Director will assist where necessary in completing the schedule and selecting training courses.

Training courses are most often scheduled for 90 minute time slots with a recommended maximum of fifteen students per course. Most courses will conclude with a short written test as well as a

product scenario which will be reviewed by the project managers from both EnerGov and the City. All course curriculum, PowerPoint presentations, notes, and additional documentation will be provided to the Agency in support of subsequent training.

Attendance to the training by end-users is a critical step during implementation. By participating in training courses, your employees gain critical hands-on experience with the system, and learn the EnerGov approach. Tyler's training staff will take attendance during classes, and relay that information back to the City Project Manager for review. This ensures that all end-users get the complete benefit of training, ensures a better understanding of new processes, and reduces support incidents after go-live.

Responsibilities

The City's responsibilities during the training period are typically minimal, but critical. Generally, it is the City's responsibility to schedule individuals for classes, distribute training materials, reserve spaces for training, provide projectors and screens for training displays, and any training workstations that may be required. The EnerGov Training Team will work collaboratively with the City to craft a training schedule around the unique needs of the City staff, and list specific needs for location and equipment during Phase 1 of the Implementation.

Post Implementation Training

Upon "go-live" of the EnerGov system the EnerGov training department will continue to work intimately with each partner to expand on the base knowledge transferred during implementation training. Post Implementation training is provided for "refresher" courses, new employee, advanced process training, etc. Depending on your needs, these courses can be conducted in the following manner:

Remote Training

Remote training sessions offer the flexibility of scheduling and conducting on-demand training sessions between an EnerGov Software Trainer and your users. These training sessions can be one-on-one or in a class setting with a large group, where we're able to demonstrate live on machines at your agency's location. Training materials can also be provided to your end users in advance of the call to compliment the content covered during the training.

On-Site Training

Similar to training provided during the initial Core Implementation, we can send an EnerGov Software Trainer to your location to conduct specialized dedicated training on the topic(s) of your choice. Our Software Trainer(s) will work to design a training program that meets the specific needs of your request, scheduling requirements.

EnerGov-Hosted Training & Certifications

Utilizing EnerGov's state of the art training facilities in our Atlanta Offices, we can host training for your team, as well as provide EnerGov Certification courses. We're able to replicate your agency's system here in our offices to guarantee a relevant and applicable learning experience.

Tyler Connect

Tyler hosts an annual education forum, Tyler Connect, which serves our customers' need for new information, as well as refresher information on our software products. Each class is tailored to meet the needs of attendees in order to increase productivity and, ultimately, improve responsiveness to your citizens and clients. Tyler is a nationwide community dedicated to learning, growing, sharing, and connecting every year.

Clients who attended Tyler Connect took advantage of the opportunity to connect directly with Tyler's seasoned professionals, business partners, and other users. They attended educational sessions, new product demos and workshops, as well as networked and shared ideas with their public sector peers. These classes enable them to gain knowledge that will empower them to better serve their communities through the use of Tyler's products.

Sample Course Syllabus

Course ID: CASH100

Course: Managing Till Sessions, Payments, Invoices and Reporting

Prerequisite(s): EG200
Course Type: Instructor Led
Course Level: Intermediate

Course Description: This course highlights how to build an invoice using auto-added and manually added fees and will also explore the Manage Payments screen and cover how and when to apply both full and partial payments in EnerGov. Additionally, trainees will learn how to apply fee adjustments and to delete fees (if their roles allow). Users will learn how to print daily and annual reports needed for accounting reconciliation. If utilized by your jurisdiction, till sessions will also be introduced in this course.

EnerGov Modules Covered: Cashier and Reporting

Who should take this course: Users who will be responsible for managing and processing invoices and payment transactions as well as users who will be generating daily or regular financial reports.

Hours: 1.5 hours

Course Objectives: At the completion of this course, users should be able to perform the following tasks:

1. Explain the difference between auto-add and manually added fees and why you would need both in your system.
2. Explain when to Build an Invoice and when to Pay Now.
3. Create an invoice from generated fees
    a. Create one invoice for a case using all fees at both the case and contact level
    b. Create multiple (at least 2) invoices for a case using a portion of your fees in each invoice.
4. Apply Payments
    a. Apply only a partial payment to an open invoice.
    b. Apply a full payment to an open invoice.
5. Manage Payment and Fee Adjustments
    a. Be able to void a payment
    b. Be able to adjust a fee amount
    c. Be able to refund a portion (or all) of a payment
6. Manage Till Sessions (optional)
    a. Be able to open and close a till session
    b. Be able to reconcile the register (account for the tender denominations)
7. Generate Reports
    a. Report on all transactions in EnerGov completed today (current date)
    b. Report on all permit transactions completed in EnerGov today (current date)
    c. Report on all permit transactions completed over 365 days

Sample Training Course Catalog Descriptions

Course ID: EG100

Course Title: EnerGov Navigation

Course Description: Fundamental concepts of EnerGov Server navigation and their application to everyday computer use. Topics include utilizing dashboard widgets as quick information tools, action items toolbar, functionality of the EnerGov 'E', and main toolbar. Module menus (setup, viewer, and reports) will be introduced. We will introduce two left-pane menu options—Additional Info and Workflow—and show how they are used throughout the application and contain a vast amount of information and the ability to collect data on many different fronts. Global Contact Management is also a large component of this course. In addition, we will explore the "global" relationships that the EnerGov application has implemented to allow the software to be used across multiple departments, serving multiple functions, yet serving as a central source of information accessible to all users.
Prerequisite(s): N/A

Course ID: EG200

Course Title: Reporting and Advanced Searching Capabilities

Course Description: EnerGov Enterprise Server provides a wide variety of approaches to searching for information/applications in the system. EnerGov Enterprise Server includes reporting functions and consoles in each module; standard reports can be generated along with parameter-driven reports based upon user selection. Additionally, EnerGov utilizes "widgets" in a dashboard format that provide much of the management and day to day business reporting information in a graphical and grid format. These Smart Grid functions allow for searching, sorting and filtering on any parameter. This course will provide an explanation of reporting functionality and existing document creation inside of EnerGov modules, along with a full description of how files may be attached to individual cases inside the EnerGov application.
Prerequisite(s): EG100

Course ID: GIS100

Course Title: Parcel Manager and the GIS Map

Course Description: A hands-on introduction to the EnerGov GIS Viewer and Parcel Manager and their respective functionalities within the application. Each GIS Viewer map tool will be examined: navigation tools, map tools, select tools, features, map notes, links, clear map, print tools, and the heat map. Users will also learn how to create records such as permits, plans, code cases, etc. once they have designated a GIS location or area(s) of interest. We will also explore the Table of Contents functionality in this course.
Prerequisite(s): EG100

Course ID: GIS200

Course Title: Spatial Collections

Course Description: Hands-on laboratory exercises will be done in this course to understand spatial collection functionality. Topics include: creating and editing spatial collections, searching for spatial collections, and creating records from the collection.
Prerequisite(s): GIS100

Course ID: GIS300

Course Title: GIS Letter Creation

Course Description: Users will learn how to generate letters and designate recipients once they have established a GIS buffer over a location or area(s) of interest.
Prerequisite(s): GIS100

Course ID: CASH100

Course Title: Managing Till Sessions, Payments, Invoices, and Reporting

Course Description: This course highlights how to build an invoice using auto-added and manually added fees. It will also explore the Manage Payments screen and cover how and when to apply both full and partial payments in EnerGov. Additionally, trainees will learn how to apply fee adjustments and to delete fees (if their roles allow). Users will learn how to print daily and annual reports needed for accounting reconciliation. If utilized by the local jurisdiction, till sessions will also be introduced in this course.
Prerequisite(s): EG200

Course ID: PERM100

Course Title: General Permit Management

Course Description: The basics of the permit application process, from application of an over-the-counter permit, to invoicing and processing fees, to inspections, to permit issuance. Users will become familiar with the basic workflow concept introduced in this course. Permit tabs in the left navigation pane will be introduced and explained (Additional Info, Workflow Details, Attached Task, Documents, Bonds, etc.). This course will also show you how to apply and manage client specific Conditions and Holds, as well as how to track applicable Bonds.
Prerequisite(s): EG200

Course ID: PERM200

Course Title: Permit Plan Reviews

Course Description: This course is focused on those business processes which require a plan review as a result of permit application. The basics of creating, managing, and completing those plan cases is introduced in this course.
* An invaluable course to include with your training will be PLNR100 (below).
Prerequisite(s): PERM100

Course ID: PERM300

Course Title: Renewable Permit Cases

Course Description: Building upon the foundation of permit management, this course expands the permitting capabilities of the EnerGov software to include renewable permits. The basics of creating, managing, and completing those renewable permit cases is introduced in this course, including the permit lifecycle process.
Prerequisite(s): PERM100

SUPPORT & MAINTENANCE

CITY OF BRYAN

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Support and Maintenance

EnerGov is committed to providing superior support for your EnerGov system. EnerGov Support Technicians are highly trained and intimately familiar with the EnerGov application. Because they work directly with government agencies throughout the U.S. and internationally, they are well versed on the type of work accomplished by customers like you.

As partners with us in the business of automating local government, our customers have a direct impact on the evolution of the software itself, as well as the policies and procedures for implementing and supporting it. Tyler provides options for support to fit the needs of different types of clients, and their specific needs.

Support Options

Tyler's Support option comes standard with all EnerGov contracts, and is available to all clients. Our Support options give you access to the Help Desk crew in EnerGov's headquarters, Duluth, Georgia. Below are the mutliple support contact options.

Unlimited Phone Support is available during our normal support hours (7 a.m. to 8 p.m. EST, Monday through Friday except certain holidays) with our toll-free phone number. EnerGov phone support is available on the days and during the times that you are engaged in your daily work assignments. When you need it, it's there.

Email for EnerGov support questions or issues may be sent to support@energov.com. This account is continuously monitored during normal support hours. EnerGov's response will be directed back to the senders email, unless a request for voice contact is made in the email and a proper phone number is provided.

There may be times when it is desirable for the EnerGov support technician to access a user's PC and view the support needed directly from the user's desktop. Permission is required from the user whose desktop is being accessed before EnerGov can the PC. EnerGov cannot access and is, in fact, prevented from accessing the user's PC without the user's granting that access.

Tyler is uniquely qualified to leverage the combined experience of tens of thousands of users with our staffs' deep domain knowledge to bring a one-of-a-kind interactive online community. In the Tyler Community clients connect with other users and Tyler staff to share information, collaborate, access support and receive training. In this interactive environment, individual knowledge is amplified exponentially across the community.

Response & Resolution

Typical Response Times are immediate as most calls are answered live by an EnerGov support team member. Though our Live Telephone Support reduces call-backs, it does not eliminate them. Goals have been established for those incidents and are monitored via constant communication with the Customers and specific metrics. The information presented below does NOT include live support, only incidents where live support was not available, such as high-volume seasons.

Case Metrics

Regardless of the method, the following metrics are logged and made available to the customer on demand in order to ascertain the status of a particular request:

EnerGov maintains an online customer portal through which issues and requests can be submitted. These requests are logged into the EnerGov Customer Resource Management System (CRM). This system assists in tracking detail information about all issues encountered by EnerGov's Help Desk. This includes your questions, issues, and problems. All issues are assigned a unique case number. Each incident contains information such as:

- Case Number
- Issue Type
- Customer Contact Information
- Account Manager
- Software/Hardware involved versions, revisions, etc.
- Etc.

Support Experience & Escalation

Support Experience

Tyler's EnerGov support personnel are trained on all software modules throughout the system, and continue their education on new products and features through our own Tyler University training center and monthly peer training events. New employees spend the first three months attending training courses, and learning the essential functions of the EnerGov software, and tested to ensure proper understanding. From there they shadow experienced support personnel on the phone, and begin to identify common issues, and how to resolve them. After that they begin to answer the phone themselves, with assistance from fellow support personnel. Typically, within six months, our new support employees are answering the phone on their own with confidence that they can handle most issues.

Support Escalation

Most Help Desk calls are resolved effectively and efficiently on a standard support call. In the event an issue is reported that the support technician is unfamiliar with or unaware of, he or she will immediately internally escalate to see if the reported issue is a known issue for which a fix is available or if it is a new issue reported for the first time.

New issues are immediately logged and escalated to EnerGov's Professional Services or Research & Development Teams, which will assess the issue, and assist the client until a permanent fix can be determined and delivered through a software update.

Typical reasons for a Priority escalation are:

- Issue is impeding essential functions of the software or halts workflow
- Issue has become more frequent or more severe since initial report
- Issue has been unresolved for an unexpected amount of time

Prioritization & Escalation: The following table illustrates how calls, once received, are prioritized by EnerGov support personnel:

	Priority 1	Priority 2	Priority 3	Priority 4	Priority 5
DESCRIPTION	Production/system is down and work cannot continue until problem is fixed. Or system is executing but not usable output is generated.	Inaccurate or loss of business data. The output is not being saved correctly or the defect prevents the nominal solution from being generated. Problem is occurring in a business critical module, and there is no work-around.	Issue is not critical to the business or there is a workaround to an otherwise priority1 or priority 2 issue.	Non-Issue trivial, cosmetic, "should be" or ease of use issues	New-report creation is available for additional costs. Assistance with modifications to existing reports and other non-issue requsts are accomplished as time permits.
RESPONSE	All parties to work continuously until problem is resolved.	Work should continue on a normal workday basis until a permanent solution is in place.	Resolution is worked into a planned project repair and development schedule.	Resolution deferred or development efforts are scheduled	If there is an urgent business need for a report modification, advise the Help Desk Technician.
RESOLUTION	ASAP, with status reports daily if not fixed within 24 hours.	72 hours, with status reports every two days, if not fixed within 72 hours.	Next Available Release	Future Release	(ask for a time quote)

Closure

EnerGov provides closure, which may include written documentation, a program fix, or some other solution or material. After we feel the issue has been fully responded to, we will request a confirmation from you to close the issue. If we don't get conformation back within 48 hours we will consider the issue resolved and close the case. Once a case is closed a confirmation email will be sent to the contact that is listed in the CRM.

System Updates & Maintenance

Tyler has proven history of providing upgrades and enhancement releases on a continual basis, which are available to all clients. Our Evergeen Philosophy ensures that those upgrades and enhancements are provided at no cost to those current with their annual software maintenance contract.

Tyler's EnerGov solution provides system updates including new features, patches, and fixes quarterly and on an as required basis. System upgrades, the newest versions and latest technologies, are also available annually. Clients are notified that a new update or upgrade is ready for release on Tyler Community, where you can notify the EnerGov team that you would like to install a new build, and find release notes with a brief description of any new features and capabilities. Clients can set up automated emails to be delivered about new system updates via Community, which means you will never have to miss out on the best Tyler has to offer.

With over 800 professionals working with Tyler's software and almost half of those in Development and Implementation, we have successfully migrated many of our customers through three generations of software. Tyler views this software development and migration as a stewardship of your annual maintenance dollars. Those dollars are invested on behalf of our customers into new products and features, continually taking advantage of current technology.

Our evergreen development philosophy has been a strong differentiator that separates us from our competitors and provides a significant cost savings to our family of clients. Through evergreen, our clients receive the latest technology developments, releases and updates without paying additional license fees – for the life of their Tyler product. While this has provided our clients with a return on investment that is unrivaled in our industry, the frequency and complexity of software releases can sometimes create a "consumption gap" for our clients.

The gap exists when new features are released and, over time, users don't learn and apply these features to their work environments. In these instances, this consumption gap increases, causing the user to fall further and further behind on optimally using the product. Clients facing this situation are no longer benefiting from the full functionality of the product, or from the latest technology enhancements.

EverGuide™ is a Tyler-wide continuous improvement initiative to address these issues. EverGuide is an extension of our evergreen philosophy, and will offer services and consulting to help clients maximize, protect and get the most from their software investment.

- Through our EverGuide initiative, we will:
- Help clients better leverage product enhancements
- Provide a workflow "maturity model" for clients to follow
- Offer strategic planning services and training resources
- Offer a client executive program to help clients build and implement a continuous

- improvement plan
- Provide domain expertise, with defined integration points and common support methodology

As every Tyler product is different, EverGuide will be customized by product group and client type to ensure we are delivering the right level of services and support to meet the unique needs of our clients.

With EverGuide, our goal is to help our clients continue to grow and evolve their use of the functionality and enhancements of their Tyler product over a long period of time. It's also our hope that this initiative is a catalyst for our clients' organizations to embrace change, commit to training and developing their staff, and fully use the wide ranges of Tyler's service and support offerings available to them.

EnerGov Support Responsibilities

EnerGov Support Responsibility	Client Support Responsibility
EnerGov Application	
Correct Application Errors	Report Application Errors
Crystal Reports	
Offer (cost-based) Training Classes for Crystal Reports	Create new Crystal Reports
Answer questions about Report Locations/standard content	Modify/Enhance existing Crystal Reports
Assist with inclusion of customer-created reports into EnerGov	
Letters/Forms (included MS Word documents)	
Answer questions about letters/forms location/access	Create/Modify MS Word Forms within EnerGov
Setup/Configuration	
Answer questions about custom configurations	Add new case "types" to Permitting, Planning, etc
	Modify/Delete existing case "types"
	Add/Modify/Delete accessory data to "types" (i.e. fees, etc)
	Add/Modify/Delete custom pages/fields
Answer questions regarding User Security	Add new users and assign security levels
	Modify/Update user Security
	Create/modify "role" levels
	Setup User Report Security
Answer questions regarding GIS interface	Setup/Modify Geo Rules
Application Server	
Provide Updates/Upgrades to Customer IT	Apply/Implement Updates/Upgrades
Provide Update/Upgrade online/phone training	
Provide technical assistance for Updates/Upgrades	
Database Server	
	Perform backups, maintenance, views, security, upgrades or patches
	Make no modifications to security or database structures
	Create views or added security levels for end users
General Training	

Provide Training facilities for Customer Training at EnerGov	Provide training for new employees
Provide limited remedial phone-based training	
Application Operations	
Answer questions regarding application data entry	
Answer questions regarding EnerGov search features	
Answer questions regarding "what if" with EnerGov applications	

*Tyler has provided this information in this section as an example only.

REFERENCES

CITY OF BRYAN

CIVIC PLATFORM

RFP #16-022

Client References

British Columbia Safety Authority, Vancouver BC

Address: 505 6th Street
City, State, Zip Code: New Westminster, British Columbia V3L 0E1 Canada
Project Manager: Dan Rausch
Telephone Number: 778-396-2166
Fax Number: 778-396-2064
E-mail address: dan.rausch@safetyauthority.ca
Number of subscribers: 300 (users)

Project Background

The British Columbia Safety Authority (BCSA) oversees many of the regulatory and safety processes of Canada's 3rd largest province. With over 4.5 million residents and a land mass of 364,800 square miles, the province of British Columbia is nearly four times the size of Great Britain and two and one-half times larger than Japan.

Throughout 2010, BCSA management evaluated and assessed the current state of its information management systems and realized that strategic changes were required with BCSA's core operating system. A comprehensive process was completed to articulate the case for change, evaluate change options, and develop the supporting business and ROI case for system replacement. Through a rigorous and competitive bid process, EnerGov was overwhelmingly selected as providing a comprehensive solution that would provide the best overall return on investment and could best fit the strategic goals of the agency.

The new EnerGov system supports the BCSA across a variety of customer and constituency interactions, channels, safety services and regulatory process management functions all of which will support the agency's mantra of "Do it right. Stay safe". The project includes a comprehensive, multi-phased approach to consolidating all of the BCSA's permitting, licensing, compliance and regulatory management processes into a centralized, enterprise-wide software application.

Project Scope / Breadth (Departments & Divisions)

- Licensing & Enforcement
- Permitting & Compliance
- Risk Assessment
- Enterprise Reporting

Software & Services Provided:

EnerGov Professional Services including: Project Planning • Resource & Communication Planning • IT Infrastructure Review • Business Process Assessment • Business Process Consulting • Workflow Translation • System / Process Definitions • System Configuration & Reviews • User Acceptance Testing • Custom Reporting Development • Legacy Data Conversion & Integration • System Administrator / Power User Training & End User Training • Go Live Support

EnerGov Software Deployed: EnerGov .NET Enterprise Framework & Administration Console • EnerGov Enterprise Permitting & Land Management Suite • EnerGov Enterprise Licensing & Regulatory Suite • EnerGov Citizen Access • MobileGov • EnerGov GIS (ArcGIS Server platform)

Contract Award Date: January 2010
Cutover Date: October 2011
Systems Interfaced: Microsoft Great Plains, BCSA Online, LXR Exam Suite
Operating System: Microsoft Windows Server 2008 R2
Database: Oracle 11g R2

Required Hardware/Software:

BCSA's infrastructure is one of the more robust environments with regard to hardware, redundancy & failover provisioning. The following components represent the core attributes of the production environment: Microsoft Windows Environment • Microsoft SQL Server 2008 RDBMS •Microsoft Windows Server 2008 R2 • Microsoft IIS 7.0 • Microsoft Exchange • Microsoft Windows 7 • ArcGIS Server / ArcSDE • Panasonic Toughbook 19 (mobile) • MS Great Plains • LXR • BCSA Online

Catawba County, NC

Address: 100 A South West Blvd.
City, State, Zip Code: Hickory, NC 28658
Project Manager: Steve Lackey
Telephone Number: 828-466-7294
Fax Number: 828-465-8906
E-mail address: splackey@CatawbaCountyNC.gov
Number of subscribers: 150 (users)

Project Background:

Catawba County has long been recognized as a regional frontrunner in the provision of e-government services – moreover, the County has established a reputation among its citizenry for maintaining a "customer-focused" and "custom-friendly" environment. Thus, it was clear that a new direction was needed when the County's permitting vendor (Accela, Inc) chose to eliminate future support of the product the county used. Without the necessary software updates beyond Windows XP, officials knew it wouldn't be long before the entire system fell far behind. This situation prompted the County to issue an extensive RFP for an enterprise permitting & land use system. Following an intense evaluation and demonstration process, the County unanimously selected EnerGov Solutions to provide its .NET based enterprise system.

Project Scope / Breadth (Departments & Divisions)

Planning & Development: Catawba County Department of Planning & Development facilitates and provides support for development of long-range planning initiatives, and implementation of a plan's policy and recommendations. It provides demographic information to the public, and provides information on land use, environmental programs, and reports and special studies to the Board of Commissioners, Planning Board, Board of Adjustment and Subdivision Review Board.

Building Services: The Catawba County Building Services Division coordinates and manages Inspections, Plan Review and Permit Center activities for the County and municipalities. It is a division of the Utilities & Engineering Department.

Utilities & Engineering: The Catawba County Utilities and Engineering Department coordinates the functions of Building Services, (Inspections, Plan Review and Permit Center activities) for the County and municipalities; Soil Erosion and Sedimentation Control for the County and municipalities except Brookford and Newton. Utilities and Engineering also manages Water and Sewer Projects, Stormwater, Solid Waste, including Recycling, Waste Disposal, Waste Reduction and Education, Convenience Centers and Co-Generation Facility, as well as the EcoComplex and Resource Recovery Facility.

Software & Services Provided:

EnerGov Professional Services including: Project Planning • Resource & Communication Planning • IT Infrastructure Review • Business Process Assessment • Business Process Consulting • Workflow Translation • System / Process Definitions • System Configuration & Reviews • User Acceptance Testing • Custom Reporting Development • Accela Data Conversion • System Administrator / Power User Training & End User Training • Go Live Support

EnerGov Software Deployed: EnerGov .NET Enterprise Framework & Administration Console • EnerGov Enterprise Permitting & Land Management Suite • EnerGov Citizen Access • EnerGov IVR Telephony • MobileGov • EnerGov GIS (ArcGIS Server platform) • Laserfiche Enterprise Document Management API

Contract Award Date:	January 2009
Cutover Date:	January 2010
Systems Interfaced:	PeopleSoft, CDP, Laserfiche Document Management, Govolution
Operating System:	Microsoft Windows Server 2008 R2
Database:	Microsoft SQL Server 2008 R2

Required Hardware/Software:

The County's infrastructure is composed of the following components: Microsoft Windows Environment • Microsoft SQL Server 2008 RDBMS •Microsoft Windows Server 2008 R2 • Microsoft IIS 7.0 • Microsoft Exchange • Microsoft Windows XP • ArcGIS Server / ArcSDE (SQL Server backend) • Panasonic Toughbook 19 (mobile) • Laserfiche Enterprise Document Management (integration provided)

REDDING, CA

Address: 777 Cypress Avenue
City, State, Zip Code: Redding, CA 96001
Project Manager: Lily Toy
Telephone Number: (530) 225-4055
Fax: (530) 225-4360
E-mail address: ltoy@ci.redding.ca.us
Number of subscribers: 50+

PROJECT BACKGROUND

In an effort to update the city's legacy AS/400 based system they had been utilizing for 20+ years, the City of Redding selected EnerGov as the premier technology over all other potential solutions in the market place. The City's decision was based primarily on EnerGov's innovative use of technology, flexible application framework, GIS integration, proven implementation methodology, and impeccable reputation with regard to customer service & support.

PROJECT SCOPE / BREADTH (DEPARTMENTS & DIVISIONS)

Development Services Building Division: The Building division is responsible for Plan Checking, Building Inspections, and Code Enforcement activities. These services include:

- Land development project review and inspections
- Structural Plan Review
- On-Site Construction Inspection
- Substandard Building Inspection
- City Wide Street Number Addressing
- Life Safety Plan Review

Permit Center Division: The Permit Center Division focuses to make the customer experience as efficient and convenient as possible by leveraging the staff from Engineering, Planning, Building, and Fire.

Planning Division: The Planning Division is primarily responsible for zoning / land use permits, long-range planning, and local administration of State environmental laws. These activities include the review and management of public and private development proposals, such as subdivisions, use permits, site development permits, variances, General Plan amendments, re-zonings, and a variety of other minor zoning permits.

Additionally, environmental review responsibilities for the Planning Division are principally defined by the California Environmental Quality Act (CEQA), which requires preparation of environmental impact determinations, environmental impact reports, and coordination with other local, State, and Federal agencies.

SOFTWARE & SERVICES PROVIDED:

EnerGov Professional Services including: Project Planning • Resource & Communication Planning • IT Infrastructure Review • Business Process Assessment • Workflow Translation • System / Process

Definitions • System Configuration & Reviews • User Acceptance Testing • Custom Reporting Development • Legacy Data Conversion & Integration • System Administrator / Power User Training & End User Training • Go Live Support

EnerGov Software Deployed: EnerGov .NET Enterprise Framework & Administration Console • EnerGov Enterprise Permitting & Land Management Suite • EnerGov Citizen Access Portal • EnerGov GIS (ArcGIS Server platform) • EnerGov IVR

Contract Award Date: Oct 2009
Cutover Date: December 2011
Systems Interfaced: AS/400 Finance System (including refunds, accounts payable, & credit card) • Treasury Point of Sale • California State licensing Board • Utility Billing (e-CIS) • City Clerk Business Licensing • Record Drawing Manager
Operating System: Microsoft Windows Server 2008 R2
Database: Microsoft SQL Server 2008 R2

Required Hardware/Software:

The City's infrastructure is composed of the following components: Microsoft Windows Environment • Microsoft SQL Server 2008 RDBMS •Microsoft Windows Server 2008 R2 • Microsoft IIS 7.0 • Microsoft Exchange • Microsoft Windows XP/7 • ArcGIS Server / ArcSDE

Deer Park, TX

Address: 710 E. San Augustine
City, State, Zip Code: Deer Park, TX 77536
Project Manager: Linda McHone
Telephone Number: 281-478-2036
E-mail address: mchone@deerpark.org
Breadth: EnerGov PLM, Code Enforcement, iG Inspect, EnerGov PMM

INVESTMENT SUMMARY

CITY OF BRYAN

CIVIC PLATFORM

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INVESTMENT SUMMARY

INVESTMENT SUMMARY NOTES

The following price quote is based on the stated requirements provided by City of Bryan in this RFP. It includes Tyler software license fees, estimated services, project management, conversion, and travel and expense costs.

Any stated conversion prices may vary depending on cooperation of previous vendor and/or the complexity of converting the data.

Travel expenses are estimated, however, actual expenses will be billable.

The license fees listed in this Cost Summary do not include any tax or other governmental impositions including, without limitation, sales, use, or excise tax. All applicable sales tax, use tax, or excise tax shall be paid by client and shall be paid over to the proper authorities by client or reimbursed by client to Tyler Technology on demand in the event that Tyler Technology is responsible or demand is made on Tyler Technology for the payment thereof. If tax-exempt, client must provide Tyler Technology with client's tax-exempt number or form.

TYLER'S SUBSCRIPTION OPTION

Tyler software solutions are available to you on a subscription basis, reducing up-front computer hardware costs and eliminating the need for dedicated IT staff. Tyler Subscription provides full functionality without the burden of hosting, maintaining, or upgrading software or hardware. It is easy to implement and you pay a predictable annual fee based on the number of users.

Subscription Advantages:

- Eliminates upfront license fees
- Includes Tyler Online Training and Disaster Recovery
- Simplified remote access
- Reduced hardware infrastructure
- Reduced impact on IT staff
- Fixed costs
- Includes single, per-user fee (covers all purchased Tyler suites)

ESCROW-SOURCE CODE

Tyler has established a relationship with a third party escrow company, Iron Mountain Escrow Services, who can store, maintain, and update the Tyler source code. Under specific conditions or triggers spelled out in the source-code agreement, the escrow company can provide the Tyler source-code directly to the City of Bryan. The cost for this *optional service* is a $756 fee, plus $756 annual maintenance.

Clients have the ability to enroll in this program at any time (This is an optional service and is <u>not</u> included in our Investment Summary.)

Quoted By:	Craig J. Dixon
Date:	3/10/2016
Quote Expiration:	10/31/2016
Quote Name:	City of Bryan-LGD-EG-PLM
Quote Number:	2016-18558
Quote Description:	Tyler-EnerGov Proposal, City of Bryan TX

Sales Quotation For

City of Bryan

PO Box 1000

Bryan, Texas 77805

Phone 281-391-4848

EnerGov SaaS - Silver

Description	Monthly Fee	Users/Units	Annual Fee
Core Software:			
EnerGov Permitting & Land Management Suite (PLM)	$163.00	40	$78,240.00
Extensions:			
EnerGov GIS	$1,583.00	Site License	$19,000.00
EnerGov Citizen Access Web Portal - Permitting & Land Mgmt (PLM)	$1,250.00	Site License	$15,000.00
EnerGov e-Reviews	$1,250.00	Site License	$15,000.00
EnerGov Adv Server Extensions Bundle	$725.00	Site License	$8,700.00
EnerGov IG Workforce Apps	$49.00	10	$5,880.00
EnerGov Permitting & Land Management SDK	$271.00	Site License	$3,250.00
EnerGov My GovPay	$0.00	Site License	$0.00
EnerGov VirtualPay	$0.00	1	$0.00
Sub-Total:			$145,070.00
Less Discount:			*$14,375.00*
TOTAL:			**$130,695.00**

EnerGov Professional Services

Description	Hours	Unit Price	Extended Price	Year One Maintenance
EnerGov Configuration Services	750	$175.00	$131,250.00	$0.00
EnerGov Onsite Training & Production Support Services	96	$175.00	$16,800.00	$0.00
EnerGov Report Development Services	100	$250.00	$25,000.00	$2,500.00
EnerGov Project Management Services	175	$175.00	$30,625.00	$0.00
EnerGov Prerequisite Training Courses			$3,600.00	$0.00
EnerGov Data Conversion Services	150	$250.00	$37,500.00	$0.00
EnerGov Fundamentals Training	32	$175.00	$5,600.00	$0.00
TOTAL:			**$250,375.00**	**$2,500.00**

Summary	One Time Fees	Recurring Fees
Total SaaS	$0.00	$130,695.00
Total Tyler Software	$0.00	$0.00
Total Tyler Services	$250,375.00	$2,500.00
Total 3rd Party Hardware, Software and Services	$0.00	$0.00
Summary Total	**$250,375.00**	**$133,195.00**
Year One Contract Total	**$383,570.00**	
Year Two Subscription	**$139,855.00**	
Year Three Subscription	**$146,847.00**	
Year Four Subscription	**$154,190.00**	
Year Five Subscription	**$161,899.00**	
Estimated Travel Expenses	**$17,000.00**	

Unless otherwise indicated in the contract or Amendment thereto, pricing for optional items will be held for Three (3) months from the Quote date or the Effective Date of the Contract, whichever is later.

Customer Approval: _____ Date: _____

Print Name: _____ P.O. #: _____

All primary values quoted in US Dollars

Comments

-Planning requires BlueBeam Revu or Adobe Acrobat Pro.

EnerGov monthly fees are rounded, excluding cents.

End user has unlimited access to courses prior to end user training. The end user prerequisite service allows end users to take up to 11 foundational courses (where they get assessed a score) prior to our trainers arriving onsite. This allows for an overall more efficient training and cost effective training experience and a reduction of estimated 20-25% of actual required end users training hours/resources.

STANDARD TERMS & CONDITIONS

CITY OF BRYAN

CIVIC PLATFORM

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tyler technologies

STANDARD TERMS & CONDITIONS

Please see the Tyler Technologies standard Terms and Conditions contract in this section of this RFP Response. Tyler Technologies is willing to negotiate contract terms to suit both parties upon award of contract.

RFP Exceptions
City of Bryan, Texas ("Client")

Tyler's negotiation philosophy is to balance the rights and responsibilities of both Tyler Technologies, Inc. ("Tyler") and Client, taking into account issues of special importance to each. The following exceptions are based on Tyler's standard contract, which Tyler expects to use as the basis for contract negotiations, as it contains language specific to the software industry. Tyler reserves the right to negotiate any and all terms to the mutual satisfaction of the parties.

Cooperative Purchasing (Page 4) (Page 6): Tyler reserves the right to negotiate customized terms for each individual customer including, without limitation, price.

Contract (Page 4) (Page 5) (Page 7) (Pages 19-27): Tyler prefers to use its standard contract as the basis for contract negotiations, as it contains language specific to the software industry. If the Client insists on using its form, and Tyler agrees, Tyler reserves the right to negotiate all terms to the mutual satisfaction of the parties. For evaluation purposes only, Tyler sets forth representative exceptions herein to the Client's "Standard Form of Agreement Contract." Tyler expects to engage in good faith negotiations with the Client to arrive at a mutually agreeable, final contract document. Because it is impossible to negotiate in a vacuum, this list is not exhaustive, and instead represents Tyler's basic position on the subject provisions of the Standard Form of Agreement Contract:

- Order of Precedence (§1): Please refer to exception below.
- Payment Terms (§2): Please refer to exception below.
- Project Plan (§3): Please refer to exception below.
- Time is of the Essence (§3): Tyler does not agree to "time being made of the essence," however, Tyler will begin and perform services in accordance with the mutually agreed upon implementation plan schedule.
- Warranty (§4): Tyler warrants that it will perform services in a professional, workmanlike manner, consistent with industry standards. In the event Tyler provides services that do not conform to this warranty, Tyler will re-perform the services at no additional cost to the Client.
- Indemnification – General (§4): Tyler will indemnify and hold harmless the Client from and against any and all direct claims, losses, liabilities, damages, costs, and expenses (including reasonable attorney's fees and costs) for personal injury or property damage arising from Tyler's negligence or willful misconduct; or Tyler's violation of a law applicable to our performance under the Agreement. The Client must notify Tyler promptly in writing of the claim and give us sole control over its defense or settlement. The Client agrees to provide Tyler with reasonable assistance, cooperation, and information in defending the claim at our expense.
- Insurance (§5): Please refer to exception below.
- Termination for Convenience (§6): The Client may terminate the contract for convenience on thirty days' prior written notice. Upon termination, the Client shall remit payment for all products and services delivered to the Client and all expenses incurred by Tyler prior through the effective date of termination. The Client will not be entitled to a refund or offset of previously paid license and other fees.
- Termination for Cause (§6): The Client may terminate the contract for cause in the event Tyler fails to cure a material breach within thirty days of the Client's invocation of dispute resolution. The Client will make payment to Tyler for all undisputed products, services and expenses delivered or incurred through the effective date of

termination. Payment for disputed products, services and expenses, and the Client's remedies, will be determined through the mutually agreed dispute resolution process.

- Federal Court (§7A): Tyler reserves the right to seek redress in federal court.
- Assignment (§7E): Please refer to exception below.
- Laws and Regulations (§7F): Please refer to exception below.
- Travel Expenses (§7G): Client shall be liable for travel expenses incurred by Tyler in accordance with Tyler's then-current business travel policy. Tyler's current business travel policy is attached to the contract as an exhibit.

Order of Precedence (Page 5) (Page 7): Client and Tyler may negotiate to include portions of the RFP into the final contract; however, the contract will be the entire agreement between the parties and will supersede any prior agreements, understandings, and representations, whether written, oral, expressed, implied, or statutory. To the extent the RFP and this proposal are incorporated, in any conflict as to terms, the order of precedence shall be (i) the Agreement, excluding exhibits, (ii) other exhibits to the Agreement, (iii) this proposal, and (iv) the RFP.

Bid Bond (Page 5): Tyler requires that the Client returns the bid bond submitted with Tyler's Proposal within thirty days from the date of the Client's execution of the contract with Tyler or in the event that Tyler is not chosen as the successful vendor for the project, within thirty days from date of the Client's execution of a contract with another chosen vendor. In no event will this period exceed one year from the due date of the Proposal unless mutually agreed by the parties.

Ownership (Page 5): Tyler shall retain ownership of (i) all software products licensed to Client; and (ii) all proprietary information contained in all deliverables, including this proposal. Tyler reserves the right to protest the public disclosure of its confidential and proprietary information, consistent with applicable public records laws. Tyler does not agree to work-for-hire provisions.

Confidential Information (Page 6) (Page 13): Tyler reserves the right to protest the public disclosure of its confidential and proprietary information, consistent with applicable public records laws. Any document submitted in connection with this proposal marked "confidential" or similar shall be exempt from public disclosure. Client may not use or disclose any of Tyler's proprietary and copyrighted material without the express written permission of Tyler, at Tyler's sole discretion. With respect to public disclosure requests under relevant state or federal law, disclosure may be made only to the extent disclosure is required by law, and provided, however, that that Client shall give prompt notice of the service of process or other documentation that underlies such requirement to Tyler so that it may obtain a protective order or otherwise protect the confidentiality of Tyler's confidential information.

Maintenance – Commitment (Page 7): Provided the Client pays annual maintenance fees on the Tyler software, Tyler will provide maintenance services on the Tyler software for at least five years from contract signing.

Payment Terms (Page 7): Tyler's standard payment terms provide for payment of license fees on milestones of contract signing and software delivery. Standard services fees and travel expenses are billed as delivered and invoiced as incurred. Maintenance fees are waived through the earlier of use of the Tyler software in live production or one (1) year from the Effective Date, and thereafter annually in advance. Payment is due within forty-five days of invoicing.
Assignment (Page 7): Neither party may assign the contract without the prior written consent of the other party, except that Tyler may, without the prior written consent of the Client, assign the contract in its entirety to the surviving entity of any merger or consolidation or to any purchaser of substantially all of Tyler's assets.

Laws and Regulations (Page 7): Tyler reserves the right to review and discuss with Client specific laws and regulations that Client wishes to incorporate into the final contract.

Project Plan (Page 9): Tyler's Proposal includes a sample project plan containing estimated timelines. Tyler will deliver a Client-tailored project plan upon obtaining additional information once implementation is underway.

Personnel – Identify in Proposal (Page 11) (Page 12): Tyler will provide information on personnel likely to be assigned to Client's project and present demonstrations. We are unable to assign or commit personnel to a project until Tyler is selected and a contract is signed, in an effort to most effectively use resources.

Indemnification – IP (Page 13): Tyler will indemnify the Client from intellectual property infringement by the Tyler software and/or documentation, in accordance with Section H(1) of Tyler's standard contract.

Insurance (Pages 15-17): Whether or not Tyler's insurance is primary depends on the circumstances of the claim. The Client can be listed as an additional insured on Tyler's Commercial General Liability policy and Auto Liability policy only, which automatically adds Client as an additional insured on Tyler's Excess/Umbrella Liability policy, which is follow form coverage. Tyler's CGL policy does not include Contractual Liability coverage as that is not appropriate in software licensing contracts that include liabilities and indemnity obligations beyond the intended scope of a general liability policy. Tyler maintains a CGL policy intended to provide coverage for personal and property damage with limits of $1,000,000 per occurrence and $2,000,000 policy aggregate. Tyler's auto policy provides a limit of $1,000,000 per occurrence. Tyler will agree to maintain umbrella coverage for the CGL and auto policies of $5,000,000 in the aggregate. Tyler's carrier has issued a blanket endorsement whereby any customer named as additional insured in the contract is afforded such status under the policy. Tyler cannot provide a certificate of insurance naming the Client as additional insured until a final contract is executed. Tyler's carrier does not issue separate additional insured endorsement specific to the Client. Tyler will maintain coverages as required by written contract with the Client. Because subrogation rights are personal to the insurance carrier and arise by operation of law, Tyler is not in a position to waive subrogation on behalf of the carrier. Whether a right of subrogation exists and is properly pursued by the carrier is dependent upon the nature of claim and ensures that responsible parties for damage or injury are appropriately accountable. Tyler's carrier uses a standard ACORD form certificate of liability which contains insurance regulations mandated language providing that notice shall be given in accordance with policy provisions. Certificates of insurance for renewal policies are not available from the carrier until 10 days after policy renewal. Tyler does hold cyber liability insurance, but reserves all rights with respect to the detailed extent of the coverage. Any subcontractors will be required to maintain their own coverage conforming to the requirements of the agreement. Tyler will agree to provide notice of cancellation directly to the Client. Copies of Tyler's policies are not available.

SOFTWARE AS A SERVICE AGREEMENT[1]

This Software as a Service Agreement is made between Tyler Technologies, Inc. and Client.

WHEREAS, Client selected Tyler to provide certain products and services set forth in the Investment Summary, including providing Client with access to Tyler's proprietary software products, and Tyler desires to provide such products and services under the terms of this Agreement;

NOW THEREFORE, in consideration of the foregoing and of the mutual covenants and promises set forth in this Agreement, Tyler and Client agree as follows:

SECTION A – DEFINITIONS

- **"Agreement"** means this Software as a Services Agreement.
- **"Business Travel Policy"** means our business travel policy. A copy of our current Business Travel Policy is attached as Schedule 1 to Exhibit B.
- **"Client"** means [INSERT CLIENT NAME].
- **"Data"** means your data necessary to utilize the Tyler Software.
- **"Data Storage Capacity"** means the contracted amount of storage capacity for your Data identified in the Investment Summary, which in all events shall not exceed 200 gigs of Data at any time.
- **"Defect"** means a failure of the Tyler Software to substantially conform to the functional descriptions set forth in our written proposal to you, or their functional equivalent. Future functionality may be updated, modified, or otherwise enhanced through our maintenance and support services, and the governing functional descriptions for such future functionality will be set forth in our then-current Documentation.
- **"Defined Concurrent Users"** means the number of concurrent users that are authorized to use the SaaS Services. The Defined Concurrent Users for the Agreement are [INSERT].
- **"Developer"** means a third party who owns the intellectual property rights to Third Party Software.
- **"Documentation"** means any online or written documentation related to the use or functionality of the Tyler Software that we provide or otherwise make available to you, including instructions, user guides, manuals and other training or self-help documentation.
- **"Effective Date"** means the date on which your authorized representative signs the Agreement.
- **"Force Majeure"** means an event beyond the reasonable control of you or us, including, without limitation, governmental action, war, riot or civil commotion, fire, natural disaster,

[1] HIGHLIGHTED PROVISIONS INDICATE PROVISIONS THAT MAY OR MAY NOT APPLY TO THE PARTICULAR CLIENT/CONTRACT. DURING CONTRACT NEGOTIATIONS, THOSE PROVISIONS WILL BE ADJUSTED AS NECESSARY.

or any other cause that could not with reasonable diligence be foreseen or prevented by you or us.

- **"Investment Summary"** means the agreed upon cost proposal for the products and services attached as Exhibit A.
- **"Invoicing and Payment Policy"** means the invoicing and payment policy. A copy of our current Invoicing and Payment Policy is attached as Exhibit B.
- **"SaaS Fees"** means the fees for the SaaS Services identified in the Investment Summary.
- **"SaaS Services"** means software as a service consisting of system administration, system management, and system monitoring activities that Tyler performs for the Tyler Software, and includes the right to access and use the Tyler Software, receive maintenance and support on the Tyler Software, including Downtime resolution under the terms of the SLA, and Data storage and archiving. SaaS Services do not include support of an operating system or hardware, support outside of our normal business hours, or training, consulting or other professional services.
- **"SLA"** means the service level agreement. A copy of our current SLA is attached hereto as Exhibit C.
- **"Statement of Work"** means the industry standard implementation plan describing how our professional services will be provided to implement the Tyler Software, and outlining your and our roles and responsibilities in connection with that implementation. The Statement of Work is attached as Exhibit E.
- **"Support Call Process"** means the support call process applicable to all of our customers who have licensed the Tyler Software. A copy of our current Support Call Process is attached as Schedule 1 to Exhibit C.
- **"Third Party Terms"** means, if any, the end user license agreement(s) or similar terms for the Third Party Software, as applicable and attached as Exhibit D.
- **"Third Party Hardware"** means the third party hardware, if any, identified in the Investment Summary.
- **"Third Party Products"** means the Third Party Software and Third Party Hardware.
- **"Third Party Software"** means the third party software, if any, identified in the Investment Summary.
- **"Tyler"** means Tyler Technologies, Inc., a Delaware corporation.
- **"Tyler Software"** means our proprietary software, including any integrations, custom modifications, and/or other related interfaces identified in the Investment Summary and licensed by us to you through this Agreement.
- **"we", "us", "our"** and similar terms mean Tyler.
- **"you"** and similar terms mean Client.

SECTION B – SAAS SERVICES

1. Rights Granted. We grant to you the non-exclusive, non-assignable limited right to use the SaaS Services solely for your internal business purposes for the number of Defined Concurrent Users only. The Tyler Software will be made available to you according to the terms of the SLA. You acknowledge that we have no delivery obligations and we will not ship copies of the Tyler Software as part of the SaaS Services. You may use the SaaS Services to access updates and enhancements to the Tyler Software, as further described in Section C(8).

2. SaaS Fees. You agree to pay us the SaaS Fees. Those amounts are payable in accordance with our Invoicing and Payment Policy. The SaaS Fees are based on the number of Defined

Concurrent Users and amount of Data Storage Capacity. You may add additional concurrent users or additional data storage capacity on the terms set forth in Section H(1). In the event you regularly and/or meaningfully exceed the Defined Concurrent Users or Data Storage Capacity, we reserve the right to charge you additional fees commensurate with the overage(s).

3. Ownership.

   3.1 We retain all ownership and intellectual property rights to the SaaS Services, the Tyler Software, and anything developed by us under this Agreement. You do not acquire under this Agreement any license to use the Tyler Software in excess of the scope and/or duration of the SaaS Services.

   3.2 The Documentation is licensed to you and may be used and copied by your employees for internal, non-commercial reference purposes only.

   3.3 You retain all ownership and intellectual property rights to the Data.

4. Restrictions. You may not: (a) make the Tyler Software or Documentation resulting from the SaaS Services available in any manner to any third party for use in the third party's business operations; (b) modify, make derivative works of, disassemble, reverse compile, or reverse engineer any part of the SaaS Services; (c) access or use the SaaS Services in order to build or support, and/or assist a third party in building or supporting, products or services competitive to us; or (d) license, sell, rent, lease, transfer, assign, distribute, display, host, outsource, disclose, permit timesharing or service bureau use, or otherwise commercially exploit or make the SaaS Services, Tyler Software, or Documentation available to any third party other than as expressly permitted by this Agreement.

5. Software Warranty. We warrant that the Tyler Software will perform without Defects during the term of this Agreement. If the Tyler Software does not perform as warranted, we will use all reasonable efforts, consistent with industry standards, to cure the Defect in accordance with the maintenance and support process set forth in Section C(8), below, the SLA and our then current Support Call Process.

6. SaaS Services.

   6.1 Our SaaS Services are audited at least yearly in accordance with the AICPA's Statement on Standards for Attestation Engagements ("SSAE") No. 16, Type 2. We have attained, and will maintain, Type II SSAE compliance, or its equivalent, for so long as you are timely paying for SaaS Services. Upon execution of a mutually agreeable Non-Disclosure Agreement ("NDA"), we will provide you with a summary of our SSAE-16 compliance report or its equivalent. Every year thereafter, for so long as the NDA is in effect and in which you make a written request, we will provide that same information.

   6.2 You will be hosted on shared hardware in a Tyler data center, but in a database dedicated to you, which is inaccessible to our other customers.

   6.3 We have fully-redundant telecommunications access, electrical power, and the required hardware to provide access to the Tyler Software in the event of a disaster or component

failure. In the event any of your data has been lost or damaged due to an act or omission of Tyler or its subcontractors or due to a defect in Tyler's software, we will use best commercial efforts to restore all the data on servers in accordance with the architectural design's capabilities and with the goal of minimizing any data loss as greatly as possible. In no case shall the recovery point objective ("RPO") exceed a maximum of twenty-four (24) hours from declaration of disaster. For purposes of this subsection, RPO represents the maximum tolerable period during which your data may be lost, measured in relation to a disaster we declare, said declaration will not be unreasonably withheld.

6.4 In the event we declare a disaster, our Recovery Time Objective ("RTO") is twenty-four (24) hours. For purposes of this subsection, RTO represents the amount of time, after we declare a disaster, within which your access to the Tyler Software must be restored.

6.5 We conduct annual penetration testing of either the production network and/or web application to be performed. We will maintain industry standard intrusion detection and prevention systems to monitor malicious activity in the network and to log and block any such activity. We will provide you with a written or electronic record of the actions taken by us in the event that any unauthorized access to your database(s) is detected as a result of our security protocols. We will undertake an additional security audit, on terms and timing to be mutually agreed to by the parties, at your written request. You may not attempt to bypass or subvert security restrictions in the SaaS Services or environments related to the Tyler Software. Unauthorized attempts to access files, passwords or other confidential information, and unauthorized vulnerability and penetration test scanning of our network and systems (hosted or otherwise) is prohibited without the prior written approval of our IT Security Officer.

6.6 We test our disaster recovery plan on an annual basis. Our standard test is not client-specific. Should you request a client-specific disaster recovery test, we will work with you to schedule and execute such a test on a mutually agreeable schedule.

6.7 We will be responsible for importing back-up and verifying that you can log-in. You will be responsible for running reports and testing critical processes to verify the returned data. At your written request, we will provide test results to you within a commercially reasonable timeframe after receipt of the request.

6.8 We provide secure data transmission paths from each of your workstations to our servers.

6.9 For at least the past ten (10) years, all of our employees have undergone criminal background checks prior to hire. All employees sign our confidentiality agreement and security policies. Our data centers are accessible only by authorized personnel with a unique key entry. All other visitors must be signed in and accompanied by authorized personnel. Entry attempts to the data center are regularly audited by internal staff and external auditors to ensure no unauthorized access.

SECTION C – OTHER PROFESSIONAL SERVICES

1. Other Professional Services. We will provide you the various implementation-related services itemized in the Investment Summary and described in the Statement of Work/our industry

standard implementation plan. We will finalize that documentation with you upon execution of this Agreement.

2. Professional Services Fees. You agree to pay us the professional services fees in the amounts set forth in the Investment Summary. Those amounts are payable in accordance with our Invoicing and Payment Policy. You acknowledge that the fees stated in the Investment Summary are good-faith estimates of the amount of time and materials required for your implementation. We will bill you the actual fees incurred based on the in-scope services provided to you. Any discrepancies in the total values set forth in the Investment Summary will be resolved by multiplying the applicable hourly rate by the quoted hours.

3. Additional Services. The Investment Summary contains, and the Statement of Work describes, the scope of services and related costs (including programming and/or interface estimates) required for the project based on our understanding of the specifications you supplied. If additional work is required, or if you use or request additional services, we will provide you with an addendum or change order, as applicable, outlining the costs for the additional work. The price quotes in the addendum or change order will be valid for thirty (30) days from the date of the quote.

4. Cancellation. If travel is required, we will make all reasonable efforts to schedule travel for our personnel, including arranging travel reservations, at least two (2) weeks in advance of commitments. Therefore, if you cancel services less than two (2) weeks in advance (other than for Force Majeure or breach by us), you will be liable for all (a) non-refundable expenses incurred by us on your behalf, and (b) daily fees associated with cancelled professional services if we are unable to reassign our personnel. We will make all reasonable efforts to reassign personnel in the event you cancel within two (2) weeks of scheduled commitments.

5. Services Warranty. We will perform the services in a professional, workmanlike manner, consistent with industry standards. In the event we provide services that do not conform to this warranty, we will re-perform such services at no additional cost to you.

6. Site Access and Requirements. At no cost to us, you agree to provide us with full and free access to your personnel, facilities, and equipment as may be reasonably necessary for us to provide implementation services, subject to any reasonable security protocols or other written policies provided to us as of the Effective Date, and thereafter as mutually agreed to by you and us.

7. Client Assistance. You acknowledge that the implementation of the Tyler Software is a cooperative process requiring the time and resources of your personnel. You agree to use all reasonable efforts to cooperate with and assist us as may be reasonably required to meet the agreed upon project deadlines and other milestones for implementation. This cooperation includes at least working with us to schedule the implementation-related services outlined in this Agreement. We will not be liable for failure to meet any deadlines and milestones when such failure is due to Force Majeure or to the failure by your personnel to provide such cooperation and assistance (either through action or omission).

8. Maintenance and Support. For so long as you timely pay your SaaS Fees according to the Invoicing and Payment Policy, then in addition to the terms set forth in the SLA and the Support Call Process, we will:

8.1 perform our maintenance and support obligations in a professional, good, and workmanlike manner, consistent with industry standards, to resolve Defects in the Tyler Software (limited to the then-current version and the immediately prior version);

8.2 provide telephone support during our established support hours;

8.3 maintain personnel that are sufficiently trained to be familiar with the Tyler Software and Third Party Software, if any, in order to provide maintenance and support services;

8.4 make available to you all major and minor releases to the Tyler Software (including updates and enhancements) that we make generally available without additional charge to customers who have a maintenance and support agreement in effect; and

8.5 provide non-Defect resolution support of prior releases of the Tyler Software in accordance with our then-current release life cycle policy.

We will use all reasonable efforts to perform support services remotely. Currently, we use a third-party secure unattended connectivity tool called Bomgar, as well as GotoAssist by Citrix. Therefore, you agree to maintain a high-speed internet connection capable of connecting us to your PCs and server(s). You agree to provide us with a login account and local administrative privileges as we may reasonably require to perform remote services. We will, at our option, use the secure connection to assist with proper diagnosis and resolution, subject to any reasonably applicable security protocols. If we cannot resolve a support issue remotely, we may be required to provide onsite services. In such event, we will be responsible for our travel expenses, unless it is determined that the reason onsite support was required was a reason outside our control. Either way, you agree to provide us with full and free access to the Tyler Software, working space, adequate facilities within a reasonable distance from the equipment, and use of machines, attachments, features, or other equipment reasonably necessary for us to provide the maintenance and support services, all at no charge to us. We strongly recommend that you also maintain your VPN for backup connectivity purposes.

For the avoidance of doubt, SaaS Fees do not include the following services: (a) onsite support (unless Tyler cannot remotely correct a Defect in the Tyler Software, as set forth above); (b) application design; (c) other consulting services; or (d) support outside our normal business hours as listed in our then-current Support Call Process. Requested services such as those outlined in this section will be billed to you on a time and materials basis at our then current rates. You must request those services with at least one (1) weeks' advance notice.

SECTION D – THIRD PARTY PRODUCTS

1. Third Party Hardware. We will sell, deliver, and install onsite the Third Party Hardware, if you have purchased any, for the price set forth in the Investment Summary. Those amounts are payable in accordance with our Invoicing and Payment Policy.

2. Third Party Software. As part of the SaaS Services, you will receive access to the Third Party Software and related documentation for internal business purposes only. Your rights to the Third Party Software will be governed by the Third Party Terms.

3. Third Party Products Warranties.

3.1 We are authorized by each Developer to grant access to the Third Party Software.

3.2 The Third Party Hardware will be new and unused, and upon payment in full, you will receive free and clear title to the Third Party Hardware.

3.3 You acknowledge that we are not the manufacturer of the Third Party Products. We do not warrant or guarantee the performance of the Third Party Products. However, we grant and pass through to you any warranty that we may receive from the Developer or supplier of the Third Party Products.

SECTION E - INVOICING AND PAYMENT; INVOICE DISPUTES

1. Invoicing and Payment. We will invoice you the SaaS Fees and fees for other professional services in the Investment Summary per our Invoicing and Payment Policy, subject to Section E(2).

2. Invoice Disputes. If you believe any delivered software or service does not conform to the warranties in this Agreement, you will provide us with written notice within thirty (30) days of your receipt of the applicable invoice. The written notice must contain reasonable detail of the issues you contend are in dispute so that we can confirm the issue and respond to your notice with either a justification of the invoice, an adjustment to the invoice, or a proposal addressing the issues presented in your notice. We will work with you as may be necessary to develop an action plan that outlines reasonable steps to be taken by each of us to resolve any issues presented in your notice. You may withhold payment of the amount(s) actually in dispute, and only those amounts, until we complete the action items outlined in the plan. If we are unable to complete the action items outlined in the action plan because of your failure to complete the items agreed to be done by you, then you will remit full payment of the invoice. We reserve the right to suspend delivery of all SaaS Services, including maintenance and support services, if you fail to pay an invoice not disputed as described above within fifteen (15) days of notice of our intent to do so.

SECTION F – TERM AND TERMINATION

1. Term. The initial term of this Agreement is five (5) years from [INSERT FIRST DAY OF FIRST MONTH FOLLOWING EFFECTIVE DATE], unless earlier terminated as set forth below. After [INSERT DATE], this Agreement will renew automatically for additional one (1) year renewal terms at our then-current SaaS Fees unless terminated in writing by either party at least sixty (60) days prior to the end of the then-current renewal term. Your right to access or use the Tyler Software and the SaaS Services will terminate at the end of this Agreement.

2. Termination. This Agreement may be terminated as set forth below. In the event of termination, you will pay us for all undisputed fees and expenses related to the software, products, and/or services you have received, or we have incurred or delivered, prior to the effective date of termination. Disputed fees and expenses in all terminations other than your termination for cause must have been submitted as invoice disputes in accordance with Section E(2).

2.1 Failure to Pay SaaS Fees. You acknowledge that continued access to the SaaS Services is

contingent upon your timely payment of SaaS Fees. If you fail to timely pay the SaaS Fees, we may discontinue the SaaS Services and deny your access to the Tyler Software. We may also terminate this Agreement if you don't cure such failure to pay within forty-five (45) days of receiving written notice of our intent to terminate.

2.2 For Cause. If you believe we have materially breached this Agreement, you will invoke the Dispute Resolution clause set forth in Section H(3). You may terminate this Agreement for cause in the event we do not cure, or create a mutually agreeable action plan to address, a material breach of this Agreement within the thirty (30) day window set forth in Section H(3).

2.3 Force Majeure. Either party has the right to terminate this Agreement if a Force Majeure event suspends performance of the SaaS Services for a period of forty-five (45) days or more.

2.4 Lack of Appropriations. If you should not appropriate or otherwise make available funds sufficient to utilize the SaaS Services, you may unilaterally terminate this Agreement upon thirty (30) days written notice to us. You will not be entitled to a refund or offset of previously paid, but unused SaaS Fees. You agree not to use termination for lack of appropriations as a substitute for termination for convenience.

2.5 Fees for Termination without Cause during Initial Term. If you terminate this Agreement during the initial term for any reason other than cause, Force Majeure, or lack of appropriations, or if we terminate this Agreement during the initial term for your failure to pay SaaS Fees, you shall pay us the following early termination fees:

a. if you terminate during the first year of the initial term, 100% of the SaaS Fees through the date of termination plus 75% of the SaaS Fees then due for the remainder of the initial term;

b. if you terminate during the second year of the initial term, 100% of the SaaS Fees through the date of termination plus 50% of the SaaS Fees then due for the remainder of the initial term; and

c. if you terminate after the second year of the initial term, 100% of the SaaS Fees through the date of termination plus 25% of the SaaS Fees then due for the remainder of the initial term.

SECTION G – INDEMNIFICATION, LIMITATION OF LIABILITY AND INSURANCE

1. Intellectual Property Infringement Indemnification.

1.1 We will defend you against any third party claim(s) that the Tyler Software or Documentation infringes that third party's patent, copyright, or trademark, or misappropriates its trade secrets, and will pay the amount of any resulting adverse final judgment (or settlement to which we consent). You must notify us promptly in writing of the claim and give us sole control over its defense or settlement. You agree to provide us with reasonable assistance, cooperation, and information in defending the claim at our expense.

1.2 Our obligations under this Section G(1) will not apply to the extent the claim or adverse final judgment is based on your use of the Tyler Software in contradiction of this Agreement, including with non-licensed third parties, or your willful infringement.

1.3 If we receive information concerning an infringement or misappropriation claim related to the Tyler Software, we may, at our expense and without obligation to do so, either: (a) procure for you the right to continue its use; (b) modify it to make it non-infringing; or (c) replace it with a functional equivalent, in which case you will stop running the allegedly infringing Tyler Software immediately. Alternatively, we may decide to litigate the claim to judgment, in which case you may continue to use the Tyler Software consistent with the terms of this Agreement.

1.4 If an infringement or misappropriation claim is fully litigated and your use of the Tyler Software is enjoined by a court of competent jurisdiction, in addition to paying any adverse final judgment (or settlement to which we consent), we will, at our option, either: (a) procure the right to continue its use; (b) modify it to make it non-infringing; (c) replace it with a functional equivalent; or (d) terminate this Agreement and refund you the prepaid but unused SaaS Fees for the year in which the Agreement terminates. We will pursue those options in the order listed herein. This section provides your exclusive remedy for third party copyright, patent, or trademark infringement and trade secret misappropriation claims.

2. General Indemnification.

2.1 We will indemnify and hold harmless you and your agents, officials, and employees from and against any and all third-party claims, losses, liabilities, damages, costs, and expenses (including reasonable attorney's fees and costs) for (a) personal injury or property damage to the extent caused by our negligence or willful misconduct; or (b) our violation of a law applicable to our performance under this Agreement. You must notify us promptly in writing of the claim and give us sole control over its defense or settlement. You agree to provide us with reasonable assistance, cooperation, and information in defending the claim at our expense.

2.2 To the extent permitted by applicable law, you will indemnify and hold harmless us and our agents, officials, and employees from and against any and all third-party claims, losses, liabilities, damages, costs, and expenses (including reasonable attorney's fees and costs) for personal injury or property damage to the extent caused by your negligence or willful misconduct; or (b) your violation of a law applicable to your performance under this Agreement. We will notify you promptly in writing of the claim and will give you sole control over its defense or settlement. We agree to provide you with reasonable assistance, cooperation, and information in defending the claim at your expense.

3. DISCLAIMER. EXCEPT FOR THE EXPRESS WARRANTIES PROVIDED IN THIS AGREEMENT AND TO THE MAXIMUM EXTENT PERMITTED BY APPLICABLE LAW, WE HEREBY DISCLAIM ALL OTHER WARRANTIES AND CONDITIONS, WHETHER EXPRESS, IMPLIED, OR STATUTORY, INCLUDING, BUT NOT LIMITED TO, ANY IMPLIED WARRANTIES, DUTIES, OR CONDITIONS OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE.

4. **LIMITATION OF LIABILITY. EXCEPT AS OTHERWISE EXPRESSLY SET FORTH IN THIS AGREEMENT, OUR LIABILITY FOR DAMAGES ARISING OUT OF THIS AGREEMENT, WHETHER BASED ON A THEORY OF CONTRACT OR TORT, INCLUDING NEGLIGENCE AND STRICT LIABILITY, SHALL BE LIMITED TO YOUR ACTUAL DIRECT DAMAGES, NOT TO EXCEED (A) DURING THE INITIAL TERM, AS SET FORTH IN SECTION F(2), TOTAL FEES PAID AS OF THE TIME OF THE CLAIM; OR (B) DURING ANY RENEWAL TERM, THE THEN-CURRENT ANNUAL SAAS FEES PAYABLE IN THAT RENEWAL TERM. THE PRICES SET FORTH IN THIS AGREEMENT ARE SET IN RELIANCE UPON THIS LIMITATION OF LIABILITY. THE FOREGOING LIMITATION OF LIABILITY SHALL NOT APPLY TO CLAIMS THAT ARE SUBJECT TO SECTIONS G(1) AND G(2).**

5. **EXCLUSION OF CERTAIN DAMAGES. TO THE MAXIMUM EXTENT PERMITTED BY APPLICABLE LAW, IN NO EVENT SHALL WE BE LIABLE FOR ANY SPECIAL, INCIDENTAL, PUNITIVE, INDIRECT, OR CONSEQUENTIAL DAMAGES WHATSOEVER, EVEN IF WE HAVE BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES.**

6. Insurance. During the course of performing services under this Agreement, we agree to maintain the following levels of insurance: (a) Commercial General Liability of at least $1,000,000; (b) Automobile Liability of at least $1,000,000; (c) Professional Liability of at least $1,000,000; (d) Workers Compensation complying with applicable statutory requirements; and (e) Excess/Umbrella Liability of at least $5,000,000. We will add you as an additional insured to our Commercial General Liability and Automobile Liability policies, which will automatically add you as an additional insured to our Excess/Umbrella Liability policy as well. We will provide you with copies of certificates of insurance upon your written request.

SECTION H – GENERAL TERMS AND CONDITIONS

1. Additional Products and Services. You may purchase additional products and services at the rates set forth in the Investment Summary for twelve (12) months from the Effective Date by executing a mutually agreed addendum. If no rate is provided in the Investment Summary, or those twelve (12) months have expired, you may purchase additional products and services at our then-current list price, also by executing a mutually agreed addendum. The terms of this Agreement will control any such additional purchase(s), unless otherwise specifically provided in the addendum.

2. Optional Items. Pricing for any listed optional products and services in the Investment Summary will be valid for twelve (12) months from the Effective Date.

3. Dispute Resolution. You agree to provide us with written notice within thirty (30) days of becoming aware of a dispute. You agree to cooperate with us in trying to reasonably resolve all disputes, including, if requested by either party, appointing a senior representative to meet and engage in good faith negotiations with our appointed senior representative. Senior representatives will convene within thirty (30) days of the written dispute notice, unless otherwise agreed. All meetings and discussions between senior representatives will be deemed confidential settlement discussions not subject to disclosure under Federal Rule of Evidence 408 or any similar applicable state rule. If we fail to resolve the dispute, either of us may assert our respective rights and remedies in a court of competent jurisdiction. Nothing in this section shall prevent you or us from seeking necessary injunctive relief during the dispute resolution procedures.

4. Taxes. The fees in the Investment Summary do not include any taxes, including, without limitation, sales, use, or excise tax. If you are a tax-exempt entity, you agree to provide us with a tax-exempt certificate. Otherwise, we will pay all applicable taxes to the proper authorities and you will reimburse us for such taxes. If you have a valid direct-pay permit, you agree to provide us with a copy. For clarity, we are responsible for paying our income taxes, both federal and state, as applicable, arising from our performance of this Agreement.

5. Nondiscrimination. We will not discriminate against any person employed or applying for employment concerning the performance of our responsibilities under this Agreement. This discrimination prohibition will apply to all matters of initial employment, tenure, and terms of employment, or otherwise with respect to any matter directly or indirectly relating to employment concerning race, color, religion, national origin, age, sex, sexual orientation, ancestry, disability that is unrelated to the individual's ability to perform the duties of a particular job or position, height, weight, marital status, or political affiliation. We will post, where appropriate, all notices related to nondiscrimination as may be required by applicable law.

6. E-Verify. We have complied, and will comply, with the E-Verify procedures administered by the U.S. Citizenship and Immigration Services Verification Division for all of our employees assigned to your project.

7. Subcontractors. We will not subcontract any services under this Agreement without your prior written consent, not to be unreasonably withheld.

8. Binding Effect; No Assignment. This Agreement shall be binding on, and shall be for the benefit of, either your or our successor(s) or permitted assign(s). Neither party may assign this Agreement without the prior written consent of the other party; provided, however, your consent is not required for an assignment by us as a result of a corporate reorganization, merger, acquisition, or purchase of substantially all of our assets.

9. Force Majeure. Except for your payment obligations, neither party will be liable for delays in performing its obligations under this Agreement to the extent that the delay is caused by Force Majeure; provided, however, that within ten (10) business days of the Force Majeure event, the party whose performance is delayed provides the other party with written notice explaining the cause and extent thereof, as well as a request for a reasonable time extension equal to the estimated duration of the Force Majeure event.

10. No Intended Third Party Beneficiaries. This Agreement is entered into solely for the benefit of you and us. No third party will be deemed a beneficiary of this Agreement, and no third party will have the right to make any claim or assert any right under this Agreement. This provision does not affect the rights of third parties under any Third Party Terms.

11. Entire Agreement; Amendment. This Agreement represents the entire agreement between you and us with respect to the subject matter hereof, and supersedes any prior agreements, understandings, and representations, whether written, oral, expressed, implied, or statutory. This Agreement may only be modified by a written amendment signed by an authorized representative of each party.

12. Severability. If any term or provision of this Agreement is held invalid or unenforceable, the remainder of this Agreement will be considered valid and enforceable to the fullest extent permitted by law.

13. No Waiver. In the event that the terms and conditions of this Agreement are not strictly enforced by either party, such non-enforcement will not act as or be deemed to act as a waiver or modification of this Agreement, nor will such non-enforcement prevent such party from enforcing each and every term of this Agreement thereafter.

14. Independent Contractor. We are an independent contractor for all purposes under this Agreement.

15. Notices. All notices or communications required or permitted as a part of this Agreement, such as notice of an alleged material breach for a termination for cause or a dispute that must be submitted to dispute resolution, must be in writing and will be deemed delivered upon the earlier of the following: (a) actual receipt by the receiving party; (b) upon receipt by sender of a certified mail, return receipt signed by an employee or agent of the receiving party; (c) upon receipt by sender of proof of email delivery; or (d) if not actually received, five (5) days after deposit with the United States Postal Service authorized mail center with proper postage (certified mail, return receipt requested) affixed and addressed to the other party at the address set forth on the signature page hereto or such other address as the party may have designated by proper notice. The consequences for the failure to receive a notice due to improper notification by the intended receiving party of a change in address will be borne by the intended receiving party.

16. Client Lists. You agree that we may identify you by name in client lists, marketing presentations, and promotional materials.

17. Confidentiality. Both parties recognize that their respective employees and agents, in the course of performance of this Agreement, may be exposed to confidential information and that disclosure of such information could violate rights to private individuals and entities, including the parties. Confidential information is nonpublic information that a reasonable person would believe to be confidential and includes, without limitation, personal identifying information (*e.g.*, social security numbers) and trade secrets, each as defined by applicable state law. Each party agrees that it will not disclose any confidential information of the other party and further agrees to take all reasonable and appropriate action to prevent such disclosure by its employees or agents. The confidentiality covenants contained herein will survive the termination or cancellation of this Agreement. This obligation of confidentiality will not apply to information that:

    (a) is in the public domain, either at the time of disclosure or afterwards, except by breach of this Agreement by a party or its employees or agents;
    (b) a party can establish by reasonable proof was in that party's possession at the time of initial disclosure;
    (c) a party receives from a third party who has a right to disclose it to the receiving party; or
    (d) is the subject of a legitimate disclosure request under the open records laws or similar applicable public disclosure laws governing this Agreement; provided, however, that in the event you receive an open records or other similar applicable request, you will give us prompt notice and otherwise perform the functions required by applicable law.

18. Business License. In the event a local business license is required for us to perform services hereunder, you will promptly notify us and provide us with the necessary paperwork and/or contact information so that we may timely obtain such license.

19. Governing Law. This Agreement will be governed by and construed in accordance with the laws of your state of domicile, without regard to its rules on conflicts of law.

20. Multiple Originals and Authorized Signatures. This Agreement may be executed in multiple originals, any of which will be independently treated as an original document. Any electronic, faxed, scanned, photocopied, or similarly reproduced signature on this Agreement or any amendment hereto will be deemed an original signature and will be fully enforceable as if an original signature. Each party represents to the other that the signatory set forth below is duly authorized to bind that party to this Agreement.

21. Cooperative Procurement. To the maximum extent permitted by applicable law, we agree that this Agreement may be used as a cooperative procurement vehicle by eligible jurisdictions. We reserve the right to negotiate and customize the terms and conditions set forth herein, including but not limited to pricing, to the scope and circumstances of that cooperative procurement.

22. Contract Documents. This Agreement includes the following exhibits:

Exhibit A	Investment Summary
Exhibit B	Invoicing and Payment Policy
	Schedule 1: Business Travel Policy
Exhibit C	Service Level Agreement
	Schedule 1: Support Call Process
Exhibit D	Third Party Terms
Exhibit E	Statement of Work

IN WITNESS WHEREOF, a duly authorized representative of each party has executed this Agreement as of the date(s) set forth below.

Tyler Technologies, Inc.

By:_____

Name:_____

Title:_____

Date:_____

Address for Notices:
Tyler Technologies, Inc.
One Tyler Drive
Yarmouth, ME 04096
Attention: Associate General Counsel

[INSERT CLIENT NAME

By:_____

Name:_____

Title:_____

Date:_____

Address for Notices:
INSERT CLIENT NAME
INSERT
INSERT
Attn:

Exhibit A
Investment Summary

The following Investment Summary details the software and services to be delivered by us to you under the Agreement. This Investment Summary is effective as of the Effective Date. Capitalized terms not otherwise defined will have the meaning assigned to such terms in the Agreement.

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Exhibit B
Invoicing and Payment Policy

We will provide you with the software and services set forth in the Investment Summary of the Agreement. Capitalized terms not otherwise defined will have the meaning assigned to such terms in the Agreement.

Invoicing: We will invoice you for the applicable software and services in the Investment Summary as set forth below. Your rights to dispute any invoice are set forth in the Agreement.

1. SaaS Fees. SaaS Fees are invoiced on an annual basis, beginning on the Effective Date. Your annual SaaS fees for the initial term, as set forth in Section F(1) of the Agreement, are set forth in the Investment Summary. Upon expiration of the initial term, your annual SaaS fees will be at our then-current rates.

2. Other Tyler Software and Services.

   2.1 *Project Planning Services*: Project planning services are invoiced upon delivery of the implementation planning document.

   2.2 *VPN Device*: The fee for the VPN device will be invoiced upon installation of the VPN.

   2.3 *Implementation and Other Professional Services (including training)*: Implementation and other professional services (including training) are billed and invoiced as delivered, at the rates set forth in the Investment Summary.

   2.4 *Consulting Services*: If you have purchased any Business Process Consulting services, if they have been quoted as fixed-fee services, they will be invoiced 50% upon your acceptance of the Business System Design document, by module, and 50% upon your acceptance of custom desktop procedures, by module. If you have purchased any Business Process Consulting services and they are quoted as an estimate, then we will bill you the actual services delivered on a time and materials basis.

   2.5 *Conversions*: Fixed-fee conversions are invoiced 50% upon initial delivery of the converted data, by conversion option, and 50% upon Client acceptance to load the converted data into Live/Production environment, by conversion option. Where conversions are quoted as estimated, we will bill you the actual services delivered on a time and materials basis.

   2.6 *Requested Modifications to the Tyler Software*: Requested modifications to the Tyler Software are invoiced 50% upon delivery of specifications and 50% upon delivery of the

applicable modification. You must report any failure of the modification to conform to the specifications within thirty (30) days of delivery; otherwise, the modification will be deemed to be in compliance with the specifications after the 30-day window has passed. You may still report Defects to us as set forth in the Maintenance and Support Agreement.

2.7 *Other Fixed Price Services*: Other fixed price services are invoiced upon complete delivery of the service. For the avoidance of doubt, where "Project Planning Services" are provided, payment will be due upon delivery of the Implementation Planning document.

2.8 *Change Management Services*: If you have purchased any change management services, those services will be invoiced in the following amounts and upon the following milestones:

Acceptance of Change Management Discovery Analysis	15%
Delivery of Change Management Plan and Strategy Presentation	10%
Acceptance of Executive Playbook	15%
Acceptance of Resistance Management Plan	15%
Acceptance of Procedural Change Communications Plan	10%
Change Management Coach Training	20%
Change Management After-Action Review	15%

3. Third Party Products.

3.1 *Third Party Software License Fees*: License fees for Third Party Software, if any, are invoiced when we make it available to you for downloading.

3.2 *Third Party Software Maintenance*: The first year maintenance for the Third Party Software is invoiced when we make it available to you for downloading.

3.3 *Third Party Hardware*: Third Party Hardware costs, if any, are invoiced upon delivery.

4. Expenses. The service rates in the Investment Summary do not include travel expenses. Expenses will be billed as incurred and only in accordance with our then-current Business Travel Policy. Our current Business Travel Policy is attached to this Exhibit B at Schedule 1. Copies of receipts will be provided upon request; we reserve the right to charge you an administrative fee depending on the extent of your requests. Receipts for miscellaneous items less than twenty-five dollars and mileage logs are not available.

Payment. Payment for undisputed invoices is due within forty-five (45) days of the invoice date. We prefer to receive payments electronically. Our electronic payment information is:

Bank:	Wells Fargo Bank, N.A. 420 Montgomery San Francisco, CA 94104
ABA:	121000248
Account:	4124302472

Beneficiary: Tyler Technologies, Inc. – Operating

Exhibit B
Schedule 1
Business Travel Policy

1. Air Travel

   A. Reservations & Tickets

   Tyler's Travel Management Company (TMC) will provide an employee with a direct flight within two hours before or after the requested departure time, assuming that flight does not add more than three hours to the employee's total trip duration and the fare is within $100 (each way) of the lowest logical fare. If a net savings of $200 or more (each way) is possible through a connecting flight that is within two hours before or after the requested departure time and that does not add more than three hours to the employee's total trip duration, the connecting flight should be accepted.

   Employees are encouraged to make advanced reservations to take full advantage of discount opportunities. Employees should use all reasonable efforts to make travel arrangements at least two (2) weeks in advance of commitments. A seven day advance booking requirement is mandatory. When booking less than seven days in advance, management approval will be required.

   Except in the case of international travel where a segment of continuous air travel is scheduled to exceed six hours, only economy or coach class seating is reimbursable.

   B. Baggage Fees

   Reimbursement of personal baggage charges are based on trip duration as follows:

   - Up to five days = one checked bag
   - Six or more days = two checked bags

   Baggage fees for sports equipment are not reimbursable.

2. Ground Transportation

   A. Private Automobile

   Mileage Allowance – Business use of an employee's private automobile will be reimbursed at the current IRS allowable rate, plus out of pocket costs for tolls and parking. Mileage will be

calculated by using the employee's office as the starting and ending point, in compliance with IRS regulations. Employees who have been designated a home office should calculate miles from their home.

B. Rental Car

Employees are authorized to rent cars only in conjunction with air travel when cost, convenience, and the specific situation reasonably require their use. When renting a car for Tyler business, employees should select a “mid-size” or “intermediate” car. “Full” size cars may be rented when three or more employees are traveling together. Tyler carries leased vehicle coverage for business car rentals; additional insurance on the rental agreement should be declined.

C. Public Transportation

Taxi or airport limousine services may be considered when traveling in and around cities or to and from airports when less expensive means of transportation are unavailable or impractical. The actual fare plus a reasonable tip (15-18%) are reimbursable. In the case of a free hotel shuttle to the airport, tips are included in the per diem rates and will not be reimbursed separately.

D. Parking & Tolls

When parking at the airport, employees must use longer term parking areas that are measured in days as opposed to hours. Park and fly options located near some airports may also be used. For extended trips that would result in excessive parking charges, public transportation to/from the airport should be considered. Tolls will be reimbursed when receipts are presented.

3. Lodging

Tyler’s TMC will select hotel chains that are well established, reasonable in price, and conveniently located in relation to the traveler's work assignment. Typical hotel chains include Courtyard, Fairfield Inn, Hampton Inn, and Holiday Inn Express. If the employee has a discount rate with a local hotel, the hotel reservation should note that discount and the employee should confirm the lower rate with the hotel upon arrival. Employee memberships in travel clubs such as AAA should be noted in their travel profiles so that the employee can take advantage of any lower club rates.

“No shows” or cancellation fees are not reimbursable if the employee does not comply with the hotel’s cancellation policy.

Tips for maids and other hotel staff are included in the per diem rate and are not reimbursed separately.

4. Meals and Incidental Expenses

Employee meals and incidental expenses while on travel status are in accordance with the federal per diem rates published by the General Services Administration. Incidental expenses include tips to maids, hotel staff, and shuttle drivers and other minor travel expenses. Per diem rates are available at www.gsa.gov/perdiem.

A. Overnight Travel

For each full day of travel, all three meals are reimbursable. Per diems on the first and last day of a trip are governed as set forth below.

Departure Day

Depart before 12:00 noon	Lunch and dinner
Depart after 12:00 noon	Dinner

Return Day

Return before 12:00 noon	Breakfast
Return between 12:00 noon & 7:00 p.m.	Breakfast and lunch
Return after 7:00 p.m.*	Breakfast, lunch and dinner

*7:00 p.m. is defined as direct travel time and does not include time taken to stop for dinner

The reimbursement rates for individual meals are calculated as a percentage of the full day per diem as follows:

- Breakfast 15%
- Lunch 25%
- Dinner 60%

B. Same Day Travel

Employees traveling at least 100 miles to a site and returning in the same day are eligible to claim lunch on an expense report. Employees on same day travel status are eligible to claim dinner in the event they return home after 7:00 p.m.*

*7:00 p.m. is defined as direct travel time and does not include time taken to stop for dinner

5. Internet Access – Hotels and Airports

Employees who travel may need to access their e-mail at night. Many hotels provide free high speed internet access and Tyler employees are encouraged to use such hotels whenever possible. If an employee's hotel charges for internet access it is reimbursable up to $10.00 per day. Charges for internet access at airports are not reimbursable.

Exhibit C

SERVICE LEVEL AGREEMENT

I. Agreement Overview

This SLA operates in conjunction with, and does not supersede or replace any part of, the Agreement. It outlines the information technology service levels that we will provide to you to ensure the availability of the application services that you have requested us to provide. All other support services are documented in the Support Call Process.

II. Definitions. Except as defined below, all defined terms have the meaning set forth in the Agreement.

Attainment: The percentage of time the Tyler Software is available during a billing cycle, with percentages rounded to the nearest whole number.

Client Error Incident: Any service unavailability resulting from your applications, content or equipment, or the acts or omissions of any of your service users or third-party providers over whom we exercise no control.

Downtime: Those minutes during which the Tyler Software is not available for your use. Downtime does not include those instances in which only a Defect is present.

Service Availability: The total number of minutes in a billing cycle that the Tyler Software is capable of receiving, processing, and responding to requests, excluding maintenance windows, Client Error Incidents and Force Majeure.

III. Service Availability

The Service Availability of the Tyler Software is intended to be 24/7/365. We set Service Availability goals and measures whether it has met those goals by tracking Attainment.

a. Your Responsibilities

Whenever you experience Downtime, you must make a support call according to the procedures outlined in the Support Call Process. You will receive a support incident number.

You must document, in writing, all Downtime that you have experienced during a calendar quarter. You must deliver such documentation to us within 30 days of a quarter's end.

The documentation you provide must evidence the Downtime clearly and convincingly. It must include, for example, the support incident number(s) and the date, time and duration of the Downtime(s).

b. Our Responsibilities

When our support team receives a call from you that a Downtime has occurred or is occurring, we will work with you to identify the cause of the Downtime (including whether it may be the result of a Client Error Incident or Force Majeure). We will also work with you to resume normal operations.

Upon timely receipt of your Downtime report, we will compare that report to our own outage logs and support tickets to confirm that a Downtime for which we were responsible indeed occurred.

We will respond to your Downtime report within 30 day(s) of receipt. To the extent we have confirmed Downtime for which we are responsible, we will provide you with the relief set forth below.

c. Client Relief

When a Service Availability goal is not met due to confirmed Downtime, we will provide you with relief that corresponds to the percentage amount by which that goal was not achieved, as set forth in the Client Relief Schedule below.

Notwithstanding the above, the total amount of all relief that would be due under this SLA will not exceed 5% of one quarter of the then-current SaaS Fee. To the extent any credit is identified in any quarter, it will accumulate, and all credits will be deducted from the SaaS Fee for the immediately following year. Issuing of such credit does not relieve us of our obligations under the Agreement to correct the problem which created the service interruption. A correction may occur in the quarter following the service interruption. In that circumstance, if service levels do not meet the corresponding goal for that later billing cycle, your credits will be reissued in that following quarter.

Every quarter, we will compare confirmed Downtime to Service Availability. In the event actual Attainment does not meet the targeted Attainment, the following Client relief will apply, on a quarterly basis:

Targeted Attainment	Actual Attainment	Client Relief
100%	98-99%	Remedial action will be taken.
100%	95-97%	4% credit of fee for affected billing cycle will be posted to next billing cycle
100%	<95%	5% credit of fee for affected billing cycle will be posted to next billing cycle

You may request a report from us that documents the preceding quarter's Service Availability, Downtime, any remedial actions that have been/will be taken, and any credits that may be issued.

IV. Applicability

The commitments set forth in this SLA do not apply during maintenance windows, Client Error Incidents, and Force Majeure.

We perform maintenance during limited windows that are historically known to be reliably low-traffic times. If and when maintenance is predicted to occur during periods of higher traffic, we will provide advance notice of those windows and will coordinate to the greatest extent possible with you.

V. Force Majeure

You will not hold us responsible for not meeting service levels outlined in this SLA to the extent any failure to do so is caused by Force Majeure. In the event of Force Majeure, we will file with you a signed request that said failure be excused. That writing will at least include the essential details and circumstances supporting our request for relief pursuant to this Section. You will not unreasonably withhold its acceptance of such a request.

Exhibit C
Schedule 1
Support Call Process

Support Channels
We provide the following channels of software support:

(1) Tyler Community – an on-line resource, Tyler Community provides a venue for all Tyler clients with current maintenance agreements to collaborate with one another, share best practices and resources, and access documentation.
(2) On-line submission (portal) – for less urgent and functionality-based questions, users may create unlimited support incidents through the customer relationship management portal available at the Tyler Technologies website.
(3) Email – for less urgent situations, users may submit unlimited emails directly to the software support group.
(4) Telephone – for urgent or complex questions, users receive toll-free, unlimited telephone software support.

Support Resources
A number of additional resources are available to provide a comprehensive and complete support experience:

(1) Tyler Website – www.tylertech.com – for accessing client tools and other information including support contact information.
(2) Tyler Community – available through login, Tyler Community provides a venue for clients to support one another and share best practices and resources.
(3) Knowledgebase – A fully searchable depository of thousands of documents related to procedures, best practices, release information, and job aides.
(4) Program Updates – where development activity is made available for client consumption

Support Availability
Tyler Technologies support is available during the local business hours of 8 AM to 5 PM (Monday – Friday) across four US time zones (Pacific, Mountain, Central and Eastern). Clients may receive coverage across these time zones. Tyler's holiday schedule is outlined below. There will be no support coverage on these days.

New Year's Day	Thanksgiving Day
Memorial Day	Day after Thanksgiving
Independence Day	Christmas Day
Labor Day	

Issue Handling
Incident Tracking
Every support incident is logged into Tyler's Customer Relationship Management System and given a unique incident number. This system tracks the history of each incident. The incident tracking

number is used to track and reference open issues when clients contact support. Clients may track incidents, using the incident number, through the portal at Tyler's website or by calling software support directly.

Incident Priority

Each incident is assigned a priority number, which corresponds to the client's needs and deadlines. The client is responsible for reasonably setting the priority of the incident per the chart below. The goal of this structure is to help the client clearly understand and communicate the importance of the issue and to describe expected responses and resolutions.

Priority Level	Characteristics of Support Incident	Resolution Targets
1 Critical	Support incident that causes (a) complete application failure or application unavailability; (b) application failure or unavailability in one or more of the client's remote location; or (c) systemic loss of multiple essential system functions.	Tyler shall provide an initial response to Priority Level 1 incidents within one (1) business hour of receipt of the support incident. Tyler shall use commercially reasonable efforts to resolve such support incidents or provide a circumvention procedure within one (1) business day. Tyler's responsibility for lost or corrupted data is limited to assisting the client in restoring its last available database.
2 High	Support incident that causes (a) repeated, consistent failure of essential functionality affecting more than one user or (b) loss or corruption of data.	Tyler shall provide an initial response to Priority Level 2 incidents within four (4) business hours of receipt of the support incident. Tyler shall use commercially reasonable efforts to resolve such support incidents or provide a circumvention procedure within ten (10) business days. Tyler's responsibility for loss or corrupted data is limited to assisting the client in restoring its last available database.
3 Medium	Priority Level 1 incident with an existing circumvention procedure, or a Priority Level 2 incident that affects only one user or for which there is an existing circumvention procedure.	Tyler shall provide an initial response to Priority Level 3 incidents within one (1) business day of receipt of the support incident. Tyler shall use commercially reasonable efforts to resolve such support incidents without the need for a circumvention procedure with the next published maintenance update or service pack. Tyler's responsibility for lost or corrupted data is limited to assisting the client in restoring its last available database.

Priority Level	Characteristics of Support Incident	Resolution Targets
4 Non-critical	Support incident that causes failure of non-essential functionality or a cosmetic or other issue that does not qualify as any other Priority Level.	Tyler shall provide an initial response to Priority Level 4 incidents within two (2) business days. Tyler shall use commercially reasonable efforts to resolve such support incidents, as well as cosmetic issues, with a future version release.

Incident Escalation

Tyler Technology's software support consists of four levels of personnel:

(1) Level 1: front-line representatives
(2) Level 2: more senior in their support role, they assist front-line representatives and take on escalated issues
(3) Level 3: assist in incident escalations and specialized client issues
(4) Level 4: responsible for the management of support teams for either a single product or a product group

If a client feels they are not receiving the service needed, they may contact the appropriate Software Support Manager. After receiving the incident tracking number, the manager will follow up on the open issue and determine the necessary action to meet the client's needs.
On occasion, the priority or immediacy of a software support incident may change after initiation. Tyler encourages clients to communicate the level of urgency or priority of software support issues so that we can respond appropriately. A software support incident can be escalated by any of the following methods:

(1) Telephone – for immediate response, call toll-free to either escalate an incident's priority or to escalate an issue through management channels as described above.
(2) Email – clients can send an email to software support in order to escalate the priority of an issue
(3) On-line Support Incident Portal – clients can also escalate the priority of an issue by logging into the client incident portal and referencing the appropriate incident tracking number.

Remote Support Tool

Some support calls require further analysis of the client's database, process or setup to diagnose a problem or to assist with a question. Tyler will, at its discretion, use an industry-standard remote support tool. Support is able to quickly connect to the client's desktop and view the site's setup, diagnose problems, or assist with screen navigation. More information about the remote support tool Tyler uses is available upon request.

SOFTWARE SOURCE CODE ESCROW AGREEMENT

TERMS AND CONDITIONS

IN CONSIDERATION OF the terms and conditions of the Agreement and other good and valuable consideration, the parties hereto agree as follows:

ESCROW AGREEMENT. Tyler Technologies agrees to name, _____hereinafter CLIENT, as a beneficiary in accordance with the provisions of the Software Escrow Service Agreement Tyler Technologies maintains with an independent escrow service.

PRICE. CLIENT agrees to pay an initial start-up fee of $756.00, due upon execution of this agreement. Future annual payments of $756.00 will be invoiced in the month prior to the renewal date and will be due in full for this agreement to continue in effect.

SOFTWARE SOURCE CODE COVERED. This Agreement applies to all Tyler Software Products for which CLIENT has paid the full agreed upon price of the Tyler Software license. If CLIENT acquires additional Tyler Software Products in the future, such software shall also be covered by this Agreement. If CLIENT fails to pay the Escrow fee when due, Tyler Technologies shall have the right in its sole discretion to suspend its performance or terminate this Agreement.

TERM. This Agreement shall become effective on the date executed by an officer of Tyler Technologies and shall have a term ending upon the last day of the month one year following that date.

A. This Agreement will automatically renew for subsequent one year terms unless either party gives the other party at least thirty days prior written notice of its intent not to renew. Fees for subsequent years are subject to change.

PROVISIONS. As a minimum requirement, Tyler Technologies agrees to provide the following service to CLIENT through an escrow agreement:

A. Tyler Technologies will maintain a software escrow service agreement with an independent escrow service provider.
B. Tyler Technologies will deposit a current copy of source code for all licensed Tyler Software Products and will update the deposit when a major revision of the software is released.
C. If Tyler Technologies chooses to change the provider of the escrow service, Tyler Technologies will notify CLIENT of the name and address of the new escrow service provider.
D. The provisions included in the escrow service agreement will include provisions for the beneficiary to receive access to the Tyler Software Products source code when the escrow service provider has received written instruction directly from Tyler Technologies, Tyler Technologies' trustee in bankruptcy, or a court of competent jurisdiction and payment to the escrow service provider of the deposit copying and delivery fees, then the escrow service provider will release a copy of the deposit materials to CLIENT.

ACCEPTED BY:	ACCEPTED BY:
Tyler Technologies, Inc. Local Government Division	[CLIENT NAME]
By:_____	By:_____
Name:_____	Name:_____
Title:_____	Title:_____
Date:_____	Date:_____

Accela

Cloud Based "Civic Platform" Solution

City of Bryan, TX

RFP 16-022
March 24, 2016

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Intuitive GIS Integration
Powerful
Predictable Best Practice
Permitting
Document Submission
Flexible
Inspections
Public Portal
Reporting Efficient

Accela

Connecting Citizens and Government

2633 Camino Ramon, Suite 500 San Ramon, CA 94583

March 21, 2016

Melanie Tigerina
Buyer
Purchasing Department
1309 E. Martin Luther King St.
Bryan, TX 77803-1530

Re: RFP# 16-022 - CIVIC PLATFORM

Dear Ms. Tigerina and Members of the Evaluation Panel:

These are exciting and challenging times for the City of Bryan. Accela stands ready to help the City achieve its business objective of obtaining a robust SaaS solution to streamline activities in land use, permitting and code enforcement and ultimately improving service to the citizens of the City. Our enclosed proposal details how Accela's Civic Platform will help the City engage with its citizens, and satisfy the needs that are most important to stakeholders.

The proposal and prices contained herein will be firm and valid for a period of ninety (90) days from the proposal opening date.

I am authorized to bind the company contractually and will act as Accela's primary contact for all matters regarding this response and any subsequent phases. I can be reached at our corporate office at 925.659.3247 or via email at jmunoz@accela.com.

Thank you for your consideration.

Julian D. Muñoz
Vice President

Enclosures

Connecting Citizens and Government

About Accela

Accela provides cloud-based civic engagement solutions for government. Accela's Civic Platform, which includes open APIs and mobile apps, enables and improves core processes for city, county, state and federal governments. Accela's solutions uniquely address the diverse needs of their constituents by making publicly available information more accessible. The Accela Civic Platform includes solutions for land management, asset management, licensing and case management, legislative management and more. With more than 2,000 customers worldwide, Accela is headquartered in San Ramon, California, with offices in San Francisco, New York, Portland, Melbourne and Dubai. For more information, visit www.accela.com.

CERTIFICATION AND AUTHORIZATION

CERTIFICATION and AUTHORIZATION:

The undersigned certifies that he has fully read **RFP # 16-022** and understands this "Request for Proposal" and has full knowledge of the scope, quantity, and quality of the services to be furnished *including the Texas Ethics Commission Certificate of Interested Parties Form 1295* and intends to adhere to the provisions described herein. The undersigned also affirms that they are duly authorized to submit this proposal, that this proposal has not been prepared in collusion with any other Vendor, and that the contents of this proposal have not been communicated to any other Vendor prior to the official opening of this proposal. Additionally, the undersigned affirms that the firm is willing to sign the enclosed Exhibit A, Standard Form of Agreement Contract.

By submitting a proposal, the vendor certifies that neither he, nor any co-owner of the organization submitting this proposal, is related to a member of the City Council of the City of Bryan within the first, second, or third degree of consanguinity (blood) or affinity (marriage).

Signed By: _____ Title: **VP of Procurement**

Typed Name: **Julian D. Munoz** Company Name: **Accela, Inc.**

Phone No.: **(925) 659-3247** Fax No.: **(925) 659-3201**

Email: **jmunoz@accela.com**

Bid Address: **2633 Camino Ramon, San Ramon, CA, 94583**
P.O. Box or Street City State Zip

Order Address: **As above**
P.O. Box or Street City State Zip

Remit Address: **As above**
P.O. Box or Street City State Zip

Federal Tax ID No.: **94-2767678**

Date: **March 21, 2016**

END OF RFP #16-022

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About Accela

Accela provides cloud-based civic engagement solutions for government. Accela's Civic Platform, which includes open APIs and mobile apps, enables and improves core processes for city, county, state and federal governments. Accela's solutions uniquely address the diverse needs of their constituents by making publicly available information more accessible. The Accela Civic Platform includes solutions for land management, asset management, licensing and case management, legislative management and more. With more than 2,000 customers worldwide, Accela is headquartered in San Ramon, California, with offices in San Francisco, New York, Portland, Melbourne and Dubai. For more information, visit www.accela.com.

Disclosure:

In relation to future versions of planned system enhancements or future product direction, the information contained in this material is not a commitment or legal obligation to deliver any of the features or functionality described herein.

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1 Executive Summary

We aspire to help change and improve how government works for agencies, communities and citizens, not just to help make agencies run better, but to improve communities overall.

Improving Government through Civic Engagement

In response to the City of Bryan's ("the City") request for a cloud-based software solution that supports the administration of municipal land-use, permitting, and code enforcement functions, Accela is pleased to present our proposal. The City of Bryan is ready to replace legacy land management software with a more functional and robust solution. The City's focus is on the success of its citizens, and the Accela Civic Platform will serve as the cornerstone of the City's ongoing customer service successes.

Agencies in 48 of the 50 U.S. states use Accela's Civic Platform to improve their communities.

Accela has a history of fostering customer success and delivering excellence in civic processes and functions, including Land Management. Our proposal illustrates how Accela's Civic Platform will transform Bryan into a hero, further engaging with its citizens while making daily staff activities more efficient and streamlined. *Read how Accela's Civic Platform is turning agencies into heroes at http://bit.ly/1EOfZVA.*

This proposal is for a cloud-based software (SaaS) solution hosted by Accela. While Accela's Civic Platform has a variety of hosting options, the cloud-hosted solution allows for ease of access to the solution via a web browser, with all maintenance and upgrades of the system handled by Accela. Having Accela host the solution in their data centers prevents City staff from being encumbered with the responsibility of maintaining another software that the City of Bryan will use.

Accela welcomes the opportunity to detail our solution's capabilities, as well as being proud to say that the Accela solution is able to meet the City's requirements. Accela is the industry leader in Land Management Software for governments. The experience and expertise of Accela has allowed it to create the most robust and easy-to-use software solution for government agencies of all sizes. **From the tight integration with GIS, to having a smooth and**

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uncomplicated customer facing portal, extensive mobile capabilities, top-tier plan reviewing functionality, and to being able to deliver data and information to any division within the City of Bryan as required- Accela is the optimal solution.

1.1 Solution Highlights

4 out of 5 of the top five best run cities use Accela software.

Accela understands the challenges a project like this can require and we bring the experience and solution to meet present and future needs. The City of Bryan, is looking for a software solution that will not only establish a strong basis for ongoing permitting operations but one that will support the City's immediate aim to expand residential housing within the City limits by making the entire process seamless. An efficient and transparent process from planning to issuing permits, to reviewing plans, performing inspections and final approval in the form of a Certificate of Occupancy builds trust and confidence in the City's residents. This creates a strong foundation and citizens progress from choosing to live in the City of Bryan to choosing to do business in Bryan. Building homes, business and lives in a strong and vibrant community. In furthering these goals, we believe that Accela's Land Management solution built on the Civic Platform is the right choice for the City.

The core of the Civic Platform, is a powerful business engine which utilizes an open architecture and a centralized database, allowing event, transaction and contact activity to be shared across departments to improve communication between office and field workers, citizens, businesses and other key stakeholders.

The specific Accela Civic Platform modules and add-on extensions we are proposing as the backbone of the City's Software project are:

- **Land Management Module** tracks and manages all land, permit, inspection, contractor license, and code violation activities. The Civic Platform delivers unprecedented capabilities to better automate the City's Planning and Permitting activities, including integration between the Civic Platform and Adobe Acrobat Pro XI for "interactive electronic plan review", a highly flexible graphical workflow engine (*for a short video demo see https://vimeo.com/acceladmos/workflowdesigner*), and the ability to manage projects through an intuitive parent-child management structure. Our Civic Platform can effectively provide agency staff and inspectors with the tools necessary to do their jobs more efficiently both in the back office and the field.
- **Accela GIS** provides a geographic view of all parcel, asset, work order, or service request data. Accela GIS works with the City's existing GIS system via integration where the City of Bryan can see their desired GIS information within Accela GIS. Accela's GIS is designed to be extremely flexible that

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our solutions can become as "Geo-centric" as the City needs them to be. That type of agility remains consistent throughout our solutions. Whether configuring screens based your roles and responsibilities, defining business rules or setting up workflow processes, the power to make it all happen resides in the City's hands. Our GIS viewer integrates seamlessly with all our applications, and displays your GIS layers without moving, copying or altering any data in any way. *To view short video demonstrations showing the power of Accela GIS, please visit https://vimeo.com/channels/accelaesri.*

- **Accela Mobile** apps extend processing capabilities to the field for inspections, work orders, service requests, and more. It is available for any Windows, iOS, or Android OS device. With Accela Mobile apps, field staff can log inspections and create cases from the field, with the information updated in the back office. *To download a version of Accela Inspector for building inspectors, please visit http://www.accela.com/civic-apps/appinspector. To download a version of Accela Code Officer for code officials, please visit http://www.accela.com/civic-apps/code-officer.* Please note both applications include a "Preview" button that allows anyone to test drive the applications.
- **Accela Citizen Access** provides agencies with better, faster services to their citizens. Streamlining processes and providing more self-service options means that service requests that used to take weeks to complete now just take days. Through Citizen Access, City services can be made available 24/7 to both citizens and business partners. Whether as simple as applying for a water heater permit, or as complex as navigating through a major City project, citizens and business partners have the ability to stay in lock step with the City throughout the entire process. Accela's Citizen Access can process and display information of complex projects that involves submittal of plans, multiple revisions, and constant status updates. Purchase of Citizen Portal includes the mobile application, Mobile Citizen Portal, which further enhances accessibility options for public users. **Constituents now enjoy a truly mobile access to government data, using iOS or Android devices.** The Citizen Portal inherits the exact business rules established in Land Management module. System administrators simply select which service request activities are to be made available to the public. Additionally, the Civic Platform utilizes one central database—data submitted through Citizen Portal is immediately available for processing by back office users in Land Management

Project Services Partner: zedIT

Over the course of its existence, Accela has developed an extensive network of partners. Accela's partner system is one of its strengths, as it allows for a reduction in overall project times. Accela utilizes partners for various parts of projects in the role of a subcontractor. Accela Services will utilize zedIT as a

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subcontractor for various areas of services for the City of Bryan's project. A full description of their background, qualifications, and experience can be found in section 2.2 of this proposal.

1.2 Why Accela?

At Accela, we believe the user interface to government can be transformed through the intelligent application of consumer technologies. Accela can provide solutions to improve the user experience for the citizens of the City of Bryan, to make the process clear and easy to understand, and to help foster a business-friendly relationship between the City and its customers. It should be as easy for citizens to obtain the permits for a home renovation as it is to book a flight or purchase an item on Amazon.

We believe in empowering government to govern better, which allows citizens to experience the civic engagement they have come to expect.

Moreover, the stakes for improving municipal permitting are high. In a year-long study of the permitting process in Houston, Texas, the city determined that *"the most significant area of revenue leakage identified through [the City of Houston Performance Management Review] is non-compliant permitting."*[1] They also concluded *"a significant portion of non-compliant permitting results from a lack of user-friendly, intuitive, searchable online information. The disjointed and uncoordinated structure of city departments' websites results in confusion for would-be customers."*

For 33 years, Accela has been the leader in the Land Management space. New vendors enter the market every year and tout their capabilities and technology, but can they really deliver? Where will they be in ten years? Accela delivers project after project, year after year. Whether measured in terms of number of employees (600+), implementations (2,000+), financial stability, or R&D (millions spent on latest version of Accela Civic Platform solutions), Accela outperforms its competitors

Compared to other vendors, Accela and the Civic Platform stand out from the competition because we are:

[1] System Requirements and Specifications, Houston Permitting Center http://bit.ly/1ncXTp9

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To read specific Land Management customer success stories, visit http://bit.ly/1OxdZqq.

To hear why our customers love Accela, visit http://bit.ly/1N5bLN5.

4 out of 5 of the top five best run cities use Accela software.

Source: http://bit.ly/1DfkVF6

- **Dedicated to innovation and partnerships** with a vision for the future of engaged, efficient, and effective government. (e.g. Adobe, Buildingeye, Code for America, CitySourced, Esri, Microsoft, Selectron, Sire, etc.)
- **508 Compliant Land Management Solution –** Passed in 1998, Section 508 of the Rehabilitation Act, 1973 requires Federal agencies to make their electronic and information technology accessible to people with disabilities. As a governmental software and services provider, Accela's products fully comply with Section 508 providing agencies with the ability to give disabled employees and members of the public access to information that is comparable to the access available to others.
- **The only Land Management solution that supports multiple languages out-of-the-box with our language packs** – The ability to conduct business in multiple languages will increase the accessibility and transparency of City government.
- **Over 30+ years of experience** in Land Management solutions.
- **The first Land Management solution to offer side-by-side and overlay comparison Electronic Document Review functionality.** Any record may have a plan review without the hassle of creating a separate plan review record for each permit – it is built-in and easy to use.
- **The only vendor that ships Bing maps as part of the GIS offering** – Our Civic Platform offers map centricity (as desired) with full integration to Microsoft Bing, Esri ArcGIS and other vendors via OGC compliance.
- **Committed to creating discrete spaces for departments and workgroups.** Building and Planning, for example, should never have to share a module just because they both issue permits. With Accela, each has their own module as well as controlled access for others as needed, and with no limit to the number of solutions.
- **The industry's most robust business rules engine defines integrated workflows in Accela solution**. Agency users do not need any duplicate entry branching and looping back in the workflow.
- **The industry's only data and document global indexing engine that enables powerful global search capacity**. Staff and customers can enjoy quick and ease data access across the agency.
- **The only vendor with a fully open platform for developers to build civic engagement apps that extend Accela solutions across all ecosystems, including Apple, Microsoft, and Android.** With Software Development Kits (SDKs) and Application Programming Interfaces (APIs) developers can build new apps rapidly, leverage scripting engine to create new records, workflows and seek support from the Accela developer community for free.
- **The home of an efficient Customer Success team exclusively tasked to ensure that customers achieve success with the solutions we implement**.

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Augmenting our standard support services, the Customer Success team consults and negotiates with customer managers, directors, and executives to better understand and document customer line of business needs, objectives and the feasibility of specific requests. The Customer Success team develops strategic project plans that outline critical success factors, metrics, potential issues, and formulates recommendations for future advancement.

1.3 Functionality, Configurability and Scalability

Finally, the City of Bryan desires a Solution that could ultimately serve other departments in the future. These other departments may include public works, licensing, asset management, and others key areas of responsibility. The City of Bryan recognizes the need to eventually reduce the number of "stovepipe" legacy systems, as the City would like to improve inter-departmental collaboration.

By choosing Accela for this project, the City of Bryan would have the best land management product on the market. Yet, the Land Management Solution is just one piece of Accela's Civic Platform. In addition to all of the industry leading functionality that comes with the Land Management solution, other solutions within the Accela Civic Platform can address any future software needs from other departments at the City. Asset Management, Licensing and Case Management, Health, Legislative Management, Right of Way Management, and Parks and Recreation Management solutions equip agencies of any size with all the tools required to manage government business, seamlessly and efficiently.

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Exhibit 1: Accela's Civic Platform: an ecosystem of solutions to serve government, the business community and citizens

While not an immediate need, the potential of having the City utilize one fully integrated system that addresses the needs of multiple departments is a benefit that selecting Accela for this current project would provide. The Accela software is completely scalable, allowing any agency to start as small or as large as they would like.

The City of Bryan has also specified that their preferred solution will have commercial-off-the-shelf-functionality that is updated regularly. With the Accela Civic Platform, there is out of the box functionality via the utilization of the Best Practices Template and the cloud-based solution hosted by Accela allows the City to always be on the latest version of the software.. **It is important to note that even with the installation of the Best Practices Template, the system retains the ability to be configured. This is important to note because it allows for flexibility to adapt to future changes or needs from the City.**

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2 Company Background

Respondents shall provide a brief history and description of their company.

2.1 Accela

Accela was incorporated in California in 1981 and is a privately held corporation with its headquarters in San Ramon, California. To meet growing global demand, the company employs 600+ technology professionals and maintains business offices in the United States, United Arab Emirates, and Australia. Our Civic Platform is implemented in virtually all U.S. states, as well as in Canada, Puerto Rico, Australia, New Zealand, and the United Arab Emirates. Throughout its 33-year history, Accela has served over 2,100 separate agencies and thousands of their departments with our Civic Platform, including agencies that range in size from Nogales, AZ to the States of:

- California
- District of Columbia
- Maryland
- Massachusetts
- Michigan
- Mississippi
- Montana
- New York
- New Mexico
- North Carolina
- Oregon
- Virginia
- Washington

Accela received the 2013 Esri Partner Conference Award for Private (Internal) Web Application for Accela's Civic Platform, a GIS-infused platform for government. The award is given to the company that demonstrates practical yet innovative solutions with ArcGIS 10.1. Please visit our website for more details.

Our platform also serves the *Cities of New York, Atlanta, San Francisco, Seattle, Oakland, Washington, D.C.*, as well as federal agencies such as the *U.S. Forest Service, the U.S. Fish & Wildlife Service, Internal Revenue Service, and National Park Service*.

In 1999, Accela launched Accela Automation (*now* Civic Platform) — a Web-enabled enterprise platform. For the last 15 years, our focus has been delivering advanced web-based solutions to back-office and field-based government workers, featuring:

- Strong mapping integration (Esri GIS), mobility apps, online citizen services, and integrated voice response (IVR)
- On Premise or Cloud deployments
- Perpetual License or Subscription-based pricing models
- Multi-Tenant and regional solutions
- Multi-lingual and internationalized solutions

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- Established strategic partnerships with industry leaders including, but not limited to Adobe, Apple, Avolve, Cisco, Esri, Hewlett Packard, Intel, Microsoft, Oracle, Selectron and Woolpert

Watch Maury Blackman, Accela CEO, explain how the Civic Platform benefits government at http://bloom.bg/1EjnJRC

Accela has consistently been first to market with groundbreaking technology for government, including:

- **First** Web-based enterprise platform
- **First** cloud applications
- **First** fully customizable web interface
- **First** 508-compliant product
- **First** internationalized product
- **First** iPhone app
- **First** tablet/PC app
- **First** free Open Data Platform with CivicData

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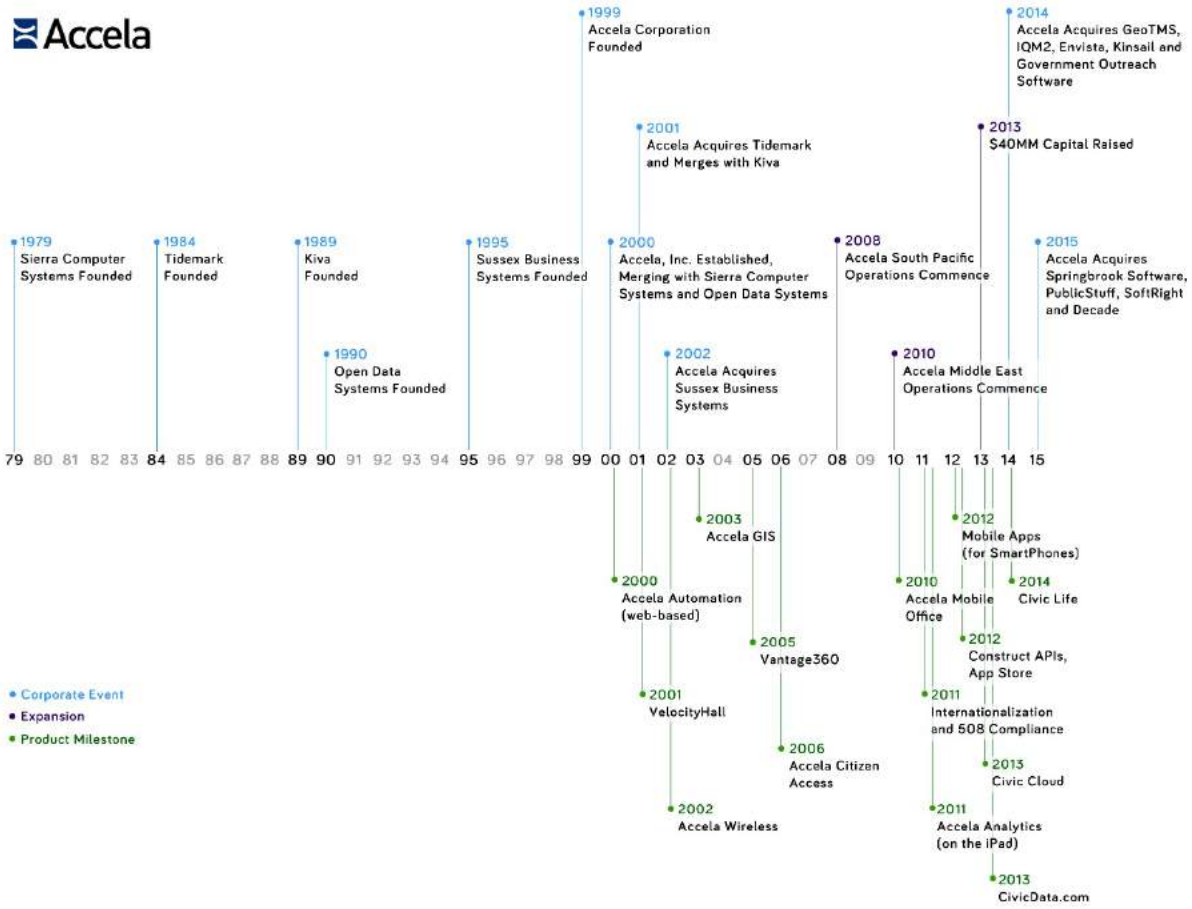

Exhibit 2: Accela's Corporate Timeline

2.2 zedIT Solutions

zedIT Solutions is the largest locally-owned Information Technology company in Atlantic Canada. Headquartered in St. John's, Newfoundland & Labrador, zedIT employs over 350 multidisciplinary IT Consultants across the Globe.

With over 25+ years of experience, a source of pride is building long lasting relationships with clients. zedIT assesses the needs of each customer individually to determine the best practices and approaches needed to meet their goals.

As a dedicated IT professional services vendor, zedIT collaborated with clients to develop an approach that best suits the requirements of the Agency. zedIT's services are typically delivered through IT Consultation, Project Outsourcing or Staff Augmentation.

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zedIT has completed a wide range of IT professional services initiatives in such areas as: Management Consulting, IT Strategy, Project Management, Business Analysis, Change Management, Software Development & Configuration and Quality Assurance.

Implementing technology solutions is at the very core of zedIT's offering, having successfully implemented over 600 COTS (Commercial-off-the-shelf) solutions for private & public customers across North America over the past several years and currently providing support & maintenance for 500 active clients.

zedIT currently implements the Accela Civic Platform to government agencies across North America.

Accela-zedIT Partnership

The partnership between Accela and zedIT Solutions follows collaboration between the two companies that spans several years. zedIT has provided implementation services on such Accela projects as the State of Massachusetts, State of Michigan, Cape Cod Commission, Newfoundland Department of Fisheries, City of Milwaukee, City of Boston and several Towns throughout Massachusetts.

Leveraging its extensive experience in creating and implementing technology solutions in both the public and private sector, zedIT ensures a smooth implementation for any government agency wishing to upgrade to the Civic Platform. Implementing technology solutions has long been the hallmark of zedIT's competitive offering. The company's on-boarding process helps ensure that projects are completed on time and within budget while maintaining focus on agency end-user acceptance and adoption throughout the software implementation lifecycle.

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2.3 Experience

It is expected that the Respondent has the requisite experience, ability, capital, facilities, organization, and staff to enable the Respondent to perform the work successfully and promptly, and to commence and complete the work within the proposed costs and time frames.

WHO WE ARE

With over 34 years experience, a global presence, a workforce of over 600 professionals including engineering and product development, maintenance and support, implementation specialists, IT and web hosting, account managers and sales, Accela is a vendor with the longevity, capital and vision that could partner with the City to fulfill the requirements of the cloud based "Civic Platform" solution project.

The chart below illustrates our organization visually.

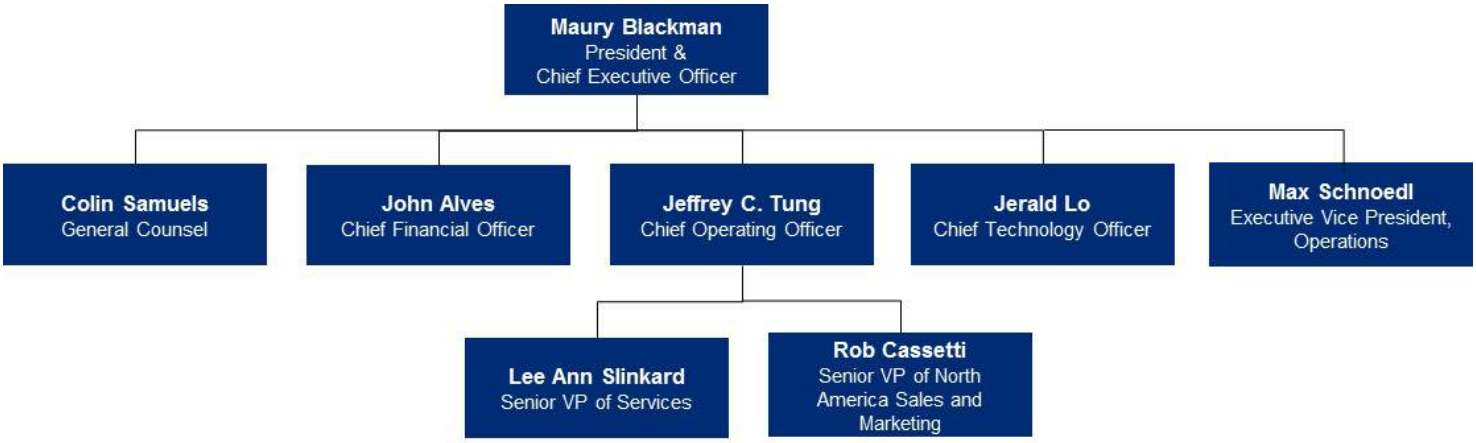

Exhibit 3: Accela's Executive Team and Major Lines of Business

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2.4 Client Base

Respondents must have a client base of more than twenty municipal government customers and have been actively using their respective product offering for more than five years

There are approximately 2,200 clients of the Accela Civic Platform. 250 of these agencies use the Civic Platform hosted in the Accela cloud for the permitting, planning and zoning solution that is being proposed to the City of Bryan, TX with well over 20 clients who have been actively using their Accela solution for five or more years.

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3 Land Management

Land Management

3.1 Build better communities

Accela, our partners, and the developer community have the capability to build, configure, deploy and manage civic solutions and applications. Accela's Civic Platform, is surrounded by a complete set of platform services that address development and customer lifecycles. Whether installed on premise or in the Cloud, the Civic Platform provides a complete infrastructure to automate and streamline civic processes related to Land Management, Licensing and Case Management, Asset Management, Finance & Administration, Environmental Health and Safety, Legislative Management, Recreation and Resource Management, Right of Way Management, and Citizen Relationship Management.

For more details, visit http://www.accela.com/platform.

What does the Civic Platform make possible?

- Transforms civic participation through mobile and cloud-based technology
- Empowers collective action for better and healthier communities
- Brings trust and flexibility to citizen interaction with government
- Streamlines processes and handles data management with ease
- Revolutionizes the way contractors engage with the government
- Creates open space for innovation

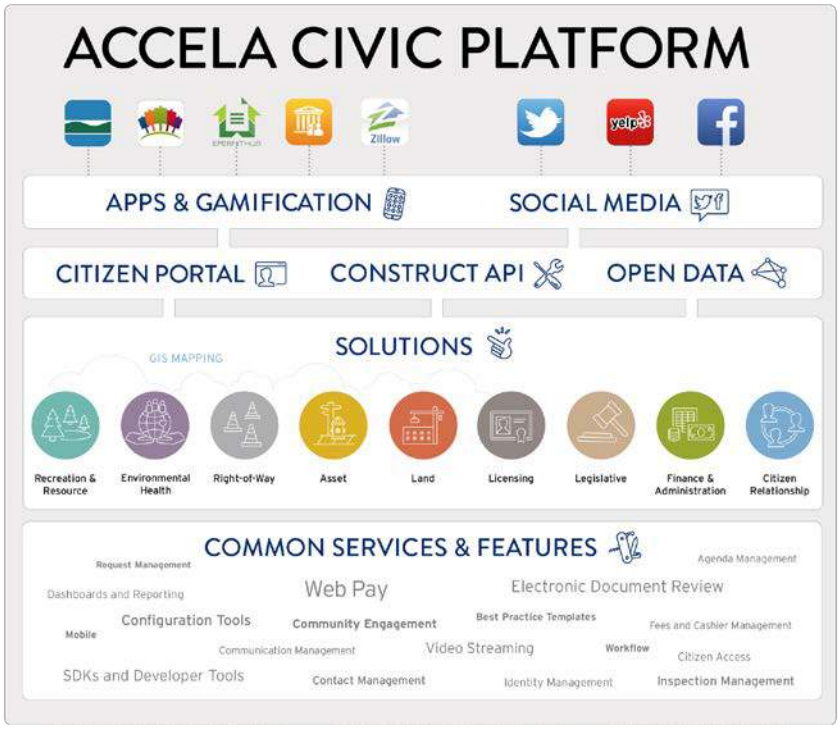

Exhibit 4: Accela's Civic Platform architecture allows the creation of cloud solutions to serve government, the business community and citizens

Accela's Land Management makes it easy for state, county and city agencies of all sizes to coordinate activities for the consideration and approval of land use and building permits, inspections and enforcement to meet your jurisdiction

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codes. The solution saves time, increases productivity and connects government agencies to the businesses, professionals and citizens they serve.

To read Land Management customer success stories, visit http://bit.ly/1OxdZqq

Accela's Land Management:

- **Streamlines planning and development.** Regulate the growth of your community and ensure that existing and proposed land use complies with zoning designations, building codes and other laws. Track and manage entitlements, historical and environmental issues, plan and departmental reviews from planning through certificate of occupancy. The Land Management Best Practice Templates allow an agency to deploy e-government services right out of the box, including pre-configured workflows, data structures, fees, business logic, standard reports, and web forms. These templates are a culmination of over 33 years of experience of Accela working with government agencies to streamline and make government services more efficient.
- **Simplifies the permit process.** Manage your entire permitting process including application check-in, plan reviews, fee calculation and collection, inspections, sign-offs, task lists, and more. Easily manage both the proposed plan and the relationships to the project – including imposing restrictions on transactions, property or individuals until compliance measures and fees are satisfied.
- **Engages your citizens 24/7/365 days of the year.** Accela's Citizen Portal and IVR capabilities provide quick and easy access to information about permits and inspections directly from any telephone, web browser, or mobile device.
- **Visualizes information** with built-in GIS capabilities, which deliver mapping and routing functionality to the enterprise. This overlays government data onto GIS maps, and allows customers to initiate and manage permit activities from a geospatial platform.
- **Provides online access** to save time for agency staff out in the field. Productivity apps, such as Analytics, Inspector, and Contractor Central, connect and equip agency field workers with the right mobile device for the job.

For video demonstrations, visit http://bit.ly/1OxHRCT and https://vimeo.com/150507776

For more details, visit http://www.accela.com/solutions/land. We are also on Facebook, YouTube, and Twitter.

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3.2 Land Management Solutions

Specific solutions include:

- **Planning and Zoning** – Provide your agency with a comprehensive solution for electronic plan submittal, review, public notification and approval of land use. Manage designated land use based on zoning and building laws. Track zone changes, variances and easements. Assign documents to multiple departments for parallel review that allow plans to move quickly to certificate of occupancy.
- **Permitting and Inspection** – Provide online customer permitting application processing and payment, and manage overall processing flow, data collection, fee collection and inspections for ICC Building Code compliance. Inspectors can interact with complete case information, access their daily inspection schedules, create new cases in the field, and submit inspection results remotely. Our award-winning GIS integration helps your staff map their day, optimally routing their visits to bring the business of government from behind the counter directly to the public.
- **Code Enforcement** – Enable your code officers to create and manage cases using their mobile devices – whether they are performing proactive sweeps or following up on issues reported by police, fire professionals, citizens or other community partners. Integrated picture mark-up makes it easy to snap to a picture to include visuals of difficult to explain situations in field reports.

See how our Civic Platform empowers an agency's service request and code enforcement processes at https://vimeo.com/102367159

The flexible configuration of Land Management lets customers define and manage the sequence and requirements of the hundreds of steps involved in a workflow, including initial applications, plan reviews, code enforcement, fee calculation/collection, inspections, notices, and approvals. The solution manages all types of regulatory activities—one-time processes such as residential construction permitting and pesticide application permitting, or annually renewable activities such as elevator permits and air quality permitting.

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3.2.1 Solution Attributes

The overall flexibility of Accela's Civic Platform is supported by business intelligence that maintains vigilance over these processes. Among the many solution attributes are the following features:

- Audit trails document changes made to critical areas;
- The solution's Business Rules Engine offers action/inaction based automation capabilities;
- Required Conditions confirm that all requirements are met prior to an activity occurring;
- Fees and Cashiering functionality employs many GAAP principles, offers full account reconciliation, and may be used with cashiering solutions or used with cash drawers to complete the payment process for all fee-based activities;
- Abundant use of Reference Data tables appropriately reuse solution data, eliminate duplicate data entry, and reduce the chance of errors; and
- Robust administrator tools support ongoing management of data and processes, ensuring all activities adhere to the specific business rules in place.

3.3 Land Management Functions

Accela's Land Management makes it easy for state, county and city agencies of all sizes to coordinate activities for the consideration and approval of land use and building permits, inspections and enforcement to meet your jurisdiction codes. The solution saves time, increases productivity and connects government agencies to the businesses, professionals and citizens they serve.

Accela's Land Management:

To read Land Management customer success stories, visit http://bit.ly/land-management-success-stories

- **Streamlines planning and development.** Regulate the growth of your community and ensure that existing and proposed land use complies with zoning designations, building codes and other laws. Track and manage entitlements, historical and environmental issues, plan and departmental reviews from planning through certificate of occupancy. The Land Management Best Practice Templates allow an agency to deploy e-government services right out of the box, including pre-configured workflows, data structures, fees, business logic, standard reports, and web forms. These templates are a culmination of over 33 years of experience of Accela working with government agencies to streamline and make government services more efficient.

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- **Simplifies the permit process.** Manage your entire permitting process including application check-in, plan reviews, fee calculation and collection, inspections, sign-offs, task lists, and more. Easily manage both the proposed plan and the relationships to the project – including imposing restrictions on transactions, property or individuals until compliance measures and fees are satisfied.
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- **Provides online access** to save time for agency staff out in the field. Productivity apps, such as Analytics, Inspector, and Contractor Central, connect and equip agency field workers with the right mobile device for the job.

For more details, visit http://www.accela.com/solutions/land. We are also on Facebook, YouTube, and Twitter.

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3.3.1 The Workflow Process

Each commercial and residential permit type comes compete with its own workflow of tasks and statuses ready to process and built specific to the industry standard building permit process. The workflow starts out with a simple acceptance step and ends with the issuance of a Certificate of Occupancy.

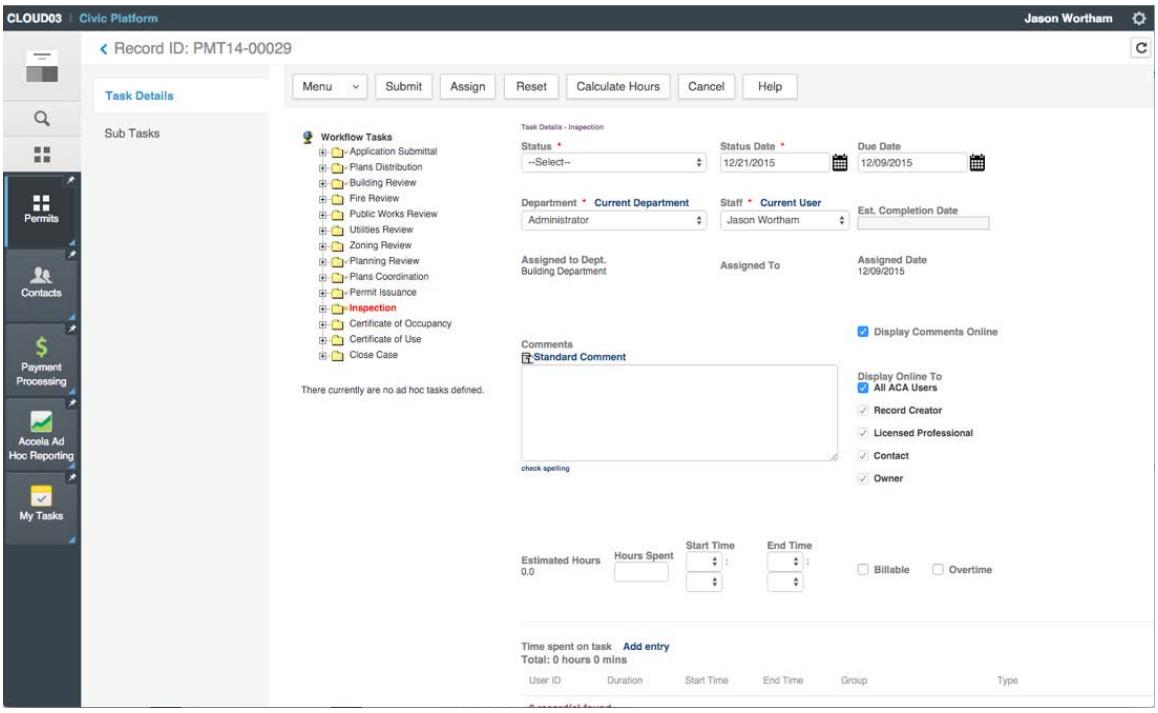

Exhibit 5: Land Management Workflow

3.3.2 Data Collection

Engage customers to apply online and collect information specific to each permit without City staff having to enter data. Collect and validate data items that vary from date fields to text fields. Easily report on all of the collected data with the built-in Accela Ad Hoc Report Writer to provide a complete view of activity and data points for all the permit history in the City.

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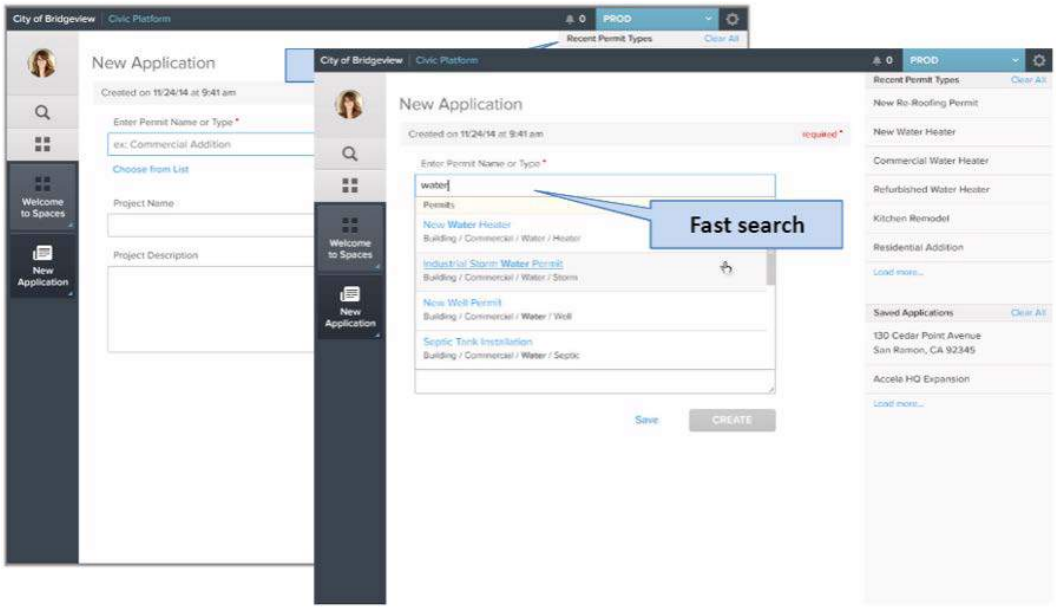

Exhibit 6: Intake Form

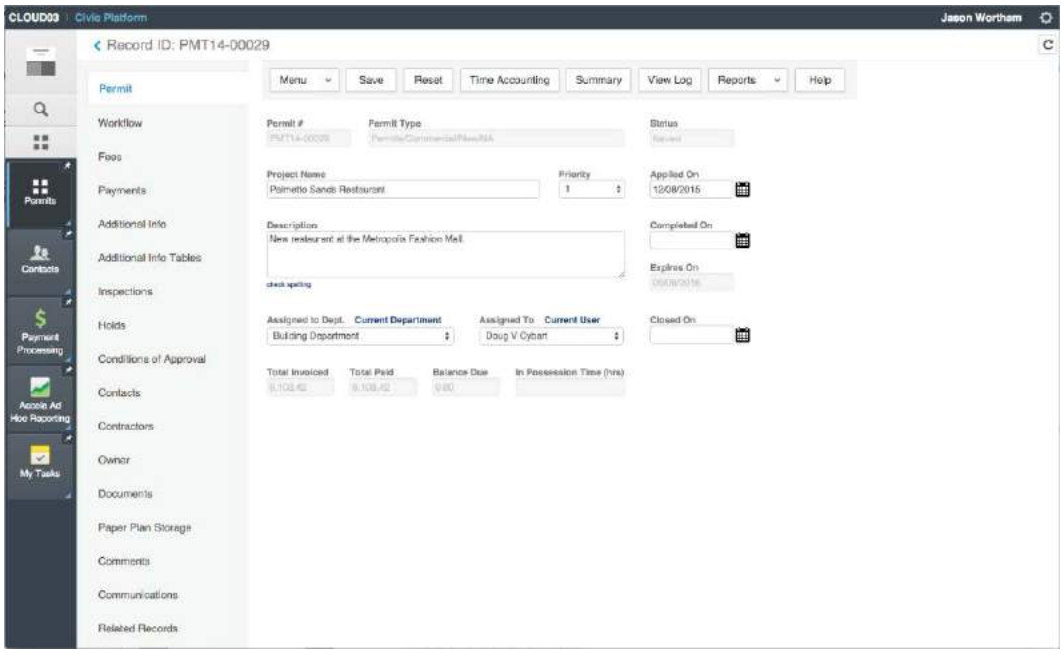

Exhibit 7: In-Process Application

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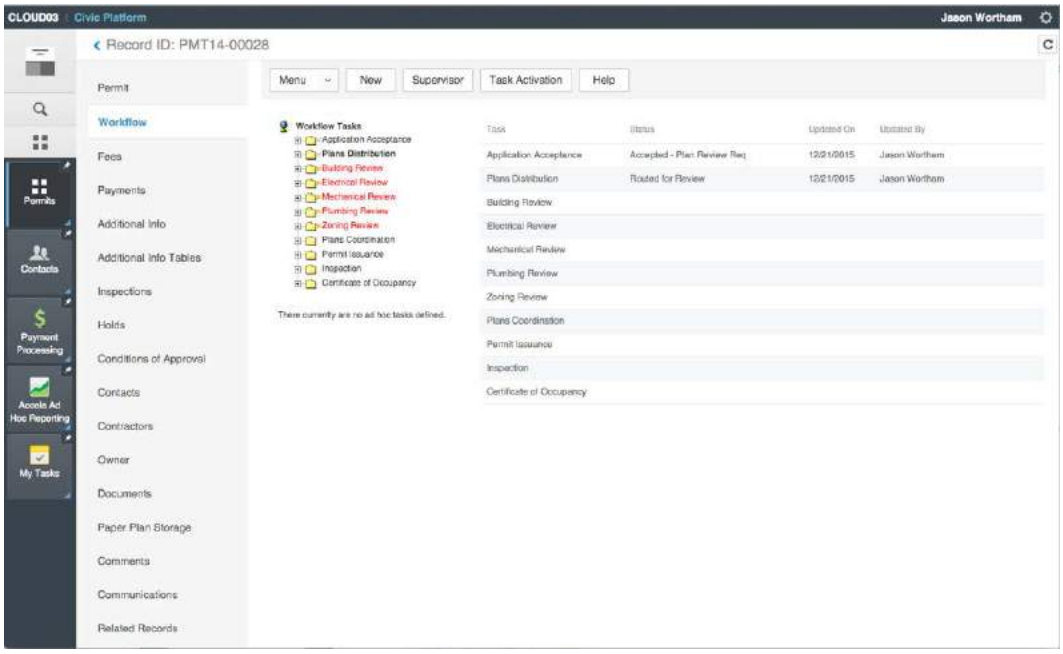

Exhibit 8: In-Review Application

3.3.3 Dashboards

The new Civic Platform Interface provides a number of navigation options to make accessing the information a user needs most often easy. Additionally, switching between dashboards such as the Task Card or Map Dashboard is easy using the dashboard toggles. Several search options are offered , allowing staff to hone in on the data that is needed via global search, reference data lookups and individual page search functionality.

3.3.3.1 Launchpad and Task Dashboard

Users can customize their Launchpad with Favorites, which will appear first whenever the Launchpad is opened. Launchpad shows recently visited applications and records as well as making access to reference data easy by the use of a list of hyperlinks to ‘launch’ or access that object.

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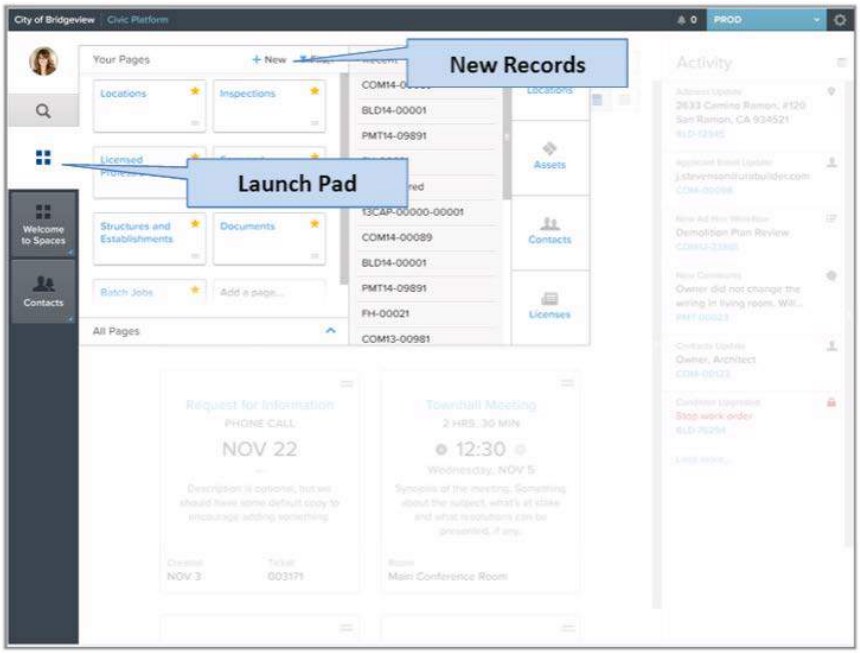

Exhibit 9: Using the Launchpad, Agency staff can quickly and easily jump to pages—such as records, reference data, and payment processing—from a single location.

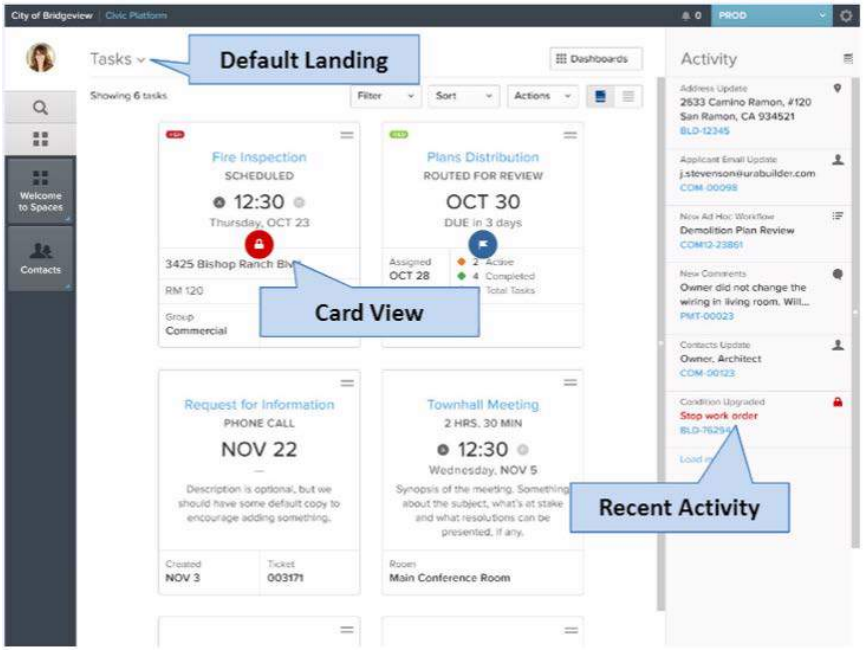

Exhibit 10: MyTasks Dashboard provides at-a-glance information, filters, and recent activity pertaining to records in a user's task list.

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3.3.4 Map Dashboard

While working with records in Civic Platform, there is the ability to create and attach GIS objects to the current record. This allows City staff working with the record to geographically visualize the impact or extent of the transaction record within the agency's jurisdiction. For example, a permit clerk can draw the exact location of a new property including the extent of its environmental impact. The geographic data enhances the transaction record and can help with facilitating efficient and effective transaction workflows.

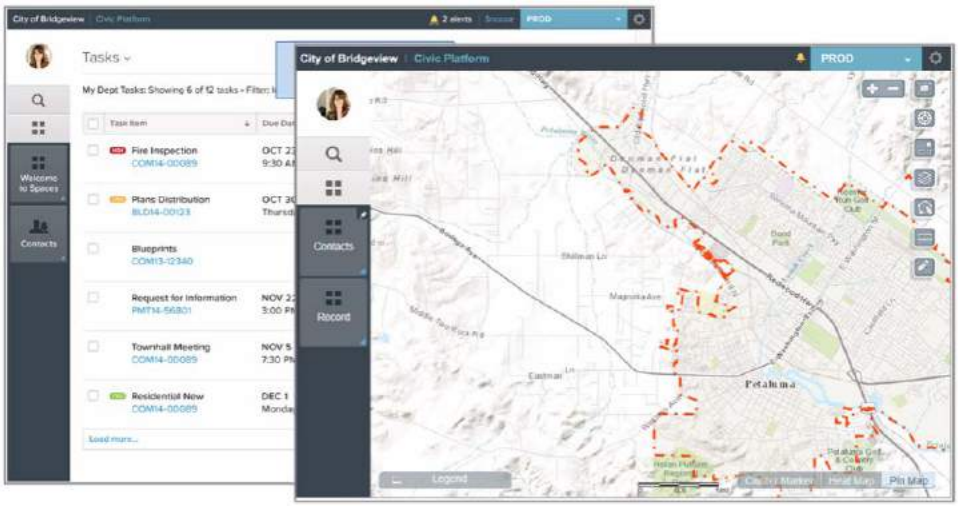

Exhibit 11: The Map Dashboard allows users to start transactions, review spatial data, view records, create new geometry, generate routes, and much more

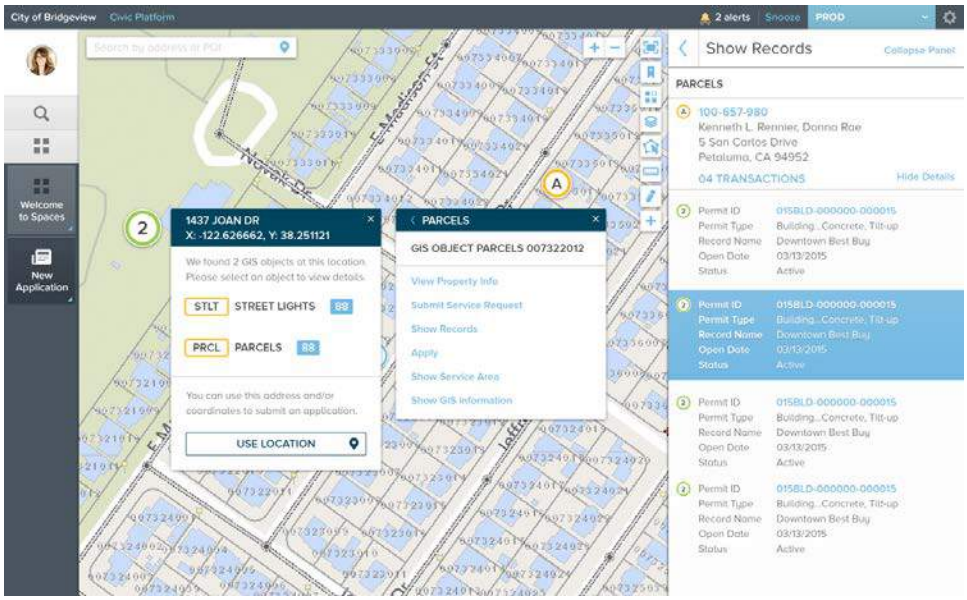

Exhibit 12: Map Dashboard Location Details

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Certificate of Occupancy

City of Bridgeview

502 E. 9TH STREET

Bridgeview, AZ 86001 Phone: 888-722-2352

This certificate is issued pursuant to the requirements of the adopted building code, certifying that at the time of issuance this structure was in compliance with the various ordinances of the City Of Bridgeview regulating building construction and use.

July 09, 2013

Permit Number: 13COO-00001

Property Owner: SMITH JOHN AND JANE
Owner Address: 3201 DYER ST
SUNRISE, AZ 86004

Site Address: 3201 N DYER
SUNRISE, AZ 86004

Type of Building: Retail

Certificate Requested For: Change of Business

THIS CERTIFICATE ISSUED PURSUANT TO THE REQUIREMENTS OF THE STANDARD BUILDING CODE CERTIFYING THAT AT THE TIME OF ISSUANCE THIS STRUCTURE WAS IN COMPLIANCE WITH THE VARIOUS ORDINANCES OF JURISDICTION REGULATING BUILDING CONSTRUCTION OR USE.

Exhibit 13: Example Generated Certificate of Occupancy

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3.3.5 Inspections

With Accela Land Management for Inspections, inspectors can:

- Review a list of inspections for the day on a mobile device
- Reference information including current plans, historic permits and code details
- View geospatial information of all land-use, zoning and enforcement data associated with a property via automated maps with Accela's award-winning Esri ArcGIS integration
- Route from Accela GIS using features including Optimized by Distance and Optimized by Time.
- Create and print reports in the field, include comments and photos, and draw and attach sketches
- View work information offline with store-and-forward mode for staff with limited or no connectivity in the field
- Increase productivity by sending real-time results and information back to the agency and the customer

5

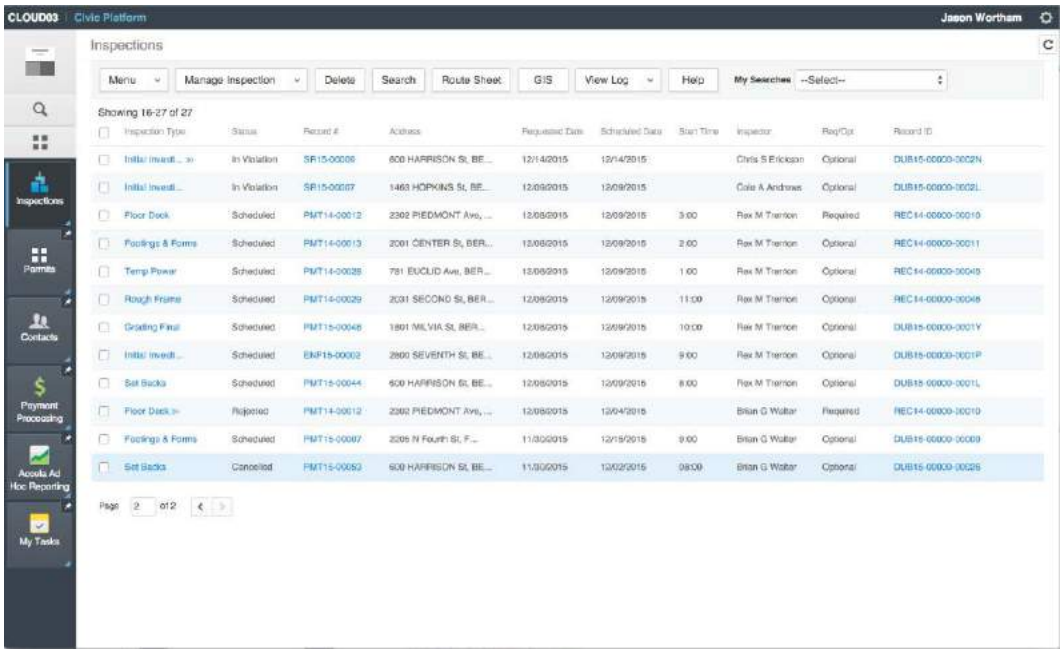

Exhibit 14: Land Management Inspections List

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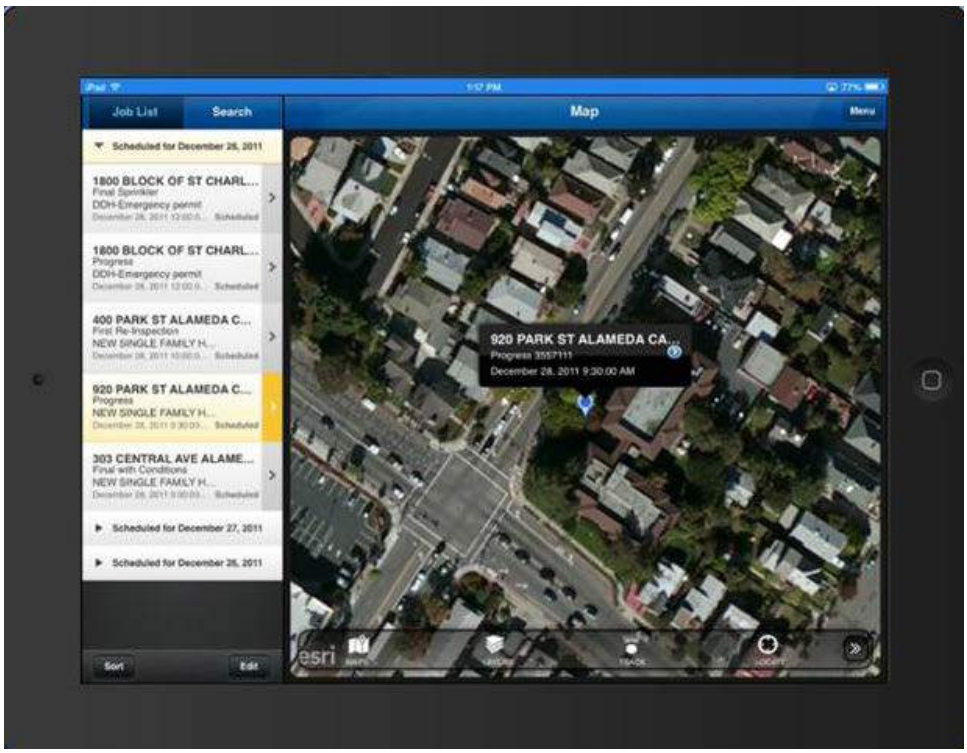

Exhibit 15: Land Management Inspection Details from Mobile Device

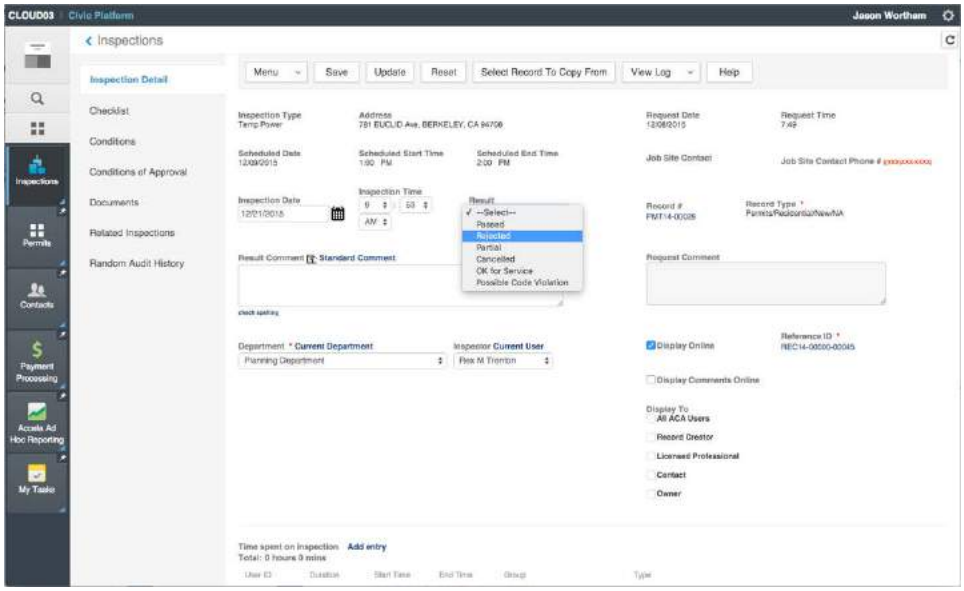

Exhibit 16: Land Management Inspection Results

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3.3.6 Code Enforcement

Civic Platform provides the City with the ability to manage end-to-end code enforcement processes. City staff will be able to collect, manage, and resolve enforcement cases concerning complaints and violations against specific individuals, properties, owners, contractors, or businesses. Code Enforcement features include:

- **Citations**. Based on the severity of a violation, a citation can be issued. Civic Platform stores citations that users create, along with any collected evidence, in the appropriate case record along with court dates and defendant information.
- **Data collection**. Once a new case is created, information about a violation can be collected by complaints against individuals, properties, owners, contractors, and businesses. In addition to the original complaint or violation, any citations, and any court information, can be tracked. You can associate incidents, other cases, citations, and evidence to the case. Civic Platform reviews and prioritizes the cases by severity, and agencies can configure Civic Platform to add the cases to a workflow to accommodate an agency's business rules.
- **Defendants**. Civic Platform allows a defendant's contact information to be added to a citation.
- **Tracking Violations**. The ability to create citations in Civic Platform enables you to keep track of offenses, violators, enforcement officers, dates, and other information relevant to the violations that require citations Defendants are individuals that are scheduled to appear in court regarding a citation. Civic Platform stores a defendant's contact information and court information along with the citation data for reference. The City's administrator can set up violations. City staff can choose from a list of standard violation codes when a violation is applied to a citation.
- **Investigations and Evidence**. Law enforcement authorities and case investigators collect facts to support a claim that requires discussion, decision, or investigation. Civic Platform provides the ability to collect and manage such facts. Documents can be uploaded into Civic Platform as evidence. If the same evidence applies to multiple cases, you can clone the record and apply it to an existing case or to a case created using the Record from Model feature. Evidence can be checked in and out from Civic Platform. Chain of custody and disposition of evidence can be tracked with supervisory access to Civic Platform.

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3.3.7 User Interface

Accela's web-based Civic Platform user interface shows several screens on a single page and are configured to meet the needs of individual user roles.

Among the most frequently used screens are those presenting alerts and notifications, upcoming and overdue tasks, performance-based charting, and frequently used data queries. When used with Accela's GIS capabilities, government activity data is viewable though a map screen, confirming the solution's versatility in how data is represented.

When used with Accela's mobile capabilities, all land management activity data is available to field staff, enabling a full mobile field office solution. Inspector assignments, schedules, routes, status reports, and inspection results are all logically presented. Data collected in the field is recorded electronically and uploaded to the solution for immediate availability throughout the enterprise.

Further extending Land Management offerings to the public are Accela's Citizen Portal and IVR solutions, which promote true government transparency and citizen self-service by bringing government services to the public 24/7. Self-service options may include property information, online applications, fee collection and inspection scheduling. In eliminating the need for in-person and paper processing, these solution components unite governments and their constituents through accessible technology while reducing costs.

3.4 GIS

Accela was selected as the recipient of the 2013 Esri Partner Conference Award for Private (Internal) Web Application for Accela Automation (now Civic Platform), a GIS-infused platform for government. The award is given to the company that demonstrates practical yet innovative solutions with ArcGIS 10.1. Partners were nominated by various Esri staff and

Accela is an Esri Gold Partner and has been an Esri partner for 20 years. This has given Accela access to Esri staff and valuable information for creating tight integration with the GIS industry leading technology. The Civic Platform map component is built using the Esri JavaScript map control and consumes GIS services published from the agency's ArcGIS Server or ArcGIS Online, as well as can consume Open Geospatial Consortium Web Mapping and Web Feature Service map services.

GIS also provides visualization of an agency's government data geographically by plotting locations of activities captured in the Civic Platform on the map. GIS provides enhanced user experience with:

- Optimal server response times
- Smooth panning
- Context sensitive commands and menu items
- Drag and drop functionality

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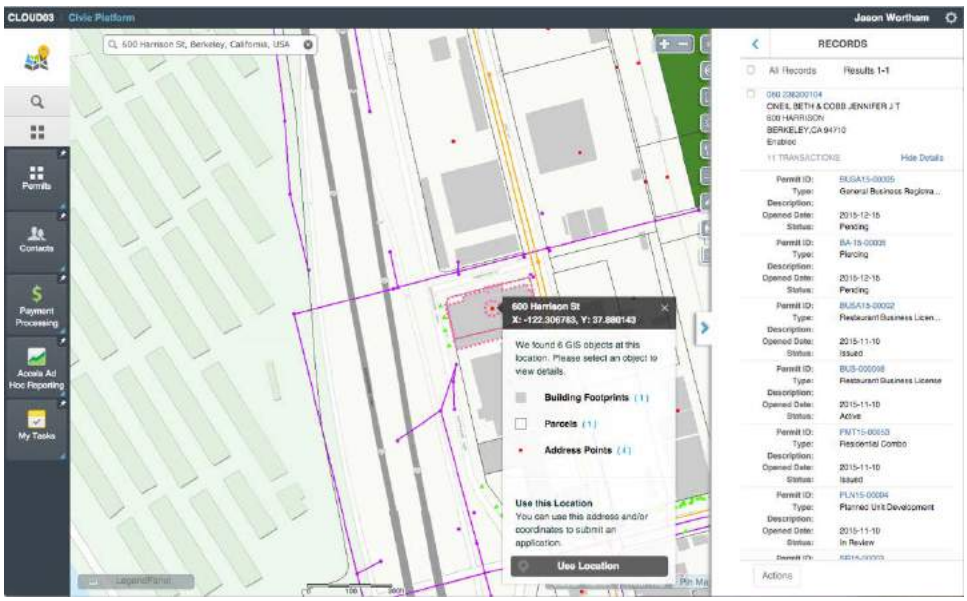
- Client side graphic rendering

Accela's GIS gives users the option to initiate and manage all land management activities from a map interface. GIS is a bi-directional interface enabling viewing, interaction and presentation of both tabular and spatial information. It leverages an agency's GIS database and map services published by one or more ArcGIS Servers. Base maps published from one agency can be combined with map data from another agency to provide a comprehensive view of geographic information.



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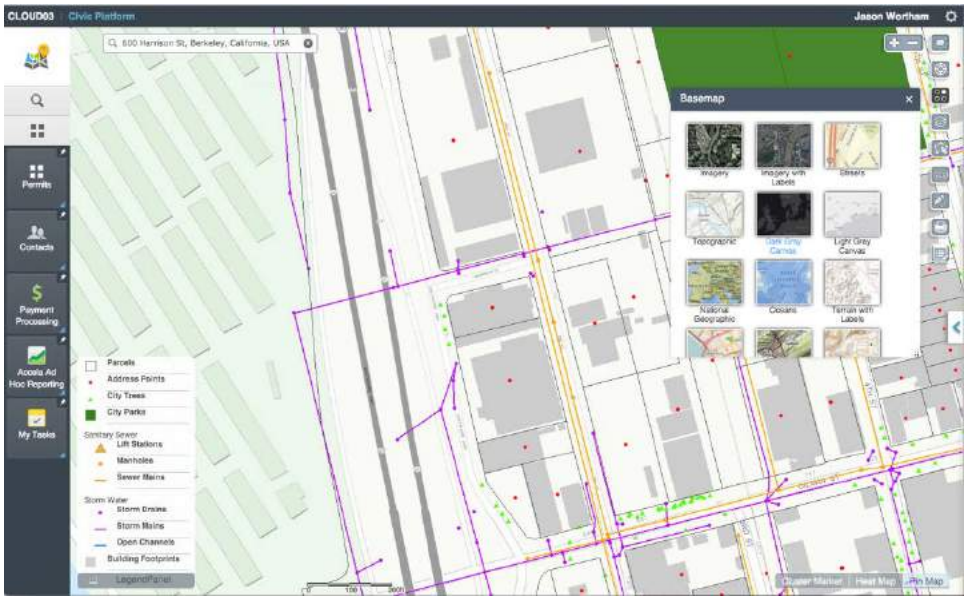

Exhibit 17: Share the Civic Platform data in Esri ArcGIS Online

See how our GIS capabilities empower agencies to leverage their GIS investment at https://vimeo.com/101579705

Optional map editing tools empower end users to draw new features using points, lines, or polygons to represent actual geographic elements or assets. Once these new features are created, they can be associated to transactions in the Civic Platform database. GIS supports efficient fieldwork through its routing features. Inspection schedules can be automatically routed or users can choose to optimize inspection schedules based on shortest distance or travel time.

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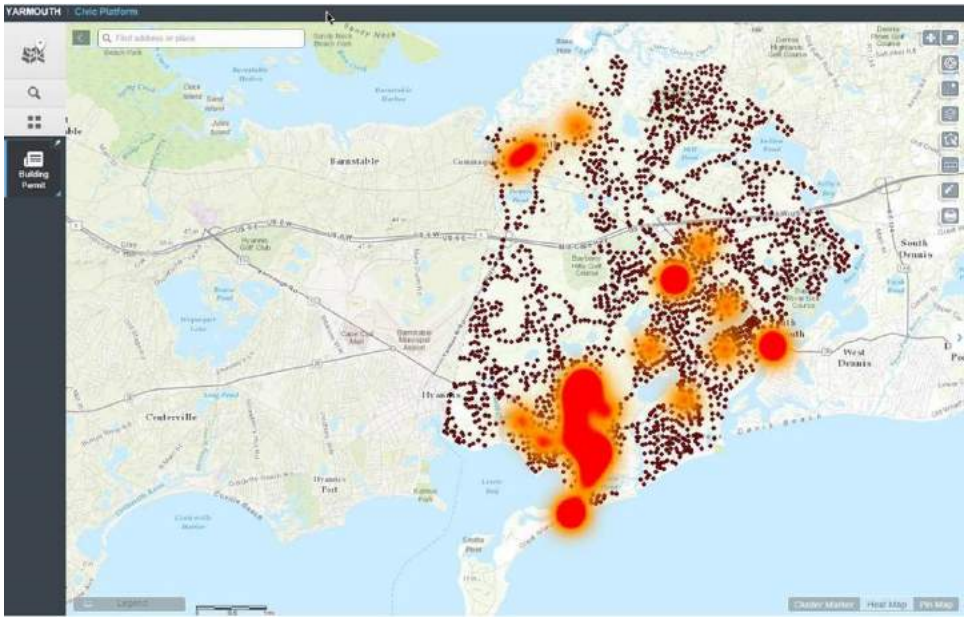

Exhibit 18: GIS Heat Map

Bing Maps are included with Accela's GIS map viewer. Customers may enhance user views by adding the agency's ArcGIS map layers to the map viewer. Together, these data sources, united with Accela transaction data, offer the most comprehensive visual representation of government and location data available. Users can manage, edit, and update data from the map viewer. The map viewer presents reference data and context-based action items for a selected parcel(s) (i.e., create record, show record, create inspection, etc.).

When deployed with Mobile, routing capabilities are available whether connected or disconnected from the network. Routes and driving directions can be saved and printed as needed. Optimized routing can be done one of two ways:

1. To use an agency's street file, that agency needs ArcGIS Server Network Extension and a published routing service. The agency typically creates the network via ArcGIS Desktop and the Network Analyst extension.

2. The agency may not have a quality street file in an Esri GIS format or does not have the additional Esri software list noted in #1 above. Alternatively, an agency may use Bing Maps, which is included in Accela's GIS solution at no additional cost.

The following is a list of features/functions that are available out of the box in Accela's GIS solution:

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GIS is not just integrated; it provides infused mapping at great speeds and capabilities, including the ability to buffer of any distance around a property and get results in record time.

- Plotting event locations (address, parcel or asset matching)
- Start new application/transaction from selected map feature
- Navigation (pan, zoom in/out, zoom to scale/selected/full extent)
- Select (by line, polygon, rectangle)
- Buffer selection
- Attach/associate feature to transaction record
- Add selected features to a Set in Accela
- Redlining (point, line, polygon and text box)
- Identify (click on map and see attributes of features)
- Reverse geocoding for mobile mapping
- Measure (linear and area)
- Search for address, parcel, asset, and GIS feature
- Routing & driving directions (either via Network Extension and street centerline or via Bing Maps)
- GIS editing (create new simple features, modify feature geometry, edit attributes)
- Mash up multiple map services
- Proximity alerts (non-visual spatial querying in the workflow process)
- Dynamic themes (real-time queries displaying results on the map- connectivity dependent)
- Mobile mapping/offline mapping
- GPS locator

3.5 Accela Mobile

A Mobile Strategy should be a Priority

"The average cost per transaction to provide a service online is $3.91 compared to $17.11 to provide the service offline – a difference of $13.20 per transaction."

Center for Public Policy & Administration University of Utah

With the widespread adoption of mobile devices, we offer mobile capabilities for iOS or Android-based smart phones and tablets to bring processing to the field through our cloud-based Civic Platform.

Our proven solutions for *operational efficiency and civic engagement through mobile apps* combine to provide extensibility by employing a dynamic cloud-based platform to support the needs of both agency employees and their user community.

Accela Mobile is more than an application—it is a complete strategy central to our government-centric development efforts. Our mobile strategy is to develop role-specific productivity and engagement solutions for every role in government, on every platform, while allowing public agencies to leverage our

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Software Development Kit. The overall approach and maturity of our mobile strategy relative to all other vendors is evident based on the following:

1. **Accela is the only vendor in our market with role-specific apps publicly released for inspectors, code enforcement officials, work crews, contractors, and Executive/Department Managers.** *To see a current list of Accela's mobile apps, visit http://www.accela.com/civic-apps.*

2. **Accela is the only vendor in our market that has iOS and Android apps that all include a preview feature, allowing anyone to download apps from any of the major app marketplaces for testing purposes.**

3. **Accela has an extremely aggressive development and release schedule.** The iOS version of Accela's Inspector app benefited from rapid releases, and works on the Android operating system. The ability to support rapid release schedules across multiple device operating systems is important as mobile hardware and software is continually evolving.

4. **Accela is the only vendor in our market with a published mobile application development kit allowing third party developers, including current clients, to develop custom mobile applications to work with our Civic Platform.** We understand mobile applications are an environment supporting evolving creativity and innovation. Accela makes it easy for third party developers to build custom mobile apps that work against our Civic Platform.

   Read how Westminster, CO cut manhole inspection time by 90 percent at http://bit.ly/RiF6MZ.

> "Empowered citizens are increasing demand for more government transparency… ushering in the age of the citizens. Social and mobile technologies have recast citizens' expectations for service…"
>
> *The Age of The Citizen*
> *Forrester Report*
> *June 2014*

3.5.1 Apps built on the Civic Platform

The core of our software platform is powered by open source technologies, and Accela, developers, and partners are working together to build and deliver apps and services that improve productivity for professionals, address community issues, and connect and engage citizens with their governments. We are working with organizations like **Code for America** and **Tumml** to spur innovation and build a vibrant ecosystem around our platform.

We make it easy for developers and partners to build, sell, and deploy mobile and social applications to engage industry professionals and citizens in their communities. With Accela's Mobile Software Development Kit (SDK), we provide the ability for developers and partners to build, sell, and deploy mobile and social applications to engage industry professionals and citizens in their communities. This improves the quality of the applications and fosters usage.

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3.6 Citizen Portal

To watch how Palo Alto, CA empowers citizens by moving permitting and inspections online, visit http://bit.ly/1NcvdWA.

Citizen participation and collaboration is now one of the most urgent needs facing our government. The ability to put processes online greatly assists this mission in two key ways—by allowing applicants to take advantage of self-service and by increasing agency staff productivity. Another obvious advantage is the solution's inherent ability to address budgetary concerns and help government do "more with less."

Accela has long been cognizant of the need for transparency and accountability. Through a self-service web portal and an open user interface, Citizen Portal extends government services to the public 24-hours a day by providing members of the public with online access to apply for land development applications, permits, licenses, schedule inspections, request services, and perform tasks from the convenience of their home, office or jobsite. This presents a useful way for public users to interact with your agency in an efficient manner.

By configuring a custom welcome page and designing page flows that are intuitive, easy-to-use, and come with agency defined context specific help agencies can better engage and connect with their public. This enables truly transparent government operations. Citizen Portal supports IE 11 and the latest stable versions of Firefox, Safari, Chrome, and Opera browsers.

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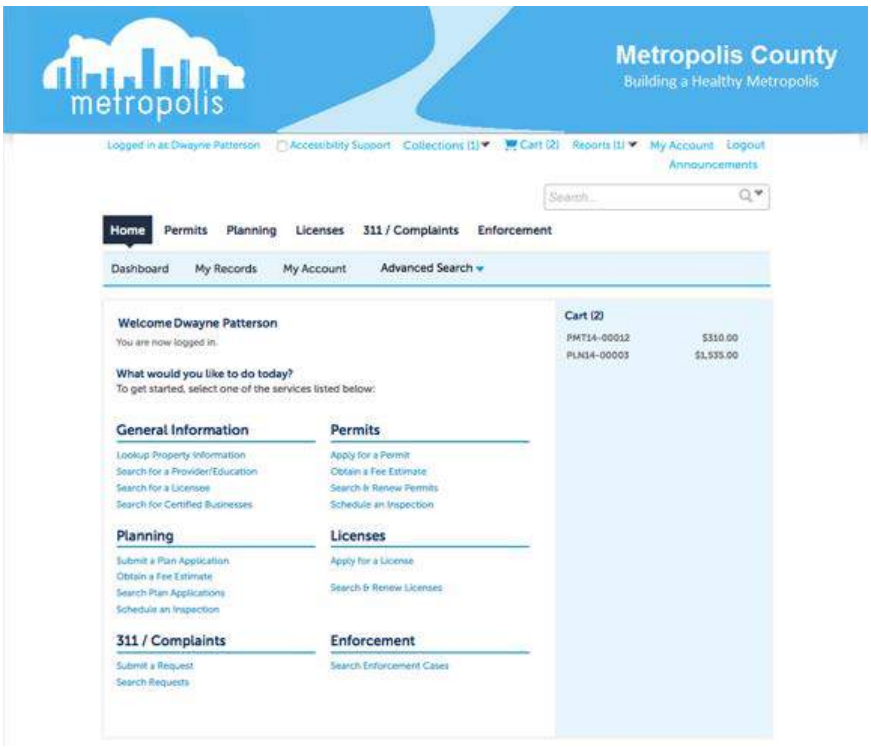

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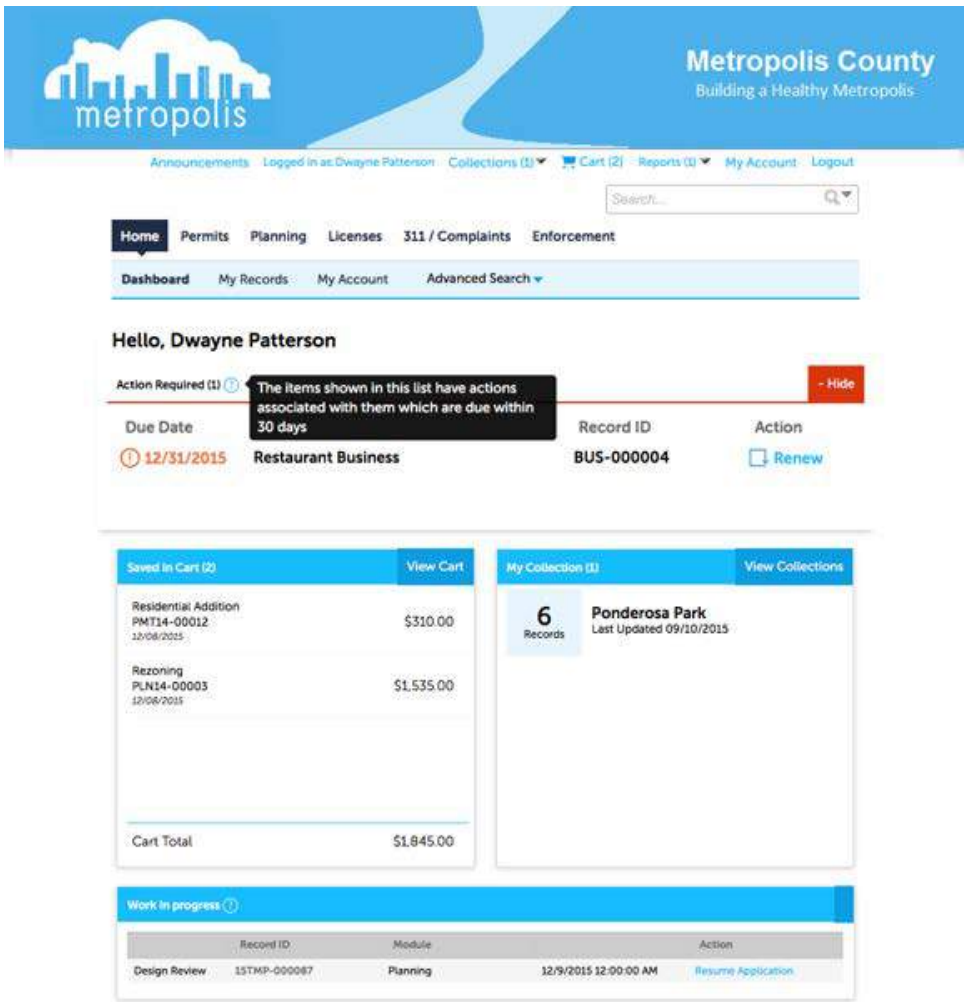

Exhibit 19: Citizen Portal Dashboard

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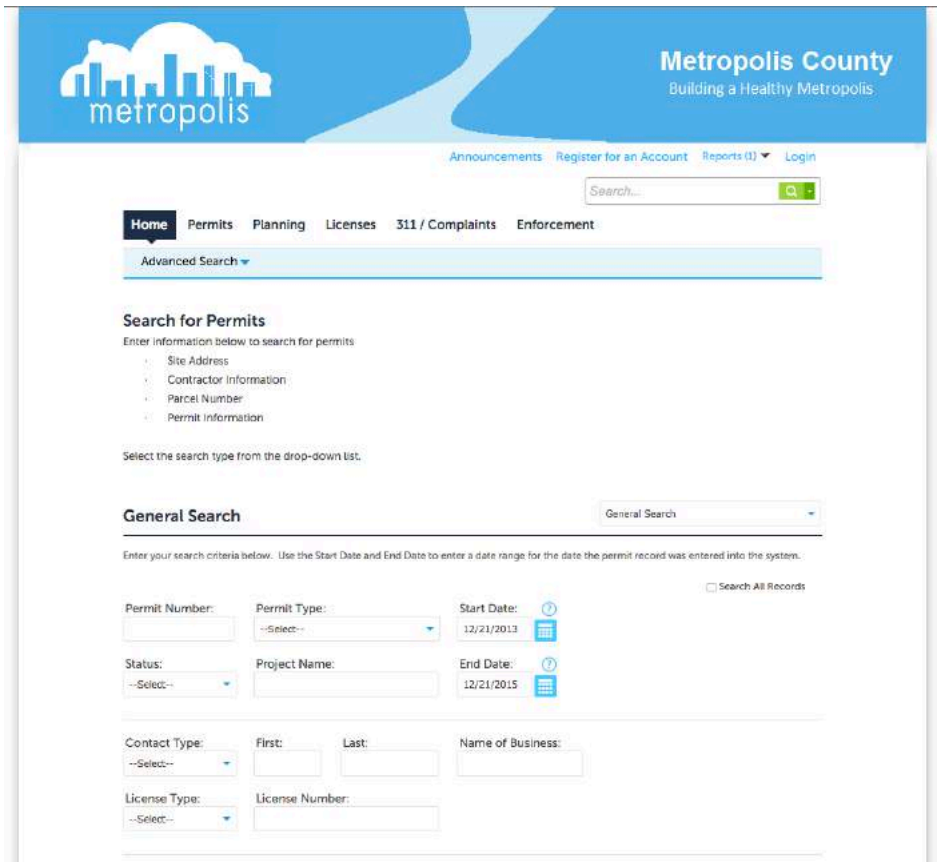

Exhibit 20: Advanced Search in Citizen Portal

> **"Permits Online (Accela Automation) also has created workflow efficiencies that allow TTB to process electronic applications nine days faster than paper applications that the Bureau receives at the same time. Industry members who use Permits Online also save approximately six days on mailing delays from the time they submit their applications to the time they receive their approval documents."**
>
> **U.S. Alcohol and Tobacco Tax and Trade Bureau Annual Report**

Among the many citizen privileges available external users can take advantage of the following capabilities:

- Apply for permits
- Research parcels using Esri GIS
- Submit complaints
- Submit requests for service
- Check status of applications, permits, and inspections
- Upload electronic plans and other documents or photographs
- View solution generated alerts and notifications
- View a history of all complaints/requests
- Conduct searches
- Pay fees
- View data on maps
- Search addresses/parcel information
- Access government documents
- View all parcel history

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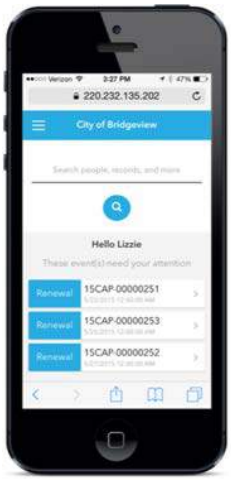

Citizen Portal is **available in English (U.S. and Australian), Spanish, French, Arabic, Chinese, Portuguese, and Vietnamese language packs**. Additionally, we developed the solution so that **all financial transactions are PCI DSS compliant.** Furthermore, **our solution is Section 508c compliant**, to make our products accessible to people with disabilities—such as blindness and low vision.

Purchase of Citizen Portal includes the mobile application, Mobile Citizen Portal, which further enhances accessibility options for public users. **Constituents now enjoy a truly mobile access to government data, using iOS or Android devices.**

Citizen Portal inherits the exact business rules established in Land Management. System administrators simply select which service request activities are to be made available to the public. Additionally, the Civic Platform utilizes one central database—data submitted through Citizen Portal is immediately available for processing by back office users in Land Management.

For a video showing how Baltimore County, MD is automating its code enforcement processes using Citizen Portal, visit http://bit.ly/1xvV3mP.

3.7 Reporting

Accela understands reporting can be one of the most difficult, time consuming functions – while critical and necessary for measuring, scheduling and determining business decisions. Accela's Civic Platform includes 100+ standard reports . The reports are created in a fashion that are dynamic and adjust to the data that is being fed to the report/letter.

In addition, the Civic Platform's Report Manager allows agencies to leverage their investment in such third-party reporting tools as Crystal Reports (RAS Edition), MS SQL Server Reports, and Oracle Reports via an adapter. This integration adapter includes basic function such as authentication, HTTP request to retrieve report names, HTTP requests to pass parameters to a BI report engine and to execute the report, and return the report result in predefined formats. Accela's Report Manager is the centralized portal that manages all report related configuration.

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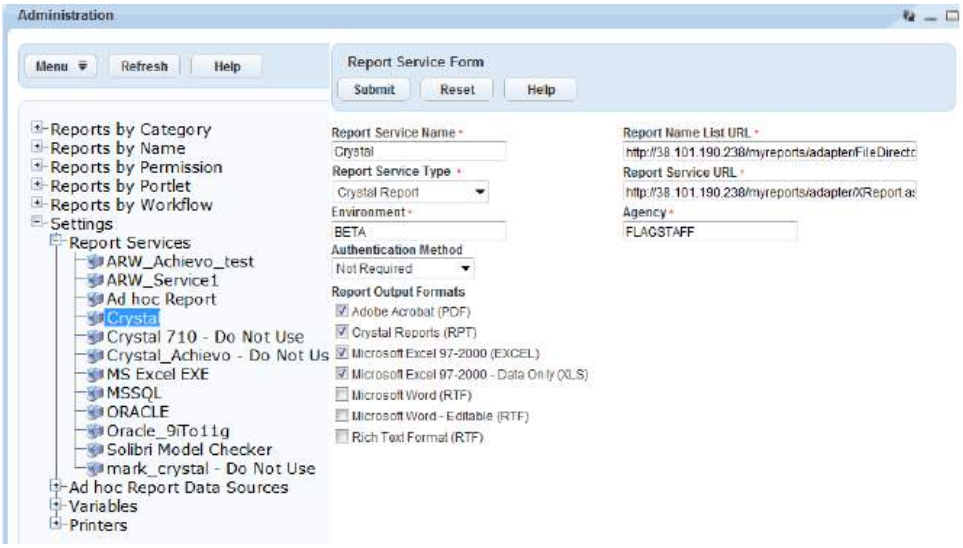

Exhibit 21: Configuring the default behavior of Crystal Reports in Accela's Civic Platform

Once the Service Settings have been established individual reports can be linked and assigned to Report screens, printers and set to Save automatically to the EDMS (EDRM) when generated.

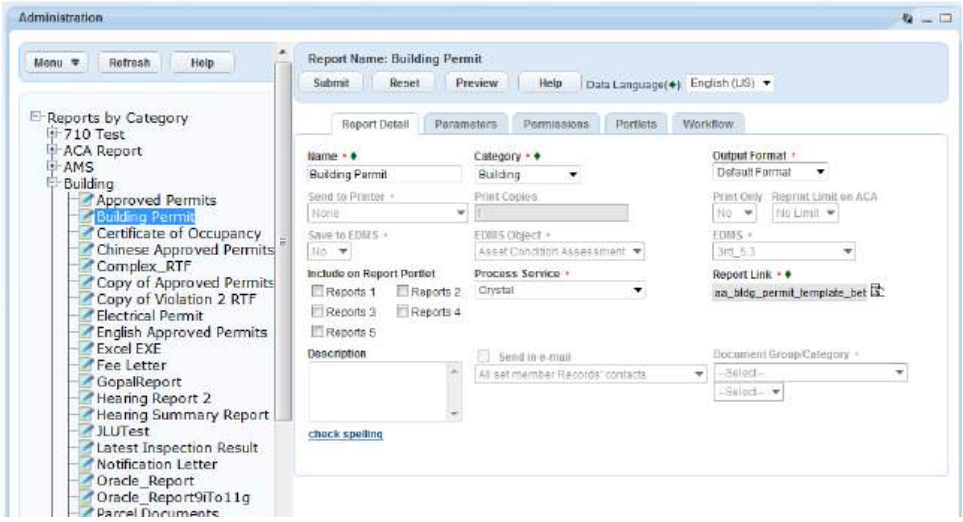

Exhibit 22: Accela's Report Manager settings for an individual report

The system can provide reports to be generated in multiple formats depending on the need including Hypertext Markup Language (.html), Adobe Acrobat Portable Document Format (.pdf), Microsoft Word (.doc), Rich Text Format (.rtf), delimited text by tab or comma, Microsoft Excel Spreadsheet format (.xls), and

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XML. Reporting tools provide services to format, spell check and design documents from simple to detailed designs.

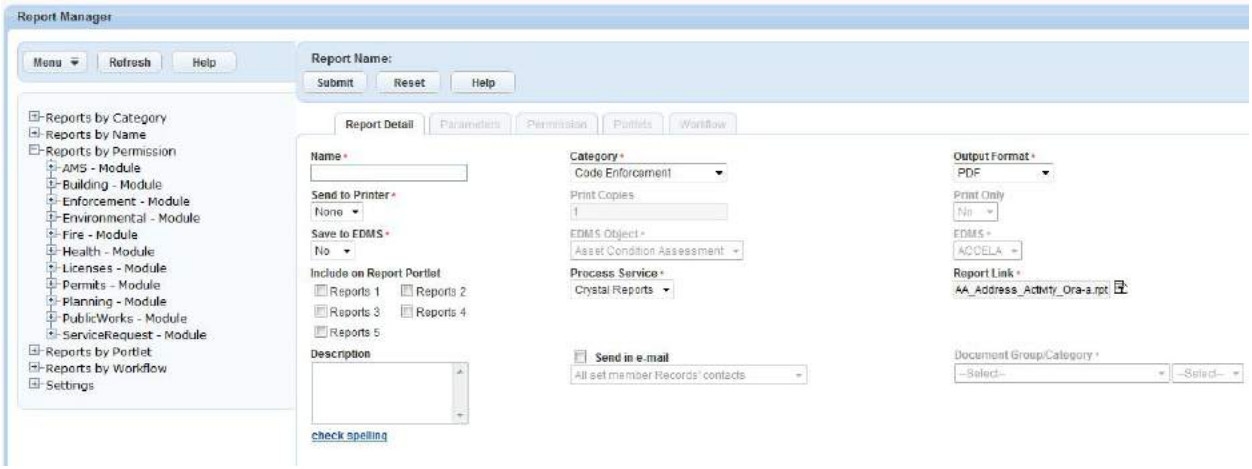

Exhibit 23: The Accela Civic Platform's Report Manager

3.7.1 Ad-hoc Reporting

Accela's Ad Hoc report writer empowers novice users to easily create reports and documents in record time with an intuitive interface without specialized database or report writing skills. What would take a trained SSRS or Crystal report writer hours to write can now be accomplished in minutes, by any end user.

Accela's Ad hoc Report Writer provides an easy point-and-click user interface and user-friendly views of the Civic Platform data, offering the City the ability to design, deploy and manage its own dashboards, reports and documents (i.e., form letters) **without requiring any third party reporting tools**. Due to its ease of use, report writers do not need specialized report-writing skills or an in-depth knowledge of the Civic Platform data schema. A basic tabular report can be written in 15 minutes or less. For s short video demonstration of the Accela Ad Hoc Report Writer, please visit https://vimeo.com/accelademos/adhocreports.

In addition to Accela's built in Ad Hoc Report Writer tool, the Civic Platform also supports reports developed in the major report authoring tools on the market including Crystal Reports, Oracle Report and MS SQL Server Reporting Services (SSRS) as well as deploying MS Word documents for mail-merge reporting against data within Accela. These reports can be deployed throughout the application seamlessly and do not require any additional software or services be deployed onto client/end user machines in order to run the reports from within the system.

Customers are giving rave reviews, including:

- "This is the most fun we have ever had working in Accela!"
- "We had no idea it was this easy to develop our own reports."

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- "Look at those charts…amazing!"

Reports may be immediately published in the Civic Platform without the assistance of the IT team or administrative staff. Tabular reports automatically provide hyperlinks that allow users to launch and view related Record data in the Civic Platform from within a report. In addition to creating tabular reports, users may also create formatted forms and documents such as contracts, permits, rental agreements, etc. Comprehensive administrative functions are available for these reports, forms, and documents, such as controlling access to creating/running reports, controlling access to data views, managing report menu visibility, automated generation of reports, automated emailing of reports, automated saving of reports to a document management system, etc.

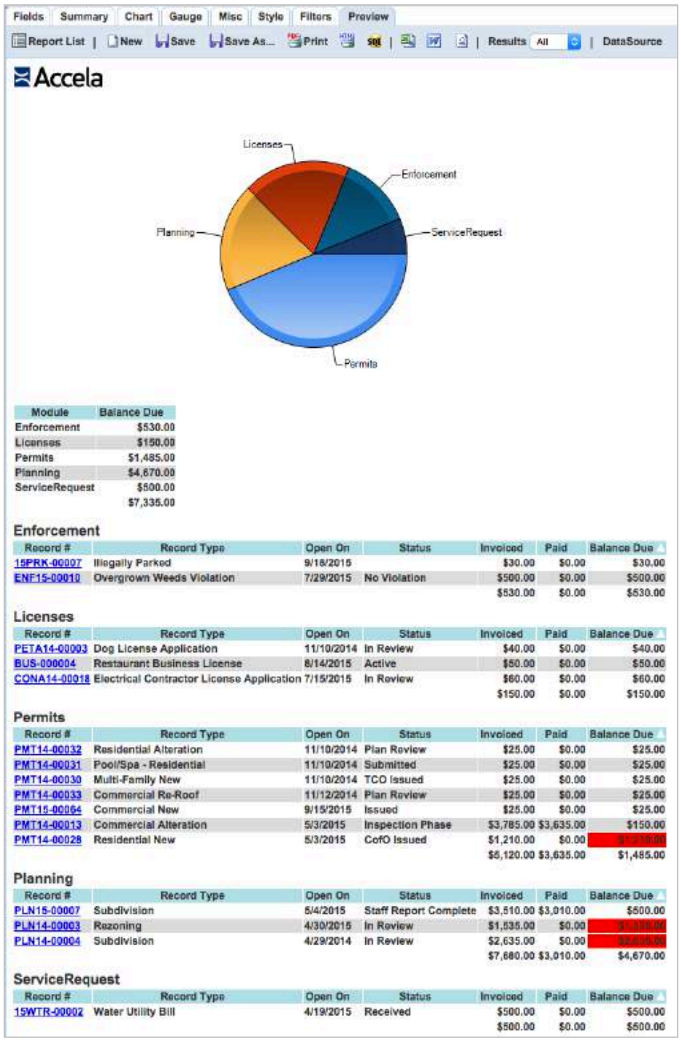

Exhibit 24: Accela's Ad-Hoc Reporting Tool

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Users can create, save, organize and maintain an unlimited number of reports from the Report Manager. Report parameters can be established, permissions assigned, and reports can be attached to screens and associated with workflow tasks (for example, "print permit" for a specific record). Report Manager manages the printing of all reports, including permits, documents, statistics, analytics, and form letters. Hard copy permits may be printed manually, as part of a workflow task, or as part of a batch process. Other types of reporting functionality include:

- **CSV Export** – End users can export the contents of any List screen directly to an Excel™ spreadsheet for reporting and analysis activities.
- **Filters and Global Searches** – Filters and Global Searches let end users see data they need to see, in the way they want to see it. This allows end users to do their jobs more effectively. Administrators configure role-based Filters, thus allowing end users to see only authorized data. Global Searches are dynamic queries that either administrators or end users can configure and save. For example, a call center agent may set up a Global Search for an Electrical Plan Check due within the next ten days.
- **SmartCharts** – SmartCharts provide at-a-glance summarized business information so end users can view actionable data and take steps to improve agency operations. SmartCharts provide multiple charting objects (bar, line, gauge, odometer, et cetera) that appear on an end user console to provide key business indicator information. During implementation, Accela Services customizes SmartCharts to display key agency-specific information.
- **Analytics** –Analytics is a free app that leverages information from an agency's Civic Platform database and displays trends and activities happening within an agency. The data can be displayed in graphical format allowing users to interact with it and drill into specific records for details. This app provides a number of ways for registered Civic Platform users to easily access the information they need via the Home screen, Watch Lists, Charts and Maps.

  iOS users reap the benefits of Civic Platform's tight integration with Esri's ArcGIS Server, enabling them to connect to their agency's map data, whether it is published from ArcGIS Server or supplied by Esri's ArcGIS Online cloud infrastructure. Esri's powerful maps have been infused into Analytics in two ways—via Esri base maps (such as street, satellite or topographic views); and map overlays, which can depict zoning impacts (e.g., color-coded city limits, special assessment districts, flood zones, school zones) as well as user-selected physical assets (such as hydrants, manholes or utility lines) on layers superimposed on the base map.

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Analytics requires a Mobile Office license. *To learn more, visit http://www.accela.com/civic-apps?id=519*.

To foster sharing of best practices across to all its customers, Accela also provides a site for sharing of ideas, configurations, and suggestions for enhancements, reports and much more in *Accela Success Community*. This site provides a benefit to our customers to share reports as a library of documents using best practices across the country.

3.7.2 Standard Reports

Since each agency operates in different ways using unique procedures, reporting is largely considered unique output—what is standard to one agency may not be standard to another. Due to their dynamic design, **Accela's Report Manager** and **ad-hoc report writer** can produce an unlimited number of reports regarding permits, inspections, licensing, workloads, audit logs, and staff performance, among others. Reports and other types of electronic documents attached to case records like permits and inspections, for instance, can be viewed in their native formats by authorized end users. Reports can be segmented via security rights to show available to specific groups. This provides an agency the ability to display a list of reports that are applicable to each user group. For example, financial clerks only see reports that apply to revenue processing, while investigators only see reports relating to enforcement actions. Accela clients can also collaborate and share report templates on Accela's public community website *https://accela.force.com/success/CustomerCommunityLogin*.

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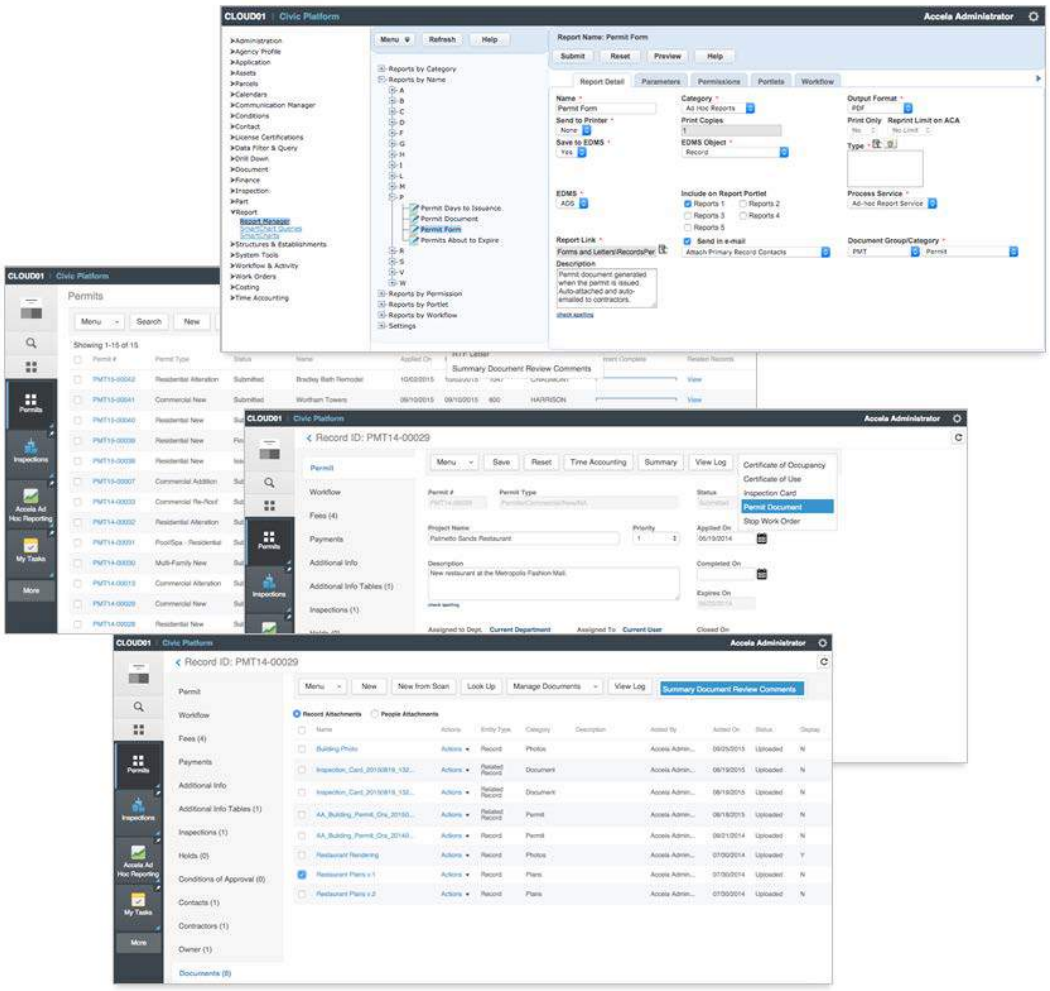

Exhibit 25: Examples of Reports deployed within a Record List, Permit Form and Permit Documents List

Citizen Portal provides additional time saving features by offering agencies the ability to publish reports to the web for both citizens and registered users. By using third party systems and those reporting tools in the system, the City will have immense opportunities to present data in a wide variety of formats for personal, administrative or publication purposes.

The following search capabilities augment our reporting functionality:

- Location-intelligent searching allows users to find records that are:
  - Within the map extent (visible geographic area)
  - Within a boundary (polygon)
  - Near a selected feature (asset, parcel, GIS object)

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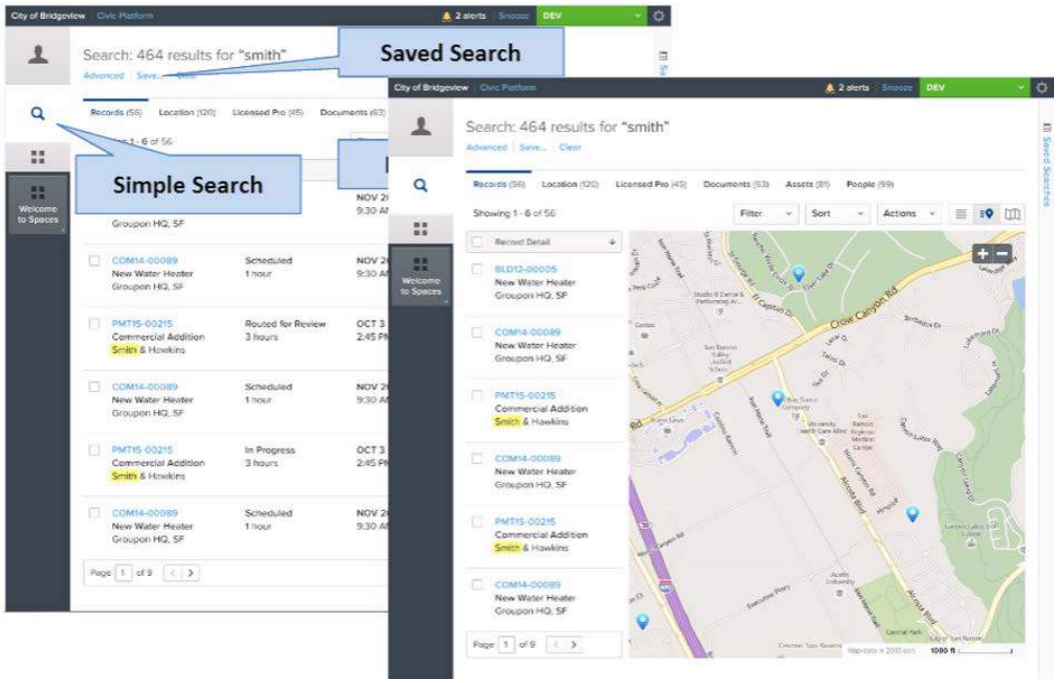

Exhibit 26: Mapping Search Results

Only Accela provides agency staff and customers quick and easy access to data across the agency via our powerful global search capability with the industry' s only data and document global indexing engine.

- Soundex Search Support uses phonetic algorithms to account for misspellings, producing better search results when searching for records by contact name or address
- Search for records with disabled record types
- Application Specific Information (ASI) fields can be used to filter the Record List and My Tasks screen using Data Filters and Global Searches
- Search for records, address, parcel, and owner data by template fields
- Search multiple levels of related records hierarchy
- Search for records using the record Expiration date range.
- Search date ranges for certified businesses
- Search by Doing-Business-As (DBA) as well as company name from Citizen Portal
- Search for documents quickly using Global Search

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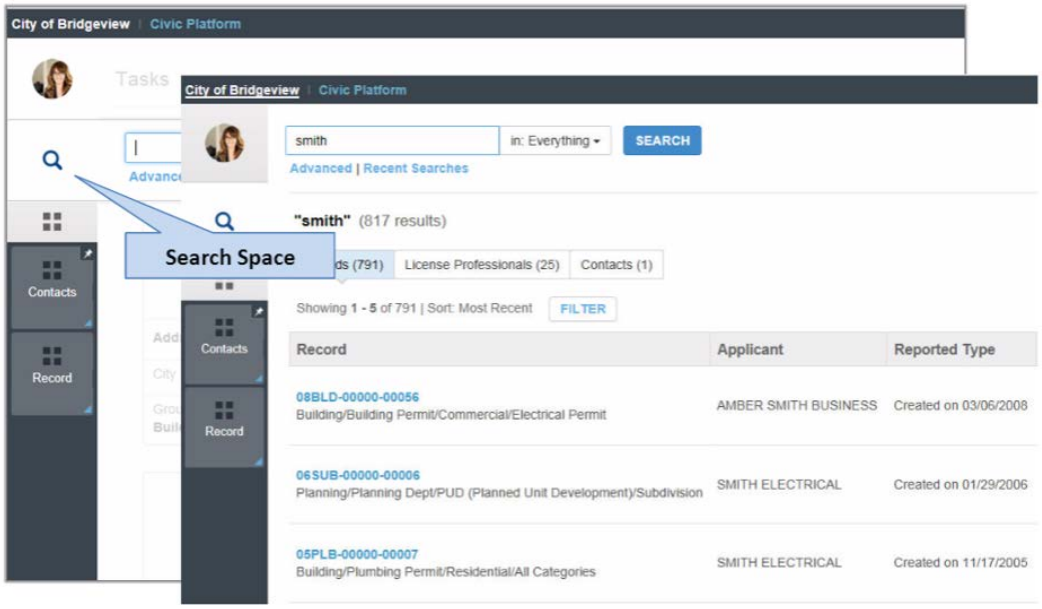

Exhibit 27: Global Search provides a one-stop-shop for searching on the Civic Platform. The search space is where you can save searches, go to recent searches and run advanced searches from a centralized place.

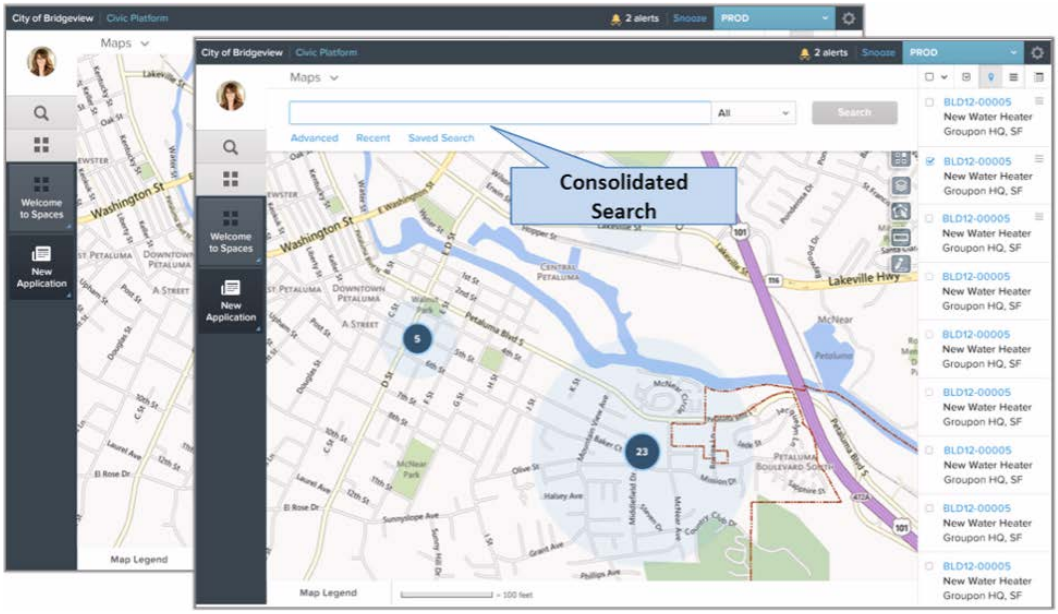

Exhibit 28: Map-Based Global Search

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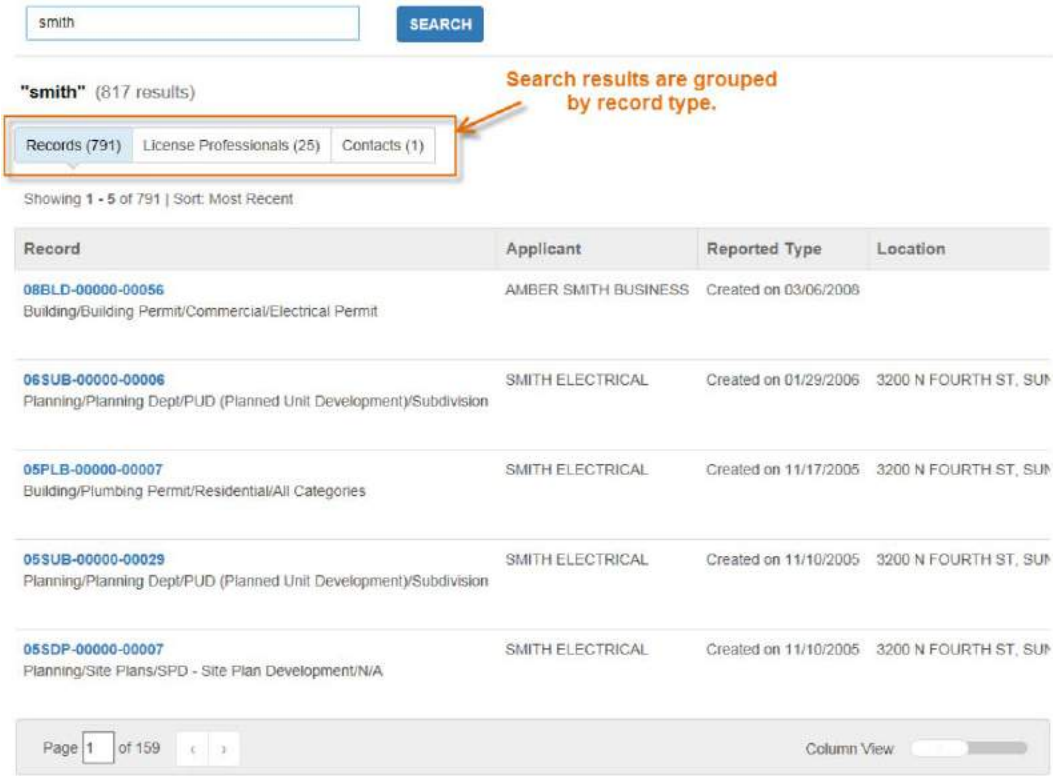

- Search Contact records or records by Business Name/Organization name
- Search Contact records by Business Name using Global Search
- Search for Records by Record and Contact Activity data
- Use the new Inspection Type value picker or Inspection Status drop-down list to locate inspections

3.7.3 Custom Reports

Custom reports are created as part of every Civic Platform implementation, as these documents not only comprise what are normal "reports", but also include other system outputs such as citations, permits, licenses, letters, etc. The Accela team will work with the City's project team in identifying the needed reports that will be developed using third party reporting systems and also jointly determine if these reports should be developed by Accela, the City or both.

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3.7.4 Data Extracts

With our on premise solution, the City can extract data at their leisure. With our Cloud solution, pursuant to our standard subscription agreement, *"throughout the term of the agreement, upon the request of Customer, not less than or more than once per quarter, Accela will provide Customer with a copy of its data in an Oracle database dump file. Within thirty (30) calendar days following the end of its final Subscribed Services term ("End of Term"), Customer may request that Accela provide a complete copy of Customer's data, as updated or modified by Customer's use of the Subscribed Services, in an Oracle database dump file format. Accela will comply in a timely manner with such request, provided that Customer a) pays all costs of and associated with such copying, as calculated at Accela's then-current time-and-materials rates; and b) pays any and all unpaid amounts due to Accela. Provision of the data on a more frequent basis than once per quarter can be accomplished upon request for an additional fee."*

3.7.5 Data Modeling

Accela's Civic Platform has a core data model representative of the objects within the Civic Platform. Data within the Civic Platform data model is persisted to the third level of normalization in the backend database system.

3.7.6 Event Triggered or Scheduled Reporting

Accela's Civic Platform provides the ability to deploy reports virtually anywhere within the system, make them available for execution manually, automatically (on a recurring cycle of the City's choosing) or only when specific milestones have been met. Furthermore, Accela's Report Manager tool offers the ability to restrict who can execute reports based on role level security and/or application status.

- **Event Triggered:** Whether triggered as a result of progress through an application's workflow, the updating of any field within the system, on milestones events such as application submission or based on anniversary dates such as license expiration date the Accela Civic Platform offers a virtually unlimited number of event-based points with which the City can trigger the generation, attachment and/or distribution of reports within the system. In fact, the technical term for the Business Rules Engine that powers much of this functionality is referred to as the Event Management Scripting Engine and is an administrative tool that is available to City Subject Matter Experts for the purpose of defining and managing requirements such as these in reactive manner.

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- **Scheduled:** The Accela Civic Platform's Business Rules Engine also encompasses a feature called Batch Jobs; which allow for the proactive elicitation of Business Rules including the creation, attachment and/or distribution of reports such as License Renewal Notices. The City is able to define the recurrence cycle (daily, weekly, monthly, annually, etc.), the execution time down to the minute, the applicable report parameters and the ability to execute Batch Jobs in defined order (i.e. a Batch Job that updates expiration status, followed by one that assess the renewal fees followed by the Batch Job that generates the renewal notice with the previous updated elements included in the body of the generated report).

3.8 Land Management Best Practice Templates

To speed time to deployment and help maximize your investment, whether on premise or in Accela's hosted Cloud, the Land Management Best Practice Templates (BPTs) will allow the City to deploy e-government services right out of the box, including pre-configured workflows, data structures, fees, business logic, standard reports, and web forms. These templates are a culmination of 33 years of experience of Accela working with government agencies to streamline and make government services more efficient.

Offering four pre-configured modules (*Permitting and Inspection; Planning and Zoning, Enforcement and Service Request*), the Land Management BPTs will get an agency up and running in the shortest amount of time, enabling an agency and its building industry customers to reap the benefits of the Civic Platform while boosting accuracy and productivity.

- **Planning and Zoning –** provides agencies with a comprehensive solution for electronic plan submittal, review, public notification, and approval of land use exceptions. It enables agencies to manage designated land use based on current zoning regulations; track zone changes, variances, and easements; and assign documents to multiple departments for parallel review, enabling plans to move quickly to certificate of occupancy.
- **Permitting** – includes activities for permit request processing, plan reviews, inspections, permit issuance, and so forth. The permits module enables agency staff to access input data, verify activities, check permit status, and obtain complete parcel information from record data stored in a centralized database.
- **Code Enforcement** – users can create cases, issue citations, and manage investigations and evidence for diverse types of cases. Detailed record types and alias can be found in the table below.

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Exhibit 29 lists the record types that come pre-configured with the Land Management BPTs.

Land Management

Permitting and Inspections

Commercial Addition	Commercial Re-Roof	Residential Plumbing	Residential Pool-Spa
Commercial Alteration	Residential Addition	Residential Re-Roof	Temporary Sign
Commercial Demolition	Residential Alteration	Multi-Family Addition	Permanent Sign
Commercial New	Residential Demolition	Multi-Family Alteration	Grading
Commercial Electrical	Residential New	Multi-Family Demolition	Fence Permit
Commercial Mechanical	Residential Electrical	Multi-Family New	Solar Permit
Commercial Plumbing	Residential Mechanical	Commercial Pool-Spa	Street Cut
Right of Way			

Planning and Zoning

Subdivision	Design Review	Pre-Application Meeting	Annexation
Preliminary Map	Variance	Appeal	General Plan Update
Final Map	Rezoning	Time Extension	Specific Plan
Planned Unit Development	Plan Amendment	Modification to Prior Approval	Zoning Text Amendment
Conditional Use	Home Occupation Permit	Confirmation Letter	Lot Line Adjustment
Revocable Permit	Site Plan – Major	Site Plan – Minor	Final Plat
Subdivision – Major	Subdivision - Minor	Preliminary Plat	

Code Enforcement

Illegal Sign Violation	Abandoned Vehicle Violation	Working W/O Permit Violation	Home Occupation Violation
Animal Violation	Overgrown Weeds Violation	Garbage Service	Tree Violation
Graffiti Removal	Grading Violation	Junk on Property Violation	Sub-Standard Property Violation
Noise Nuisance	Illegal Occupancy Violation	Vacant Building Violation	Fence Violation

Fire Safety

Fire Sprinkler System	Fire Alarm System	Fire Suppression System	Business Licenses
Annual Inspection	Complaints	Demolition	Hazardous Material
Special Event	Tanks Storage	Water Flow	

Exhibit 29: Pre-configured record types in the Land Management BPTs

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3.9 Electronic Document Review (EDR + Adobe Acrobat)

With Accela's Electronic Document Review, any record may have a plan review without the hassle of creating a separate plan review record for each permit – it is built in and easy.

Accela's Electronic Document Review (EDR) provides a comprehensive enterprise document review and management solution for various types of regulatory documents – plans, architectural drawings, etc. – required to be submitted in support of a variety of projects, applications and renewals. Our Civic Platform delivers a complete end-to-end solution for tracking and managing the most critical regulatory functions – permitting, licensing, and more.

Accela EDR is designed to enable review staff to incorporate document review and markup directly into the existing Civic Platform processes that automate, organize, and track reviews. This adds end-to-end management of electronic documents assuring adherence to agency policies and codes. Electronic Document Review is a fully integrated feature within the Civic Platform that leverages different technologies to the agency's choice, enabling users to review regulatory documents faster and easier. For the City of Bryan, TX, we recommend the City take advantage of Adobe Acrobat Pro, the classic plan review software that most Accela clients use to enjoy the full spectrum of benefits of Accela EDR. However, if the City desires to maintain the current license of existing document review solutions, such as Bluebeam or Avolve's ProjectDox, it can still leverage Accela EDR by integrating with our Civic Platform using APIs provided.

Accela's Civic Platform APIs and third party adapters allow agencies to use <u>any</u> electronic document review solution available in the marketplace.

Primary features of Accela EDR include:

- Side-by-side comparison display
- Overlay comparison display with one document transparently overlaying the other
- Manage security profiles for users and to check-in and markup documents
- Manage resubmissions of documents and versioning
- Upload multiple documents simultaneously
- Alert internal users of resubmittals
- Alert public users that a document has been reviewed, approved, or require revisions
- Support hyperlinks to documents for one click access
- Provide configurable attribute fields by document type
- Store document comments in the Civic Platform and generate correction notices
- Assign documents to review outside of a workflow

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3.9.1 Side-by-Side and Overlay Displays

User defined colors easily identify what has been added and what has been removed on each page. The user can isolate the objects they are looking for using the *Differences* tool bar. For example, users may view only differences, deleted objects, added objects, or objects both documents have in common. In *Overlay* mode, the user can tag differences to create placeholders that can be quickly revisited and examined more closely or to indicate where the annotations and revisions may be required. The multi-page documents viewing capability allows for easy transition between pages, comparison between documents where the pages do not align, and comparison of a single document against itself. Additional features include the ability to zoom, rotate, magnify, measure, and adjust resolution.

"There are environmental benefits, achieved by not having to print multiple copies of different versions of thick site development plans. Countless trips to the government center are also eliminated. Plans can be submitted via email around the clock, adding another layer of convenience for applicants. The new process is also much quicker, saving time due to a more coordinated city response.

Government Technology -- Charlotte, NC Digitizes Commercial Planning Process

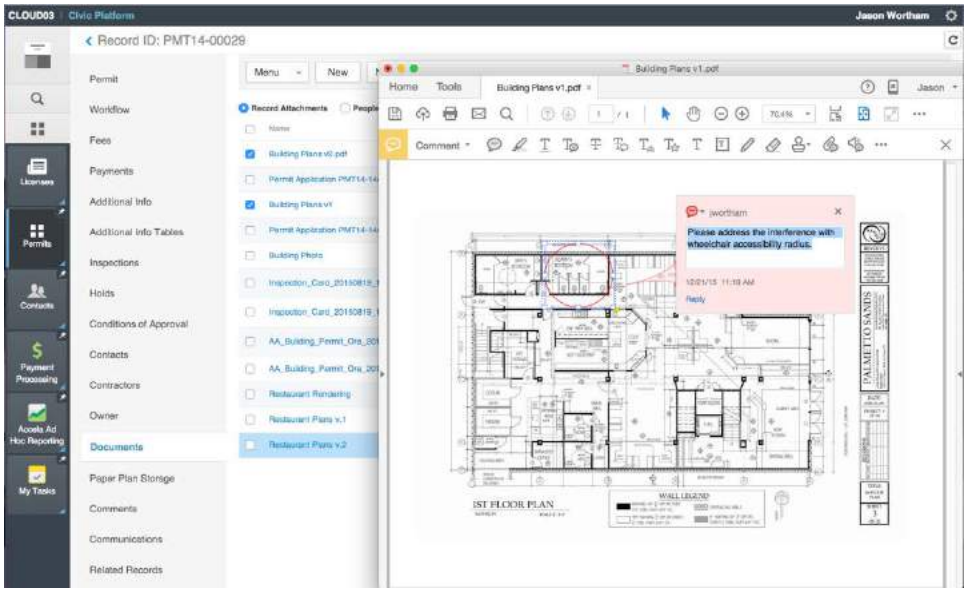

Exhibit 30: Accela Civic Platform's Electronic Document Review has been specifically engineered to support the comparison of large, multi-page PDF documents, a capability unparalleled in the industry

With Electronic Document Review, users can attach single or multiple PDF documents to a record, and then assign them for review to one or more reviewers, who are able to access and manage their assigned documents either via the record or via their individual My Tasks screen. Users can also use the Global Search screen to search for specific documents as needed. Attached PDF documents can be opened in Adobe Acrobat Pro directly from the Civic Platform. Once opened,

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users can utilize Acrobat Pro's easy-to-use annotating tools to review, comment, and mark up documents.

Accela provides a set of standard review stamps as a quick start feature, allowing users to stamp plans. When the review is done, the commentary and annotations are saved back to the Civic Platform application server. The toolbar provides configurable online access to ICC eCodes, the world's primary source of regulatory design and construction compliance standards, as well as state and local codes as required, giving reviewers the ability to look up codes and regulations and use standard copy/paste functionality to cite regulations via annotations added to the PDF. To better manage the life cycle of documents, a Document Audit log is available. It records all changes made to attached documents, including the moment a document is attached to a record, as well as annotations and comments that have been added/modified and saved.

For more details, visit http://www.accela.com/electronic-document-review.

Exhibit 31: Agency challenges and the benefits of using Accela's Electronic Document Review

Challenges	Electronic Document Review	Results
▪ Reduced budgets ▪ Staffing constraints ▪ Doing more with less ▪ Meeting public demands for speed, access, and transparency ▪ Commitment to green solutions ▪ Physical storage of large plans	▪ Integrated, single-source solution for document submission, review, markup, and management ▪ Leverages key features of the Civic Platform ▪ Introduces document review and markup functionalities	▪ Documents where and when users want them ▪ Seamless support for third-party EDMS for storage and retrieval of documents ▪ Flexible solution that supports a variety of agency-driven standards for document submission and review ▪ Collaborative plan review process facilitated via Accela Citizen Portal

3.10 CivicData

CivicData is a free cloud-based open data platform that makes it easier for government agencies to publish and manage datasets. When forward-thinking

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Watch a CivicData demo from Engage 2015 at http://bit.ly/1Q2pxRx

municipalities join the Civic Platform, they automatically enjoy free publishing of their community data in real time to the industry leading Civic Data platform.

Built on open source technology using CKAN, CivicData makes it easy for developers to create and deploy innovative apps with cross-jurisdiction datasets. The civic apps created by this growing ecosystem can be used by multiple agencies, thereby helping civic developers to build and scale their businesses. The platform will unlock the value of open data while helping agencies move from transparency to trust as they offer citizens, businesses and professionals access to civic information that was historically hard to find. *Visit http://www.civicdata.com/ for more details.*

3.10.1 Why Open Data?

"One of the things we're doing to fuel more private sector innovation and discovery is to make vast amounts of America's data open and easy to access for the first time in history. We're making it easier for people to find the data and use it, so entrepreneurs can build products and services we haven't even imagined yet."

President Obama Open Government Initiative http://www.data.gov/

Open data is shareable data that permits use and redistribution by anyone for commercial or non-commercial purposes. Government agencies are tremendous repositories of data that is collected to perform their primary functions. Most government data is public by law and therefore could be made freely accessible to drive innovation and value both within government and for public benefit. Worldwide, open data has been employed to drive transparency, empower citizenship, propel innovation of new products and improve efficiency of government services.

For example, is it possible to condition the denial of a permit from government agency on whether a person has an outstanding tax liability, an outstanding parking ticket, a violation against a property they own, or an outstanding utility bill? Doing so requires querying data sets that fall under the purview of an array of different departments and agencies across the government footprint. It also requires the development of systems that integrate all this data and allow it to be used as part of a well-defined process.

Open data programs can help make this kind of integration possible. Open data make data discoverable – it removes the need for special relationships or political clout to obtain data. Anyone and everyone can see what data is available for use, so few resources are spent hunting around for data and connecting with data owners.

Exhibit 32: The Challenges and Future of Open Data

The Challenges	The Future
Fulfilling mandates vs. embracing opportunities	More data, greater variety and richness
Data portals as data islands	Cross jurisdictional data portals

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The Challenges	The Future
Lack of common data specifications	Common specifications for common data
Data publishing without engagement	Multi-tenant civic solutions built on common data
Failure to institutionalize	Greater government collaboration with outside developers
Sharing failures as well as successes	More sophisticated data use by governments themselves

3.10.2 Benefits of CivicData

Accela CivicData offers a wide spectrum of benefits so that government departments can:

- **Respond to Open Data requests through FOIA** (Freedom of Information Act) in a timely and cost efficient manner.

> **"In 2009 Salt Lake City began its Open Government Initiative. Working to fulfill this commitment, Salt Lake City partnered with Accela, whose free CivicData service hosts our data in a space that enables the citizen developer to create applications, alleviates a burden on IT departments and provides tools that the City may not have considered." "**
>
> ***Salt Lake City, Utah***
> ***http://www.data.gov/***

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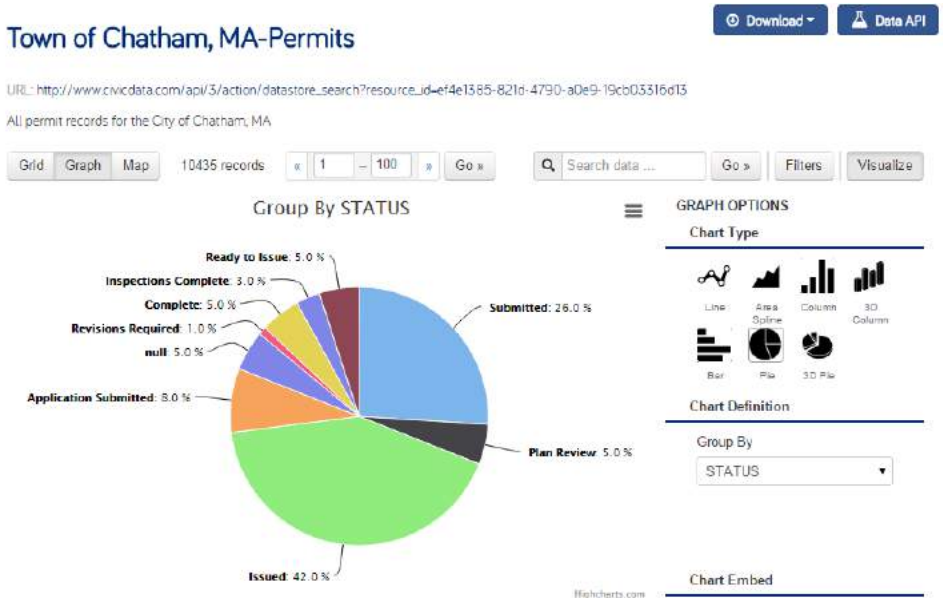

Exhibit 33: Sample data set graphic view – CivicData makes it easy for governments to publish their datasets, for developers to build solutions and for citizens to have transparent access to community information

- **Share your success with citizens.** Government staff can easily share information with business and citizens online with a one-time release of dataset.
- **Extract, visualize, summarize and compare business results within a single click.** CivicData offers a complete toolkit to filter, compare and view your data in different ways including grid, graph and map view.
- **Publish your data on a single-site regardless of agency size.** CivicData provide real-time visualization of datasets across multiple jurisdiction, allowing the public to browse not only relevant information in their own community, but also benchmark with neighboring municipalities.

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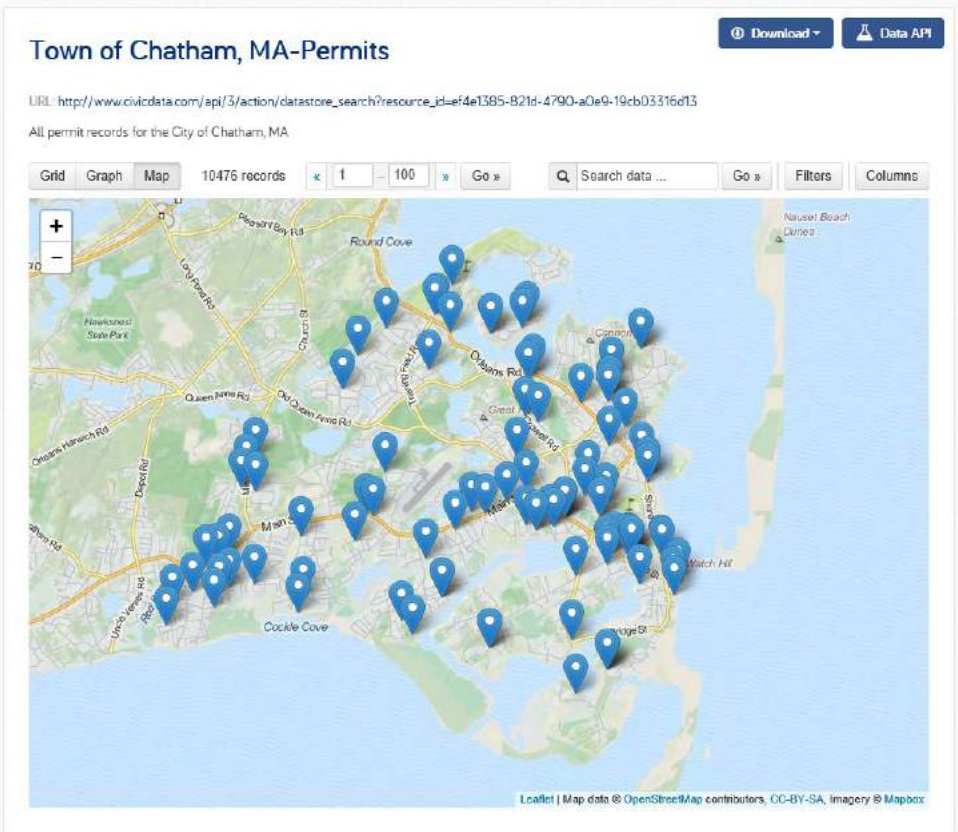

Exhibit 34: Town of Chatham, MA permit datasets map view

- **Promote innovation among civic hacker and other developers.** CivicData embraces emerging data set standards such as LIVES and HouseFacts that paves the way to numerous creative ways to promote government transparency.

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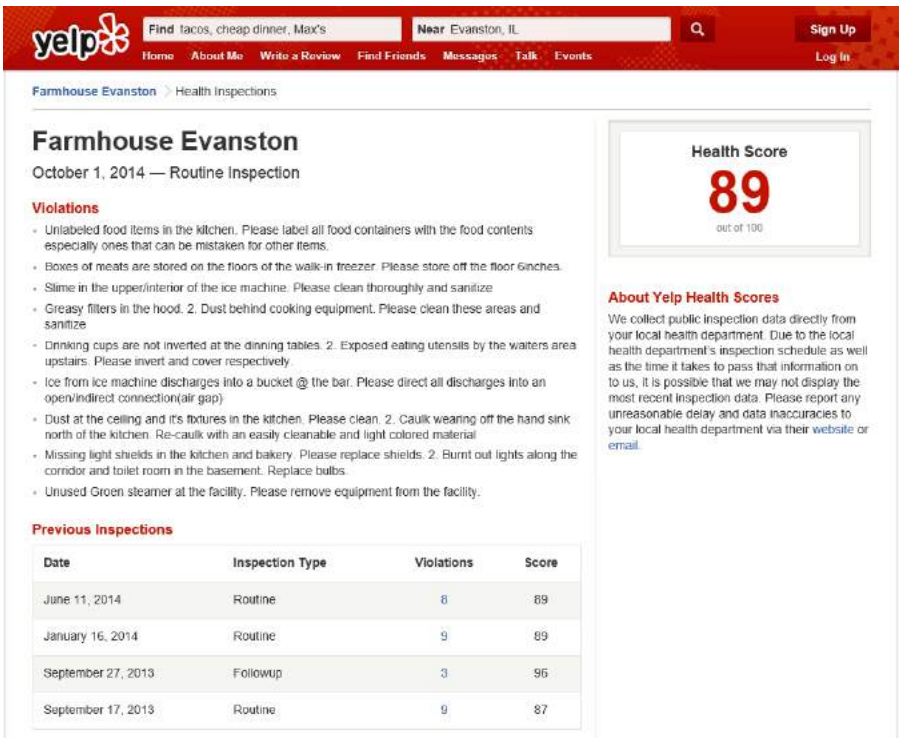
"Our IT team worked closely with Accela to share our restaurant inspection data on CivicData, which is compatible with the LIVES format required for the popular restaurant app Yelp. Our goal is to meet the citizens where they are, and Accela helped us achieve that vision with our restaurant inspection data."

Evanston, Illinois
http://www.data.gov/



CivicData supports many emerging data set standards to make data more accessible to citizens

- **Gain complete control of your data.** Agency staff can set up which datasets are exposed to the public and which are only viewable to internal employees.
- **Ease the burden on your local IT infrastructure.** Publishing open data can also help reduce unwanted web traffic on government websites, which is often the result of "data scraping" by parties seeking to obtain data in bulk from their government.
- **Enhance citizen perceptions of government service.** Specifically, a recent study conducted by Harvard Business School found that *"increasing the operational transparency of government services - showing citizens the work in which government is engaging on their behalf - engenders positive attitudes toward government and greater support for maintaining or expanding the scale of government programs."*

We encourage the City to explore CivicData.com to see all of the publicly accessible data sets that Accela customers are sharing, even those that are sharing data that is not from within Accela to show that they are using CivicData.com as their preferred Open Data platform at no cost.

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Exhibit 35: Tampa, FL Citizen Portal and Open Data, real-time metrics – Read more at http://bit.ly/1Y8XzGz.

Exhibit 36: Deschutes County, OR Permits Dashboard – Use the links on the left side of the page to navigate between some other options including some amazing GIS map dashboards.

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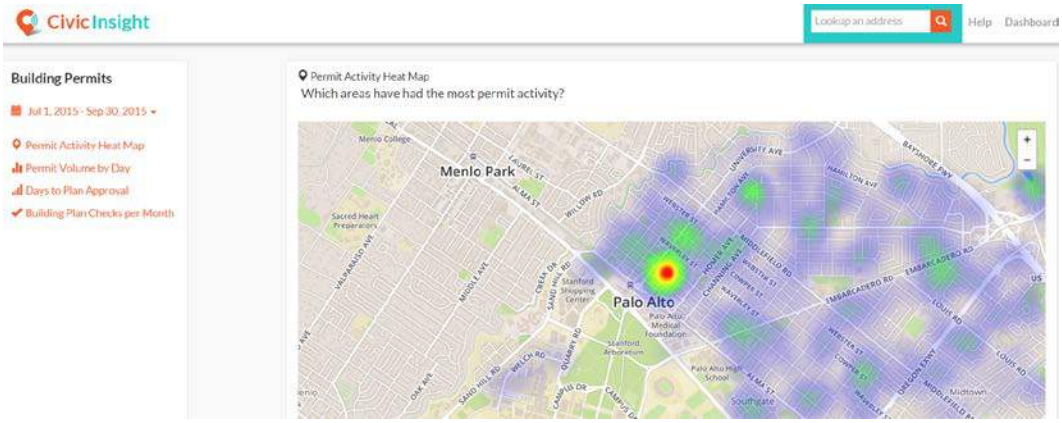

Exhibit 37: Palo Alto, CA Building Permits Dashboard – Use the links on the left side of the page to navigate between dashboards and/or select your desired reporting date ranges.

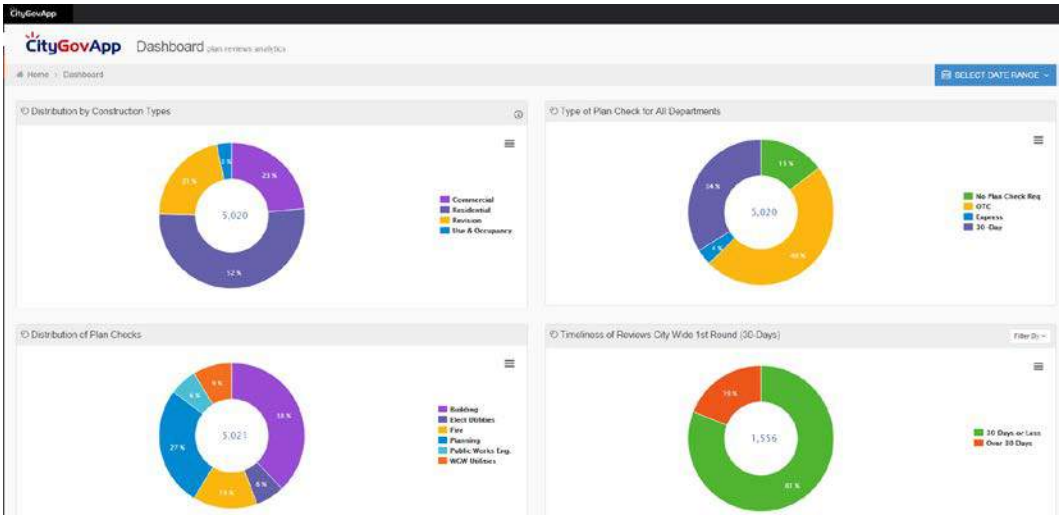

Exhibit 38: Plan Review Analytics Dashboard – Built by Accela's development partner CityGovApp, this dashboard does a phenomenal job of offering interactive dashboards, allowing them to be printed, exported or have their data downloaded for external use. Feel free

3.11 Developer Community

Accela's Developer Community includes people from across the nation—from individual developers, to software companies, to government IT professionals. They are actively developing and publishing apps for the Civic Platform, many of which are available today at app stores (right alongside the Accela-built apps). Each SDK includes:

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- APIs
- Getting Started Guide
- Platform Libraries
- Accela Civic Platform Test Environments with recommended process configurations
- Sample Code
- Sample Apps
- Documentation

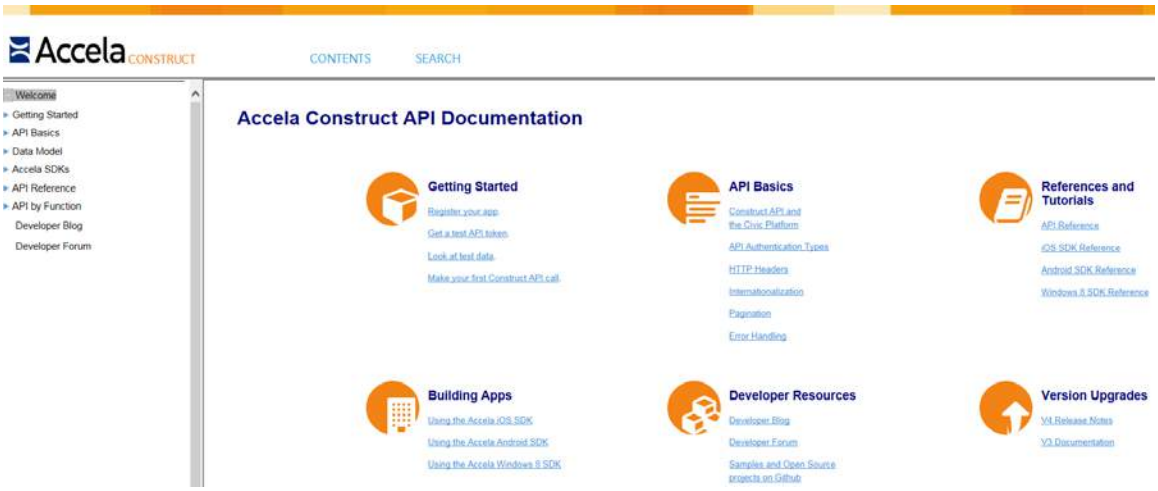

Exhibit 39: Accela's Mobile SDK can be downloaded at https://developer.accela.com/ after a quick and free registration process.

The following are samples of the modern, innovative, easy to use solutions built by developer partners, both responsive HTML5 Web Apps as well as native mobile apps for Apple, Android, and Microsoft. Each of these solutions are fully integrated with the Civic Platform, providing extended capabilities and often targeted, task specific point solutions for the staff and citizens of agencies enjoying the huge benefits of the Civic Platform.

Accela's Construct has 1,200+ registered developers using 350+ publicly available APIs.

Some of these solutions are fully dependent on the Civic Platform for use, while others are amazing in their own regard, but become much more valuable as an integrated extension to the Civic Platform. All serve as great examples of the power and flexibility of the Civic Platform and its Construct API in supporting innovative solutions by third parties as well as agencies themselves.

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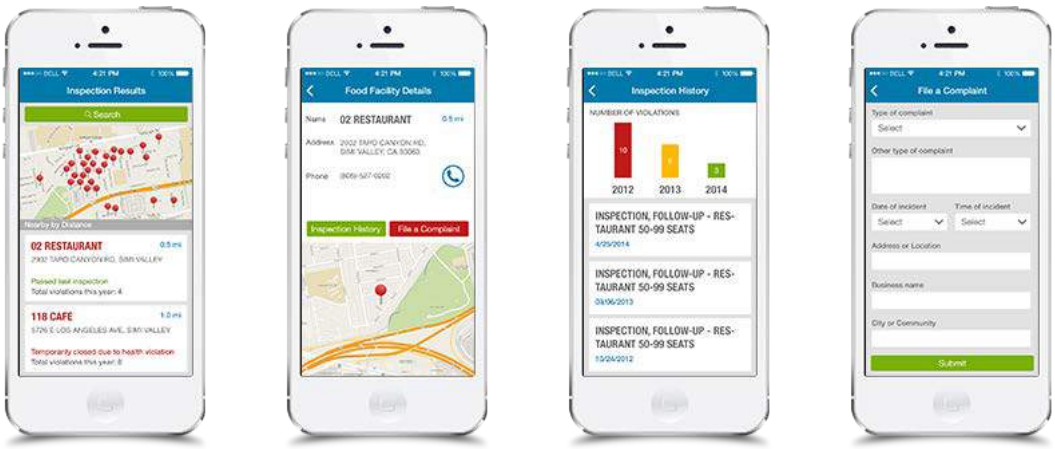
3.11.1.1 CityGovApp

CityGovApp offers Civic Platform Extension Mobile Apps for government made easy for internal productivity and citizen engagement. They provide these apps on a subscription bases, avoiding all upfront costs while providing ongoing support and maintenance. With over 40 apps built to extend the Civic Platform, they have the largest library of extension solutions from one vendor. We have many happy customers who use CityGovApp solutions, including Westminister, CO, El Paso, TX, County of San Diego, CA, and the State of Oregon.



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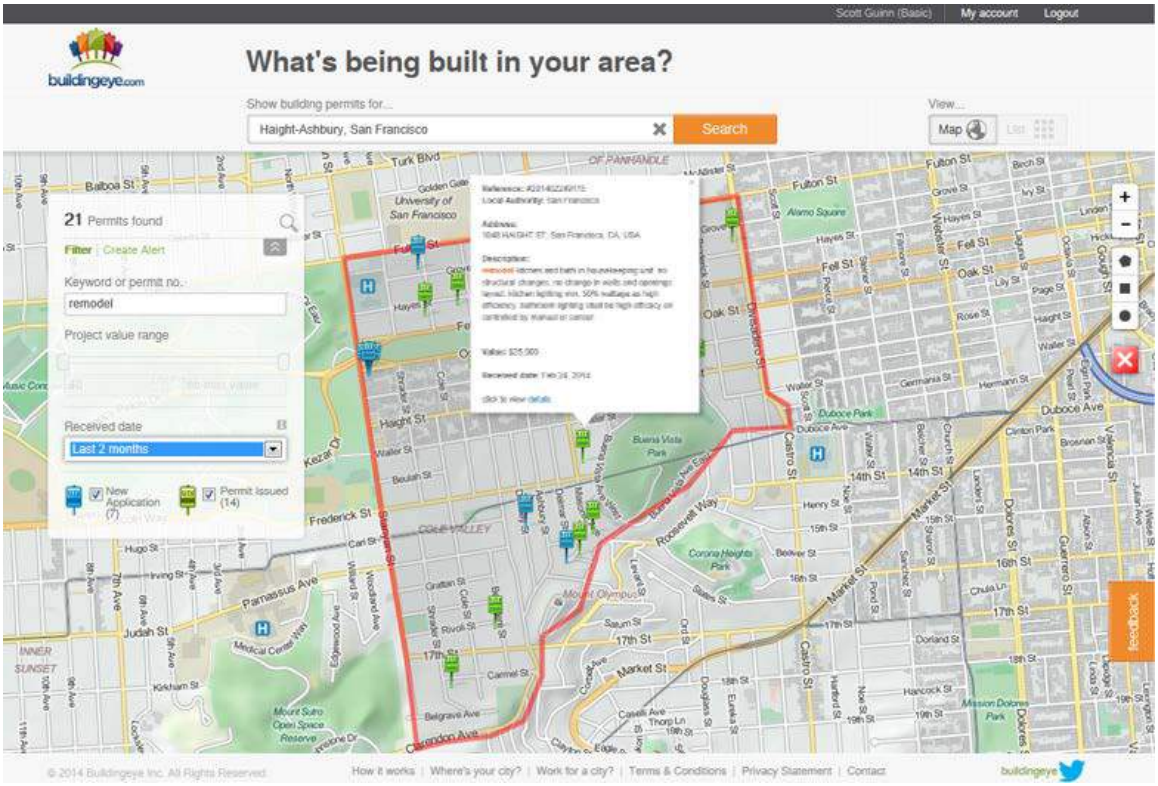
3.11.1.2 Building Eye

Building Eye provides a modern, responsive web solution fully integrated with the Civic Platform for citizens and staff to visualize Planning Applications, Building Permits, Code Enforcement, Capital Projects and more. Access information (updated daily) from your desktop, tablet or mobile device. We have a number of customers currently implementing this solution, including the City of San Francisco and Corvallis, OR.



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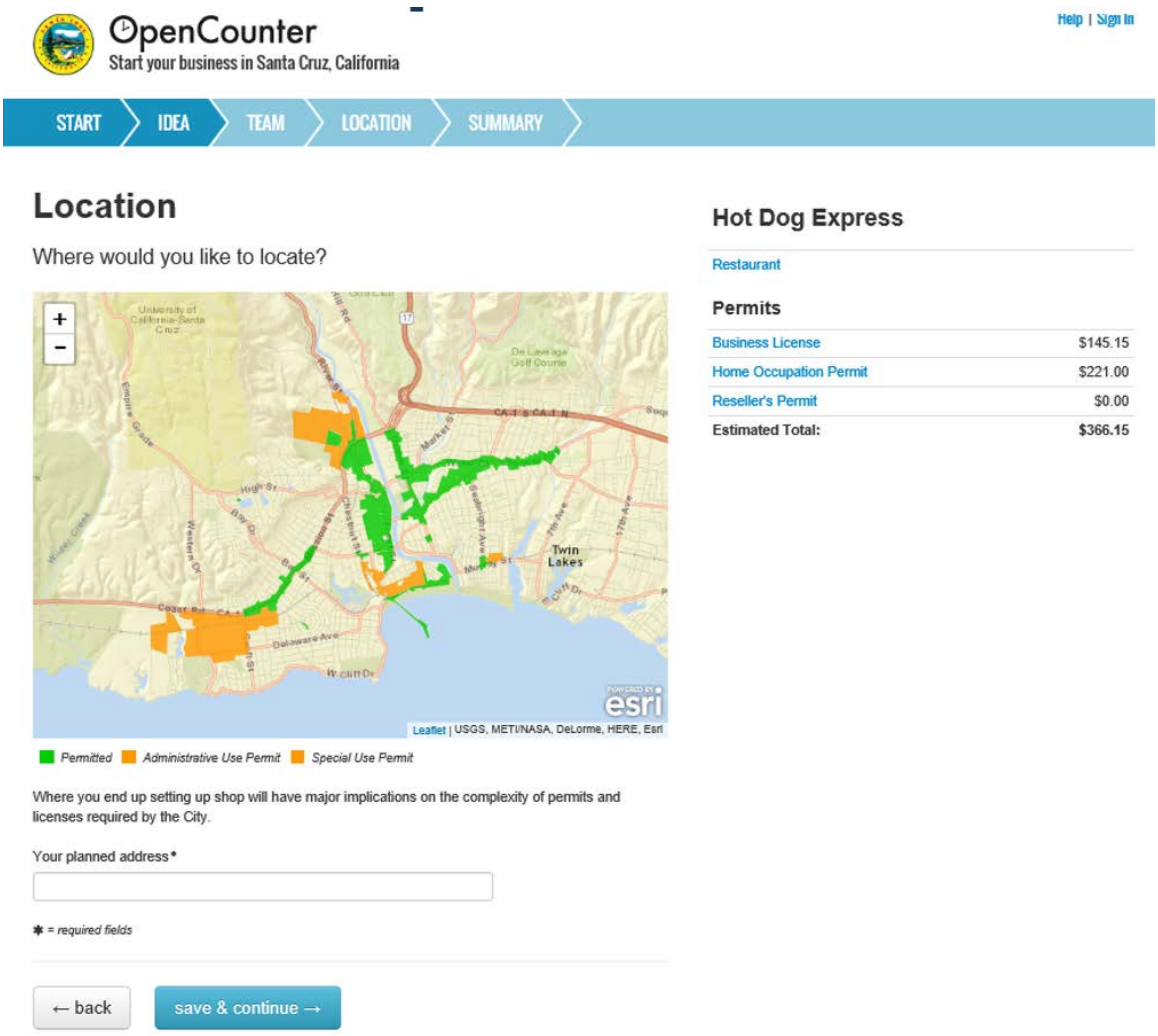
3.11.1.3 Open Counter

Open Counter provides a modern, responsive web solution fully integrated with the Civic Platform that helps cities support local economic development with a "one-stop-shop" for starting a business, helping cities become truly "business friendly". We have a number of customers currently implementing this solution, including Palo Alto, CA and Boston, MA.



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3.11.1.4 National Call to Action

> "If you want to start a business, we'll make it so easy to navigate the license and permitting system online, that you'll be off and running within 24 hours."
>
> *President Barack Obama*

In partnership with the National League of Cities (NLC) and Open Counter, Accela is actively promoting President Obama's "Startup in a Day". The White House launched the initiative to help cities cut red tape by implementing solutions that will modernize their permitting and licensing processes, ultimately reducing the time it takes entrepreneurs to get open for business. Specifically, the initiative calls for cities to take a pledge to:

- create an online tool within one year that lets entrepreneurs identify and apply for all the necessary requirements to launch a business, and
- develop a streamlined business friendly, online permitting system.

3.11.1.5 NLC's Pledge

"Our cities and communities are committed to making it easier for every entrepreneur to start a business. We believe an entrepreneur's time is best spent developing innovative products and services, creating jobs, and growing local economies—not navigating red tape. While fair zoning rules, licenses, and permits are important to ensuring public safety and fair competition, ***it should not take more than a day for an entrepreneur to identify and apply, ideally through a single online tool, for all the licenses and permits they need to responsibly launch a business."***

The NLC advocates that all cities should embrace the spirit of the White House program by taking advantage of Accela and Open Counter's technology to ramp up economic development activity in their communities. *For more details, visit http://engage.accela.com/Startup-in-a-Day-PW-Video-LP.html.*

3.11.1.6 VuSpex

VuSpex offers an innovative video inspection solution fully integrated with the Civic Platform, which includes a responsive web app for the inspector and a native smart phone app for the contractor. VuSpex Mobile Video Inspections transforms the inspection process by connecting the onsite Contractor's mobile device to the Inspector's web based application. VuSpex reduces cost for Contractors and Inspectors. Fewer delays gets the job done faster, saving time and money for everyone. We have a number of customers interested in embracing this revolutionary solution, with the first, Alameda, CA, in active testing.

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Engagement

Enable people and businesses to directly participate and engage in their communities.

311
by CityGovApp
Provide your citizens the ability to submit service requests from the convenience of their mobile devices

Contractor Central
by Accela
Contractor can track and schedule inspections and view permits from the job site

Garage Sale
by CityGovApp
Apply for a permit, list items for sale and promote your event

CityLife Platform
by APPCityLife
Rapid, low-cost mobile app development you can tailor for your agency, no coding skills required

OpenCounter
by OpenCounter
Improve economic development

WeGovern
by Accela
Connect citizens with their local governments by improving the way they engage through "Town Hall" meetings

Community

Make it easy to do business and address key community issues.

Animal Services
by CityGovApp
Obtain licenses for your pet registrations

Buildingeye
by Buildingeye
Detailed map, information and status updates for building permits in the U.S.

Civic Insight
by Civic Industries
Connect directly to a government's existing workflow systems to make government data available

Garbage Collection
by CityGovApp
Schedule and manage garbage collection activities

PAT (Permit Application Tracker)
by CityGovApp and Razavi
Location-based mobile app for tracking permits and licenses

CityLife Platform
by APPCityLife
Rapid, low-cost mobile app development you can tailor for your agency, no coding skills required

Exhibit 40: Accela, developers and partners work together to build and deliver apps and services

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3.12 Productivity Solutions

3.12.1 Analytics App

Accela provides a free Analytics app for iOS devices that allows agency staff to have real-time access to role-specific information on an iPad. The Analytics app leverages information from the Civic Platform database and displays trends and activities happening within an agency. The data can be displayed in graphical format allowing users to interact with it and drill into specific records for details. The Analytics app provides a number of ways for registered Civic Platform users to easily access the information they need via the Home screen, Watch Lists, Charts and Maps:

- **Home** – The Home screen provides an integrated dashboard of key performance indicators including charts of activity over designated time periods, displays average and daily total values, and a map view showing the locations of permits, licenses and other records using color-coded push pins.
- **Watch Lists** – The Watch Lists screen allows creation of a customized list of specific items of interest. Lists can be easily modified or removed without affecting any back-end data.
- **Charts** – The Charts screen includes large, easy to read charts displaying application and inspection trends. Users can choose a timeframe of interest or other selection criteria to customize the display. Charts allow administrators to see how their organization is performing over time. Drop-down menus allow user-defined searches, and color-coded lines in the charts represent the various kinds of data selected, such as application trends and inspections workloads.
- **Maps** – The Maps screen displays locations of records on a map using color-coded pushpins to differentiate building permits, code enforcement cases, service requests, and business licenses. Map markers linked to the pushpins provide additional high-level record information.

  iOS users reap the benefits of the Civic Platform's tight integration with Esri's ArcGIS Server. This connects to agency map data (published from ArcGIS Server or supplied by Esri's ArcGIS Online cloud infrastructure). Esri's powerful maps are infused into the Civic Platform in two ways—via Esri base maps (such as street, satellite or topographic views); and map overlays. The overlay can depict zoning impacts (e.g., color-coded city limits, special assessment districts, flood zones, school zones) as well as user-selected physical assets (such as hydrants, manholes or utility lines) in superimposed layers.

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Analytics' rich mapping environment allows government managers and field-based workers to better understand the terrain, environment or other attributes affecting current projects. For instance, specific functions allow a fire captain to view maps showing hydrants and gas lines, a building inspector to utilize flood zones or topographic information, and a public works employee to see locations of manhole covers and storm drains.

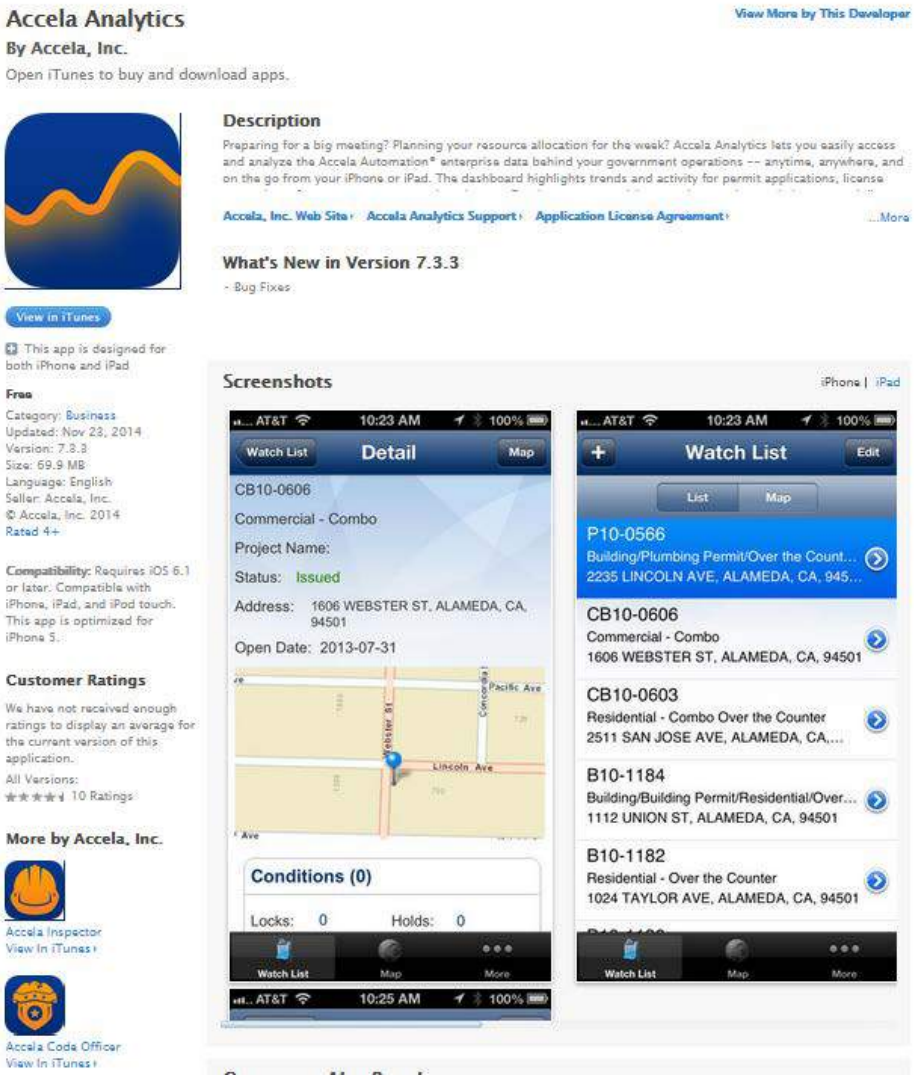

Exhibit 41: Analytics App

The Analytics app requires an Accela Mobile license. *To learn more, visit http://www.accela.com/civic-apps?id=519.*

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3.12.2 Inspector App

Accela's Inspector app provides permitting, licensing, and code enforcement professionals with functionality designed to perform onsite inspections or investigations using their smartphone or tablet. Integrated with the Civic Platform, Inspector connects mobile workers to their back-office accounts, enabling them to work from their desk, vehicle, or on site using their preferred device. Users can perform a complete onsite process – from initial inspection to submittal - and can also view and update their inspection details including checklists, attachments and comments.

Inspector provides numerous capabilities for easy and efficient onsite inspection or investigation management, prior to synchronization with an agency's Civic Platform solution, including:

- **Comment Management** – For faster access, the app enables inspectors to add custom comments and mark frequently used comments as favorites. The comments section also aggregates all comments entered in any section of the inspection or investigation.
- **Image Annotation** – Users can take photos, access existing images, and make simple annotations. They can add comments directly to the image. All this saves time and reducing the likelihood of errors in data collection.
- **Geo-Centric Job List** – In the map view, the job list automatically centers to the user's current location and displays the nearest jobs on a map.
- **Batch Updates to Checklist Items** – Checklist items can be updated individually or in batches from the list view. The view can be changed to a detailed view to add more information such as comments, attachments or scores.
- **Single-Click Calling** – All phone numbers and locations can be accessed with a single click, enabling inspectors to quickly reach primary contacts or other relevant parties.
- **Free Preview Mode** – The app provides access to a simulated demo agency, allowing agency users to "test drive" the app and become familiar with its full range of functionality prior to using in a live setting.

> **"We've found Inspector as simple to use and as intuitive as the iPad itself. It's easy to comment and get results on inspections, and the app is very fast and responsive. Being able to take and attach pictures automatically saves our inspectors a lot of time in the field."**
>
> ***City of Oklahoma City, OK***

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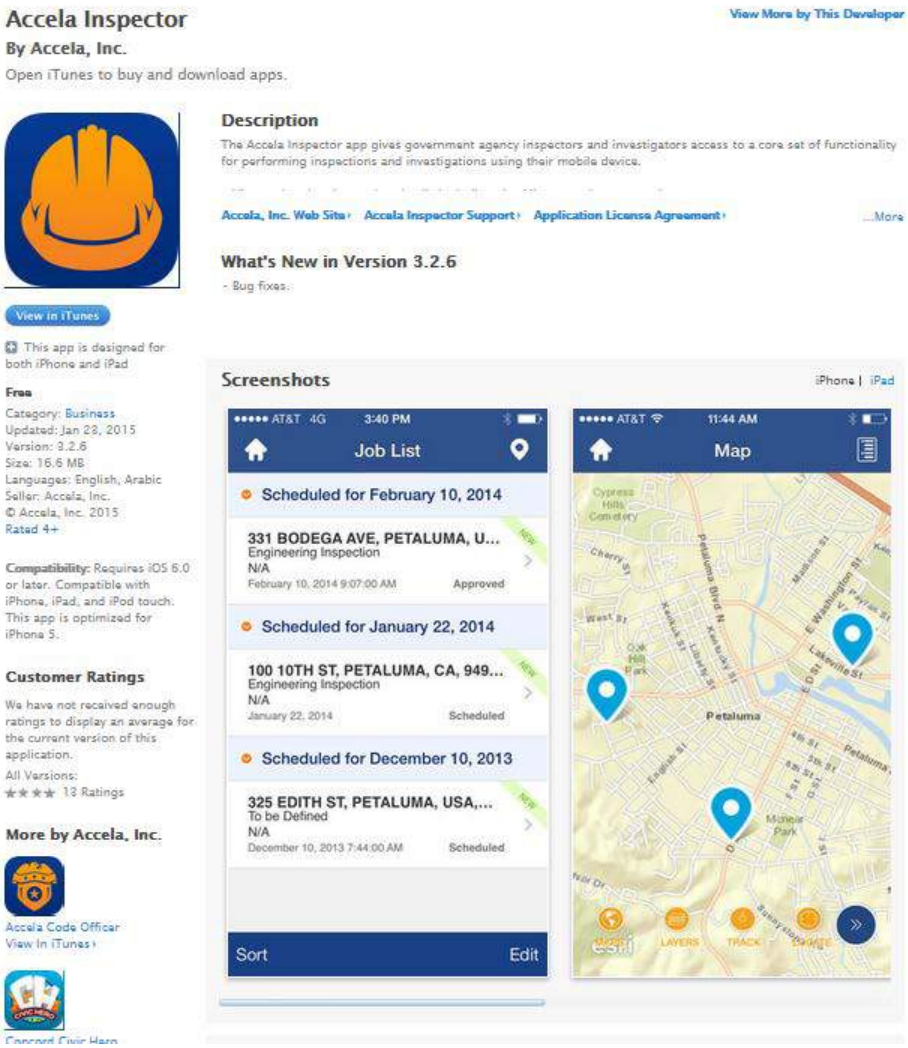

Exhibit 42: Inspector Map screen on the iPad and iPhone

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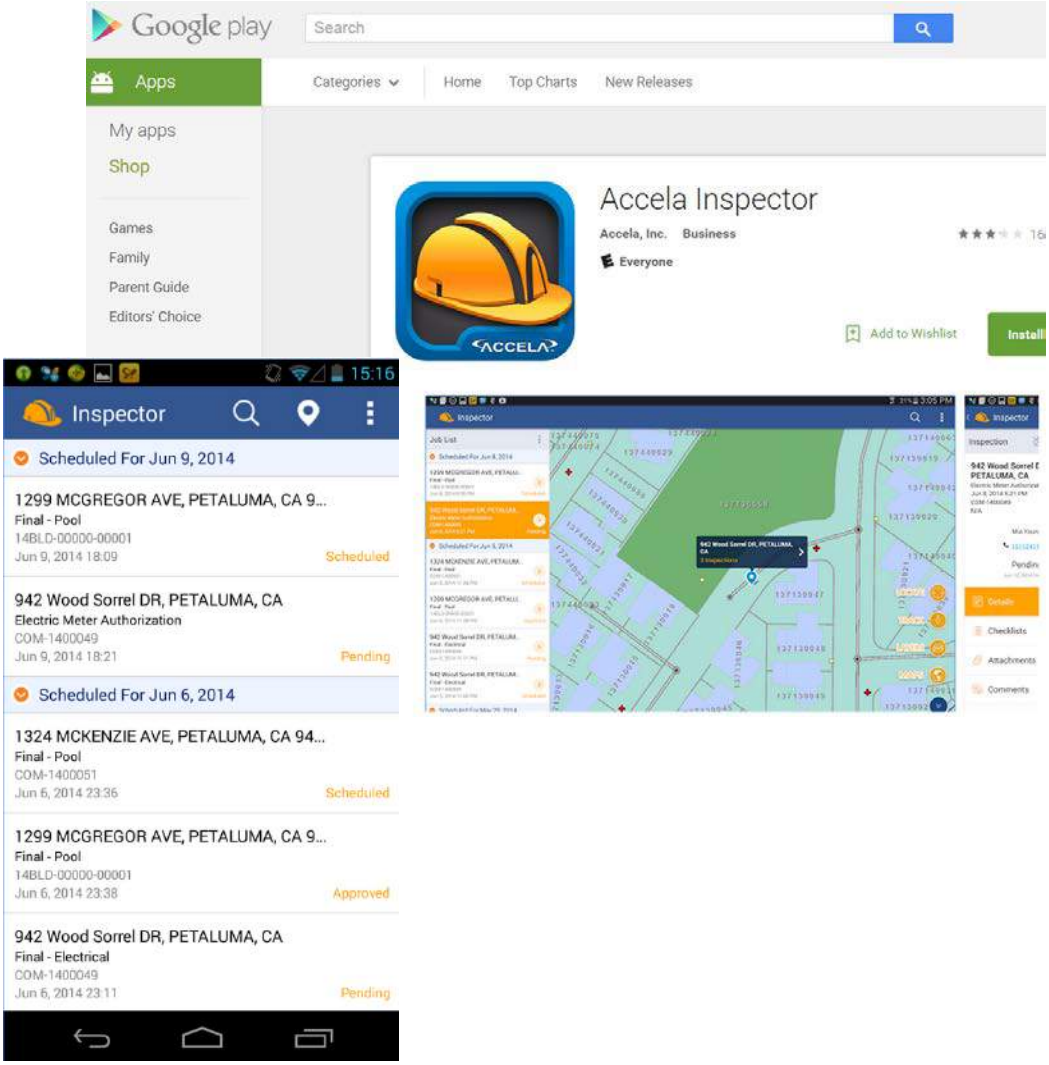

Exhibit 43: Accela Inspector on Android

Inspector requires an Accela Mobile license. *For more details, visit* *http://www.accela.com/civic-apps?id=515*. Inspector for Android can be downloaded at the Google Play Store and for iOS at the Apple iTunes Store. Anyone can preview the app for free.

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3.13 Engagement Solutions

3.13.1 Contractor Central App

As a free, added benefit to our Land Management solution, the Contractor Central app provides another way for agencies to speed up the inspection process. Following the same permissions configured for Land Management, this app benefits contractors by allowing them to:

- Schedule inspections from anywhere, in minutes
- See instant updates on inspections and projects
- Focus on the job at hand with quick access to a permit's contacts, professionals, and dues

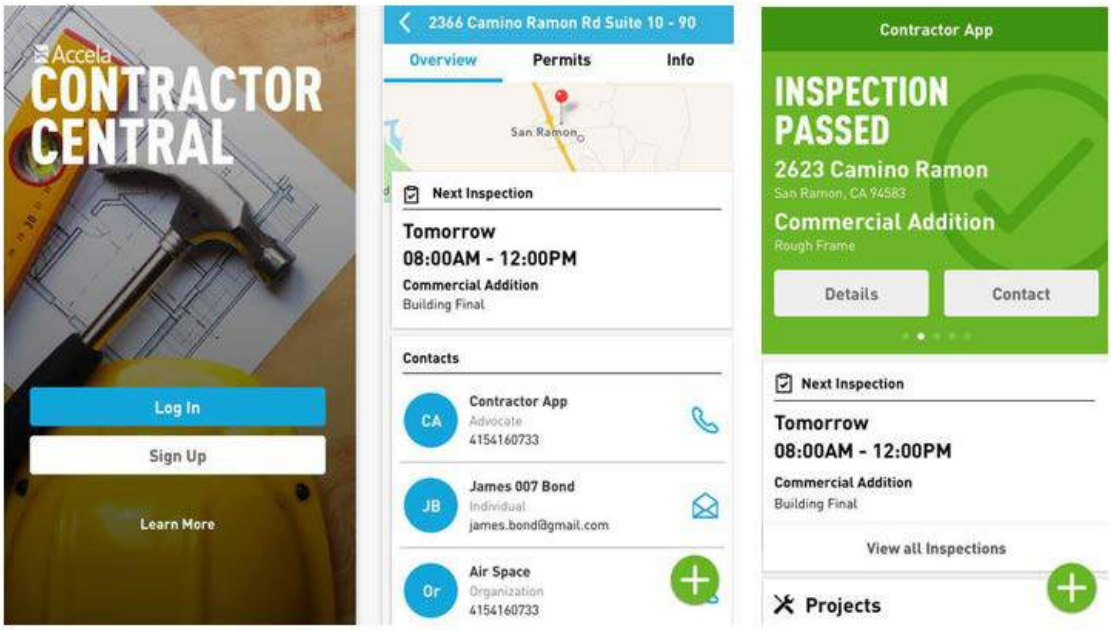

Exhibit 44: Contractor Central app

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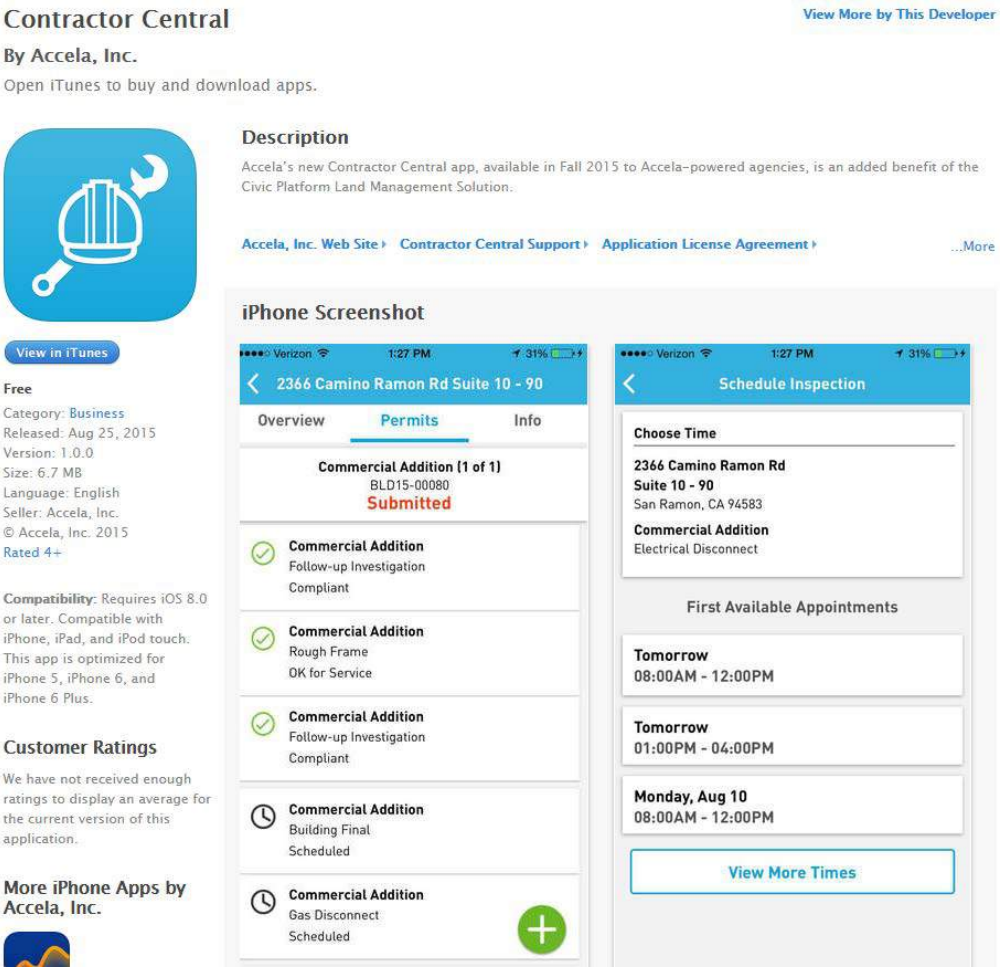

Exhibit 45: Permits and Schedule Inspection screens in Contractor Central

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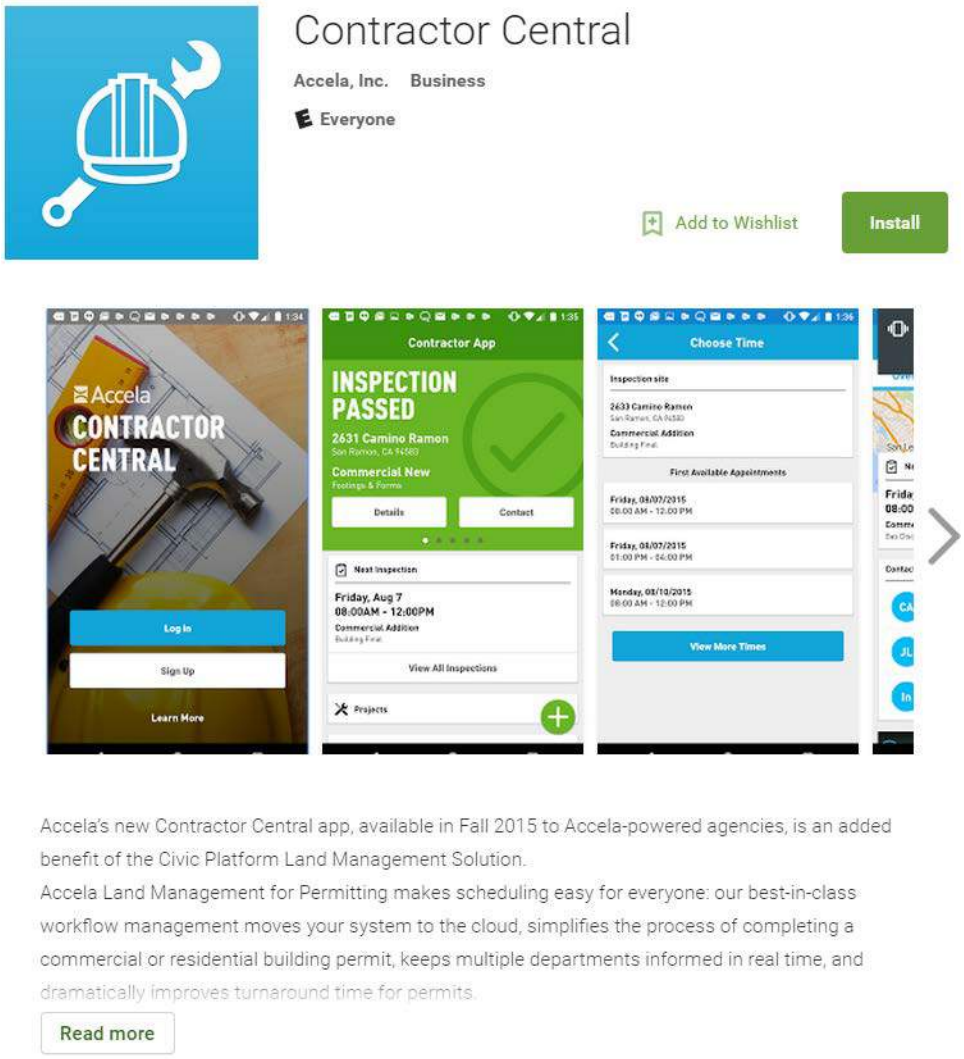

Exhibit 46: Contractor Central in the Google Play Store

Contractor Central requires an Accela Mobile license. *For more details, visit http://www.accela.com/civic-apps/contractor-central*. Contractor Central for Android can be downloaded at the Google Play Store and for iOS at the Apple iTunes Store. Anyone can preview the app for free.

All Accela-developed apps support portable printers. On an iPad, the user may print reports using AirPrint printer on the Wi-Fi network, or choose the Brother PocketJet Ad Hoc Wi-Fi Printer option. Android version supports the Brother PocketJet Bluetooth printer.

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> **"The Civic Platform allows the City to connect all of our departments under a common database, improve our ability to deliver government services to the community, and provide online access to more information."**
>
> ***City of Oklahoma City, OK***

3.13.2 Mobile Office App

Accela's Mobile Office app enables field-based personnel to capture, store, update, manipulate, and analyze geographic information for real-time land management activities (connectivity dependent). The Mobile Office app leads to increased efficiency using up-to-date and accurate spatial data. This smart client application offers:

- Role based configuration
- Elegant user interface
- Map-centric approach
- Store and forward capabilities for on or offline work
- Routing with driving directions
- Reporting from the field
- Broadcast messaging and e-mail communications

Exhibit 47: Accela's Mobile Office app offers an easy-to-use, touch-enabled interface for field staff to manage their daily tasks.

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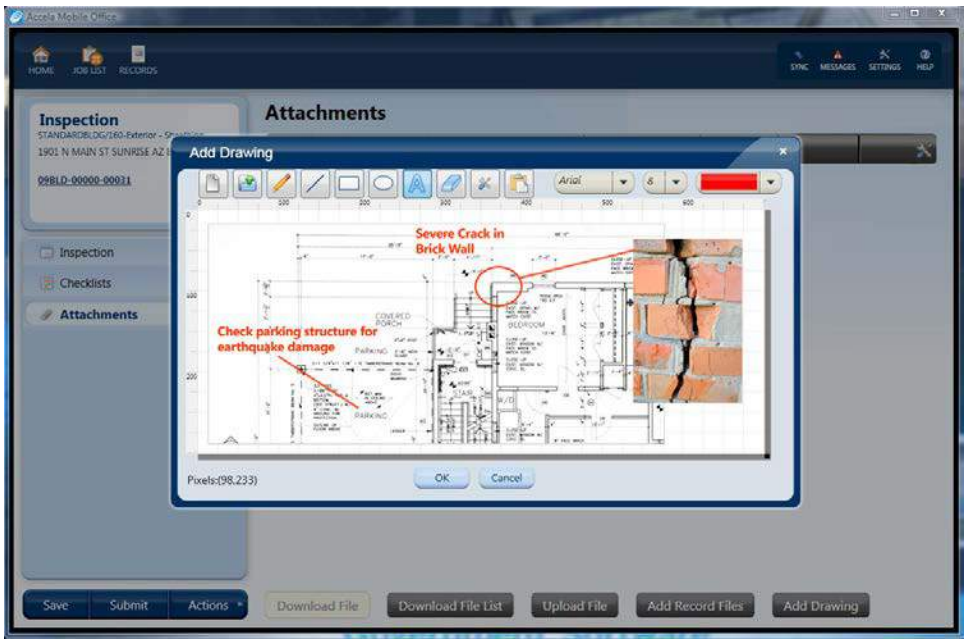

Exhibit 48: Accela Mobile Office app's drawing tool allows field teams to add real-time images and comments to their records.

Mobile Office features, bring field personal complete access to all transaction data, including record histories. Electronic documents, including sketches and digital photos, may be attached to permit and/or inspection records. The field user must have the software that created the document in order to open and view the document (e.g., MS Word to open/view Word documents).

Exhibit 49: Document management via Mobile Office app

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See how the Mobile Office app empowers field inspectors to improve their output at https://vimeo.com/102340190

Once permits and/or inspections are documented via Mobile office app, they are immediately available across the enterprise. Based on the workflow configuration, results can automatically trigger alerts, send email notifications, and generate reports, letters, and other notices. Data synchronization takes place automatically from the Mobile-enabled device and the back office service providing connectivity is present. When connectivity is not present, the solution will automatically save the recorded information and transmit it to the server when connectivity is restored or becomes available. This process is transparent to the end user and no specific or special actions by the field user are necessary.

Mobile Office app's capabilities also provide a feature for scheduling the synchronization of permits, solution data, and saved searches with the Mobile-enabled server. Users can configure synchronizations to occur at a variety of time intervals, such as upon initial login or at specific times of the day. For example, system administrators can configure the inspection synchronization to occur upon initial login to the Mobile Office app as well as at noon each weekday. Additionally, system administrators can define additional inspection search options, such as only downloading new inspections, to avoid duplicate inspections on a user's local device.

When used with Accela's GIS capabilities, field operations are further enhanced enabling a fully mobile GIS solution. Mobile Office app users have access to Bing Maps and ArcGIS Online maps and data. Further, they can edit GIS data, view complete parcel and activity histories, initiate new activities from the map interface, and optimize work routes all from their mobile devices. Accela's GIS capabilities are also extended to Accela's mobile solution, and are available whether or not the user is connected to the network.

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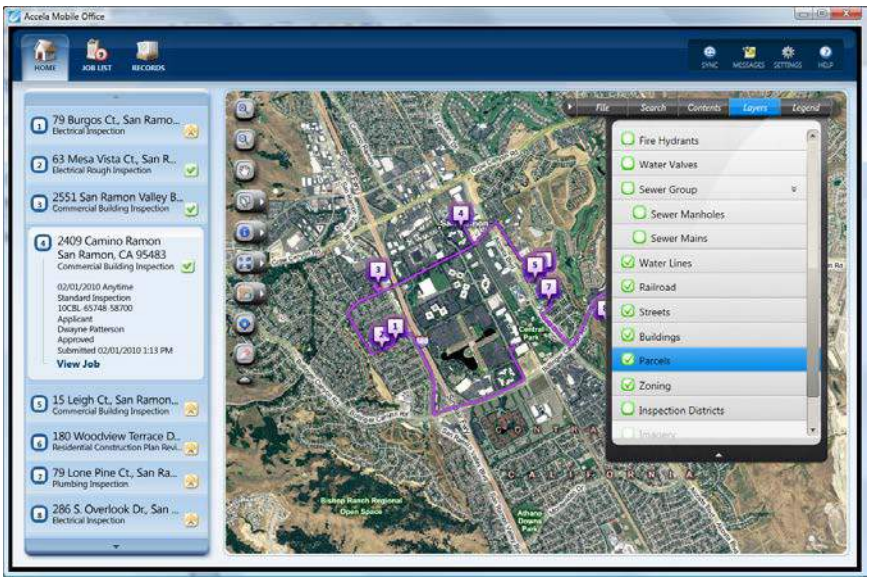

Exhibit 50: Built-in routing capability displays the shortest distance between work assignments, allowing mobile teams to plan and modify their routes throughout the day for maximum efficiency in time and fuel.

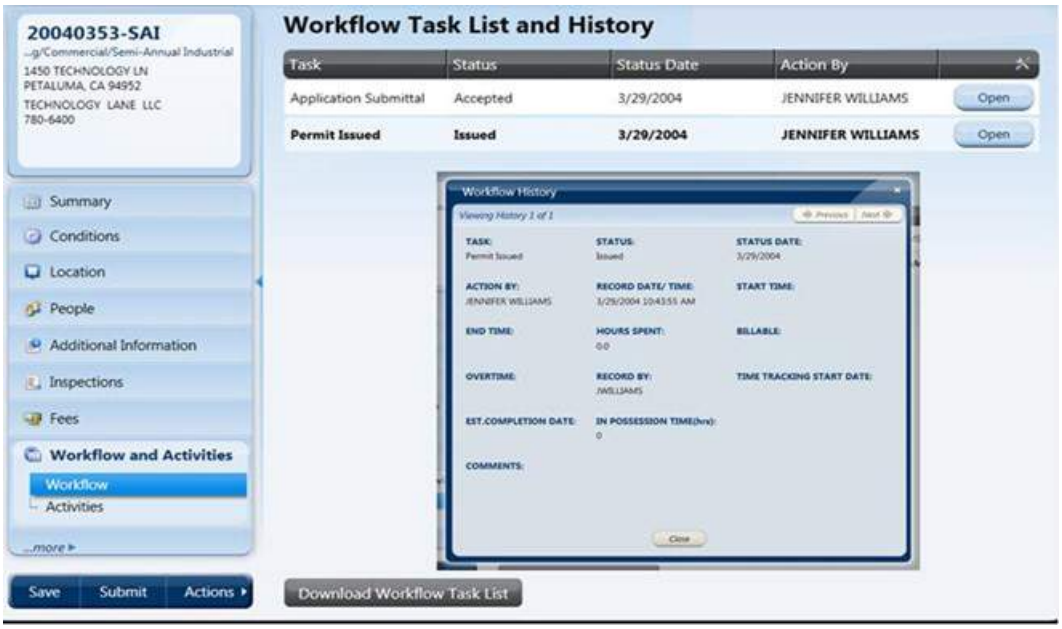

Exhibit 51: Field/mobile users can view record workflow tasks and history

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Exhibit 52: Government's Mobile Challenges and the Benefits of Mobile Office

Mobile Challenges	Benefits of Mobile Office
Reduced staff	Reduced travel time/costs
Large geographic region	Eliminate office time
Dispersed job locations	Optimized routing of tasks
Need geospatial information	Electronic maps
Need documents and photos	Upload documents and images
Not 100% connectivity	Store and forward capability
Generate and print reports	Print and email reports
Remote access to data	Virtual reporting
Quickly analyze information	Charts, Graphs, and Maps

The Mobile Office app supports *portable printers* by USB, Wi-Fi or Bluetooth connection from the laptop or tablet to the printer and uses the standard Windows print utility function like other applications. *Bar code scanners* can be used in the app to capture the asset ID. Users place the cursor in the ID field and use the onboard bar code scanner on the device.

Mobile Office runs on a wide variety of platforms including Windows 7 and Windows 8, and is optimized for touch screen devices, making it compatible with many mobile devices including smartphones, Tablet PCs and laptops. It is the only mobile office solution in the industry that is Intel and Cisco certified for data optimization from field to back office.

Mobile Office has full online and offline functionality, and can operate independently of an internet connection. It can operate in wireless environments, transmitting field information and data in real-time (connectivity dependent). Alternatively, while offline, it operates in a store and forward mode where data captured is uploaded upon reconnection to a wireless network or upon return to the office.

Without wireless connectivity, agency field staff using Mobile Office can download all necessary information needed to complete their day's activities, perform their work and data collection through the day and then return to the office or to another location with connectivity to upload their collected data to the Civic Platform. With full connectivity available, staff using mobile devices have access to all required information and documents real-time directly from the server.

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All information input into the solution by the staff person will be automatically sent and saved in the Civic Platform. In instances where connectivity is temporarily lost or becomes unavailable, the solution will save all input information and automatically synchronize the data since the last transmission to the Civic Platform. This process is transparent to the end user and no specific or special actions by the field user are necessary. Field personnel can continue to work even if network connectivity is lost, and synchronize their work when connection is re-established.

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4 Response to Functional Requirements

4.1 Response Key

Please input the corresponding letter of the available response codes for each requirement. Where indicated by all response codes other than "Y", the Vendor should insert text statements into the corresponding requirement column. Unanswered requirements or requirements with multiple response codes will be scored as "N" (Not Available).
All items marked with response codes of "C", "I" and "T" also require pricing to be indicated on the pricing forms. Comments provided to requirements herein shall not indicate any pricing.

Response Code	Definition
Y	This requirement exists in the Accela Civic Platform and is satisfied out-of-the-box or met through minor configuration performed during the implementation. Please see corresponding optional Comment for details.
C	This requirement mandates customization of the source code of the system. Customization may involve additional pricing to satisfy the requirement. Please see corresponding optional Comment for details.
I	This requirement requires an interface to Accela's Civic Platform at an additional cost. Please see corresponding optional Comment for details.
T	This requirement or portions thereof are satisfied through third party systems. Please see corresponding optional Comment for details.
R	This requirement is met through the Accela Civic Platform's Report Manager/ad-hoc report writer or via one of three industry-standard report writers (Crystal, Oracle, SSRS). Please see corresponding optional Comment for details.
N	This requirement cannot be met by the system or is not applicable. Please see corresponding optional Comment for details.

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4.2 General Specifications

General Specifications			
#	Requirement	Response Code	Comment
GEN-1	System generates date/time stamping of transactions.	Y	
GEN-2	System generates letters, reports and notifications automatically and email to recipients.	Y	
GEN-3	System has built-in spell check for all comment boxes.	Y	
GEN-4	System allows an administrator to configure the dictionary within the system that drives the spell check functionality.	Y	
GEN-5	System employs customized fields and/or pull down lists to facilitate data entry.	Y	
GEN-6	System has its own set of tools to allow agency staff to modify the system as needed without having to call upon the vendor or outside technical resources.	Y	
GEN-7	System seamlessly integrates with similar data in other vendor modules.	Y	
GEN-8	System displays only those modules and pull-down menus that the user is authorized to access.	Y	
GEN-9	System allows a system administrator to inactivate or reactivate a user's permissions at any time.	Y	

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General Specifications

#	Requirement	Response Code	Comment
GEN-10	System logs off an inactive user after a specified period of time, determined and controlled by the system administrator.	Y	
GEN-11	Staff overrides designated workflow tasks at any time providing they have the necessary capabilities based on user control tables.	Y	
GEN-12	System has available security that can be applied to end users for checking and marking documents related to electronic document review.	Y	
GEN-13	System provides easy access to documents by supporting hyperlinks to these documents.	Y	
GEN-14	System makes status information available 24/7 via the Internet to interested parties within government agencies and the public.	Y	
GEN-15	System selects standard information from pull down lists to simplify data entry and provides the ability to input standard comments, such as inspection results.	Y	
GEN-16	System allows the initiation and potential completion of an application or case when a specific address is not available or required.	Y	
GEN-17	System allows the user to define case types with a user-defined sequence of tasks and case data for each type.	Y	
GEN-18	System allows for the creation of a system-generated and unique project number and project name for each permit, license or other	Y	

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General Specifications

#	Requirement	Response Code	Comment
	case type under which other activities may be associated.		
GEN-19	System displays historical information about each case, project or other record type and viewable by authorized staff.	Y	
GEN-20	System maintains, sorts, searches, retrieves, and reports on key information about property, including Parcel ID.	Y	Reporting capabilities fulfilled by employing the Ad Hoc Report Writer or any one of the supported and seamlessly integrated Reporting Engines (Crystal Reports, MS Reporting Services, or Oracle Reports).
GEN-21	System provides convenient service and accurate information retrieval to the public via remote on-line access. Specify how this is accomplished.	Y	Applicants, contractors, citizens and others can access the online web portal of the Civic Platform (Citizen Portal) 7/24/365 to perform a myriad of tasks and activities including submission of applications, viewing application status, making payments, requesting information, downloading available documents, reviewing inspection results, and more. Information provided on the web portal exists in real-time.
GEN-22	System allows multiple cases, projects and other records to be associated with a property or address.	Y	
GEN-23	System relates all pertinent information to a particular property - permits, liens, licenses, permits, enforcement actions, etc.	Y	All information is permanently recorded and available to authorized users for access and viewing at any time.
GEN-24	System re-assigns queued tasks from one staff member to another.	Y	

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General Specifications

#	Requirement	Response Code	Comment
GEN-25	System issues permits and licenses to businesses, facilities, activities and individuals.	Y	
GEN-26	System assigns multiple locations to one permit/license.	Y	
GEN-27	System tracks and accommodates approvals from various departments including date of approval, person approving, and comments.	Y	The login of the task owner is also provided as part of all completed Workflow tasks.
GEN-28	System reprints licensees, permits and other case-outputs on demand.	Y	
GEN-29	System workflow electronically routes and automatically notifies, via email, each reviewer on a queue that an approval for an application or renewal or other task is pending	Y	
GEN-30	System tracks the amount of time individuals or departments spend on each application and/or renewal in total and by appropriate subsets of activity.	Y	For more granular time entries, configuration can account for the input of total hours spent on any workflow task by any task owner.
GEN-31	System flags applications and renewals that have outstanding pre-defined issues.	Y	
GEN-32	System allows for internal and external notes associated with each customer file.	Y	
GEN-33	System emails renewal reminders to all applicants, licensees and others citizens who have upcoming expiration deadlines.	Y	
GEN-34	System complies with ADA Section 508 standards for end users with disabilities. Please describe your compliance.	Y	The Accela Civic Platform has been ADA compliant for many years offering what is now over 150 million people in the US its online availability through their local, county, or state

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General Specifications

#	Requirement	Response Code	Comment
			jurisdictions.
GEN-35	System displays content in multiple languages. State language availability.	Y	Citizen Access is available in English (U.S. and Australian), Spanish, Canadian French, Arabic, Traditional Chinese and Vietnamese language packs.
GEN-36	System offers agency hosted or vendor hosted applications.	Y	
GEN-37	System includes functional online help documentation for system users.	Y	
GEN-38	System includes context sensitive help that is displayed based on the location of the mouse or cursor.	Y	
GEN-39	System provides users with an integrated, consistent "look and feel" user interface to minimize training and administration.	Y	
GEN-40	System provides detailed and comprehensive user and administrative manuals and documentation.	Y	
GEN-41	System provides the ability for configuration of workflow by use of a drag and drop graphical tool.	Y	
GEN-42	The graphical workflow tool provides for previewing the workflow as a diagram and for employing fonts and colors to make the workflows more apparent and easy to read.	Y	
GEN-43	System has user configurable menus and	Y	

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General Specifications

#	Requirement	Response Code	Comment
	screens (by role or individual).		
GEN-44	System allows for custom home page definition per individual user preferences. Various components of the system can be viewed/accessed through the home page (based on user security privileges).	Y	
GEN-45	System allows for home pages to view and manage all assigned activities to that individual user (i.e. pending applications for review, pending inspections, permits requiring plan checks, etc.).	Y	
GEN-46	System has GUI appointment calendaring with multi-inspector schedule viewing, or seamlessly links to same	Y	
GEN-47	System allows managers to view all of their staffs work schedules and assigned activities.	Y	
GEN-48	System allows each department the ability to configure custom fields for each of the permit/license applications (min. of 20 custom fields per permit type).	Y	The solution allows for an unlimited number of user-defined fields to be created in order to capture all needed information relative to any type of application or case.
GEN-49	System allows owning departments to view status on all of their applications throughout the review process including but not limited to staff assigned, status of service level agreements, etc	Y	
GEN-50	Applicants can view pending applications for the status, additional step in the process and comments from reviewing departments.	Y	

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General Specifications

#	Requirement	Response Code	Comment
GEN-51	System attaches documents and photos on any case, action level, or parcel. System time stamps all such attachments. System also attaches address and parcel identifier to photos.	Y	All aspects of this requirement are met by the solution with the exception of the last item which is partially met in that photos are attached to records which are inherently tied to address/parcels.
GEN-52	System allows non-system documents and photos to be "attached" to addresses and other system records for easy viewing, including but not limited to MS Office application documents and files, .jpgs, .gifs, .pdf.,.txt,. rtf.,.bmp .	Y	
GEN-53	System allows users to attach photos to applications and letters.	Y	
GEN-54	System allows records and applications to be partially created and completed at a later time by initial creator or other authorized users. Incomplete records are not viewable by unauthorized users.	Y	
GEN-55	System provides for email or letter follow-up or status notifications to be made in batch for records and applications These batch processes can also automatically update records with new statuses, compliance dates, etc.	Y	
GEN-56	System allows the user to define escalation workflow rules based on definable work criteria.	Y	
GEN-57	System allows authorized user to assign one or more roles to a user and the geographic area(s) they work in (such as inspectors responsible for a certain district, zone, etc.).	Y	

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General Specifications

#	Requirement	Response Code	Comment
GEN-58	System allows specific fields to be editable and others to be non-editable.	Y	
GEN-59	System interface requires user confirmation for operations that result in the deletion of any system record, or function that was created by that user. Records should be marked as inactive and an audit trail should exist.	Y	
GEN-60	System provides for easily going back and forth to view, create or modify records from anywhere within system.	Y	
GEN-61	System interface allows the user to preempt activity on the system for another activity, with the ability to return to the original activity	Y	
GEN-62	System allows authorized users to create records on behalf of other users (such as office staff creating violation records for inspectors, office staff abating violation records for inspectors, etc.)	Y	
GEN-63	System provides for spellchecking of text entered by the user when creating or modifying records, letters, etc. Authorized users can create and modify words in spellchecker.	Y	
GEN-64	System can prohibit records from being created without valid Agency addresses.	Y	
GEN-65	System provides a method for easily identifying bottlenecks and problem areas throughout the permit lifecycle (application, construction inspection, close-out, certificate of occupancy),	Y	

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General Specifications

#	Requirement	Response Code	Comment
	as well as other lifecycles.		
GEN-66	System integrates with a GIS system to validate parcels, addresses, owners and zoning.	Y	Such integration is inherently and seamlessly provided by the Accela GIS component of the Civic Platform.
GEN-67	System defines minimum of 20 different geographic areas (minimum of 15 characters) of the Agency that have specific work requirements (i.e. code compliance, conservation districts)	Y	There are no limits posed by the solution with respect to the setting up of geographical areas.
GEN-68	System allows pending work assignments can easily and quickly display and print on a map. In addition to districts, mapping can be for all open or pending work or a specific record type, districts in division, and/or block or census tract(s) or defined polygon. Records past due (overdue) are plotted in different colors from other pending work.	Y	Accela Civic Platform will provide the ability to plot all work assignments to the GIS map, which can also be printed. Each user will have the ability to filter the records by various attributes that are displayed on the GIS map.
GEN-69	System automatically flags properties, and/or sends out advisory notification when ownership change information is received from the Agency's system.	Y	Enabled by system configuration.
GEN-70	System provides easy query of property related records by address, also-known-as address, street, taxkey, district(s), record #, owner name, contractor, etc. For those queries that would yield more than one record, user	Y	

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General Specifications

#	Requirement	Response Code	Comment
	additionally can choose to query by relevant date field ranges, and to sort by address and relevant date fields depending on type of record.		
GEN-71	System searches and displays all historical information recorded on a particular property (prior permits, complaints, periodics, code violations, use, description, etc.) This information shall be broken down by building, unit, etc.	Y	
GEN-72	System provides method for modifying inspector district boundaries and for moving records from one district to another, by criteria such as census tracts and blocks.	Y	The GIS map will provide agency staff, based on user role permissions, the ability to edit inspector district boundaries within the Accela Civic Platform. Users will also have the ability to manually change the inspection district.
GEN-73	System provides for authorized users to create report templates for inspection forms, contact letters, certificates, bills or any other form templates using any field in system.	R	
GEN-74	System accesses property ownership history from other data sources	Y	
GEN-75	System prints records (w/ attachments) for board reviews, etc.	Y	
GEN-76	System allows renewal dates for Special Use/Variance zoning appeals to be defined manually or calculated from a number of months.	Y	

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General Specifications

#	Requirement	Response Code	Comment
GEN-77	System tracks all activities concerning violations, permits, complaints and code enforcement. This includes inspections and attempted inspections; contacts with owners, contractors, landlords and tenants; letters; phone calls; emails, court enforcement, billing, etc. performed by inspectors and other employees. Reports can easily be generated which list all such activities in chronological order for any violation, permit, periodic, complaint and code enforcement record in system.	Y	
GEN-78	System supports association of inspection with an individual who may be different then the property owner. System has the ability to track information regarding licenses, inspections, and violation by operator and to review all establishments linked to an operator.	Y	
GEN-79	System tracks changes in operator and requires re-licensing and re-inspection when operations for an establishment change hands.	Y	
GEN-80	System exports all data in a format (access, excel, tab delimited, html, etc.) that can be imported and analyzed using statistical analysis software. System allows a user based on defined roles to specify fields and date ranges of data for export.	Y	

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General Specifications

#	Requirement	Response Code	Comment
GEN-81	System creates custom reports and adhoc queries by the user. Please specify how each type is accomplished.	Y	Custom reports can be generated from system data by authorized users employing the Ad Hoc Report Writer or any of the Reporting Engines. Queries can be enacted by any authorized user. Both aspects allow users to report and query on all fields in the solution.
GEN-82	System displays a minimum of 3 years of inspection history in real time for each type of inspection performed at a property.	Y	In actuality, Accela recommends that all system records be permanently retained as to provide the ability of City staff to access these records for research or reporting purposes. Closed or abandoned records can be given appropriate statuses to separate them from active records in the system.
GEN-83	System automatically schedules and re-inspects a property based on routine inspection results where violations were identified.	Y	
GEN-84	System transfers a license/permit to a new location without a change of ownership.	Y	
GEN-85	System edits/modifies out-of-compliance items and codes identified during an inspection.	Y	
GEN-86	System defines/codifies inspection results for each type of inspection.	Y	
GEN-87	System reports multiple violations for each element of an inspection.	Y	Multiple calls for the same apparent violation can also be accommodated per the City's business rules.
GEN-88	System supports management and tracking of approved variances for inspection elements.	Y	

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General Specifications

#	Requirement	Response Code	Comment
GEN-89	System simultaneously reviews and displays license/permit, inspection, and complaint data and results for a selected property.	Y	Once a selected property is selected/identified, all active and closed applications will be displayed allowing the end user to click on any one to view its details.
GEN-90	System provides a public web portal that displays inspection results based on user-provided search criteria.	Y	The online portal functionality noted plus much more exists on Citizen Portal - the online web portal of the Civic Platform.
GEN-91	System's batch functionality configures on a job-by-job basis to execute at any time during the day.	Y	Off hours batch processing is also supported.
GEN-92	System allows users to modify screen layouts to optimize a user's experience.	Y	
GEN-93	System views inspectors' availability, schedules inspections and reschedules/rearranges inspections all within a calendar interface in the back office.	Y	
GEN-94	System is offered in multiple foreign languages.	Y	Currently, English (U.S. and Australian) and Arabic are available for Agency Staff screens, AGIS and AMO. Citizen Access is available in English (U.S. and Australian), Spanish, Canadian French, Arabic, Traditional Chinese and Vietnamese language packs. Accela IVR is available in English and Spanish. Additional software language packs can be developed by Accela as a service and AIVR language packs can be recorded by the customer/Accela or by a partner as a service.

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4.3 Web Portal Specifications

Web Portal Specifications			
#	Requirement	Response Code	Comment
WEB-1	System provides a seamlessly integrated web portal for citizens, applicants and others.	Y	
WEB-2	System provides administration of the web portal from consoles within the back office product and does not require access to or editing of technical files on the web server (i.e. no requirement for CSS, HTML, ASPX, etc. skills)	Y	
WEB-3	System receives payments online by credit cards and e-checks.	Y	
WEB-4	System accepts forms filled online.	Y	
WEB-5	System accepts documents of any file type. (List any limitations or exclusions.)	Y	No limitations or exclusions. All types of documents and file types are supported unless otherwise restricted by the City.
WEB-6	System must not require a redirect of the online user to a third party merchant's site for payment processing.	Y	
WEB-7	System provides online ability to complete permits and other types of applications 24/7.	Y	
WEB-8	System displays key permit information online.	Y	
WEB-9	System schedules and reschedules inspections.	Y	
WEB-10	System accesses permit information and status updates online.	Y	
WEB-11	System allows public users to lodge complaints and to access code enforcement information	Y	

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Web Portal Specifications

#	Requirement	Response Code	Comment
	online, both named and anonymously.		
WEB-12	System accepts contractor license information online.	Y	
WEB-13	System obtains minor trade and sub permits online.	Y	
WEB-14	System allows customers to initiate applications online for further processing and validation by staff without re-entry of information.	Y	
WEB-15	System provides field-level help, watermarks, and directions for all data entry sections on the web portal to assist end users.	Y	
WEB-16	System allows public users to attach electronic documentation to complete application requirements.	Y	
WEB-17	System web application is PCI-DSS certified.	Y	
WEB-18	System allows applicants to view building violation comments.	Y	
WEB-19	System allows applicants to electronically view all related activities of a project, permit, license, enforcement, complaint or other record type.	Y	
WEB-20	System displays Holds, Conditions, and Notices that may exist on a project, permit, etc.	Y	
WEB-21	System allows applicants to request all required inspections that have been made available for them to schedule.	Y	

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Web Portal Specifications

#	Requirement	Response Code	Comment
WEB-22	System provides residents and business owners to report, review and research application and licensing information, including history, from inception to conclusion.	Y	
WEB-23	System requires users to register before making portal information available to them. (Except in the case of anonymous code enforcement requests.)	Y	Registration is optional and entirely at the discretion of the City.
WEB-24	System web portal accepts and links all supporting electronic documents associated with the application.	Y	
WEB-25	System calculates fees on the web portal so that applicants and others can estimate fees prior to the submission of an application.	Y	
WEB-26	System schedules, reschedules and cancels inspections on the web portal.	Y	
WEB-27	System allows for access to view inspection results and inspection comments on the web portal.	Y	
WEB-28	System allows access to renew business licenses and permits on the web portal.	Y	
WEB-29	System web portal has a "shopping cart" feature allowing citizens to make a single payment to include all fees due. This feature allows multiple transactions to be paid with a single payment.	Y	
WEB-30	System web portal allows users to access reference contacts of designated contact types	Y	

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Web Portal Specifications

#	Requirement	Response Code	Comment
	when making applications for permits, licenses and other record types.		
WEB-31	System web portal announcements can be posted to members of the public.	Y	
WEB-32	System allows applicants to save, resume and make changes to the application before submission.	Y	
WEB-33	Once the permit application, registration, or recording form has been submitted, the system calculates fees associated with information entered on the application, verifies a contractor is currently licensed, verifies the address is valid, accepts on-line payment, records payment in cash system, accepts electronic signature of customer, approve, deny or hold for staff review, and if approved, assigns permit number.	Y	
WEB-34	System provides on-line internet access to all public records, including permit, complaint, violation, recording, etc.	Y	
WEB-35	System web portal provides global search capabilities.	Y	The City has the ability to restrict record types from being searchable on the web portal, providing the agency with further ability to control their data.
WEB-36	System web portal allows users to search for a property and see all related records to that property (permits, plans, inspections, code cases, etc.) without having to go to individual	Y	

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Web Portal Specifications

#	Requirement	Response Code	Comment
	search screens to access each of those records.		

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4.4 Permitting, Planning, and Zoning Specifications

Permitting, Planning and Zoning Specifications			
#	Requirement	Response Code	Comment
PPZ-1	System issues and tracks multiple permits and cases associated with one location.	Y	
PPZ-2	System captures addresses and an unlimited amount of information regarding buildings, parcels, zoning and other land management data.	Y	
PPZ-3	System captures Legal Descriptions.	Y	
PPZ-4	System captures proposed project descriptions.	Y	
PPZ-5	System links or relates one or more developments together.	Y	
PPZ-6	System accepts applications and related documents in unlimited electronic formats as attachments to records.	Y	
PPZ-7	System allows the agency to determine the size and format of any document submitted through the web portal.	Y	
PPZ-8	System users can attach documents to applications by applicants and others through the web portal.	Y	
PPZ-9	System tracks an application's life cycle status (pending, accepted, revised, response letter, etc.).	Y	
PPZ-10	System automatically assigns a application prefix and number (case number) based on the type of request (e.g., unique prefix for each	Y	

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Permitting, Planning and Zoning Specifications

#	Requirement	Response Code	Comment
	type of case).		
PPZ-11	System checks and validates the property address and ownership against an internal or external database (including GIS if applicable).	Y	
PPZ-12	System provides logical and easily viewable association between master and any subsidiary permits or other unrelated case types.	Y	Viewing of the master permits or any of its associated permits or other case types will also allow the user to click and view all associated others in detail.
PPZ-13	System attaches multiple documents to the permit application or other case or record type.	Y	There is no limit posed by the system as to the number of attachments to a given case or record type.
PPZ-14	System clones a permit or other case type containing information to create subsequent and similar permits/cases.	Y	All or selected information may be "cloned" to form one or more new and similar permits or cases.
PPZ-15	System provides connectivity to the Texas Department of Licensing and Regulation database to ensure accurate and timely updates on contractors' licensure.	I	Accela will develop an interface to the listed State of Texas database to enable the needed intercommunication between the solution and that licensing database.
PPZ-16	System allows staff to conduct the electronic review of submitted documents (plans, etc.) with redline capabilities and employing side-by-side viewing of documents.	Y	Redlining and related functionality provided by the Electronic Plan Review feature of the solution.
PPZ-17	For the electronic document review functionality, the system assigns documents outside of the workflow, to filter and categorize documents and to view the history of all reviews and comments.	Y	

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Permitting, Planning and Zoning Specifications

#	Requirement	Response Code	Comment
PPZ-18	The functionality of electronic document review provides for side-by-side and overlay comparison capabilities.	Y	
PPZ-19	The electronic document review ability extends to allowing documents to be directed to reviewers that exist outside of the configured workflow.	Y	
PPZ-20	System determines and tracks plan review steps and department comments based on permits or other application types.	Y	
PPZ-21	System electronically routes permits and cases for review, approval and inspection management.	Y	
PPZ-22	Partial address information may be employed to locate an address from the land management repository (either internal or external).	Y	
PPZ-23	System allows concurrent plan review by multiple departments and outside agencies and to allows them to input plan review results and comments.	Y	
PPZ-24	System allows selected standard plan review comments to be modified. Modifications will only be applicable for that particular occurrence.	Y	
PPZ-25	System allows the user to add non-standard plan review comments or copy/paste from other external outside sources (i.e., Word, SharePoint, Internet, etc.).	Y	

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Permitting, Planning and Zoning Specifications

#	Requirement	Response Code	Comment
PPZ-26	System tracks the location of plans in the review pipeline.	Y	
PPZ-27	System allows administrative rights to edit, move, delete and add any file or folder to the electronic plan review system.	Y	Accela Civic Platform allows for administrators and other users based on user role permissions to add, edit, move and delete electronic plan review files.
PPZ-28	System's electronic plan review electronically compares any two sheets of plans and notate the differences between the two sheets.	Y	
PPZ-29	System records and retains parcel parentage and genealogy data. Allows information from parent parcel to be carried forward to parcels created from parent.	Y	
PPZ-30	System links or unlinks or relates individual records together to create parent/child and/or master/subordinate relationships.	Y	
PPZ-31	System attaches sets of conditions to a record based on record type.	Y	
PPZ-32	System supports resubmissions of documents by parent/child relationships.	Y	
PPZ-33	System uploads multiple documents simultaneously.	Y	
PPZ-34	System can alert applicants and others that a document is available for review.	Y	
PPZ-35	System tracks changes made to conditions of approval in its audit log.	Y	
PPZ-36	System provides for permit corrections to trigger approvals or distribution re-routing to	Y	

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Permitting, Planning and Zoning Specifications

#	Requirement	Response Code	Comment
	applicable departments.		
PPZ-37	System logs revised submissions and notifies reviewers that changes have been	Y	
PPZ-38	System allows for the reviewer to manually place holds or notes into the record that are not visible to the customer.	Y	
PPZ-39	System creates the permit and calculates fees when plan review is complete and can include selected comments and conditions from reviewers.	Y	
PPZ-40	System allows for online credit card payment and as payment is received, permit number and transaction information (time and date of payment, amount of payment, permit type and transaction number) is recorded on the permit copy. Permit is made available to the system in real time.	Y	The permit exists as a report template generated from the Reporting Engines typically.
PPZ-41	Cashier system records all payment transactions, and allow records to be exported in common format (.CLS, .XLS, etc.)	Y	
PPZ-42	Authorized staff can add permanent annotations to the permit record. Examples of this include address changes or revised occupancy application information.	Y	
PPZ-43	System allows for corrections to final records, such as change of address.	Y	

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Permitting, Planning and Zoning Specifications

#	Requirement	Response Code	Comment
PPZ-44	System generates real-time information that allows applicants and customers and staff to check the status of a plan review via a web portal using a unique user ID.	Y	
PPZ-45	System manages electronic plans submitted.	Y	
PPZ-46	System allows viewing and printing of the attached documents/plans on an application.	Y	Viewing is enabled in the native format of the document while printing is dependent on the capabilities of the designated printer.
PPZ-47	System allows reviewers to make changes to attached documents/plans supporting the corresponding application and track such changes.	Y	
PPZ-48	System allows modification of format, conditions, and notes on applications and records.	Y	Many of these changes will be subject to provisions of the System Audit Trail for accountability and transparency to the City's business operations.
PPZ-49	System deals with multiple contractors and application types for each trade on each project.	Y	
PPZ-50	System separately tracks multiple projects or programs and their associated permits, inspection activity, orders, etc. that exist at the same property address or other identifier.	Y	
PPZ-51	System allows the owning department to assign inspectors to specific records or applications.	Y	
PPZ-52	System allows for certain applications to be issued without a valid street address (ex. permits in the right of way).	Y	

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Permitting, Planning and Zoning Specifications

#	Requirement	Response Code	Comment
PPZ-53	System allows the applicant to identify their preferred medium of communication throughout the process (e-mail, fax, hard copy via mail).	Y	
PPZ-54	System issues and tracks partial, temporary and provisional certificates of occupancy.	Y	
PPZ-55	Owning departments can modify the default routing list for an individual permit as conditions require.	Y	
PPZ-56	System allows the real time routing list to be defined to include outside agencies not affiliated with the Agency.	Y	
PPZ-57	System automatically routes the assigned application to all identified departments once the application has been authorized by the owning department.	Y	
PPZ-58	System allows specific activities to commence simultaneously without hindering the permitting process.	Y	
PPZ-59	Once a permit application is complete all users can view the permit application and supporting documents according to their assigned roles and privileges.	Y	
PPZ-60	Owning departments can define what information is required for each of their corresponding permit applications.	Y	
PPZ-61	Owning department can define the business rules/workflow to be followed for their	Y	

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Permitting, Planning and Zoning Specifications

#	Requirement	Response Code	Comment
	permit/license workflows (time constraints, sign-offs, reviewers, required documentation, fees, forms, etc.).		
PPZ-62	System manages an electronic submission of drawings and review of such electronic files.	Y	
PPZ-63	System utilizes the criteria defined during creation of a record to determine approval process/requirements in its workflow element. This will include department and agency approval responsibilities.	Y	
PPZ-64	System notifies the owning department by automatically posting to the specified user's To Do List when a time sensitive event occurs (i.e. state statute mandated requirement to record a document is approaching).	Y	
PPZ-65	System tracks and processes application fees.	Y	
PPZ-66	System views and prints the attached documents/plans supporting the corresponding application.	Y	All such documents can be viewed in their native formats.
PPZ-67	System allows reviewers to make changes to attached documents/plans supporting the corresponding application and track such changes.	Y	
PPZ-68	Owning department can create their own unique workflow process for the review and approval of their specific record types.	Y	
PPZ-69	System links companion files to one another. For example, a project requires a zoning	Y	

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Permitting, Planning and Zoning Specifications			
#	Requirement	Response Code	Comment
	change, vacation, and land division. All three records should be linked together.		

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4.5 Inspections Specifications

Inspections Specifications			
#	Requirement	Response Code	Comment
INS-1	System schedules online inspections through the web portal and through the back end system.	Y	
INS-2	System displays inspection route to staff personnel in the office and in the field and offer inspectors the ability to change their planned routes during the day.	Y	
INS-3	System provides a calendar for scheduling daily inspections that can be queried and included in reports.	Y	
INS-4	System defines inspection checklists by specific permit type and inspection item.	Y	
INS-5	System allows inspectors to enter inspection results in the field and reference applicable codes to append comments and specific details or documents (e.g., photographs).	Y	
INS-6	System provides daily schedules for inspections and supports schedule modifications by authorized parties.	Y	
INS-7	System allows applicants to request all required inspections through the web portal that have been made available for them to schedule.	Y	

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Inspections Specifications

#	Requirement	Response Code	Comment
INS-8	System tracks inspection data and ensure accountability of staff. Specify how this is accomplished.	Y	All necessary and supplementary data can be entered into Accela Mobile, the field component of the Civic Platform. The City has the option of employing Mobile under both a wireless-supported environment or one in which inspectors return to their home/office to download data into the central server. Mobile, like other components of the Civic Platform, is governed by assigned rights and privileges that safeguard who can access the system and for what reasons. All data entered via Mobile is subject to the System Audit Trail ensuring full accountability and transparency to the City's field operations.
INS-9	System obtains signatures while on inspection (signature pad).	Y	
INS-10	System configures inspection Checklists for each type of inspection.	Y	
INS-11	System Checklists (e.g. Punch List) track agency-definable status such as Partial Pass, N/A, Pass, Fail, etc.	Y	
INS-12	System allows for the standard inspection comments/violation codes to be modified and all such modifications will only be applicable for that specific occurrence.	Y	
INS-13	System allows the authorized user to add non-standard inspection comments/violation codes.	Y	
INS-14	System schedules, reschedules and cancels inspections on the web portal.	Y	

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Inspections Specifications

#	Requirement	Response Code	Comment
INS-15	System allows for access to view inspection results and inspection comments on the web portal.	Y	
INS-16	System generates historical views of previous Checklists allowing for the comparison of current results and scores.	Y	
INS-17	System displays selected inspection comments to the field and/or to the public through the web portal.	Y	
INS-18	System defines required inspections by type of permit and complexity.	Y	
INS-19	System schedules re-inspections based on a designated due date.	Y	
INS-20	System schedules a temporary certificate of occupancy re-inspection based on an expiration date.	Y	
INS-21	System allows for manual override or rescheduling of automated inspection requests, with provisions of automated notification to the inspector, permittee, owner, and electronic record.	Y	
INS-22	System allows field personnel to schedule an inspection from the field.	Y	
INS-23	System notifies the owner, permittee and supervisor if a field inspector cancels a scheduled inspection.	Y	
INS-24	System provides access to the agency codes/ordinances in electronic format.	Y	

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Inspections Specifications

#	Requirement	Response Code	Comment
INS-25	System tracks all permit status changes and record them in an audit log.	Y	
INS-26	System generates a reminder list of upcoming inspections based on due dates.	Y	Inspections scheduled in the Civic Platform can provide a list of upcoming inspections based on their due (scheduled) dates.
INS-27	System supports periodic fire inspections of all commercial and multifamily structures.	Y	
INS-28	System accommodates different field and workflow requirements for each type of periodic inspection.	Y	
INS-29	System fees are calculated based on prescribed tables and formulas.	Y	
INS-30	System allow inspection requests to be auto-forwarded to outside partner agencies. (Electric, water, natural gas, etc.)	Y	

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4.6 Code Enforcement Specifications

Code Enforcement Specifications			
#	Requirement	Response Code	Comment
CE-1	System tracks inspections and violation data with its user audit trail.	Y	
CE-2	System tracks code complaints from complaint inception to conclusion, including liens and the ability to generate ad hoc reports necessary to identify trends, report on objectives, and monitor workload measures.	Y	
CE-3	System provides residents and business owners with the ability to report, review and research property information, including complaints and complaint history, from inception to conclusion, including a record of any code compliance liens and cases by property.	Y	
CE-4	System creates, alerts and maintains the need for annual fire inspections.	Y	
CE-5	System creates and maintain unique code cases specific to distinct types of violations and infractions.	Y	
CE-6	System tracks all enforcement remediation related activities, such as lot clearing, graffiti, etc. in the case that such efforts will be invoiced to property owners.	Y	
CE-7	System supports issuance of violations in the field by inspection staff.	Y	If such Notices are printed, portable printers (not included) needed.

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Code Enforcement Specifications

#	Requirement	Response Code	Comment
CE-8	System allows inspectors in the field to record, enter inspection, and research data into a case with minimal manual input.	Y	
CE-9	System researches property and owner information to complete inspections and issue violations.	Y	
CE-10	System identifies violations by parcel and address if applicable.	Y	
CE-11	System automatically tracks each case, calendar each step in the process and alerting officers, when needed, for key steps until case is closed/resolved.	Y	
CE-12	System automatically engages a lien process if a fine is not paid within a specific timeframe.	Y	
CE-13	System creates and maintains unique code cases specific to distinct types of violations and infractions.	Y	
CE-14	System tracks all aspects of liens including collections, tasks, hearings, court cases, outcomes, etc.	Y	
CE-15	System allows inspectors and other field users to search prior premised history on property with code violations and to use GIS mapping for display of such violations if desired.	Y	
CE-16	System restricts access to the complainant information based on user login and security settings.	Y	

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Code Enforcement Specifications

#	Requirement	Response Code	Comment
CE-17	System automatically routes all web portal registered complaints/possible code violations to the appropriate department or individual based on the type of complaint.	Y	
CE-18	System provides for online complaint submissions to be system-assigned a complaint number, auto-acknowledgement, and ticklers for follow-up.	Y	
CE-19	System allows a pre-identified list of users to request inspections on specific properties (i.e. customer service, city council members, etc.). List can have 'hidden' pre-defined priority codes assigned to their requests.	Y	Security will allow only people in specific roles to request inspections on properties. Hidden codes can be included since the fields can be disabled from view, also based on role.
CE-20	System enables authorized supervisors to reassign work to other staff and to track those assignments under an audit trail.	Y	
CE-21	Security provides management team access to all complaints for review, updates and (re)assignment.	Y	
CE-22	System generates inspection requests by type of buildings (such as vacant buildings) on a predefined schedule.	Y	
CE-23	System tracks and assigns actions to external agency vendors for example grass cutting, trash removal, inoperative vehicle removal, building boarding, building demolition. System tracks task assignment, completion, invoicing and lien assignment.	Y	

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Code Enforcement Specifications

#	Requirement	Response Code	Comment
CE-24	System tracks all activities associated with Agency demolition of structures on private property. Activities include raze files and orders, utility cutoffs, contracting bid process, contract award, monitoring of the demolition, and the verification and signoff of the work performed by the contractors to demolish the building and reseed the property.	Y	Each of the listed components of this requirement can be configured in the Civic Platform. However, those aspects related to "contracting bid processes and contract award" are typically not incorporated.
CE-25	System allows for code complaints to be submitted by residents anonymously via the internet.	Y	
CE-26	System allows for code enforcement officers to attach photos and other documents to a case ticket.	Y	
CE-27	System provides calendar reminders to support the re-inspection of open tickets.	Y	
CE-28	System allows for unlimited updates to current and past enforcement tickets.	Y	

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4.7 Mobile Specifications

Mobile Specifications			
#	Requirement	Response Code	Comment
MA-1	System provides a seamlessly integrated application specifically designed for inspections and other field-related duties.	Y	
MA-2	Mobile app supported by wireless connectivity to the Internet and those where system data can be saved to the field device for downloading upon return to the office.	Y	Accela's mobile ecosystem of products capable of running on Apple iOS, Android and Windows phones, tables and other devices. The mobile products provide the ability to conduct work in the field disconnected using store-and-forward capabilities, automatically syncing changes and updates made to records. In addition, the mobile ecosystem applications allow the user to download all data -- record information as well as documents and files -- to ensure fields staff has access to critical documents and files.
MA-3	Mobile app is compatible with iOS, Android and Windows platforms for mobile devices (e.g., smartphones, tablets)	Y	
MA-4	Mobile app is easily accessible from the mobile's corresponding app store and a link from the agency's website.	Y	
MA-5	Mobile app provide a method of attaching to the record, electronic image(s) from the mobile device's camera or from an existing library of images.	Y	
MA-6	Mobile app are map-based and utilize location-aware technology. Requestor must be able to	Y	

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Mobile Specifications

#	Requirement	Response Code	Comment
	make more precise adjustments or enter a street address for more accurate location reporting.		
MA-7	Mobile app enters the inspection disposition in the field and update system data in real time.	Y	
MA-8	Mobile app prints documentation in the field.	Y	Use of portable printers required.
MA-9	Mobile app researches information such as prior inspections from field devices.	Y	
MA-10	Mobile app displays all the inspections related to a permit or other case type in the field.	Y	

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Mobile Specifications

#	Requirement	Response Code	Comment
MA-11	Mobile app interfaces with handheld devices and laptop computers to upload and download information for daily inspections. Specify all supported platforms.	Y	**Host Machine Requirements** ***Accela Mobile Office (client)***: Processor - Intel Pentium or Intel Centrino dual core processor; RAM 4 GB; Hard Drive: 40 GB Network: Wireless card (not necessary if AMO client use is offline/store and forward mode); Devices tested: Motion Computing J3500, Motion Computing F5v, Panasonic Toughbook CF-19 and H1; Dell E6400 XFR, Asus Eee Slate EP121, Surface Pro, Panasonic Toughpad FZG1; *Accela Code Officer / Accela Inspector / Accela Work Crew* **iOS Device**: iPhone 5s (with iOS 7.0.5), iPad mini (with iOS 6.1), iPad mini 2 (with iOS 7.0.4) or iPad 2 (with iOS 7.1.0) **- Android Device**: Nexus 4 (with Android 4.3), Nexus 7 (with Android 4.3), Samsung S3 (with Android 4.1.1) or Samsung Galaxy Note 10.1 (with Android 4.3)
MA-12	Mobile app provides GIS in the field for assisting in accomplishing field research and inspections.	Y	
MA-13	Mobile app provides access to maps and related property information through a map service while in the field.	Y	
MA-14	Mobile app captures time and mileage to be	Y	Such entries are not automatic and must be

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Mobile Specifications

#	Requirement	Response Code	Comment
	associated to a department or budget.		input by the field user.
MA-15	Mobile app allows users full access to all relevant information for their assigned permits or applications.	Y	
MA-16	Mobile app allows users to enter notes and report any code violations that may be identified during an inspection.	Y	
MA-17	Mobile app electronically links external sources of information, including passing a parcel identifier, x-y coordinate or other information needed to look up and supply information relative to the location or characteristics of the suspected violation.	Y	Accela's mobile Code Officer application will utilize the City's GIS data to provide field staff direct access to parcel, address and other relevant data to ensure suspected violations are associated to geospatial locations.
MA-18	Mobile app allows users to schedule follow-up appointments.	Y	
MA-19	Mobile app synchronizes with the core system through wireless connectivity.	Y	
MA-20	Mobile app stores entered data when connections are lost and, seamlessly connect and reconnect wireless network coverage is available automatically.	Y	
MA-21	Mobile app supports seamless roaming between broadband networks; agency owned wireless hot spots, and other agency network facilities.	Y	
MA-22	Mobile app has predefined and modifiable Checklists based on the inspection and/or complaint type.	Y	
MA-23	Mobile app starts a record (permit, complaint,	Y	

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Mobile Specifications			
#	Requirement	Response Code	Comment
	etc.) in the field in the online or offline mode.		
MA-24	Mobile solution stores both photos and videos.	Y	

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4.8 GIS Specifications

GIS Specifications			
#	Requirement	Response Code	Comment
GIS-1	System supports ESRI ArcGIS platforms	Y	
GIS-2	System connects to the ArcGIS Server to get GIS information and verifies this information using the GIS addressing system.	Y	
GIS-3	System displays GIS and select property in lieu of entering an address.	Y	
GIS-4	System queries using ESRI GIS tools.	Y	
GIS-5	System uses GIS browsing that will pinpoint location of permits, cases, etc. by number, address, owner name, and/or parcel number.	Y	
GIS-6	System can display GIS information on an embedded web map (e.g. Agency's map services, ArcGIS Online basemaps, etc.)	Y	
GIS-7	System initiates an activity in the system from GIS Base Map (e.g., permit application, planning application, open a code case, schedule inspection, etc.)	Y	
GIS-8	System turns GIS layers on and off. System allows user control of layers.	Y	
GIS-9	System launches the GIS tool within the application.	Y	
GIS-10	System launches the GIS tool standalone.	N	This requirement is not currently available in the solution.

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GIS Specifications

#	Requirement	Response Code	Comment
GIS-11	System selects and performs actions on properties geospatially, one or many, through a map screen (go from map to property/parcel) using tools for various types of selection, e.g., point and click, multi-select, etc.	Y	
GIS-12	System displays selected properties geospatially on a map (go from property/parcel to the map).	Y	
GIS-13	System shows all addresses associated with a parcel or multiple parcels.	Y	
GIS-14	System shows permit records organized by individual address within that parcel/parcels.	Y	
GIS-15	System identifies records pertaining to site-related work (property record) separately from building-related work (GIS coordinates), i.e. permits for flagpoles or driveways - not associated with a building address.	Y	
GIS-16	System imports information from the Agency's GIS RDBMS database automatically, e.g., permit setup, and manually, e.g., staff search and import.	Y	With Accela's Civic Platform there's no need to import any GIS parcel, address point or other layer's data. The Civic Platform will integrate to the City's ArcGIS map services to provide a real-time direct link to (something about populating fields, proximity alerts, etc.) . Through the GIS Map in Civic Platform, City staff will have the ability to manually search the GIS layers (for buffering, etc.).
GIS-17	System automatically updates addresses based on updated information in external data sources.	Y	

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GIS Specifications			
#	Requirement	Response Code	Comment
GIS-18	System has no limit to the number of layers allowed for viewing within the web portal.	Y	

4.9 Financial Transaction Specifications

Financial Transaction Specifications			
#	Requirement	Response Code	Comment
FIN-1	System provides effective dating of all financial transactions completed in the system including an audit trail tracking all financial actions including modifications to financial elements and data.	Y	
FIN-2	System loads, tests, and stores revised fee schedules to be implemented in the future.	Y	
FIN-3	System directly links payments received to the Agency's financial system.	Y	Dependent on the existence of an interface between both systems planned as part of the proposed implementation.
FIN-4	System provides integration with Sungard HTE/NaviLine so as to update financial records in real-time as transactions take place.	Y	Enabled by the planned interface.
FIN-5	System handles all transactions involving bonds and bond refunds and to relate them to permits and other types of applications.	Y	
FIN-6	System calculates fines and interest.	Y	

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Financial Transaction Specifications

#	Requirement	Response Code	Comment
FIN-7	System can reverse a transaction and all related allocations and record this action permanently as part of the system audit trail.	Y	
FIN-8	System tracks and automatically calculates all fees related to the permitting, planning, zoning, licensing and enforcement processes at any point dictated by the business rules.	Y	
FIN-9	System calculates fees based on configured fields.	Y	
FIN-10	System generates invoices by any combination of the following criteria: use, square footage, number of seats, number of beds, number of units, number of X, etc.	Y	
FIN-11	System automatically determines fees from codes based on business rules defined by the code ordinances.	Y	The Civic Platform will calculate and compute fees based on the fee codes, fee schedules and code ordinances established by the City.
FIN-12	System tracks all transaction history (renewals, bills, payments, penalties, late fees, etc.) associated with a business/individual.	Y	
FIN-13	System provides receipts as part of the payment process in real time.	Y	Receipts represent configurable report templates.
FIN-14	System allows authorized users to waive and void permitting and other fees and have all such changes reflected as part of the system audit trail.	Y	
FIN-15	System tracks and accounts for all current and historical financial related transactions collected through the system.	Y	

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Financial Transaction Specifications			
#	Requirement	Response Code	Comment
FIN-16	System is PCI-DSS certified for financial transactions.	Y	

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4.10 Reporting

Reporting			
#	Requirement	Response Code	Comment
REP-1	System must have seamless integration with one of three industry-standard report writers (Cognos, Crystal, and SSRS).	Y	While Cognos is not supported, the solution has seamless integration with Crystal Reports, SSRS and Oracle Reports.
REP-2	System provides an ad hoc reporting tool to enable non-technical users to quickly and easily create, generate, display and print basic reports from the application software with built-in charts/graphs and deep links to the record directly in the system.	Y	
REP-3	System users can save and edit the current query or current report settings once a report has been built.	Y	
REP-4	System saves reports built with the report module for future printing. Access to that repository can be determined by system administrators.	Y	Within the system all reports are saved in the Document Repository for future printing. There is no report module per se, however.
REP-5	System directs report output to a specific printer or file, or to a screen.	Y	
REP-6	System exports output in formats that can be further manipulated by multiple third party applications such as PDF, Excel, Word, or MS Access.	Y	
REP-7	Reports can be generated from all system data fields as needed.	Y	
REP-8	System customizes reports, letters, correspondence and other printed outputs	Y	

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Reporting

#	Requirement	Response Code	Comment
	derived from the system database.		
REP-9	System prints letters as well as original or duplicate permits or permit cards.	Y	
REP-10	System provides a library of standard reports (i.e. canned reports).	Y	
REP-11	System allows searches by wild cards, based on security permissions.	Y	
REP-12	System allows end users to create, edit, save and delete their own search criteria or parameters.	Y	
REP-13	System has an internal reporting tool which provides for multiple levels of security to control access to reports and reporting tools.	Y	
REP-14	System allows access for search for cases, permits violations, complaints, licenses and other applications by address, parcel number, record number and owner/ business/contractor name.	Y	
REP-15	System allows for searching records that may include discontinued or disabled record types.	Y	Providing those records are still maintained in the system as historical files.
REP-16	System conducts searches on multiple levels of related records hierarchy.	Y	
REP-17	The ad hoc report writer requires no technical knowledge of MS SQL or Oracle to allow end users to create queries or reports.	Y	

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Reporting

#	Requirement	Response Code	Comment
REP-18	Reports created using the report writer provide for interactive linking and drill-down as well as the ability to export data to all popular file formats.	Y	
REP-19	System provides searchable notes fields by key word across all records/modules/departments including by date and user.	N	Notes are searchable by keyword but not by date and user.
REP-20	System sorts/filters all reports by user defined parameters (geographical zoning areas, inspector, inspection territory etc.).	Y	
REP-21	Financial reports can be defined and selected by a date or date range of activity.	Y	
REP-22	System allows users to print notices, etc. in the field from their mobile devices to a field/remote printer.	Y	
REP-23	System allows users to send notices of non-compliances electronically from the field.	Y	
REP-24	System allows users to build their own reports and create templates for recurring reports.	Y	
REP-25	Owning departments can check the status on all of their active/inactive records.	Y	
REP-26	System can report on all communications and comments on a permit application.	Y	
REP-27	System and its mobile version provides work management tools for users to review work status on all assigned permits, work load and schedule of appointments.	Y	

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Reporting			
#	Requirement	Response Code	Comment
REP-28	System evaluates the optimal route for field staff to travel between appointments for a day's activity prior to scheduling time for appointments while also accommodating appointments set through auto scheduling.	Y	The Civic Platform and mobile ecosystem products will provide the ability to optimally route inspections and other appointments for the day, as well as accommodating automatically scheduled events.
REP-29	System allows for appropriate records retention schedules and ease of retrieval for open records requests.	Y	

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4.11 Security Specifications

Security Specifications			
#	Requirement	Response Code	Comment
SEC-1	System has role-based security where users can be assigned multiple roles – modify, view, or to restrict access control.	Y	
SEC-2	System provides adequate security functions to handle web-based transactions without compromising the integrity of the system.	Y	
SEC-3	System Administrator must be able to add, change, and cancel permissions for the system access.	Y	
SEC-4	Multiple sessions are supported on a single machine.	Y	
SEC-5	Multiple sessions with a single login credential is supported.	Y	
SEC-6	Audit trail contains a date/time stamp to the nearest second.	Y	
SEC-7	Audit trail records are not modifiable.	Y	
SEC-8	System provides access to audit trails for authorized users based upon the user's security profile.	Y	
SEC-9	Authorized users have the ability to print audit trail information.	Y	
SEC-10	System administrators have the ability to grant specific users with certain administration rights such as granting access rights/permissions to other users.	Y	

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Security Specifications

#	Requirement	Response Code	Comment
SEC-11	System allows access/security configuration settings by department (including giving access rights to specific permits, records and functions of the system.	Y	
SEC-12	System tracks all transaction history associated with a business/ individual.	Y	

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4.12 Technical Specifications

Technical Specifications			
#	Requirement	Response Code	Comment
TECH-1	System is 100% web-based and web-accessed.	Y	
TECH-2	System operates on Windows and OSX.	Y	
TECH-3	System operates on multiple browsers including Explorer, Chrome, Safari, and Firefox.	Y	
TECH-4	System supports the VMWare virtual server environment.	Y	
TECH-5	System is supported by a cloud database which is backed-up daily to a physically separate location.	Y	
TECH-6	System provides a centralized data dictionary that fully describes table structure and appropriate levels of metadata.	Y	
TECH-7	System database can interoperate with MS-SQL Server.	Y	
TECH-8	System utilizes a middle tier web service to access backend database and the Application resides in a multiple N-tier environment.	Y	
TECH-9	The Tier 1 and 2 are capable of running in a virtually hosted server environment.	Y	

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Technical Specifications			
TECH-10	The Tier 1 and 2 application/system components are capable of running in a load balanced server configuration.	Y	
TECH-11	System is installed with a production environment and a separate test environment that can simulate actual operating conditions for all functions and uses.	Y	
TECH-12	System is designed for object driven data entry.	Y	
TECH-13	System uses network logon credentials to assign permissions.	Y	
TECH-14	System can receive converted and migrated historical information from the existing and current system.	Y	
TECH-15	System leverages Microsoft Word and Microsoft Excel and employs MS Outlook for issuing ad hoc and automated emails.	Y	
TECH-16	System in both agency- and vendor-hosted options provides a minimum of 99.9% uptime excluding scheduled maintenance.	Y	
TECH-17	The vendor provides a Software Development Kit (SDK) to allow staff and others to customize and configure new applications based on the vendor's system.	Y	
TECH-18	System SDK is designed to allow citizens and other interested parties to develop new iOS, Android and Microsoft apps.	Y	

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Technical Specifications			
TECH-19	System provides for an Application Programming Interface (API) or Web Services interface for processing third party electronic payments.	Y	
TECH-20	System provides the ability to support extraction and publishing of single record types or an entire environment.	Y	
TECH-21	System supports and is compliant with Service Oriented Architecture (SOA).	Y	
TECH-22	System supports and is compliant with Section 508 EIT standards.	Y	

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5 Cloud/Hosting Services

5.1 Accela Cloud

Whether by a perpetual or subscription license, agencies can significantly reduce their infrastructure costs by choosing to host their system in the Accela Cloud, which provides 99.9 percent uptime and full disaster recovery over a standard internet connection. This means agency IT staff can focus on things other than maintaining new hardware and software. Because the Accela Cloud is elastic and scalable, Accela is able to easily expand capacity as demand spikes occur. In addition, the Accela Cloud has full integration capabilities with ESRI, Selectron, and other third-party applications that will allow the City to offer a fully functional web-based, cost efficient solution on a 24/7/365 basis while still owning the data that can be exported monthly to our Cloud customers (at the customer's request).

SSAE16
SOC-1 TYPE II CERTIFIED

For the City's cloud solution, Accela will leverage its long history of providing cloud solutions for governmental clients. The proposed primary cloud data center is **Raging Wire**—an industry leader for managing complex, mission critical solutions. Taking advantage of Washington D.C.'s talented workforce and the Northern Virginia technology boom, the data center campus is located in Ashburn's "Data Center Alley", containing one of the largest fiber carrier densities in the world and reliable and cost-effective utility power from Dominion Virginia Power. *Visit http://www.ragingwire.com/virginia-data-center-campus/virtual-tour for a virtual tour.*

Our cloud facility is 24/7/365 and **has several certifications including SSAE 16 Type II, PCI DSS, FISMA, LEED Gold, and Energy Star.** As outlined below, Raging Wire's care and datacenter design provide unparalleled reliability and protection for the Accela Cloud solution:

- 99.9% SLA for Accela's Civic Platform
- Thousands of vulnerabilities tested monthly by independent vendor
- HP WebInspect part of development process
- Veteran staff with multiple industry certifications (Oracle, Microsoft, VMWare, Java)
- 25,000+ monthly man hours of development

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- Zero successful security attacks over history

Deployment Options	On Premise (Delivered By)	Accela Cloud (Delivered By)
Accela Automation Application Admin	Agency	Agency
Physical data center	Agency	Accela
Disaster recovery facility	Agency	Accela
Hardware	Agency	Accela
Software	Agency	Accela
Upgrades	Agency	Accela
Staff	Agency	Accela

Exhibit 53: On-Premise versus Accela Cloud

In 2014, our hosting facilities processed 6,515,531 permits, licenses and other types of applications in the Accela Cloud.

Benefits of our Cloud solution include:

- A reliable and cost effective solution for mission-critical business needs handled in the Civic Platform.
- Load-balanced web servers to handle the needs of all users
- Multiple middle tier application servers
- Two node Oracle Real Application Cluster database
- No single points of failure in any hardware device from the external firewalls through the backend database
- Redundant database backups (database is backed up five times daily)
- Redundant archive log storage
- Synchronized disaster recover site in the event of a site wide outage

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5.1.1.1 Provisioning and Desktop Management Capabilities

The cloud facility is dedicated to servers and storage only. There are no user terminals or workstations in this environment that strengthens the Cloud security model. As such, there is no need for any type of provisioning or desktop management software.

5.1.1.2 Deployment Model

Our Accela hosted environment contains a staging, support, and production environment. There is a two-week testing window for each environment when a new version is applied. This allows clients a chance to preview and validate new features prior to its push into production. Accela follows an annual cycle between major releases with hot fixes and patches provided as needed in the interim. There is also a configuration or support environment available to Accela Cloud clients where new configurations can be created and tested.

Each release of the Accela software follows an internal development and QA process prior to making the new version generally available to customers. The City is responsible for any configuration or changes needed as well as testing each release prior to applying the update to a production environment.

Accela Cloud customer sites are updated in one-week intervals to allow customers adequate time for testing and research prior to the version being applied to the production environment. This allows for a two-week test interval before any release is added to the Production environment.

- Week 1 – Hosted Test Environment Upgraded
- Week 2 – Hosted Support Environment Upgraded
- Week 3 – Hosted Production Environment Upgraded

5.1.1.3 Impact to the City's Network and Bandwidth

As a Cloud model, the impact to the City's network will likely be negligible as the traffic is web oriented.

5.1.1.4 Partners involved in Service Delivery

Other than using the offsite cloud facility, Accela does not require any partners to provide cloud services to the City.

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5.1.1.5 Accela Cloud Service Level Agreement

Briefly, the overall service package under this option is as follows:

- Identical services and products as City-hosted option
- Accela and City cloud contract – not a third party cloud provider
- Hosted at a physically-secure and redundant data center
- Dedicated Accela cloud staff
- System administration and support duties for the application and the system database
- Provisioning of 99.9% application uptime each calendar month, excluding the events described in our attached hosting agreement
- Advanced notice of planned maintenance (performed late/early morning during off-business hours
- Exclusive data ownership by the City

5.1.1.6 Accela Cloud Support Model

Under Accela-Cloud projects, Accela provides a wide variety of services and products as part of its service level agreements. These services are rendered as part of our standard Services Agreement executed yearly.

- Included as part of our standard maintenance and support, the City will have up to four scheduled after hours incidents. Accela's standard hours of operation for our Customer Support team are 4:00 a.m. to 6:00 p.m. PST. Included with our standard maintenance agreements are response time guarantees based on our Customer Support team applying a Low, Medium, or High severity level.
- In a City-hosted environment, following the recommended hardware and software configurations, the City should expect the same application response time as they should from the Accela Cloud environment. If properly configured, the system should perform in a timely fashion without any latency issues. Also, following the recommended hardware and software configurations, and excluding the events described in our attached hosting agreement, Accela warrants that the Cloud environment will be generally available no less than 99.9% of each calendar month.
- Accela's Customer Support is the key client contact for all post-implementation services provided. Our Customer Support team has responsibility for all client related service calls and inquiries and a staff of 26 experienced personnel trained in all aspects of customer support is available during normal business hours. Customers can also use other online channels

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such as the Accela Success Community to peruse responses to previously asked questions and to exchange information with the entire Civic Platform community worldwide.

- Standard warranties are offered as part of Accela's support and maintenance services and all services are provided in a professional and workmanlike manner consistent with the practices and standards of care generally accepted within Accela's industry.
- Version upgrades and other point releases are offered to all customers allowing each customer to decide what portions of these upgrades and releases they desire to incorporate into their configured systems. Documentation supporting each version release or point release is also provided. All upgrades are designed to not affect any configuration accomplished by any client on the Accela Civic Platform.

Each Accela Civic Platform site operates successfully within the local network environment provided by our clients and at acceptable performance levels to facilitate the transaction of business by each of our clients and their constituents. As a fully web-based system, our Civic Platform is available 24/7 and our agency-hosted clients use their own departmental or enterprise IT department staff to support the application after receiving specific training during the implementation process by Accela.

5.1.1.7 Business Continuity

Accela's Security & Compliance program leverages the NIST 800-53 (e.g., FISMA) as the basis for its security and privacy controls.

The City can rest assured that our proposed Cloud solution offers a reliable business continuity plan, including:

- No loss of any functionality in comparison to an Agency-hosted site.
- Efficient failover and easy-to-manage switchover capabilities allow quick role reversals between primary and standby databases, minimizing the downtime of the primary database in the event of a disaster.
- Logical exports of the database are taken every night and the exports are stored in a redundant volume location before being moved to a separate server.
- Logical exports are kept for a minimum three-month period on a separate server.
- Hot backups of the database files are taken every Tuesday, Thursday, and Saturday and stored to disk both locally and on a separate server location.
- The solution has a disk-to-tape contract so that we can retrieve up to two weeks of data.

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- Archive logs are stored locally in two redundant volume locations and also moved to a separate server every ten minutes.

- A standby database is located at a remote disaster recovery site. This provides the availability of the solution the event of a disaster.

Once engaged on the project, our team will work with the City to establish the service levels needed to support the PREB solution including:

- Customer support prioritization and triage
- Performance metrics
- Level of security (e.g., port, dedicated line, etc.) needed/preferred
- Disaster recovery/business continuity benchmarks
- Management and monitoring service levels

5.1.1.8 Redundancy/Load Balancing Capabilities

No single point of failure exists within Accela's cloud model. Load-balanced web servers provide high availability for all of our customers. Load balancing is a computer networking method for distributing workloads across multiple computing resources, such as computers, a computer cluster, network links, central processing units or disk drives. Load balancing aims to optimize resource use, maximize throughput, minimize response time, and avoid overload of any one of the resources. Using multiple components with load balancing instead of a single component may increase reliability through redundancy. Load balancing is usually provided by dedicated software or hardware.

- Complete redundancy
- Two ISPs with BGP Peering
- Hardened firewalls
- Load balancers
- SSL encryption
- Monthly third party vulnerability testing

Accela uses two different ISP vendors to provide Internet traffic utilizing BGP. All equipment has a peer and all power is redundant. In the event of a site-wide outage, Accela can failover to a secondary, geographically distinct datacenter in Utah.

In most cases, failover is a function of the database engine. SQL Server supports failover but all sessions will still experience downtime, however brief it may be. In a clustered scenario, the Accela services can communicate with the SQL Server Virtual IP address for the database engine and it will continually check that connections are viable. In the event of a database server failure, the SQL

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Server cluster can fail the engine over to the second server and during that time all connections will be forcibly terminated and the Accela application will not work. Once the second node's database engine is active and the virtual IP is connecting user sessions, the Accela system connection pools should connect to the failed over server and begin processing requests again. If not, the Accela services can be restarted to establish those connections.

In the case of Oracle, this type of downtime is completely mitigated by use of the OCI driver, transparent application failover, Real Application Clusters, cluster service names, and/or DataGuard configured with Fast-Start failover.

5.1.1.9 Disaster Recovery Capabilities

- Second datacenter in Salt Lake City, Utah
- Oracle DataGuard
- Oracle Streams
- Replication Technology
- 15 minute health checks
- Annual data switchover testing

Disaster recovery is an integral part of maintaining business continuity should a catastrophic outage occur. Accela is committed to giving its Cloud customers access to their respective data and sites in a timely fashion should such an unlikely outage occur.

The hosted production database is mirrored using Oracle DataGuard to a geographically distinct failover site in Utah. Great care, planning, and expense has been taken to ensure that no single points of failure occur within the cloud environment itself. All network and I/O paths are redundant and all services are available via load-balanced environments. Accela employs virtualization via VMWare vSphere that allows for dynamic migration of any failed virtual guests to a live physical host the moment an outage is detected. This ensures continuity of business services should a single physical server go offline. Additionally, load-balanced pool members are isolated to different physical hosts further ensuring that a virtual service remains available even if a single pool member goes offline.

A two-node Oracle Real Application cluster provides high availability for the key production Oracle databases. This cluster allows for both dynamic and manual relocation of key services insomuch that the associated web and business services can always connect to a live node. The cluster itself consists of physical servers that also use multipath I/O and aggregated NICs to ensure high availability

Database backups follow a standard weekly full/nightly incremental schedule using Oracle's Backup and Recovery Manager (RMAN).

In any scenario involving data loss, there are multiple paths that can be followed to recover the data. The first involves using Oracle's flashback technology at either the query or table level. The second involves using the logical export to restore the data to a new database to export it. The third involves using RMAN to perform a point-in-time recovery of the data files and archive logs to an

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isolated cloned instance. The fourth involves using RMAN to perform a point-in-time recovery of the database proper (this being the most drastic).

If a site-wide outage occurs that is projected to be sustained and lasting but the data itself within the datacenter is retrievable, Accela employees will transfer any outstanding archive logs to the physical standby site and activate the standby site as the primary cloud facility. External DNS entries will then be updated to reflect the failover site.

5.1.1.10 Accela's Cloud Data Center and Storage Facilities

5.1.1.10.1 Locations

Accela's primary cloud facility is located in Ashburn, Virginia, and operated by Raging Wire. Taking advantage of Washington D.C.'s talented workforce and the Northern Virginia technology boom, the data center campus is located in Ashburn's "Data Center Alley", containing one of the largest fiber carrier densities in the world and reliable and cost-effective utility power from Dominion Virginia Power.

5.1.1.10.2 Staffing

All staff at the primary cloud facility are employees of Raging Wire that maintain the IBX's primary features including security, power, cooling, and other facility work. Accela staff maintains the systems remotely using private VPNs and/or dedicated lines.

5.1.1.10.3 Physical Security

All Raging Wire facilities are outfitted with biometric scanners and require face-to-face verification with security personnel prior to entry. All personnel must present government issued identification and be on a preauthorized access list prior to gaining entry. All equipment is kept inside a biometrically secured private cage with onsite security personnel monitoring the cloud facilities 24/7 via indoor and outdoor

- Multilevel user tracking
- Detailed video tracking and archival
- Access by authorized ticket only
- 5 layers of security prior to cage
- Biometric scanners with pin codes
- Two-factor remote authentication
- 4 Accela employees have access to cage

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video surveillance. Accela's private cage includes a dedicated video camera monitored by security personnel.

5.1.1.10.4 Environmental Controls

Cooling Features

- Robust, N+1, HVAC provides stable airflow, temperature, and humidity
- N+2 redundancy for chillers
- Six 750 ton centrifugal chillers
- Six cooling towers
- Variable frequency drives
- Chilled water pumps
- Condenser pumps
- CRAC air-handling units in the colocation area
- Cold aisle containment

Power Always Flowing

- Power feeds from multiple sites
- Multiple 2MW Diesel generators
- Dedicated fuel contracts
- 48 hours of fuel on-hand to power site at full capacity
- >99.999% uptime

Flood Control Features

- Built above sea level
- No basement
- Moisture barriers on external walls
- Dedicated pump rooms
- Moisture detection sensors

Earthquake and Fire Features

- Exceeds local building codes
- Can withstand 9.5 magnitude (only 1 recorded in modern history in Chile, 1960)
- Multi-zoned, dry-pipe, double-interlock, pre-action fire suppression system
- Very Early Smoke Detection and Alarm (VESDA)

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Power Features

Raging Wire has some of the world's foremost experts on power management engineering their data centers. Raging Wire engineers have designed International Business Exchange™ (IBX®) power systems with built-in redundancy, full Uninterruptible Power Supply (UPS) systems with N+1 redundancy levels or greater, and backup generator systems in the event of a local utility failure. Accela currently uses redundant circuits to power every PDU and system within the cloud facility.

5.1.1.11 Procedures and Protocols

5.1.1.11.1 Access to Systems

Prior to having any type of physical or remote access to any system at the Cloud facility, users must first be authorized by the IT Manager or Director of IT (per the Hosted Production Access Security Policy).

5.1.1.11.2 Acceptable Use Policies

All users accessing any system at the Cloud facility must read and agree to the following conditions:

- Users with remote desktop access will not download, install, remove, or update any software on any hosted system
- Users will not use the server's Internet browser(s) for any type of browsing activity that is outside the scope of work served by those systems
- Users will not modify, create, or remove any local or domain accounts
- Users will not escalate or further change any privileges granted to any user
- Users will not power cycle or shutdown any remote server
- Users will not stop, start, or restart any service or daemon
- Users will not alter the configurations of deployed services without prior authorization from the Production Network Administrator, IT Manager, or Director of IT and without opening an IT Ticket for the change request
- Users will not upload files to the server that are not essential to the work of the server
- Users will virus scan all files they wish to upload to the server before deploying said files

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- Users will not attempt to gain access to any server(s) that they have not been authorized by the Production Network Administrator, IT Manager, or Director of IT to do so.
- Users will not share their account credentials for hosted systems with anyone else including other Accela employees
- Users will not use hosted systems to retrieve or view email
- Users will not download files from the hosted systems to any other machine
- Users will not attempt to mine, extract, or gather information from hosted systems outside the scope of their work
- Users will immediately log off hosted systems once they have completed their work and do so using a proper mechanism (e.g., Start->Log Off rather than just "X-ing" out of a remote desktop session)
- Users will not attempt to sniff or capture data from the Cloud network
- Users will immediately report if they suspect their credentials have been stolen or otherwise compromised to the Production Network Administrator, IT Manager, or Director of IT
- Users will not use any form of instant messaging on the Cloud servers

5.1.1.11.3 Authorization Process

Any user requesting access remotely to a system at the Cloud data center must first log a ticket with the IT Ticket system and assign that ticket to the Production group. Upon receipt of the ticket, the Production Network Administrator will review the ticket request and determine its validity. He will then contact the IT Manager and Director of IT with the request so that they can issue the final authorization. If the request is granted for remote access, the Production Network Administrator will ensure the following:

- A unique username is created for the account
- The default password will be unique for that user
- The initial password must be set to require change upon first login by the user
- The user will only be granted access to the requested resource and have the minimal level of permissions needed to perform his/her work
- The user's password will adhere to the default password policy
- The user will receive the Hosted Systems Acceptable Use Policy and sign it.
- Upon signature and receipt, the Production Network Administrator will scan the document and attach it to the original IT Ticket request.

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- The user's account will only be active for as long as the ticket request requires.

5.1.1.11.4 Periodic Review

Once per quarter the Production Network Administrator will review the active accounts to verify that they are needed and will disable any unused accounts. If any employee is terminated, that user's account will be immediately disabled, his group memberships and roles revoked, his password reset, and the account removed from the OU it belonged to and placed in the Terminated Accounts OU.

5.1.1.11.5 Physical Access Policy

Any user wishing to gain physical access to the Cloud data center must submit an IT Ticket specifying the need. All requests of this type are denied by default and it is only by authorization of the Director of IT that any employee or Accela-sponsored vendor can gain said access. If access is granted, the Production Network Administrator, the IT Manager, or the Director of IT must contact the Cloud facility to open a ticket authorizing the user and the day and time of the visit. Upon arrival at the Cloud facility, the user must surrender a government-issued ID card that is verified with the hosting facility's security personnel. No personal items may be taken in to the facility. The Cloud facility will issue the user a badge that is surrendered once the visit has concluded. The Cloud facility personnel will escort the user to Accela's cage in the hosting area. Logs of the visit including video recordings are kept onsite at the Cloud facility. The ticket is closed and the user's access privileges revoked upon completion of his assignment.

No one is allowed to take any data from the hosted environments at any time without direct written consent of the Director of IT. Any hardware either removed or added from the Cloud facility must be logged thoroughly (including date and time, model, make, serial #, reason for removal).

5.1.1.11.6 Password Policy

All user accounts must meet the following password requirements:

- 24 passwords remembered
- Maximum password age = 42 days
- Minimum password age = 1 day
- Minimum password length = 7 characters

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- Password must meet complexity requirements

5.1.1.11.7 Auditing

All systems at the Cloud facility will record and capture both failed and successful login attempts. The central logging server will detect all failed login attempts and will send email notifications to the Production Network Administrator and IT Ticket system for review and analysis. The Production Network Administrator must then clear the log alert and take corrective action (including contacting the end user of the account).

5.1.1.12 Data Flow

All customers share the same redundant, highly available hardware and multi-tenant database. Each Cloud customer's data is segregated via the application level to ensure that only their respective data is visible. The image below illustrates what data is stored locally in the City's data center versus what is stored in the Accela Cloud.

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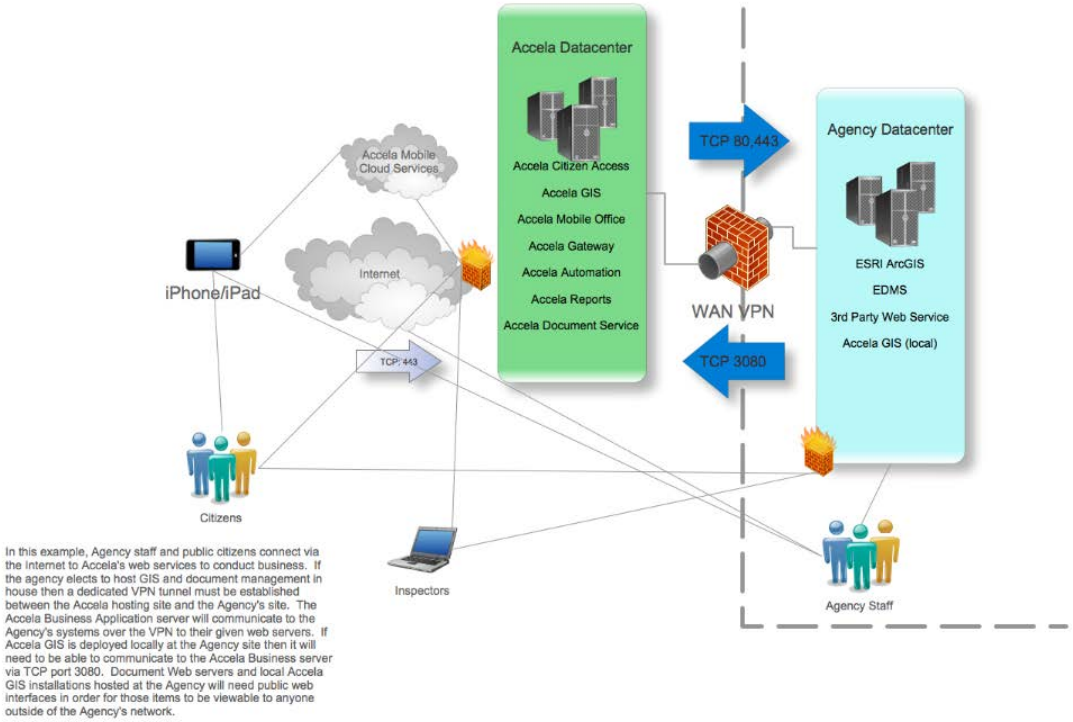

Exhibit 54: Data flow for Accela Cloud customers

5.1.1.13 Data Retention and Backups

At a minimum, Accela keeps two weeks' worth of backups available via the RMAN process for the Oracle database. Where possible, Accela strives to maintain longer backups of data up to one month. Database backups occur nightly and the backups are stored in two separate geographically distinct. All production databases run in archive log mode and all archive logs are backed up nightly. Traffic between the datacenters is via an encrypted VPN tunnel. *Encryption is not part of the backup process as no removable media is generated.*

5.1.1.14 Accela Cloud Logical Security

5.1.1.14.1 Data Protection

End users access SSL protected web services. Backend Accela servers can communicate (only if needed) with agency-hosted systems via a site-to-site VPN.

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5.1.1.14.2 Application Level Protections

All agency data is identified via a unique agency code that is part of every relevant query from Accela's Civic Platform to prevent vendor/SaaS provider or subcontractor staff from being able to view protected information

5.1.1.14.3 Firewall Security

The server tiers are split up by a firewall in between the Web tier and the application and database tiers. External to the overall application is the cloud facilities firewall, which is configured to only allow access to the Web tier. Since Accela currently hosts the data for 200+ governmental clients, all data is logically separated within our servers specific to their jurisdiction IDs even though they share the same database tables. The Civic Platform and its associated components enforce client isolation such that no client is able to access or view the data of any other client.

All employees who work on the City application will be required to sign non-disclosure agreements. Access to City data will be limited to employees working on the City application and no others.

Accela employs a security strategy of "least minimums." For instance, the least minimum secure ports needed for traffic processing are enabled and allowed at the firewalls. Policies supporting VPNs are locked down to the least minimum individual servers and ports responsible for the traffic. End users are given the least minimum privileges needed to perform their work and so forth. We periodically update all systems with the latest firmware and software patches needed to ensure a secure and safe environment. Additionally, all servers have endpoint protection such as antivirus software enabled that stays current with definition and engine files.

5.1.1.14.4 Authentication Controls

Our Civic Platform supports a very fine-grained access control system. There are four basic levels of security—agency, module, group, and user. Users can belong to groups that can belong to modules, which belong to the agency. Security can be applied at every level via functional identifiers (FIDs).

The Civic Platform provides a multi-level security system where the system administrator has full control on user access. This control on user access is granted based on a single user logon ID and grants that user specific rights and privileges to the system. The Civic Platform also allows system administrators to set up groups or roles and set security based on those such as read only, update or no access.

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For on-premise (agency-hosted) customers, the Civic Platform includes support for LDAP and Active Directory repositories as the authentication source for users. When the Civic Platform is configured to use an external directory server, users are prompted by the application for their username and password which are then authenticated against the directory server providing a single point of administration for users.

5.1.1.14.5 Data Encryption Capabilities

Accela uses industry standard SSL encryption to keep data in transit protected and make sure that all client transactions are secure.

To further assist in security compliance, Accela employs industry leading Web Application security assessment tools such as HP WebInspect to perform thorough scan testing of our software as part of our product development cycle and regularly scans our production external links for vulnerabilities using a third party service.

Regarding credit card payments, all financial transactions performed on Accela Civic Platform are PCI-DSS compliant. The solution is PCI compliant. The PCI DSS provides the guidelines and requirements relating to the processing, transmission, and storage of credit card/cardholder data. Accela has recently completed an assessment for the PCI DSS for its Cloud solutions, and is in the process of certification for the Payment Application Data Security Standard (PADSS) (formerly known as Payment Application Best Practices [PABP]).

A tenet of PCI DSS compliancy is that the system may not retain full magnetic stripe, card validation code or value (CAV2, CID, CVC2, CVV2), or personal identification number (PIN) block data. The software does not provide hardware interfaces to read magnetic stripe information. In addition, Accela Civic Platform meets PA-DSS requirements for cardholder protection by only storing the last four digits of the credit card number and the authorization code.

5.1.1.15 Accela Cloud Change Management Practices

Changes to the cloud environment require careful planning and testing prior to implementation. By way of code releases, the code has to pass through a minimum of three separate environments prior to its introduction into production. In every case, clients receive advance notification of the code change as well as any anticipated downtime associated with the maintenance (that generally occurs during the later evening hours). Standard notification is two weeks prior to any scheduled downtime of the hosted production environment. All servers are kept

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up to date with the latest OS and firmware patches as they become available based on criticality and need.

Accela maintains its systems in full operation to all of its clients and upgrades hardware based on the specific recommendations of a hardware vendor. One benefit of a virtual infrastructure is that the hardware being upgraded happens behind the scenes to the virtual machines. For example, if four physical servers hosted all the virtual machines, then one server could be put into maintenance mode to have its virtual machines migrated to the remaining three members. Then, that physical server can be taken offline and upgraded based on the schedule already defined and in place by the agency. Once that server has been upgraded, it can be brought back online and host virtual machines again. This process repeats for the remaining members. For new server additions, they can be added to the farm and host virtual machines right away.

5.1.1.16 Accela Cloud Systems Administration Capabilities

There are many factors and variables that can affect performance/response time that are outside Accela's control (e.g. City network latency). While we make no guarantees, every one of our sites is operating in a satisfactory manner to employ the automation our solution is able to deliver. For those clients who opt to employ their systems on the Accela Cloud, we have a guaranteed uptime of 99.9% each calendar month. *Please see our sample hosting and subscription agreements in section 11 of this proposal for more details.*

5.1.1.16.1 Monitoring Performance Measures

The Civic Platform generates a number of logs that can be used for monitoring the health of the overall application. To perform monitoring of the systems away from the Accela stack, we use a variety of widely available third-party utilities that specialize in these areas. Listed below are monitors that Accela uses in its Cloud environment to monitor its systems and report on their availability.

- **SolarWinds DPA** uses response time analysis to find the Oracle problems causing application and end-user slowdowns. Ignite focuses on measuring response time, and adds server resources, expert advice, and trends ranging from one second to one year. Ignite has a focus on Response Time that tells why applications wait on the database. Ignite gives the most detailed Wait Event analysis. It also includes historical Trend Patterns ranging from one second to one year. Ignite goes beyond here-and-now to show full performance history.

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- Accela uses **SolarWinds** as a central monitoring server for all Accela services and systems.
- For file integrity monitoring, registry monitoring, and general intrusion detection monitoring at the server level, Accela uses the open-source **OSSEC monitor** available from http://www.ossec.net/. OSSEC utilizes an agent-based deployment and can be customized to watch critical directories for any file changes.
- Accela's hosting facility uses **Symantec Endpoint Protection** as its Industry standard antivirus protection with central monitoring
- At the database level, Accela uses a combination of internally developed monitors and **Oracle's Enterprise Manager**.

The figures below present performance statistics for a statewide Accela client site, and display the response time from the monitoring server to the application server, and the performance of the server speed to webpage posting.

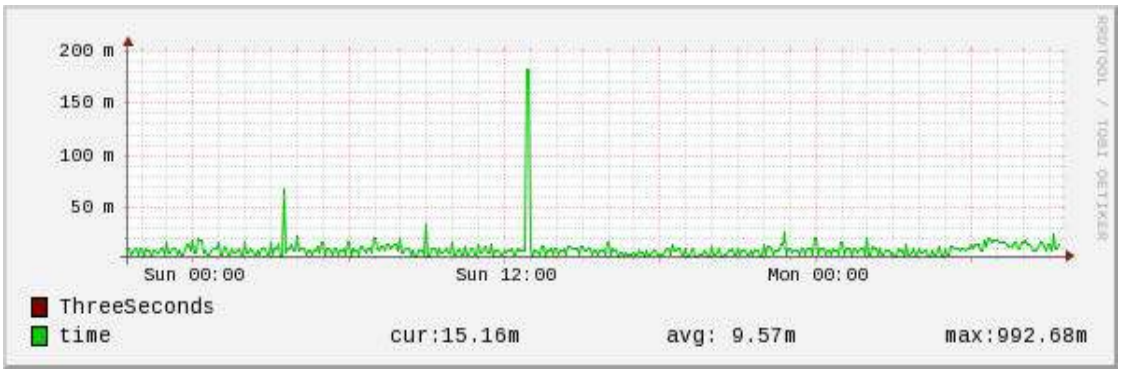

Exhibit 55: Accela Civic Platform Performance Statistics

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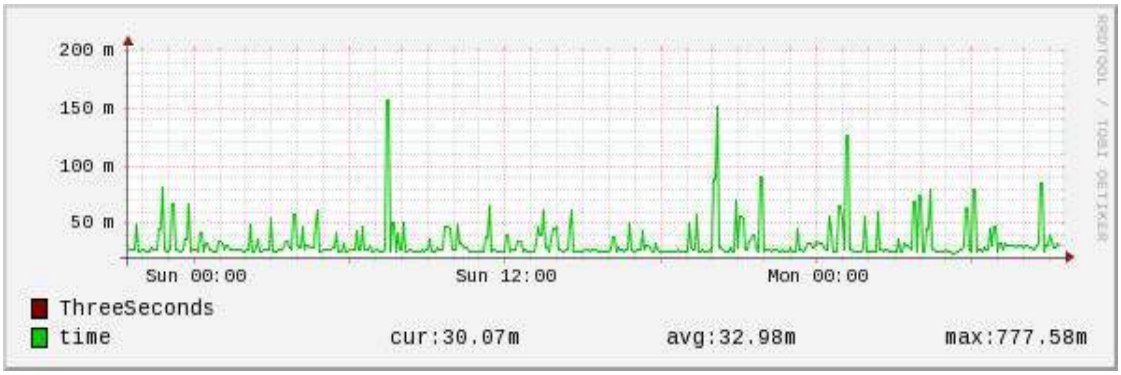

Exhibit 56: Accela Civic Platform Administration Interface Performance Statistics

If the City wishes to monitor uptime, Accela will provide a set of URLs and response strings that the City can use to implement in its own self-deployed or third party web monitoring solution.

5.1.1.16.2 Intrusion Detection

Accela uses IDS at the firewall levels as well as internally on the backend systems via file system integrity monitors and antivirus systems. Additionally, the application sanitizes input to avoid XSS attacks and SQL injection.

5.1.1.16.3 Error Resolution

Typically, error resolution comes into play only when a server has gone down. If such is the case, services for the sites it serves will likely still be available by way of another load-balanced member. The failed server will be brought back online as quickly as possible. Often this can be an automated process as Accela employs VMWare virtualization and uses the High Availability and Disaster Recovery features to automate the cycling of failed Virtual Machines.

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6 Project Approach

6.1 Project Timeline

Considering the requirements listed above [...under Scope of Work RFP page 9] and attached, provide a tentative comprehensive project timeline for the City's planning purposes.

Week	Deliverable	Agency Responsibilities
1	**Agency Setup** New agency with best practice templates, staff user accounts, Bing map setup and/or ESRI Integration, mobile app setup	▪ Confirm payment gateway vendor ▪ Review & input into project plan. ▪ Review BPT record list and identify non-required record types. ▪ Review BPT data sheets & identify requested data field changes.
1	**Configuration** Setup agency users, update and/or create user groups, setup time tracking	▪ Review Roles & Functions Matrix document. Submit list of user accounts & user group roles. ▪ Submit list of the user group permission updates. ▪ Submit list of new user group permissions.
2	**Configuration** Disable record types and data fields the agency will not use	▪ Submit requested data field changes. ▪ Submit list of non-required record types to be disabled
3	**Configuration** Workflow and inspection distinct updates	▪ Submit list of distinct workflow process and inspection group updates. ▪ Test & validate that changes have been completed as requested.
4	**Configuration** Create new record types and data field configuration	▪ Submit list of the new record types with associated data fields.

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Week	Deliverable	Agency Responsibilities
5-6	**Training** Agency staff provided access to online, self-paced training courses available on Success Community	▪ Confirm access to online training content. ▪ Complete online training courses
7	**Configuration** Fee item configuration	▪ Provide list of new fee items. ▪ Test & validate that changes have been completed as requested.
8	**Data Conversion** Property and Licensed Professional Conversion	▪ Submit property and licensed professional data. ▪ Test & validate property & licensed professional data uploaded correctly.
9	**Data Conversion** Express Historical Data	▪ Submit Historic transaction data. ▪ Test & validate converted data. ▪ Provide list of any identified issues.
10	**Citizen Portal Setup** Citizen Portal branding, payment gateway setup with supported vendor and configuration updates	▪ Submit merchant account information. ▪ Submit web branding. ▪ Submit list of ACA updates.
11	**Data Conversion** Second Property, Licensed Professional, Historical Conversion	▪ Test & validate converted property and licensed professional Data
12-15	**Mobile Office** Analysis & Configuration, Installation and Setup, Training and UAT.	▪ Instructor lead training by remote zedIT personnel
16-21	**Custom Interfaces** Sungard H.T.E./Naviline and TX Department of Licensing and Regulation	▪ Confirm key contacts Sungard H.T.E./Naviline and TX Department of Licensing and Regulation
22	**Data Conversion** Final conversions run	▪ Test & validate converted Historic transactional data.

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Week	Deliverable	Agency Responsibilities
23	**Training** Instructor lead training and Electronic Document Review Training	▪ Instructor lead training by remote zedIT personnel
24	**User Acceptance Testing**	▪ Provide zedIT with sufficient detail on issues encountered to support effective and efficient issue resolution.
25	**Go-Live**	

Given the fact that project schedules are working documents that change over the course of the project, Accela will work closely with the Agency to update, monitor, agree, and communicate any modifications. Changes to the baseline project schedule may result in a change in resource availability and a change order to increase project management support for the project.

6.2 Implementation Project Manager

Respondents shall identify a primary professional staff member who will be assigned to this project if the Respondent's proposal is selected. Provide a brief statement of qualification for that staff member, including specific experience in providing this type of SaaS to a municipality.

Allison Locke is a versatile and forward-thinking Senior Consultant with over nine (9+) years' experience in a combined background of product management, business analysis and project management.

Allison possesses significant Local and North American Public Sector experience implementing Land Management, Permitting and Asset Management software solutions for all levels of government, working on such Accela implementations as State of Michigan, Town of Provincetown, Town of Harwich and Newfoundland Department of Fisheries.

Allison has the ability to effectively lead and contribute to any Accela implementation given her experience in providing Project Manager and Business Analyst functions for a variety of Accela implementations. Her typical duties when assigned to a project as the Lead Consultant include:

- Leading project discovery and scoping activities.
- Hosting weekly project status meetings with core project team and completing weekly status reports.

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- Completing project setup tasks including resource assignments, bookings and maintenance of project schedule.
- Preparing and conducting project kick-off and core team orientation sessions.
- Capturing client's business requirements and design solution foundation based on requirements identified during discovery.
- Configuration of Civic Platform, Accela Citizen Access and Accela Mobile Office in accordance with solution foundation design.

We have included Ms. Locke's' full resume in the Additional Information section at the end of this proposal.

6.3 City's Project Manager

Respondent must identify whether it is their recommendation for the City to dedicate the services of a full/part -time project manager. Respondents must provide the reasoning in favor of or against this recommendation.

It is recommended that the Agency identify a resource to work directly with the Implementation Project Manager. Assigning a part-time City Project Manager (Lead Resource) to the implementation will ensure Agency resources are available to assist with and support project deliverables per the implementation schedule, and to coordinate and secure necessary resources and equipment (i.e. conference rooms, projectors, speaker phones, computers, etc.) for conference calls and meetings.

The Implementation Project Manager will engage with the City's Project Manager to refine the implementation schedule and coordinate the completion of all deliverables and resources. The implementation schedule will include acceptance review periods for the Agency for each deliverable. Previous experience suggests that collaborating with a City's Project Manager ensures Agency resources are made appropriately available as required.

City's Project Manager Responsibilities:

- Identify a City Project Manager (Lead Resource) that will collaborate with the Implementation Project Manager throughout the project to manage and coordinate all project deliverables.

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- Work with the Implementation Project Manager to refine the agreed upon implementation schedule.
- Ensure Agency resources are available to assist with and support project deliverables per the implementation schedule.
- Coordinate & secure necessary resources and equipment (i.e. conference rooms, projectors, speaker phones, computers, etc.) for training, conference calls, on-site meetings etc.

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7 Customer Support and Maintenance

7.1 Accela's Customer Care Program

Customer Service is an Attitude

Accela's Customer Care organization is dedicated to overall customer care throughout the Accela customer lifecycle.

Exhibit 57: Accela's Customer Care Organization

7.1.1 Account Management

Accela's Account Management Group is tasked with managing, retaining, and growing Accela customers. All customers have a regionally based single point of contact who routinely interfaces with customers on site or via phone and e-mail. The Account Manager's primary role is to serve as a customer advocate. S/he is the one common denominator for the customer during any stage of the customer lifecycle. S/he acts as a liaison for Accela customers—a community of over 2,100 agencies. An agency is able to interact, learn, and network with these other agencies through the customer portal known as Accela Success Community, as well as

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National User Group Meetings, Regional User Group Meetings, and more – offering the opportunity to learn from the collective product expertise of our users.

7.1.2 Customer Success

As part of a customer's annual maintenance and support, Accela provides a Customer Success team tasked with ensuring that customers achieve success with the solutions we implement. These highly trained consultants work with our customers' managers, directors, and executives to better understand and document line of business needs, objectives, and the feasibility of specific requests detailed with a post deployment Customer Success Plan. The Customer Success team develops strategic project plans that outline critical success factors, metrics, potential issues during and post implementation, and documents recommendations for future solution advancement to maximize their use of the Civic Platform.

7.1.3 Customer Support

Accela's Customer Support, based in our San Ramon, California headquarters, provides live technical support between 4:00 a.m. and 6:00 p.m. Pacific Time, Monday through Friday, excluding Accela-observed holidays. Staffed with over 50 support professionals, the Customer Support team responds to all client issues and routes technical incidents accordingly based on the nature of the incident. *Unlike some of our competitors who provide better support to customers who pay a higher annual maintenance, our Customer Support team provides the same level of superior service to all clients*, which includes:

- Providing information in a timely and professional manner
- Performing best efforts to resolve any incidents submitted
- Documenting each incident and its resolution
- Escalating incidents to other Accela departments as necessary
- Tracking the duration of open incidents and ensure forward progress
- Communicating the progress of open incidents with customers up to and including resolution
- Delivering fixes and workarounds for any incidents

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Recent customer feedback

Our Customer Support organization has implemented a Service Delivery framework built on the Information Technology Infrastructure Library (ITIL) model. ITIL offers a systematic approach to the delivery of quality IT services which has been globally recognized as a best practice for delivering service and adopted by many leading organizations.

7.1.4 Support Services

Pursuant to our standard maintenance agreement (included in the Additional Information section of this proposal), the following services are included in Accela's annual maintenance:

- **Telephone Support –** Accela provides a telephone number to contact Customer Support, Accela's live technical support facility.
- **E-Mail Support –** Accela will provide one or more electronic mail addresses to which a customer may submit routine or non-critical support requests 24 hours a day, which Accela will address during its regular business hours.
- **Online Support –** Accela will provide access to archived software updates and other technical information in Accela's online support databases, which are available 24 hours a day.
- **Remote Support –** When required to properly resolve a maintenance request, Accela will provide remote assistance via the WebEx environment or another mutually acceptable remote communications method.

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- **On-Site Support –** If remote support is not acceptable, Accela can provide on-site assistance, which will be billed at Accela's then-current time and materials rates. In addition to these charges, compensation for associated airfare, lodging, rental transportation, meals, and other incidental expenses will be billed as accrued.
- **Software Updates –** Accela will provide revisions of and enhancements to maintained software products as such updates are generally released. We deliver, or make available to customers for download, software updates and supporting documentation via our File Transfer Protocol (FTP) site.

7.2 Other Methods of Software Support

7.2.1.1 Context-Sensitive Online Help

Accela's Civic Platform provides online help as well as fully indexed, searchable, and editable help files for all features and functions. To use online help, the user simply clicks the Help button on any menu bar. Our Civic Platform will display the help topic specific to the current screen. The image below illustrates this feature.

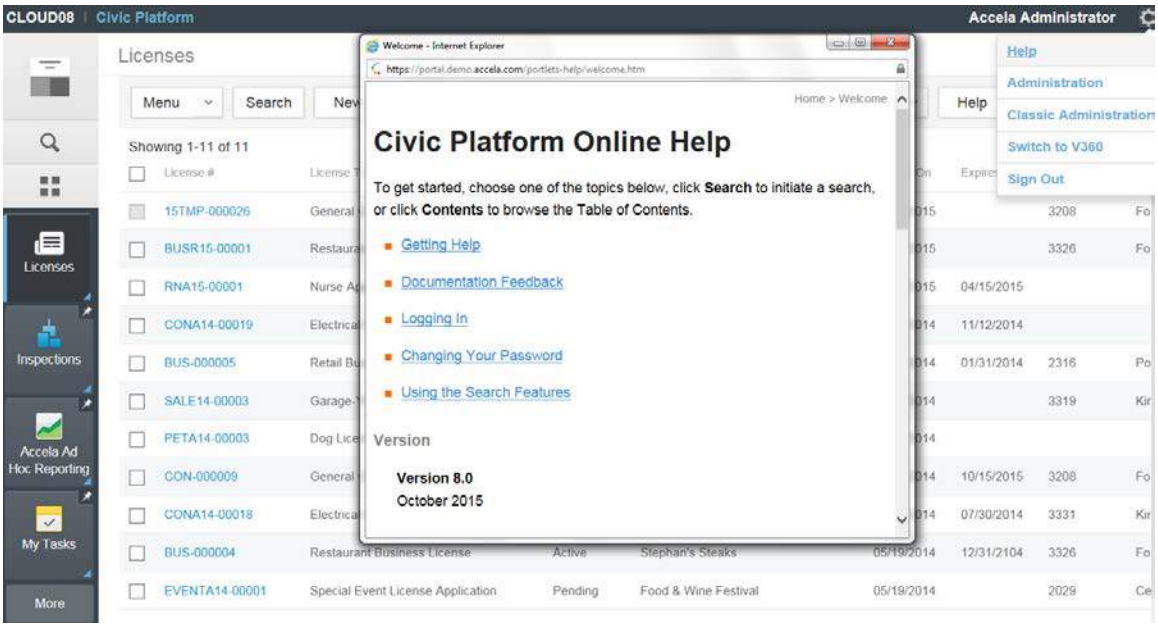

Exhibit 58: Accela Civic Platform's Online Help Feature

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7.2.1.2 Accela Success Community

- One-stop location for all things Accela
- Streamlined access to support cases and knowledge
- One login and password
- Enhanced search capabilities
- Rate articles and discussion threads
- Reduction of emails
- Follow only the items that interest you

With 6,751 users and counting, Accela's public community website (https://accela.force.com/success/CustomerCommunityLogin) is where our solution experts blog about industry news, preview new features and upcoming releases. The Community is open to our customers, prospects, developers, and partners to learn about Accela solutions, discuss ideas for how to get the most out of the Civic Platform, and share tips with others.

Users will also enjoy:

- **Getting everything in one place –** Single sign-on for documentation, support, articles, and conversations with other community members.
- **Finding information easily –** Search a topic and get results from all areas of the Community with enhanced search capabilities.
- **Experiencing an improved enhancement request process –** The process provides consistency, offers a look into the planning and development process and provides opportunities for users to collaborate directly with product owners.
- **Providing feedback –** Rate articles and discussion threads and vote on ideas.
- **Keeping up with what's important to you –** Follow topics and people that you are interested in.
- **Reducing your emails –** Easy-to-access profile settings give users full control of content consumption and frequency.

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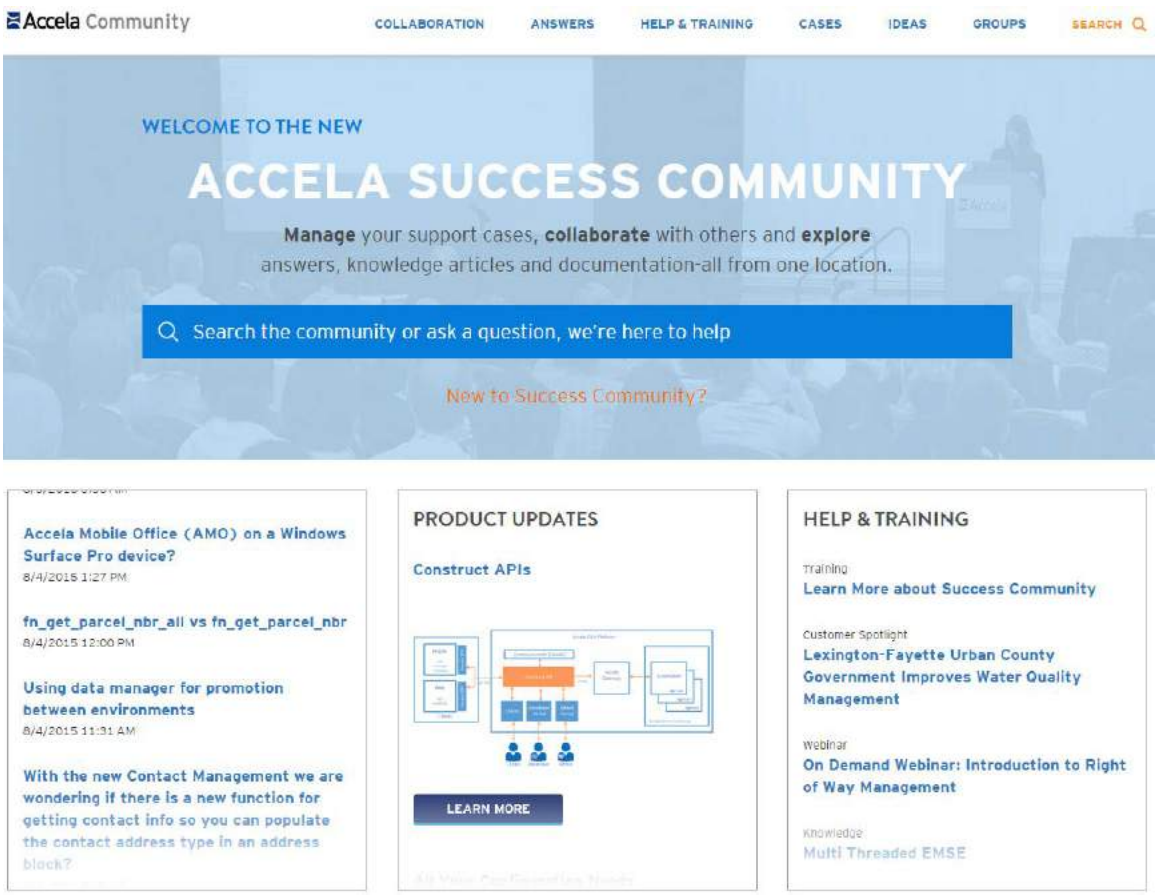

Exhibit 59: Accela Success Community homepage

7.2.1.3 Accela Ideas

Ideas is a valuable resource that allows users to share ideas on potential new solution functionality with Accela and other Civic Platform users, collect feedback from others, and comment and vote on ideas proposed by others. Ideas is a key data point used by our Product Management team as part of release planning, so we encourage others to comment on and vote for your idea. Since active input and involvement is essential for all ideas, Ideas allows users to comment on and vote for (or against) ideas posted by others.

Whether you are in active implementation, have used the product for years, are a development partner, mobile user, or Accela staff, anyone using any Accela solution can submit an idea. By opening Ideas to such a large audience, we hope to better serve our users by bringing focus to features that are popular among the entire community, offer the most business value, and result in solutions users love.

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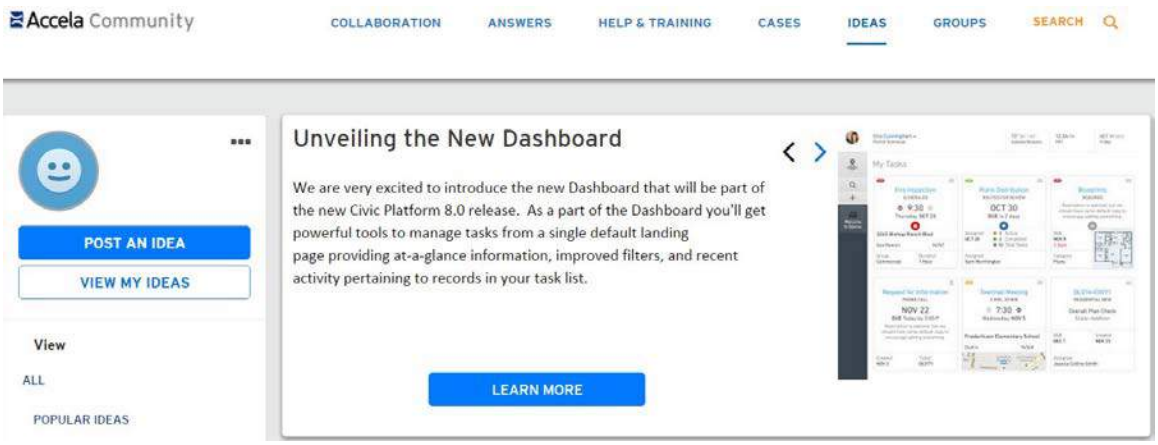

Exhibit 60: Ideas page on Success Community

As an idea receives votes and progresses through the assessment process the status will be updated according to the following guidelines:

- **The Next Big Idea** – This status is the default initial status assigned to all submittals.
- **We built it** – This status is assigned to ideas that have made it into a release.
- **We're working on it** – This status is assigned to ideas that are in development and are expected to be included in an upcoming release.
- **Current release candidate** – This status is assigned to ideas that are actively being considered as within the potential scope for an upcoming release but are not yet in development.
- **Very interesting** – This status is assigned to ideas that are not actively being considered as within the scope for an upcoming release but which may become release candidates in the future.
- **Let us chew on it** – This status is assigned to ideas that have received at least 100 points but may not currently align with the product roadmap and are therefore not currently expected to become release candidates.
- **Under point minimum** – This status is assigned to ideas that have received fewer than 100 points.
- **Closed** – This status is assigned to ideas that have been closed due to duplication or any reasons other than that the idea has made it into a release.

We encourage users to check the status of an idea at any time by returning to the Ideas page.

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7.2.1.4 Accela User Groups

Accela user groups discuss products and share experiences to improve the use of their Accela products. These groups are designed as a resource for, and by, those who know the product best—the users. There is a formal meeting during *Accela Engage*, the annual User Conference, where each of the group members vote and name a regional lead. The regional lead then coordinates with the regional Account Manager on webinars, meetings and other notifications from the collaborations and discussions with other users in the group. The regional lead, along with other group members can determine if meeting more frequently than quarterly is an option but if not, remote meetings or conference calls are encouraged to promote collaboration and issue resolution.

Most meetings and product updates are coordinated around new releases and provide the user group members with information about the release, product demonstrations and product issues that have been addressed since the last release and new product enhancements based on feedback from the general user community. Accela posts all user group events in the events section on the Accela website (http://www.accela.com/company/events) and can also access additional customer forums and discussions in Accela's Success Community.

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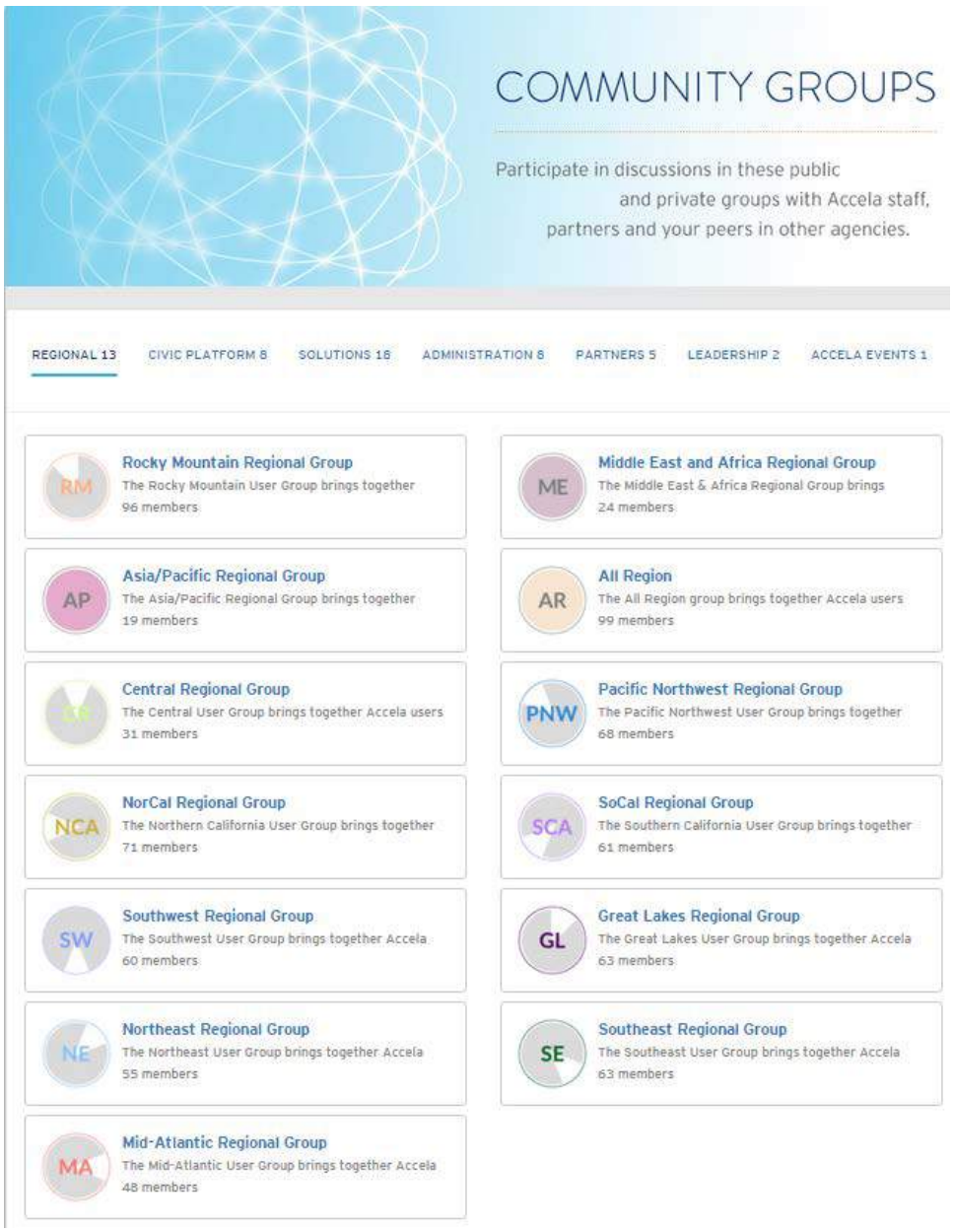

Exhibit 61: Participate in discussions in these public and private groups with Accela staff, partners, and agency peers

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7.2.1.5 Accela Engage User Conference

Watch Accela CEO Maury Blackman's Keynote from Accela Engage 2015 at: http://bit.ly/1G9Ulju

This annual event in August brings together hundreds of users, administrators, IT managers, and other government officials for four days of product training, app development training, breakout sessions, presentations, networking events, engaging with Customer Support and Services staff, partner solutions, exciting activities, and more. *The 2016 Annual User Conference will be held in Los Angeles, California at the JW Marriott L.A. LIVE*http://www.starwoodhotels.com/sheraton/property/overview/index.html?propertyID=127&elq=98baf5522b764faf913fd20da925d652&elqCampaignId= *from August 22 to 26th*. L.A. LIVE is the premier destination for live entertainment in downtown Los Angeles and is anchored by the JW Marriott, Staples Center, Grammy Museum and Nokia Theatre. The L.A. LIVE campus features sports and music venues, night clubs, 20 restaurants, movie theaters and a bowling alley. *For more details, visit http://bit.ly/1Jmpulq.*

Dynamic learning opportunities included:

- **General Session and Keynote Speakers** – Attendees were inspired by civic technology leaders and discovered what's ahead for Accela and the growing civic tech industry.
- **Breakout Sessions** – Attendees learned about best practices and heard first-hand how customers have solved similar challenges by using game-changing technologies from Accela.
- **Hands-On Training** – Attendees got the know-how needed to get the most out of their solution.
- **Expert Desks** – Attendees met with Accela experts and got immediate answers to all their questions as well as product support and live demos.
- **User Group Meetings** – Attendees connected with peers at other agencies in their region, and internationally, and learned what they're up to.
- **Demo Theater** – Attendees caught 15-minute demos of existing and prototype solutions that integrate with the Civic Platform.
- **Exhibit Hall** – Attendees learned how our partners' solutions and services are extending the benefits for other agencies on the platform.

The following topics are just some of the sessions that have been offered to attendees in past conferences:

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7.3 Software Upgrades

Accela is committed to the ongoing development of its products and works continuously to enhance the solutions to remain current with new technologies and consistent with best business practices. Accela spends millions of dollars each year on its research and development activities to enhance the effectiveness of its technology for its clients. Every single release advances technology and the automation it can bring our clients and their communities.

For each new release, the requirements for new enhancements and features originate from a number of sources:

- Market demand
- Customer requests
- Strategic investment
- Technology advances

Customer requests may come from various channels, such as direct requests from existing customers, industry trade shows and conferences, or user group meetings. At our annual user conference, for example, attendees have the option to participate in an organized vote to rank the intended system enhancements. The voting results are announced and discussed with the voters at that time. The following bullets outline our typical release cycle:

Unlike some other vendors that rush to deliver multiple releases within a single year, our annual release cycle supports our platform's maturity and our desire to release meaningful enhancements in response to market needs.

- **Frequency** – Accela's software releases typically occur annually (but may vary as requirements dictate) and other point releases as needed. The City will need someone with network administration skills and access as well as a Database Administrator or someone with credentials to access, modify and update the database. Service/feature packs are a collection of different patches, minor enhancements, or revisions that, by necessity, must be released outside of the normal release cycle and typically occur at six to eight week intervals as needed. Patches are used to correct an identified problem with a software program or an operating system that requires immediate action are only issued on an as-needed basis. Upgrades and patches do not affect any local configurations developed by individual agencies using the system's Admin Tools. A typical duration to install/implement in one environment (Dev, Test, Prod) is as follows:
    - Hot Fix: 1 to 2 hours
    - Service/Feature Pack: 2 to 3 hours

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- Version: 4 to 6 hours

- **Provision of release notes** – All version upgrades, patches, etc. are provided with corresponding instructions to enable a complete understanding of the reasons and outcomes. Detailed product release notes accompany all product releases, and are alternatively available on Accela's Success Community website for customers to review prior to installation. In addition, the following technical documentation is provided with each major release:
  - Administrator Guide
  - User Guide
  - Installation and Configuration Guide
  - Online Help
  - Interface Software Development Kit
- **Ability for Client staff to implement versus need to contract for services** – *For on premise customers*, upgrades to Accela's Civic Platform do not require a contract. When an upgrade becomes available, an e-mail notification is sent to all affected customers. Clients have the option of accepting these upgrades and releases into their configured systems. Accela keeps track of table structures and all system configuration data changes and then incorporates them into our standard database upgrade scripts. (It is the client's responsibility to test any customized user interfaces or user-defined tables and store procedures.) The result is that such efforts do not impact future releases of the product at any client agency.
- **Duration of support for prior releases** – Pursuant to our Maintenance agreement, Accela will provide maintenance support *to on premise customers* for the current release of each of its maintained software applications and for the release immediately preceding such current release. All other releases are deemed to be "legacy releases". Accela will respond to maintenance requests concerning legacy releases only using currently available information. Services requiring additional research, engineering-level support, or coding or programming by Accela will not be provided pursuant to the Maintenance Agreement, but may be separately available at rates and on terms that may vary from those described herein.

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7.3.1.1 Accela Cloud Clients

Accela upgrades its Cloud Test environment one month before the Accela Cloud Production environment is upgraded to the same release version. We upgrade our Cloud Support environment two weeks prior to upgrading the Cloud Production environment. This gives our Cloud clients one full month of testing the release prior to the release being installed into the Production environment. Our Cloud Environment Team has the responsibility of completing the upgrade for our clients. It is our customers' responsibility to perform all testing and verification of the new release against their specific configuration and setup.

- Day 1 – Test Environment Upgraded
- Day 14 – Support Environment Upgraded
- Day 30 – Production Environment Upgraded

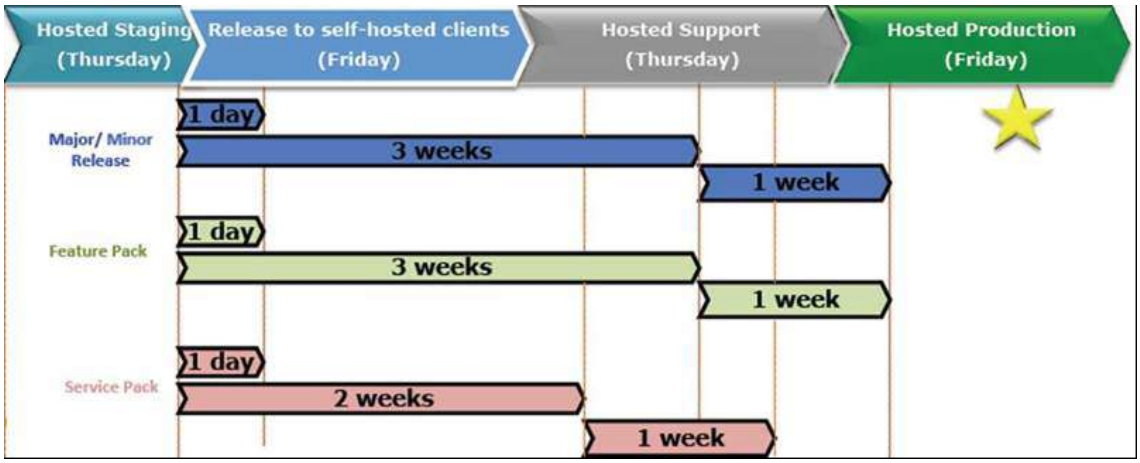

Exhibit 62: Typical Release Schedule for Hosted and On-Premise Clients

7.3.1.2 Approach to System Modifications

7.3.1.2.1 Designing New Enhancements

Accela's Civic Platform offers a variety of configuration tools that may allow requirements new to the system to be implemented without product enhancement. Among these tools are custom screens, Accela's Business Rules Engine, and robust support for GovXML and Web Services. For non-enhancements, the complete solution is documented and detailed in our standard Configuration Document, which allows the customer to understand the solution approach and approve it prior to execution.

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If a product enhancement is needed to meet a requirement, Accela follows a well-delineated process for assessing and designing new features for our existing Accela's Civic Platform COTS product. If the requirement is contractual or based on legislative mandates, Accela's Services team assigned to the project will collect requirements in the context of the project at hand and then work with Product Management to document the requirements and the proposed product enhancement. The requirements and delivery of enhancements will be reviewed with the customer for accuracy before development begins.

If the requirement is not contractual, enhancement requests can be made through Accela's Community Ideas page. Ideas are routinely reviewed and updated by Product Management. Based on a number of factors (number of votes, popularity, product direction, etc.), ideas are planned for future releases.

This approach is used routinely and supports well over 100 enhancements to our Civic Platform each major release. For non-enhancements, our Services team is well versed in using the configuration tools used to provide the configuration of new requirements not otherwise supported in the system.

The primary advantage to this approach is that it ensures that requirements are correctly documented and that the customer gets an opportunity to review and approve all requirements before any development begins. The result is an enhancement that meets expectations and works as designed. For non-enhancements, the complete solution is documented and detailed in our standard Configuration Document, which allows the customer to understand the solution approach and approve it prior to execution.

7.3.1.2.2 Retaining Client-Specific Enhancements during Upgrades

We develop and maintain a single code line for the base Accela Civic Platform. This in no way precludes an agency from securing improvements or enhancements to Accela's Civic Platform, but Accela Product Management has a responsibility to ensure that the requested improvements or enhancements do not negatively affect the use of the system for other clients. We maintain an internal product roadmap, and enhancements developed based on this roadmap are released to the entire customer base with each release. By using function IDs or switches, a specific customer solution need not turn on all functionality as a part of their specific solution.

If a product enhancement is needed to meet a requirement, Accela follows a well-delineated process for assessing and designing new features for our existing Accela's Civic Platform COTS product. If the requirement is contractual or based on legislative mandates, Accela's Services team assigned to the project

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will collect requirements in the context of the project at hand and then work with Product Management to document the requirements and the proposed product enhancement. The requirements and delivery of enhancements will be reviewed with the customer for accuracy before development begins.

At our discretion, Accela may require the customer to pay for the enhancement and will present the customer with any associated costs as a part of the submission of the functional requirements for signoff. Once the requirements are agreed upon, we will make the enhancement a candidate for the next regular release. In certain circumstances where functionality may be needed more rapidly, some enhancements may be able to be delivered in a service pack pending the extent of the development effort and developer availability.

Any customization performed by Accela is reviewed with the agency to ascertain that the existing features and functionality of the system cannot accomplish the need. Many times, we are able to present workable approaches that resolve the need. In the case that customization is ultimately selected as the appropriate path, Accela performs the work on the system after the agency has approved the work and its respective costs. There are no known constraints as Accela will enable completion of the customization without any deleterious effort on downstream releases.

Anytime Accela enhances its product either for what may be deemed a single customer at the time or for the benefit of all, it is a company policy to make the enhancement (customized code) available to all of our customers through a scheduled upgrade or point release. Under this approach, the Accela Civic Platform's source code is not "customized" – rather updates to the source code become part of our supported product for all customers moving forward. The benefit of this approach is clear—neither Accela nor its customers have a string of code that is not generally supported. Instead, Accela's engineering team confirms that the Accela Civic Platform is wholly supported and aligns with the original product specifications throughout its lifetime. Under this design, Accela does not build any product "enhancement" that does not map to the product direction and overall company approach to solution building.

7.3.1.2.3 Third-Party Product Compatibility

Accela will make every effort and take every precaution to ensure that its Civic Platform and complementary product ecosystem remains compatible and compliant with the latest releases from our partners and industry leaders such as Microsoft, Oracle and Esri. Periodic releases of service packs and patches to existing, supported version of these complementary products will be supported in as timely a fashion possible. Support timelines for when wholly new products and/or product versions will be supported shall be communicated to our customer

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base via release notes and/or formal announcements from our Customer Care team. The timelines will be determined by Accela based upon the value with which those products bring value to our customers and the Civic Platform as a whole. We recommend the industry best practice to test all new service packs, patches and versions within a Pre-Production environment prior to publishing to your Production environment. Accela's Customer Care team is also a valuable resource for questions and assistance in these matters.

7.3.1.2.4 Scheduled Downtime

Changes to the cloud environment require careful planning and testing prior to implementation. By way of code releases, the code has to pass through a minimum of three separate environments prior to its introduction into production. In every case, clients receive advance notification of the code change as well as any anticipated downtime associated with the maintenance (that generally occurs during the later evening hours). Standard notification is sent via email and posted to Success Community two weeks prior to any scheduled downtime of the hosted production environment. All servers are kept up to date with the latest operating system and firmware patches as they become available based on criticality and need.

7.4 Incident and Escalation

When the Customer Support team receives an incident report, it is tracked until final resolution. The assigned Customer Support representative communicates incident progress, and email notifications are sent at critical milestones. The escalation process adheres to the following path:

- **Initiation:** All information provided to the Customer Support is entered into Accela's tracking system; the incident is assigned an identification number and a Customer Support Representative.
- **For Requests for Information:** the Customer Support representative provides the information and either closes the incidents or escalates to the appropriate resource.
- **For Usage Questions:** the Customer Support representative explains to the customer how to accomplish the task in question. The incident is then closed.
- **For Software Issues:** After confirming that the issue is not related to usage, the Customer Support representative performs an issue analysis to determine the cause of the incident.

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- **For Enhancements**: The Customer Support representative gathers information about the requested enhancement, and escalates the incident to the appropriate resource within Accela, based on the request.
- **For Service Requests:** The Customer Support representative communicates and escalates the request to the appropriate Accela sales representative.
- **Analysis:** Once a software issue is reported, the Customer Support will attempt to replicate, analyze, research, and diagnose the cause of the issue. The customer may be asked to provide additional information, screenshots, or files to demonstrate the issue. Once resolved, and prior to closing the incident, the customer is asked to test the resolution. In the event that the Customer Support representative cannot resolve the issue, it is escalated to the appropriate resource.
- **Escalation to Sales:** Incident escalation to our Sales team occurs when a product enhancement or service is requested. The Sales representative will coordinate with Accela's Engineering and/or Services teams to prepare a cost estimate for the requested service. Upon customer approval, a purchase order is generated and Accela will provide the requested enhancement or service.
- **Escalation to Engineering:** Escalation to Accela's Engineering Team occurs when a modification to the existing ecosystem is required or requested. After an initial evaluation, the Engineering Team provides an estimated completion date. Our Quality Assurance staff evaluates each fix, patch, or workaround before it is sent to the Customer Support team for distribution. Once the Customer Support receives the fix, patch, or workaround, it is delivered to by e-mail or through Accela's FTP site.

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Exhibit 63 illustrates this process visually.

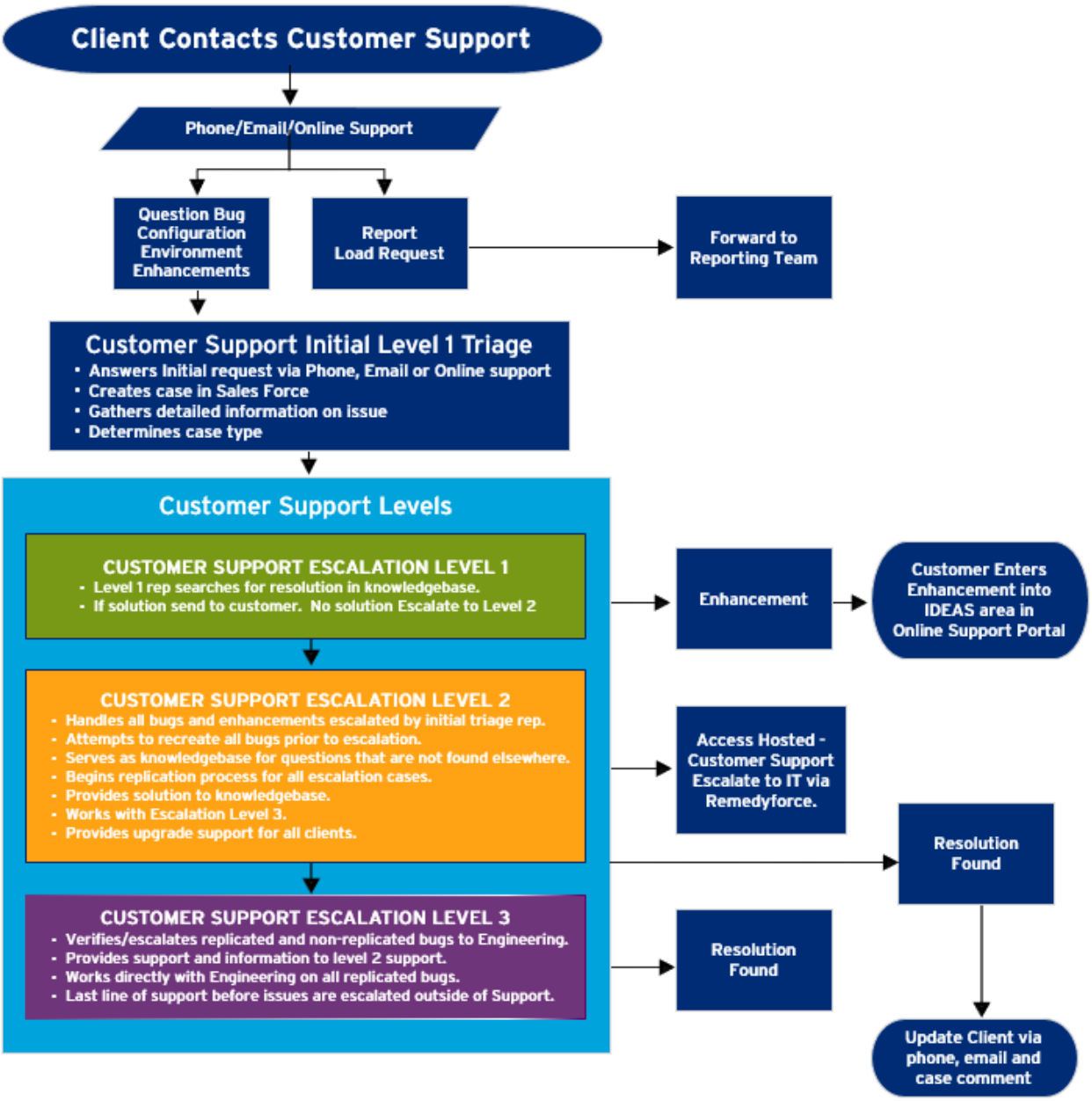

Exhibit 63: Accela Customer Support Case Lifecycle

We prefer the City have internal escalation procedures to ensure that our Customer Support team does not receive multiple calls regarding the same issue.

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Most agencies delegate two or three individuals to handle escalation issues prior to contacting the Customer Support with the issue, however, our Customer Support will accept calls from any City staff member if it chooses to do business this way.

7.4.1.1 Client Testing / Acceptance

Any time a fix, patch, or workaround, is delivered, the Customer Support team will assist with the install and testing, as necessary. If testing reveals that the incident is satisfactorily resolved, the incident is closed; otherwise, the incident is escalated to Accela's Engineering team.

Once a solution is confirmed as satisfactorily resolving the issue, it is closed and no longer actively tracked by the Customer Support team. A closed incident can be reopened at any time if the issue needs to be readdressed.

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8 References

Respondents shall provide the names, titles, addresses, and phone numbers of at least three municipal government references to whom they have provided similar SaaS solutions to within the most recent two years.

Our solution has built a global presence helping over 2000 customers worldwide ranging from population size of 9,000 to 1.23 million to better manage more than 250,000 projects. We encourage the City evaluation committee to contact the following Accela references for more details in assistance to your assessment of our overall qualifications and past project performance. As requested, each reference has purchased a similar SaaS (Accela's cloud-hosted (SaaS) solution for Land Management) solution in the past two years.

8.1 Reference 1

Reference 1	
Agency	County of Cowlitz, WA
Address	207 4th Avenue N. Kelso, WA 98626
Contact Person	Nick Little
Title	Deputy Director- Planning & Building
Phone Number	360-577-3052
Email Address	littlen@co.cowlitz.wa.us

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8.2 Reference 2

Reference 2	
Agency	City of San Leandro, CA
Address	835 E. 14th Street San Leandro, CA 94577
Contact Person	Tony Batalla
Title	I.T. Manager
Phone Number	510-577-3385
Email Address	tbatalla@sanleandro.org

8.3 Reference 3

Reference 3	
Agency	City of Lancaster, CA
Address	44933 N. Fern Avenue Lancaster, CA 93534
Contact Person	Monique Edwards
Title	I.T./Customer Care Manager
Phone Number	661-723-6024
Email Address	medwards@cityoflancaster.org

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8.4 Additional Reference

In addition to the requested references that have purchased a cloud-hosted solution for Land Management from Accela within the last two years, Accela is also opting to include an additional SaaS reference that uses Accela's Land Management Solution. The City of Rancho Cucamonga, CA is an Accela customer using the SaaS Land Management Solution. The City has been using the solution for more than two years. Accela felt it was important to provide a reference with more experience being live on the system than the City of Bryan's mandated references for this RFP response. Rancho Cucamonga can provide context for the City of Bryan on the initial experience of being live on the Civic Platform, as well as insight from their longer experience using the system.

Additional Reference 1	
Agency	City of Rancho Cucamonga, CA
Address	10500 Civic Center Drive Rancho Cucamonga, CA 91730
Contact Person	Jennifer Nakamura
Title	Associate Planner
Phone Number	909-477-2750 ext. 4324
Email Address	jennifer.nakamura@cityofrc.us

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9 Exceptions

Paragraph (As Noted and Wherever Referenced in the RFP)	Exception / Clarification	Proposed Language / Solution
RFP Page 5 *Proposals*	Contractor must provide its subscription order form and subscription terms and conditions, which contain information that is specific to the services proposed. Terms covered include pricing, assumptions and payment terms.	Clarify that Contractor must provide its subscription terms and conditions.
RFP Page 5 *Proposals* RFP Page 7 *If Proposal Results…* RFP Pages 11-12 *Requirements* RFP Page 20, *Section 1 Scope of Services*	Contractor will perform to the Agreement and its Proposal. Contractor agrees to perform to the RFP, but only to the extent the RFP does not impose requirements that are inconsistent or additional to the commitments in its Proposal. In the event of a conflict of terms among the proposal, contract and RFP, the contract should take precedence over the proposal and the proposal should take precedence over the RFP.	Revise language to reflect that Contractor is only responsible to perform to its Proposal and items that should have reasonably been considered incidental, it being understood that any item not specifically required or priced that has other than an insignificant cost associated therewith provide, would not be considered incidental. Contractor suggests that the parties negotiate the order of precedence in good faith to provide appropriate weight to the various terms.
RFP Page 5 *Proposals*	Contractor agrees to extend contract terms to other entities that enter into a joint purchasing inter-local cooperation agreement with City, with the exception of pricing terms, as Contractor is unable to indefinitely guarantee the same pricing.	Clarify that although contract terms may be extended, pricing terms may be subject to change.
RFP Page 5 *Reservations* RFP Page 6 *Cooperative Agreements* RFP Page 21, Section 4(E) *Warranty, Indemnification & Release*	Contractor does not provide performance bonds, considering the overall scope, cost, and nature of the proposed software services.	In lieu of a performance bond, the parties negotiate in good faith to determine alternate appropriate means of securing Contractor's performance as proposed.
RFP Page 7 *If Proposal Results…*	Subscription fees are due upon delivery of authentication credentials.	Clarify that subscription fees are due upon delivery of authentication credentials.

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Paragraph (As Noted and Wherever Referenced in the RFP)	Exception / Clarification	Proposed Language / Solution
RFP Page 7 *If Proposal Results…* *RFP Page 24, Section 7(E) Miscellaneous Terms*	Assignments made for purposes of financing or factoring or pursuant to changes in the corporate equity structure of Contractor should not be subject to prior approval by the City, as these do not affect the provision of services by Contractor.	Add the following language: "Notwithstanding, Contractor may assign its rights and obligations hereunder for purposes of financing or pursuant to corporate transactions involving the sale of all or substantially all of its stock or assets."
RFP Page 10 *Scope of Work*	Contractor does not provide maintenance for hardware or for third-party applications and makes no representations concerning said items' interactions with Contractor's software.	
RFP Page 11 *News Releases/Publicity*	Contractor requests that it be allowed to publicly disclose its ongoing business relationship with City provided such disclosures do not expressly or impliedly indicate City's endorsement of Contractor's products or services without City's prior written authorization.	Revise section to indicate that Contractor may disclose its business relationship with City. However, it may not expressly indicate or imply City's endorsement of Contractor's products or services.
RFP Pages 11-12 *Requirements*	Contractor's software product is not limited to a particular purpose and we are unable to provide a warranty indicating same. Contractor disclaims any and all express and implied warranties, including but not necessarily limited to, warranties of merchantability and fitness for a particular purpose.	Contractor offers the following professional services and software warranties: Contractor warrants that the software product offered by Contractor is free of material defects and shall operate as provided within Contractor's published specifications. Contractor warrants that it has full power and authority to grant licenses to the software proposed and that, as of the effective date of this submission, the software does not infringe on any existing intellectual property rights of any third party. Contractor will commence and complete its professional services and maintenance obligations in a good and workmanlike manner, consistent with the practices and standards of care generally-accepted within and expected of Contractor's industry, to ensure that the operation of the maintained software products does not materially differ from documented specifications. Contractor may make repeated efforts within a reasonable time period to resolve maintenance requests. Contractor provides

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Paragraph (As Noted and Wherever Referenced in the RFP)	Exception / Clarification	Proposed Language / Solution
		a ninety (90) day warranty for professional services deliverables, starting from date of acceptance. All professional services are provided "as is" without express or implied warranty of any kind regarding the character, function, capabilities, or appropriateness of such services or deliverables. Contractor provides no warranty whatsoever for any third-party hardware or software products. Third-party applications that utilize or rely upon the professional services may be adversely affected by remedial or other actions performed pursuant to this agreement; Contractor bears no liability for and has no obligation to remedy such effects.
RFP Page 15, Section B *Commercial General Liability Insurance*	The sentence, "No coverage shall be deleted from the standard policy without notification of individual exclusions and acceptance by the City" must be removed, as industry-wide exclusions might be made during renewals. In such cases, insurance carriers cannot take exception to such exclusions.	Remove the sentence, "No coverage shall be deleted from the standard policy without notification of individual exclusions and acceptance by the City."
RFP Page 16 *Insurance Requirements* RFP Page 21, Section 5 *FIRM's Insurance*	Per policy provisions, the City may be named an additional insured only to Contractor's general liability and automobile insurance policies; additionally, these same policies are the only policies that are primary and non-contributory.	Clarify that City may be named an additional insured only to Contractor's general liability and automobile policies; additionally, these same policies are the only policies may be primary and non-contributory.
RFP Page 16, Subsection G *Deductibles, Coinsurance Penalties...* RFP Page 22, Section G *Deductibles, Coinsurance Penalties...*	Contractor's self-insured retentions, or deductibles, are not subject to prior approval by City. Additionally, Contractor's insurance policies and deductibles/retentions apply to the entirety of its business and cannot be modified for any single engagement.	Remove language/section.
RFP Page 16, Subsection K *Notice of Cancellation, Non-renewal...*	Contractor will provide notice of any reduction in limit of liability, cancellation or non-renewal of insurance covered *if there is not equal or better insurance policies in place.*	Clarify that Contractor will provide notice *if there is not equal or better insurance policies in place.*

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Paragraph (As Noted and Wherever Referenced in the RFP)	Exception / Clarification	Proposed Language / Solution
RFP Page 23, Section K *Notice of Cancellation, Non-renewal...*		
RFP Page 16, Subsection K *Notice of Cancellation, Non-renewal...* RFP Page 17, Subsection L *Contractor's Failure to Maintain Insurance* RFP Page 23, Section K *Notice of Cancellation, Non-renewal...* RFP Page 23, Section L *Contractor's Failure to Maintain Insurance*	Contractor agrees to withholding of payment associated with disputed work only, pending resolution by both parties.	Clarify that the withholding of payments due shall be applied to disputed work only, pending resolution by both parties.
RFP Page 17, Subsection M *No Representation of Coverage Adequacy* RFP Page 23, Section M *No Representation of Coverage Adequacy*	To the extent not offset by its insurance coverage and to the maximum extent permitted by applicable laws, in no event will Contractor's cumulative liability for any general, incidental, special, compensatory, or punitive damages whatsoever suffered by City or any other person or entity exceed the fees paid to Contractor by City during the twelve (12) calendar months immediately preceding the circumstances which give rise to such claim(s) of liability, even if Contractor or its agents have been advised of the possibility of such damages.	
RFP Page 23, Section 6(B) *Termination*	Determination and cure of breaches should be further defined and applicable to both parties. Where a "for cause" termination is contemplated, Contractor recommends that a minimum of 30 days' cure period be allowed to establish whether material inconsistencies with agreement requirements are capable of	

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Paragraph (As Noted and Wherever Referenced in the RFP)	Exception / Clarification	Proposed Language / Solution
	remedy as indicated as this time period is more appropriate to determine and address a software issue.	

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10 Cost Proposal

Provide a fixed price proposal for each of the five contract periods for all proposed services.

Present options as appropriate.

Outline all pricing conditions, assumptions, and payment terms. Include ALL travel and expenses in the fixed fee price.

	FYE 2016	FYE 2017	FYE 2018	FYE 2019	FYE 2020
Fixed Fee Price	$294,792.10	$104,868.13	$112,208.91	$120,063.53	$128,468.00

Pricing Notes:

For the pricing table above, FYE 2016 includes all software, services, and travel associated to the implementation of the Civic Platform for Bryan, Texas. Since the proposal is for an Accela-hosted SaaS solution, the pricing for FYE 2017, 2018, 2019, and 2020 is for the subscription software costs. Software costs were calculated as 40 SaaS users on the Civic Platform and Citizen Access fees for the City of Bryan's population of 82,920.

The annual increase for the software costs (FYE 2017-2020) are calculated with a 7% annual increase. The amount of annual increase is subject to agreement term length. The SaaS Terms and Conditions have language that states the annual increase will not exceed 7%, so the 7% figure was used for the purposes of calculation for this RFP response.

Subscription software costs are renewed annually and are subject to the terms and conditions stated in Accela's Subscription Agreement.

The pricing set forth herein reflects information generally known to Accela, supplied to Accela by the Agency and based on Accela's interpretation of the RFP. Further information gathered through detailed investigation by Accela is required before a final Statement of Work and pricing can be mutually agreed upon.

- **Payment Terms:** The initial Annual Subscription fees are invoiced upon Accela's receipt of purchase order or signed agreement. Annual Subscription fees (renewal date) are due based on the anniversary date of contract signing.

  Professional Services fees are billable based upon mutually agreed terms and

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condition of the Statement of Work (SOW).Travel time and expenses will be billed as incurred. Travel time will be billed at the rate stated in the SOW. Billing terms for professional services, travel time and expenses are Net 30, unless otherwise agreed upon in the SOW.

Payment obligations hereunder are non-cancelable and any sums when paid shall be non-refundable. The Agency will be responsible for payment or reimbursement to Accela all federal, state, provincial and local taxes and duties that are applicable, except those based on Accela's net income.

Annual Subscription fees do not include hardware or equipment.

- **Alternate Terms Disclaimed:** The parties expressly disclaim any alternate terms and conditions accompanying drafts and/or purchase orders issued by Customer.

For reporting purposes, Accela Cloud clients can leverage Accela Ad-hoc report as well as Crystal Reports *(version includes Crystal Reports (CR) Server 2011 or 2013 with Enterprise 4.1 or CR 11 r1 and r2 or Enterprise 2008v1 or OEM Embedded; Crystal Reports Runtime 2008 or 2010 (for Mobile Office)),* however:

- Oracle Reports 11g or 10g are only supported by our San Jose, CA data center, not applicable for clients on other Cloud facilities
- MS SQL Reporting Server is not supported by Accela Cloud facilities

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11 Additional Information

Accela has included additional information for the City's evaluation.

- Resume for Proposed Project Manager: Allison Locke
- Other Product Recommendations
- A sample of Accela's Subscription Agreement
- A sample of Accela's Services Agreement
- A sample Subscription Order Form

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11.1 Resume: Proposed Project Manager: Allison Locke

Accela's proposal provides the City with a dedicated Project Manager, selected due to their extensive experience and expertise in delivering projects of this size. To this end, we have provided the full resume of our proposed Project Manager for the City's evaluation.

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zedRESOURCE

ALLISON LOCKE
BUSINESS ANALYST / IMPLEMENTATION CONSULTANT

Summary of Qualifications

A versatile and forward-thinking business professional with over nine (9+) years' experience in a combined background of product management, business analysis and strategic planning.

Significant Local and North American Public sector experience implementing Land Management, Permitting and Asset Management software solutions for all levels of government.

Brings significant Private Sector experience working with one of North America's largest telecommunication companies in roles which included Business Analysis, Business Strategy, Revenue & Capital Budgets, and Vendor Relations.

Known for a positive and engaging approach to team leadership and highly effective application of business analysis and process improvement initiatives.

Self-motivated and goal-oriented person that thrives in dynamic, changing environments and has a demonstrated passion for finding ways to make things better.

Core Competencies

- Business analysis and documentation
- Business process improvement and analysis
- Requirements documentation and validation
- Meeting facilitation and communication
- Eliciting collaboration between business units

Work Experience

zedIT Solutions Inc., St. John's, NL
Business Analyst, Feb 2013 - Present
Delivery Manager for the Enterprise Solutions team providing Business Analysis functions for public sector and private sector clients.

Client: Michigan Department of Technology
Project: Department of Licensing and Regulatory Affairs
Role(s): Senior Implementation Consultant, Jul 2015 - present

Providing Senior Implementation Consultant functions for the implementation of Accela Automation Land Management software for the State of Michigan's Department of Licensing and Regulatory Affairs.

- Lead project discovery and scoping activities.
- Collaborate with client Product Owner to create and maintain project delivery schedule.
- Conduct Project Kick-off and Core team orientations sessions.
- Capture client's business requirements and design solution foundation based on requirements identified during discovery.
- Configuration of Accela Automation, Accela Citizen Access and Accela Mobile Office in accordance with solution foundation design.
- Contribute to weekly Project Status meetings with core project team and Executive stakeholders.

Client: Cape Cod Commission
Project: Town of Provincetown
Role(s): Project Manager & Business Analyst, Aug 2014 – Dec 2015

Providing Project Manager and Business Analyst functions for the implementation of Accela Automation Land Management software for the Town of Provincetown based on the Massachusetts Base Configuration Template.

- Host weekly Project Status meeting with core project team and complete weekly status reports.
- Complete project setup tasks including resource assignments, bookings and maintenance of project schedule.
- Prepare and conduct Project Kick-off and Core Team Orientation sessions
- Perform GAP analysis sessions to identify gaps in Base Template required for Town of Harwich processes and capture Citizen Access configuration requirements.
- Implement Accela Automation configuration changes as indicated in GAP analysis sessions.
- Provide Administrative and End-User Training

Client: Cape Cod Commission
Project: Barnstable County – Town of Harwich
Role(s): Project Manager & Business Analyst, Nov 2013 – Apr 2015

Providing Project Manager and Business Analyst functions for the implementation of Accela Automation Land Management software for the Town of Harwich based on the Massachusetts Base Configuration Template.

- Host weekly Project Status meeting with core project team and complete weekly status reports.
- Complete project setup tasks including resource assignments, bookings and maintenance of project schedule.
- Perform GAP analysis sessions to identify gaps in Base Template required for Town of Harwich processes.
- Complete configuration changes as indicated in GAP analysis sessions.
- Complete configuration of Accela Citizen Access portal.

Client: Office of the Chief Information Office (OCIO), Government of Newfoundland and Labrador (GNL), Department of Fisheries and Aquaculture (DFA)
Project: Accela-DFA Licensing & Inspections System
Role(s): Business Analyst, Feb 2013 – Apr 2015

Providing business analyst functions for the implementation of new online Fish Licensing and Inspections system for the Department of Fisheries and Aquaculture (DFA) in partnership with Accela and Accela Automation Software.

- Assist in completion of To-Be Analysis documentation

- Complete configuration of Accela Automation Licensing module for Solution Foundation.
- Complete Analysis and Configuration of Accela Citizen Access portal
- Conduct Knowledge Transfer sessions for agency's Citizen Access admin personnel and end-users.
- Business analysis activities including mapping client business requirements to the functionality of Accela Automation's Licenses & Case Management, Citizen Access, Mobile Office and GIS.
- Complete Business Requirements Traceability matrix throughout project lifecycle
- Assist in capturing and prioritizing Report & EMSE requirements
- Coordinate interface deliverables (ePayment, Oracle Financials, EDMS).
- Coordinate and provide training assistance for AA Administrator and End-User training
- Completed 9 day Accela "New-hire Bootcamp" training session covering a mix of Technical & Implementation Consultant curriculum

Client: City of Milwaukee
Project: Land Management System
Role(s): Business Analyst, Jul 2013 – Apr 2014

Providing oversight functions for the implementation of new online Land Management System to meet the requirements of multiple government agencies within the City of Milwaukee.

- Provide orientation on Accela software and methodologies to new local project resources.
- Host weekly check point meetings with internal zedIT Business Analysts to provide oversight and guidance on Accela project delivery
- Attended Project Kick-off meetings with Agency staff
- Attended Accela Automation Core Team Training

Bell Aliant, St. John's, NL
Product Manager, Mar 2009 – Jan 2012

Responsible for the lifecycle management of a select B2B and B2C product portfolio of Voice and Data Terminals, working collaboratively with a variety of stakeholders, the Product Manager undertakes product strategy and tactics along with the development and execution of the annual Product Plan.

- Establish, implement and maintain product strategies to achieve corporate objectives including product introduction, evolution and exit tactics; pricing strategy and tactics; product promotion, advertising and branding.
- Monitor and analyze market trends, business developments, industry reports and research using the findings to recommend product initiatives and tactics in-line with marketing strategies.
- Gather and report on customer research and competitive intelligence to identify and recommend new business opportunities.
- Work with key internal and external stakeholders to implement and promote product strategies.

- Internal channels include: Sales, Technology Teams, Finance, Customer Care etc.
- External channels include: service partners, vendors, 3rd party contractors, retail outlets etc.
- Financial Performance Reporting including the development and maintenance of Revenue & Capital forecasts, accountability for profit/loss and the management of capital spending.
- Deliver reports to the Directors of Business and Consumer Marketing on the status of product and promotional activities.
- Present Product Plans to executive committees in order to secure and coordinate sufficient resources from numerous business departments for the successful implementation of marketing activities.

Bell Aliant, St. John's, NL
Product Consultation Manager, Oct 2005 – Mar 2009

Primary responsibility with the role is the coordination, implementation and communication of activities needed to launch or update products and promotions.

- Fulfill role of prime coordinator on projects requiring the collaboration of numerous departments to ensure efficient and timely implementation of Product Launches, Sales campaigns and educational information.
- Develop, communicate and distribute product information and promotion initiatives through the internal corporate resource site, external customer website, internal newsletters and marketing collateral.
- Plan, coordinate and host "Lunch & Learn" product education sessions and/or seek out specialized guest speakers.
- Reach out to industry knowledge experts to engage them in trade shows, employee training, product demonstrations, and supplementary support material.
- Coordinate, schedule, take minutes and host video & web-conferences.
- Maneuver through multiple departments and information sources to pull relevant information to address specific issues, concerns and/or fill in informational gaps.
- Maintain and analyze monthly performance reports
- Monitor market research reports to provide environmental assessment and competitive intelligence information to Product Manager for the Product Planning process.
- Create and present monthly Occupational Health and Safety meetings to team members.
- Provide informational support and implementation guidelines for new and re-negotiated customer contracts.

Newtel, St. John's, NL
Customer Service, Jul 2001 – Oct 2005

Consult with customers in order to provide information on, and facilitate the sale of Telecommunication products and services.

- Promotion and sale of cellular products and services

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ALLISON LOCKE
BUSINESS ANALYST / IMPLEMENTATION CONSULTANT

- Responding to customer inquiries on their accounts and services
- Illustrate functions of cellular and data products
- Provide troubleshooting & problem solving assistance
- Maintain inventory and cash supply for Aliant Mobility Sales & Payment Centers

Education & Training

Bachelor of Business Administration (BBA),
Memorial University of Newfoundland & Labrador (2013)

Bachelor of Arts (BA),
Memorial University of Newfoundland & Labrador (2001)

Professional Development and Training:

Principles of Effective Communication (Barbara Brummer & Associates)

Managerial Marketing, (TUCK School of Business Online course)

Continued Studies in Managerial Marketing, (TUCK School of Business Online course)

Marketing to MARCOM (Barbara Brummer & Associates)

Developing Winning Value Propositions (Dr. Lynn Phillips, President, Reinventures)

Customer Focus – A Shared Commitment

Linking Solutions to Customer Needs

Accela Training Curriculum

Accela Boot-Camp training August 2013

Implementation Consultant training sessions attended:
- Accela Product Overview
- Accela Automation Analysis & Configuration
- Accela Mobile Office
- Accela GIS
- Accela Citizen Access
- Accela EDR
- Accela Apps

Technical training sessions attended included:
- EMSE Scripting Introduction
- AdHoc reporting & Report Schema
- Introduction to Accela Conversion Tools

Accela Learning Management System Training
- Configuring Record Types in Accela Automation
- Mobile Inspector Webinar
- **Accela Citizen Access (ACA) Implementation**

11.2 Other Product Recommendations

Solutions that may serve the City in the future include:

- **Licensing and Case Management Module** is fully integrated to track and manage regulatory process associated with licensing, inspection, investigations, complaint handling, hearings and legal action. The solution also supports the collection of payments for new licenses, renewals and other taxes, allowing agencies to not only deliver outstanding customer service, but focus on revenue-generating activities. Key benefits of choosing Accela Licensing and Case Management solution include: Streamlined internal processes to deliver timely customer service; Maximum configurability to meet current and future needs while providing highest level of automation; Robust workflow engine allows for multiple workflows for licenses and case tracking all tasks from application inception to license; Flexible user interface supports unique "look and feel" for each agency; Reporting data that can be extracted for letters, spreadsheets, and graphics and Automated business rule scripts for scheduled notifications, status changes, fee calculations and more.
- **Asset Management Module:** allows agencies to manage Street, Water, Storm water, Sewer, Fleet, Parks, Buildings or any other type of asset, including inventory, preventative maintenance schedules, work orders, costing, etc.
- **Citizen Relationship Management:** Accela CRM allows staff to efficiently manage service requests and provide best-in-class service to residents. The highly customizable solution automatically ingests, routes and stores resident requests, enabling staff users to easily manage inbound service requests from residents and City staff users for internal work orders. Finally, the CRM solution acts as a collaboration tool, helping facilitate communication and teamwork between staff and departments.
- **Finance and Administration:** Our core Finance and Utility Billing modules are seamlessly integrated, providing smooth and efficient workflows through all the finance, billing, payroll and other processes your organization relies on every day. *The Utility Billing solution is priced in the cost worksheet with this proposal.*
- **Legislative Management:** allows agencies to manage legislative and public meetings and engage their community via agenda management, civic streaming, digital boardroom management, and boards and commission appointment management.
- **ROW Management:** provides visibility and real-time insight into street projects and activities that occur within the public right of way. Map-based

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coordination uncovers potential conflicts, identifies new opportunities, improves planning and communication and saves you time and money when managing activities in the public right of way.

- **Environmental Health Module:** tracks and manages the permit and inspection activities that ensure that community health standards are upheld and environmental health regulations are enforced.

Licensing and Case Management

Accela's Licensing & Case Management Vertical Markets

- Agriculture
- Alcohol & Tobacco
- Business Licensing
- Education
- Environmental
- Financial & Banking
- Health Professions & Facilities
- Occupational and Trade
- Professional Licensing
- Recreation: Hunting and Fishing
- Social Services
- Weights and Measures

11.2.1.1 Licensing and Case Management

Automate licensing to a new level

Accela's Licensing and Case Management is a fully integrated solution to track and manage regulatory processes associated with licensing, registration, inspection, investigations, complaint handling, hearings and legal action allowing you to deliver outstanding customer service to licensed professionals and business entities. Accela's Licensing and Case Management solutions offer the highest level of configurability and flexibility to meet best practice and unique government licensing requirements.

Licensing and Case Management creates an enterprise platform that promotes:

- **Flexibility and versatility** in licensing, registration, and case management via the Licensing and Case Management platform. This comprehensive business intelligence solution automates government operations while facilitating timely and proactive activity management.
- **Self-service**, using Citizen Portal, our public facing web portal, and our interactive voice response technology (Accela IVR). These technologies substantially reduce the need for counter operations and provide 24 hour online and telephone access to government operations.
- **Visualization of information** with Accela's award-winning Esri ArcGIS integration that provides access to geographic representation of licensing information and other vital data both in the office and the field.
- **Mobility** via Accela Mobile and our productivity apps Analytics, Inspector, Code Officer, and Contractor Central, which enhance accessibility for field staff and community users by extending back office and public self-service options to the field – with or without an active connection back to the office.

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11.2.1.2 Asset Management

Asset Management

Maximize the life and value of your infrastructure assets

Accela, our partners, and the developer community have the capability to build, configure, deploy and manage civic solutions and applications. The Accela Civic Platform is surrounded by a complete set of services that address development and customer lifecycles. Whether installed on premise or in the Cloud, the Civic Platform provides a complete infrastructure to automate and streamline civic processes related to Asset Management, Land Management, Licensing and Case Management, Finance & Administration, Environmental Health and Safety, Legislative Management, Recreation and Resource Management, Right of Way Management, and Citizen Relationship Management. *For more details, visit http://www.accela.com/platform.*

Accela's Asset Management solution helps you identify and focus on your top priorities when it comes to managing the lifecycle of your agency's infrastructure—both for investments in new assets and in the operations and maintenance of existing ones and keeps you ahead of infrastructure demands.

Accela's Asset Management:

- **Accelerates decision-making processes.** By combining geographic information system (GIS) and supervisory control and data acquisition systems (SCADA), agencies can quickly analyze information about staff, schedules, work orders, and equipment to make informed decisions about how to utilize available resources.
- **Streamlines asset tracking and management.** Streamline activities associated with tracking and managing your community's assets and resources while improving operational efficiency and reducing cost. Whether planned or reactive, all activities are captured in a single database allowing coordination between departments. At the end of the day, all this allows your community to consistently enjoy optimal use of the infrastructure and facilities that improve and enhance their quality of life.
- **Visualizes information** with built-in GIS capabilities that provide access to geographic representation of property information, infrastructure assets, work orders and other vital information both in the office and the field.
- **Self-service**, using Accela CRM– the work request management system and Citizen Portal – the public facing web portal. These technologies substantially reduce the need for counter operations and provide 24 hour online and telephone access to government operations.
- **Mobility** via our suite of mobile apps, which enhance system accessibility options and efficiencies for field staff, community users, and executives by

To read how Fort Worth, Texas applies our Asset Management solution to its specific operations, visit http://bit.ly/1MwMH1h

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extending back office and public self-service options to the field – with or without an active connection back to the office.

11.2.1.3 Citizen Relationship Management (CRM)

Citizen Relationship Management

Community engagement, simplified

Accela CRM offers a complete, turnkey, best-in-class solution that includes branded smartphone applications, a public-facing web portal, a private back-end CRM system for staff workflow (with administrative dashboards for city administrators), and an industry-leading approach to integration – all within the context of a single solution.

Accela CRM spans three major project categories:

- **Citizen Engagement Tools**, including a customized, City-branded, all-in-one mobile application and public-facing embeddable web iframe;
- **Cloud-based Customer Relationship Management (CRM) System** automatically ingests, routes and stores resident requests, while providing the tools for staff members to create custom push notifications to keep residents up-to-date on all pertinent City-related information. In addition, the CRM solution
- **Reporting and Analytics** means all of the City's data can be parsed for metrics, performance trends, and current activity. Data can also be exported for external analysis. Additionally, reporting is offered on-demand, as staff members can access real-time data ensuring decision making proceeds on the basis of relevant data.

Finance and Administration

11.2.1.4 Finance and Administration

Cloud-based financial solutions evolving local government

Accela's cloud-based suite of financial and administration software enables local governments to be more productive through reliable and efficient solutions. The solutions are uniquely suited to the many roles of local government, helping agencies keep pace with the demands of other departments and local residents, while innovating and evolving the business. Efficient, intuitive and easy to use, they free up time and fuel fast, accurate work

Solution modules include:

- **Finance and Budgeting -** With features for general ledger, budgeting, clearing house, procurement, bank reconciliation, project management, fixed

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assets, purchase orders, requisitions and accounts payable, you can masterfully manage, report on and share information on complex financials

- **Payroll and Human Resources** - Comprehensive and robust, the module was designed to exceed local governments' most complex payroll requirements and give users the ability to control authorized positions and handle complex benefit and deduction calculations. The Human Resources application's reporting capabilities meet all OSHA, FMLA and EEOC requirements and the strict security standards ensure that sensitive records remain safe and secure.
- **Utility Billing** - cornerstones of the Accela suite of applications. This application automates a variety of tasks and provides a customer-service-driven solution that allows the management of water, sewer, electric, garbage and any other service information with ease. An online Web portal allows your customers to look up their transaction history, consumption history, graph their consumption history and pay their bill electronically.
- **Property Tax** - Designed to manage municipal tax billing and collection, this module may be used for school, real property and personal property taxes. School and property tax bills are generated through local county government and transferred into our centralized Collection system. Tax rolls, special assessments and other one-time charges can be easily managed.

11.2.1.5 Legislative Management

Legislative Management

Manage your public meetings, cut costs and connect with citizens

Accela's Civic Platform provides the most feature-rich, intuitive, and effective public meeting management tools available to governments, schools districts and public sector agencies, all geared to make you and your organization better, more efficient and fiscally prudent.

While our solution is a powerful, comprehensive, seamless application that does not require integration points, organizations can choose to deploy all five of our modules, or just one at a time. Each module is valuable on its own and allows for easy module addition.

- **Agendas and Minutes** - Easily prepare for meetings, approve agenda items, generate documents, create meeting packets and capture minutes
- **Digital Boardroom** - Display meeting content and voting results in real time with simple touch-screen design, allowing easy navigation and voting.

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- **Civic Voice** - Engage your citizens online and join the conversation they are already having about your agency, your work or projects impacting your community.
- **Civic Streaming** - Build trust with live and on-demand video of public meetings, when and where it's most convenient for citizens.
- **Boards and Commissions** - Streamline the boards and commissions appointment process by bringing board governance to the cloud.

11.2.1.6 Right of Way Management

Right of Way Management

Map-based coordination for smarter, safer streets

Accela's Right of Way Management (ROW) solution solves the problem of coordinating road construction projects and street activities between public works, utilities, and government agencies, while keeping citizens informed. This solution enables proactive management of all utility and street projects to optimize street performance, reduce costs, and minimize the environmental impact.

Accela ROW allows customers to coordinate and manage all projects in one place. Stakeholders uncover potential conflicts and identify new opportunities with real-time access to information about road construction and street activities. Permits offers a set of tools to model the workflow associated with permit applications for projects. With Events and Incidents, users can coordinate and communicate all types of activities happening in the right of way. Users can share a map on the web to inform citizens of construction projects and street activities.

The Accela Right of Way Management solutions include:

- **Utility Coordination** lets you coordinate construction work in real time, minimizing conflicts and unnecessary street cuts while stretching budgets and increasing pavement lifetime.
- **Events and Incidents** enables events to be planned, and unplanned incidents to be taken care of in conjunction with planned projects and permitted work, allowing for a deeper level of coordination across a greater number of entities and reducing the impact events and incidents have on citizens.
- **Citizen's View** gives citizens visibility into activities taking place in the public right of way. With Citizen's View, your agency can build a configurable website that shows street projects and community events in multiple formats, including a map, timeline and calendar, giving your citizens flexibility to view the information most important to them.

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- **Right of Way Permitting** helps by bringing all right-of-way project and permit data into a single location, automatically checking for conflicts. This solution brings a deeper level of visibility across entities and enables all parties to understand the bigger picture, increasing ease and efficiency across the system.

11.2.1.7 Environmental Health

Environmental Health

Helping You to Protect the Public's Health

Additionally, the Accela Environmental Health & Safety solution tracks and manages the permit and inspection activities that ensure that community health standards are upheld and environmental health regulations are enforced.

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11.3 A sample of Accela's Subscription Agreement

Accela has provided a sample copy of our Subscription Agreement on the following pages.

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ACCELA SUBSCRIPTION TERMS AND CONDITIONS

Version 52615a

1. As used herein, "Accela" refers to Accela, Inc. and "Customer" refers to the subscribing customer designated on the attached Order. Accela and Customer are collectively designated as the "Parties".

2. These Subscription Terms and Conditions ("Terms") are effective upon execution of the Order by Customer and are for the exclusive benefit of the Parties. Nothing herein will be construed to create any benefits, rights, or responsibilities in any other parties.

3. Customer's subscription term commences on the date Accela provides appropriate access credentials to Customer's designated technical contact, indicating that the application services identified in the Order ("Subscribed Services") are available for Customer's subscription use. Said date is Customer's "Service Date" for purposes of designating the start of any subscription term.

4. Subscription terms are twelve (12) calendar months in duration. At the end of Customer's subscription term or, if a multi-term subscription is indicated on the Order, the last of Customer's subscription terms, Customer's subscription will renew for an additional term. The per-unit pricing during said additional term will be the same as the prior term's annual fees unless Accela notifies Customer otherwise not less than sixty (60) calendar days prior to the end of said prior term. Any price increase will be effective at the start of the renewal term. No such price increase will exceed seven percent (7%) of the prior term's annual pricing. Customer may opt-out from said automatic renewal by providing written notice to Accela not less than sixty (60) calendar days prior to the Service Date anniversary which begins the renewal term. During said sixty-day period, Customer may decrease the number of users for which it has subscribed; said decrease will be effective during the next subscription term. Customer may not decrease its number of subscribed users at any other time during a subscription term. At any time during a subscription term, Customer may increase its number of subscribed users by submitting an order to Accela and paying the fees associated with the increase. Such fees will be calculated as the pro-rata remaining portion of the subscription term, rounded-up to the nearest full month.

5. In exchange for its use of the Subscribed Services, Customer will pay to Accela the amounts indicated in the Order. Said amounts are based on services purchased and not actual usage; payment obligations are non-cancelable and fees paid are non-refundable, except as otherwise specifically-provided herein. Unless otherwise stated, such fees do not include any taxes, levies, duties or similar governmental assessments of any nature, including but not limited to value-added, sales, use or withholding taxes, assessable by any local, state, provincial, federal or foreign jurisdiction ("Taxes"). Customer is responsible for paying all Taxes associated with its purchases hereunder. If Accela has the legal obligation to pay or collect Taxes for which Customer is responsible, the appropriate amount will be invoiced to and paid by Customer, unless Accela is provided with a valid tax exemption certificate authorized by the appropriate taxing authority. Accela is solely responsible for taxes assessable against it based on its income, property and employees.

6. The Subscribed Services are protected under the laws of the United States and the individual states and by international treaty provisions. Accela retains full ownership in the Subscribed Services and grants to Customer a limited, nonexclusive, nontransferable right to use the Subscribed Services, subject to the following terms and conditions: a) The Subscribed Services are provided for use only by Customer employees and to the extent of their duties for Customer, Customer's agents, contractors and officials; b) Customer may not make any form of derivative work from the Subscribed Services, although Customer is permitted to develop additional or alternative functionality for the Software using tools and/or techniques provided to Customer by Accela; c) Customer may not obscure, alter, or remove any confidentiality or proprietary rights notices; d) Customer may use the Subscribed Services only to process transactions relating to properties within both its own geographical and political boundaries and may not sell, rent, assign, lend, or share any of its rights

SAMPLE

hereunder; e) Customer is responsible for all activities conducted using its user credentials and for its users' compliance with the provisions of these Terms; and f) All rights not expressly granted to Customer are retained by Accela. Accela will make the Subscribed Services available to Customer pursuant to these Terms during a subscription term. Customer agrees that its purchases hereunder are neither contingent on the delivery of any future functionality or features nor dependent on any oral or written public comments made by Accela regarding future functionality or features.

7. Accela warrants that it has full power and authority to agree to these Terms and that, as of the effective date hereof, the Subscribed Services do not infringe on any existing intellectual property rights of any third party. If a third party claims that the Subscribed Services do infringe, Accela may, at its sole option, secure for Customer the right to continue using the Subscribed Services or modify the Subscribed Services so that these do not infringe. Accela will have the sole right to conduct the defense and will defend any legal action and conduct all negotiations for its settlement or compromise.

8. Accela has no obligation for any claim based upon a modified version of the Subscribed Services, where such modifications were not made or authorized by Accela, or the combination or operation of the Subscribed Services with any product, data, or apparatus not provided by Accela. Accela provides no warranty whatsoever for any third-party hardware or software products. If a third-party product is supplied by Accela, no support for any third party product is provided, unless an addendum is attached hereto, identifying the product and specifying the terms and conditions of any support. Except as expressly set forth herein, Accela disclaims any and all express and implied warranties, including but not limited to warranties of merchantability and fitness for a particular purpose.

9. The Subscribed Services will be hosted by Accela on Accela-owned equipment at a physically-secure commercial third-party hosting facility. Accela will perform system administration duties as required to maintain the service levels described below and to facilitate timely restoration of Customer's data and operations, if necessary, following unanticipated interruptions of the Subscribed Services. Accela will implement suitable network security measures to minimize the likelihood of unanticipated interruptions of the Subscribed Services.

10. Accela will endeavor to provide Customer with no less than twenty-four (24) hours' notice prior to Subscribed Services unavailability due to planned maintenance (other than during Accela's standard maintenance window between the hours of 9:00 PM [21:00] Thursday and 1:00 AM [1:00] Friday Pacific time); Accela will endeavor to provide as much notice as is practicable under the circumstances for updates and fixes which may be applied on a more urgent basis. Accela will provide five (5) business days' notice prior to any planned network, server hardware, operating environment, or database modifications of a material nature.

11. Excluding the foregoing events, Accela warrants that the Subscribed Services will be available no less than ninety-nine point nine percent (99.9%) of each calendar month. For each month during which the availability of the Subscribed Services does not achieve the established standard, Accela will provide a credit to Customer's account as calculated pursuant to Section 12 below, provided that the substandard availability is timely identified by Customer in writing, can be objectively verified, and the Subscribed Services are being used in live-production. Credits accumulated pursuant to this Section may be applied to additional Accela products and/or services, but will not be refunded to Customer.

12. The performance requirements for the Subscribed Services, excluding planned maintenance downtime, are below. Uptime is calculated on a calendar month basis as U=O/(M-P)*100, where U is Uptime, O is the amount of operational uptime for the Subscribed Services during a given month, M is the number of minutes in the month, and P is the number of minutes of planned downtime during the month. Credits are calculated on pro-rated monthly fees.

Uptime	*Credit*
≥99.9%	None
<99.9% but ≥99.0%	15%
<99.0% but ≥95.0%	35%
<95.0%	100%

13. In support of the Subscribed Services, Accela will provide Customer with a) a telephone number to

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contact the Customer Resource Center (CRC), Accela's live technical support facility, which is available from 4:00 a.m. until 6:00 p.m. Pacific time Monday through Friday, excluding Accela's observed holidays; b) one or more electronic mail addresses to which Customer may submit routine or non-critical support requests, which Accela will address during its regular business hours; and c) access to archived software updates and other technical information in Accela's online support databases, which are continuously available. Where support is needed to address non-functioning or seriously impaired Services and there is no reasonable workaround available, Accela will promptly respond to the support request and use commercially reasonable efforts to provide updates toward resolution of the issue.

14. The following are not covered by these Terms, but may be separately available at rates and on terms which may vary from those described herein: a) Services required due to misuse of the Subscribed Services; b) Services required by Customer to be performed by Accela outside of Accela's usual working hours; c) Services required due to external factors including, but not necessarily limited to, Customer's use of software or hardware not authorized by Accela; or d) Services required to resolve or work-around conditions which cannot be reproduced in Accela's support environment.

15. Customer warrants that it owns or has been authorized to provide the data to Accela. Customer retains full ownership of said data and grants to Accela a limited, nonexclusive, nontransferable license to use said data only to perform Accela's obligations in accordance with these Terms.

16. Throughout the term of the agreement, upon the request of Customer, Accela will provide Customer with:
(i) a copy of its data in a database dump file not more than once per calendar quarter, ;
(ii) an APO property conversion upload, not more than twice per annual term, and
(iii) a Crystal Report placement not more than ten (10) times per annual term.

Within thirty (30) calendar days following the end of its final Subscribed Services term ("End of Term"), Customer may request that Accela provide a complete copy of Customer's data and associated documents, as updated or modified by Customer's use of the Subscribed Services, in a database dump file format. Accela will comply in a timely manner with such request, provided that Customer a) pays all costs of and associated with such copying, as calculated at Accela's then-current time-and-materials rates; and b) pays any and all unpaid amounts due to Accela.

17. Subject to the limitations of Section 6, Customer may authorize access to the Subscribed Services by creating unique user names and passwords ("Logins") up to the number of users indicated in the Order.

18. Each Login must be assigned to a single individual and may not be shared or used by more than one such user. Customer may reassign any Login to another individual, provided that such reassignments do not circumvent the "single individual" requirement described in this Section.

19. Customer acknowledges that transmissions and processing of Customer's electronic communications are fundamental to Customer's use of the Subscribed Services. Customer further acknowledges that portions of such transmissions and processing may occur within various computer networks not owned or operated by Accela. Customer agrees that Accela is not responsible for any delays, losses, alterations, interceptions, or storage of its electronic communications which occur in computer networks not owned or operated by Accela.

20. Either party may end Customer's access to the Subscribed Services if the other materially breaches these Terms and, after receiving a written notice describing the circumstances of the default, fails to correct the breach within thirty (30) calendar days. Upon any termination for cause by Customer, Accela will refund any prepaid subscription fees covering the remainder of the subscription term after the effective date of termination.

21. "Disclosing Party" and "Recipient" refer respectively to the party which discloses information and the party to which information is disclosed in a given exchange. Either Accela or Customer may be deemed Disclosing Party or Recipient depending on the circumstances of a particular communication or transfer of information. "Confidential Information" means all disclosed information relating in whole or in part to non-public data, proprietary data compilations,

SAMPLE

computer source codes, compiled or object codes, scripted programming statements, byte codes, or data codes, entity-relation or workflow diagrams, financial records or information, client records or information, organizational or personnel information, business plans, or works-in-progress, even where such works, when completed, would not necessarily comprise Confidential Information. The foregoing listing is not intended by the Parties to be comprehensive, and any information which Disclosing Party marks or otherwise designates as "Confidential" or "Proprietary" will be deemed and treated as Confidential Information. Information which qualifies as "Confidential Information" may be presented to Recipient in oral, written, graphic, and/or machine-readable formats. Regardless of presentation format, such information will be deemed and treated as Confidential Information. Notwithstanding, the following specific classes of information are not "Confidential Information" within the meaning of this Section: a) information which is in Recipient's possession prior to disclosure by Disclosing Party; b) information which is available to Recipient from a third party without violation of this Section or Disclosing Party's intellectual property rights; c) information which is in the public domain at the time of disclosure by Disclosing Party, or which enters the public domain from a source other than Recipient after disclosure by Disclosing Party; d) information which is subpoenaed by governmental or judicial authority; and e) information subject to disclosure pursuant to a state's public records laws. Recipient will protect the confidentiality of Confidential Information using the same degree of care that it uses to protect its own information of similar importance, but will in any case use no less than a reasonable degree of care to protect Confidential Information. Recipient will not directly or indirectly disclose Confidential Information or any part thereof to any third party without Disclosing Party's advance express written authorization to do so. Recipient may disclose Confidential Information only to its employees or agents under its control and direction in the normal course of its business and only on a need-to-know basis. In responding to a request for Confidential Information, Recipient will cooperate with Disclosing Party, in a timely fashion and in a manner not inconsistent with applicable laws, to protect the Confidential Information to the fullest extent possible.

22. ACCELA WILL, AT ALL TIMES DURING THE AGREEMENT, MAINTAIN APPROPRIATE INSURANCE COVERAGE. TO THE EXTENT NOT OFFSET BY ITS INSURANCE COVERAGE AND TO THE MAXIMUM EXTENT PERMITTED BY APPLICABLE LAWS, IN NO EVENT WILL ACCELA'S CUMULATIVE LIABILITY FOR ANY GENERAL, INCIDENTAL, SPECIAL, COMPENSATORY, OR PUNITIVE DAMAGES WHATSOEVER SUFFERED BY CUSTOMER OR ANY OTHER PERSON OR ENTITY EXCEED THE FEES PAID TO ACCELA BY CUSTOMER DURING THE TWELVE (12) CALENDAR MONTHS IMMEDIATELY PRECEDING THE CIRCUMSTANCES WHICH GIVE RISE TO SUCH CLAIM(S) OF LIABILITY, EVEN IF ACCELA OR ITS AGENTS HAVE BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES.

23. If Accela is delayed in its performance of any obligation hereunder due to causes or effects beyond its control, Accela will give timely notice to Customer of such circumstances and will act in good faith to resume performance as soon as practicable.

24. Accela may assign its rights and obligations hereunder for purposes of financing or pursuant to corporate transactions involving the sale of all or substantially all of its stock or assets.

25. The Parties expressly disclaim any alternate terms and conditions accompanying drafts and/or purchase orders issued by Customer.

26. Section 5 will survive the End of Term for so long as is required to complete collection of unpaid amounts. The limitations and waivers described in Sections 8, 19, 22, and 27 will survive the End of Term. Section 12 will survive the End of Term for a period of thirty (30) calendar days. Section 16 will survive the End of Term for a period of thirty (30) calendar days or for so long as is required for Accela to complete its response to a Customer request made during said thirty-days period. Section 21 will survive the End of Term for a period of two (2) years. With the exceptions of the foregoing surviving sections, the remainder of these Terms will terminate at the End of Term.

27. If any particular provision of these Terms is determined to be invalid or unenforceable, that determination will not affect the other provisions, which will be construed in all respects as if the invalid or unenforceable provision were omitted. No extension, modification, or amendment of these Terms will be effective unless it is described in writing and signed by the Parties.

SAMPLE

11.4 A sample of Accela's Services Agreement

Accela has provided a sample copy of our Services Agreement on the following pages.

(The remainder of this page left intentionally blank)

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SERVICES AGREEMENT

1. Parties

ACCELA	CUSTOMER
Accela, Inc.	_____
2633 Camino Ramon, Suite 500	_____
Bishop Ranch 3	
San Ramon, California 94583	_____
Attention: Contracts Administration	Attention: _____
T: 925.659.3200	T: _____
F: 925.407.2722	F: _____
e-Mail: contractsadmin@accela.com	e-Mail: _____

This Services Agreement ("SA") is intended for the exclusive benefit of the Parties; nothing herein will be construed to create any benefits, rights, or responsibilities in any other parties.

2. Term and Termination

2.1 Term Provided that Customer signs and returns this SA to Accela no later than _____, 201_____, this SA is effective as of the date of Customer's signature ("Effective Date") and will continue until completion of the services deliverables described herein.

2.2 Termination Either party may terminate if the other party materially breaches this SA and, after receiving a written notice describing the circumstances of the default, fails to correct the breach within thirty (30) calendar days. Upon any termination or expiration of this SA, all rights granted to Customer are cancelled and revert to Accela.

3. Professional Services Accela will provide the implementation, data conversion, and/or training services ("Professional Services") described in the Statement of Work ("SOW") attached hereto as Exhibit A.

3.1 Warranty Accela will commence and complete the Professional Services in a good and workmanlike manner, consistent with the practices and standards of care generally-accepted within and expected of Accela's industry.

3.2 Customer Cooperation As required, Customer agrees to provide Accela with appropriate access to Customer's facilities, personnel, data systems, and other resources. Customer acknowledges that the implementation process described in this SA is cooperative in nature and that Customer must complete its designated tasks in a timely manner in order for Accela to proceed with and complete the Professional Services. Customer delays during the implementation period may have adverse collateral effects on Accela's overall work schedule. Although Accela will use its best efforts to immediately resume work following such a delay, Customer acknowledges that schedules for the Professional Services may be delayed by more than the number of days delayed by Customer. Customer agrees that if additional time is required to complete the Professional Services because of Customer delays, such time will be charged to Customer at Accela's then-current time-and-materials rates.

3.3 Compensation

3.3.1 Implementation Fees In exchange for the Professional Services, Customer will pay to Accela the amounts indicated in Exhibit A according to the billing events schedule described therein. The pricing set forth herein reflects information generally known to Accela, supplied to Accela by Customer, and based on Accela's interpretation of the work to be performed. In addition to such amounts, Customer will reimburse Accela for airfare, travel time, lodging,

SAMPLE

rental transportation, meals, and other miscellaneous expenses at current rates. Customer will reimburse Accela for data communications charges at the flat, per-day rate specified in Exhibit A. Upon Customer request, Accela will provide scanned or copied receipts of other appropriate documentation supporting claimed expenses and other charges.

3.3.2 Payment Terms Amounts are quoted in United States dollars and do not include applicable taxes, if any. Customer will be responsible for payment of all federal, state or provincial, and local taxes and duties, except those based on Accela's income. If Customer is exempt from certain taxes, Customer will provide Accela with an appropriate certificate of exemption. Customer will be invoiced for all amounts upon occurrence of the billing events described in Exhibit A. The payment terms of all invoices are net thirty (30) calendar days from the dates of the invoices. Accela may, at its sole discretion, suspend its obligations hereunder without penalty until payments for all past-due billings have been paid in full by Customer.

4. Confidentiality

4.1 Definitions "Disclosing Party" and "Recipient" refer respectively to the party which discloses information and the party to which information is disclosed in a given exchange. Either Accela or Customer may be deemed Disclosing Party or Recipient depending on the circumstances of a particular communication or transfer of information. "Confidential Information" means all disclosed information relating in whole or in part to non-public data, proprietary data compilations, computer source codes, compiled or object codes, scripted programming statements, byte codes, or data codes, entity-relation or workflow diagrams, financial records or information, client records or information, organizational or personnel information, business plans, or works-in-progress, even where such works, when completed, would not necessarily comprise Confidential Information. The foregoing listing is not intended by the Parties to be comprehensive, and any information which Disclosing Party marks or otherwise designates as "Confidential" or "Proprietary" will be deemed and treated as Confidential Information. Information which qualifies as "Confidential Information" may be presented to Recipient in oral, written, graphic, and/or machine-readable formats. Regardless of presentation format, such information will be deemed and treated as Confidential Information. Notwithstanding, the following specific classes of information are not "Confidential Information" within the meaning of this Section:

a) information which is in Recipient's possession prior to disclosure by Disclosing Party;
b) information which is available to Recipient from a third party without violation of this SA or Disclosing Party's intellectual property rights;
c) information disclosed pursuant to Subsection 4.4 below;
d) information which is in the public domain at the time of disclosure by Disclosing Party, or which enters the public domain from a source other than Recipient after disclosure by Disclosing Party;
e) information which is subpoenaed by governmental or judicial authority; and
f) information subject to disclosure pursuant to a state's public records laws.

4.2 Confidentiality Term The obligations described in this Section commence on the Effective Date and will continue until two (2) years following any termination or expiration of this SA ("Confidentiality Term").

4.3 Confidentiality Obligations During the Confidentiality Term, Recipient will protect the confidentiality of Confidential Information using the same degree of care that it uses to protect its own information of similar importance, but will in any case use no less than a reasonable degree of care to protect Confidential Information. Recipient will not directly or indirectly disclose Confidential Information or any part thereof to any third party without Disclosing Party's advance express written authorization to do so. Recipient may disclose Confidential Information only to its employees or agents under its control and direction in the normal course of its business and only on a need-to-know basis. In responding to a

SAMPLE

request for Confidential Information, Recipient will cooperate with Disclosing Party, in a timely fashion and in a manner not inconsistent with applicable laws, to protect the Confidential Information to the fullest extent possible.

4.4 Publicity During the term of this SA, including the term of any amendment hereto, Accela may publicly disclose its ongoing business relationship with Customer. Such disclosures may indicate Customer's identity and the Accela product(s) and services provided or contracted to be provided to Customer. These disclosures may include press releases or other communications to media, display on Accela web sites, or use in other marketing activities, but will not include non-public information or indicate Customer's express endorsement of Accela's products or services without Customer's prior written authorization.

5. Other Terms and Conditions

5.1 Mutual Indemnification Accela agrees to indemnify, defend, and hold Customer and its officers, agents, and employees harmless against any claims, suits, or damages arising out of physical property damage or bodily injury caused by the negligence or misconduct of Accela or its employees or agents while the terms and conditions of this SA remain enforceable. Customer agrees to indemnify, defend, and hold Accela and its officers, agents, and employees harmless against any claims, suits, or damages arising out of physical property damage or bodily injury caused by the negligence or misconduct of Customer or its employees or agents while the terms and conditions of this SA remain enforceable.

5.2 Limitation of Liability Accela provides no warranty whatsoever for any third-party hardware or software products. Third-party applications which utilize or rely upon the Professional Services may be adversely affected by remedial or other actions performed pursuant to this SA; Accela bears no liability for and has no obligation to remedy such effects. Except as set forth herein, Accela provides all Professional Services "as is" without express or implied warranty of any kind regarding the character, function, capabilities, or appropriateness of such services or deliverables. To the extent not offset by its insurance coverage and to the maximum extent permitted by applicable laws, in no event will Accela's cumulative liability for any general, incidental, special, compensatory, or punitive damages whatsoever suffered by Customer or any other person or entity exceed the fees paid to Accela by Customer during the twelve (12) calendar months immediately preceding the circumstances which give rise to such claim(s) of liability, even if Accela or its agents have been advised of the possibility of such damages.

5.3 Insurance Coverage Accela will maintain insurance coverage at its sole cost and expense and will provide certificates of insurance to Customer if so requested. The insurance will not be cancelled or terminated without thirty (30) calendar days' advance written notice to Customer.

5.4 Force Majeure If either party is delayed in its performance of any obligation under this SA due to causes or effects beyond its control, that party will give timely notice to the other party and will act in good faith to resume performance as soon as practicable.

5.5 Dispute Resolution This SA is governed by the laws of the State of California. Any controversy or claim arising out of or relating to this SA, or the breach thereof, will be settled by arbitration administered by the American Arbitration Association under its Commercial Arbitration Rules, including the Emergency Interim Relief Procedures, and judgment on the award rendered by the arbitrator may be entered in any court having jurisdiction thereof. The place of arbitration will be Santa Clara County, California. Either party may apply to the arbitrator for injunctive relief until the arbitration award is rendered or the controversy is otherwise resolved. Either party also may, without waiving any remedy under this SA, seek from any court having jurisdiction any interim or provisional relief that is necessary to protect the rights or property of that party, pending the arbitrator's determination of the merits of the

SAMPLE

controversy. Each party will initially bear its own expenses and an equal share of the costs of the arbitration, but the prevailing party may be awarded its expenses, reasonable attorneys' fees, and costs. The failure of either party to object to a breach of this SA will not prevent that party from thereafter objecting to that breach or any other breach of this SA.

5.6 Assignment Accela may assign its rights and obligations hereunder for purposes of financing or pursuant to corporate transactions involving the sale of all or substantially all of its stock or assets. Accela may subcontract with qualified third parties to provide portions of the Professional Services described hereinabove.

5.7 Survival The following provisions will survive the termination or expiration of this SA: Section 3.3 and all subsections thereof, as to Customer's obligation to pay any fees accrued or due at the time of termination or expiration; Section 4 and all subsections thereof; and Section 5 and all subsections thereof with the exceptions of Subsections 5.1, 5.3, and 5.4.

5.8 Alternate Terms Disclaimed The parties expressly disclaim any alternate terms and conditions accompanying drafts and/or purchase orders issued by Customer.

5.9 Severability and Amendment If any particular provision of this SA is determined to be invalid or unenforceable, that determination will not affect the other provisions of this SA, which will be construed in all respects as if the invalid or unenforceable provision were omitted. No extension, modification, or amendment of this SA will be effective unless it is described in writing and signed by the Parties.

ACCELA	CUSTOMER
By: _____ (Signature)	By: _____ (Signature)
_____ (Print Name)	_____ (Print Name)
Its _____ (Title)	Its _____ (Title)
Dated: _____ (Month, Day, Year)	Dated: _____ (Month, Day, Year)

Exhibit Follows.

END OF DOCUMENT

SAMPLE

EXHIBIT A

Statement of Work (SOW) document follows this page.

END OF DOCUMENT

SAMPLE

11.5 A sample Subscription Order Form

Accela has provided a sample copy of a Subscription Order Form on the following pages.

(The remainder of this page left intentionally blank)

© 2016 Accela, Inc. All rights reserved

Order Form For:
Quote Number:
Valid Through:
Subscription Agreement: Version 52615a
Proposed By:

Upgrade: N
Product:

Address Information

Bill To:

Ship To:

Billing Email:
Billing Phone:

Attention:
Email:

Payment Terms and Conditions

Number of Annual Terms: 1
Service Start Date:
Service End Date:
Billing Frequency: Annual

Payment Method: Check
Payment Terms: Net 30
Billing Method: Email
PO Required: (yes/no)
PO Number:

Products Terms and Conditions

SKU	Description			Unit Price		Net Price
SS10APFMSAS0001	Accela Civic Platform - Subscription User	Qty		$ 1,788.00		$0.00
SS10AACAPOP0001	Accela Citizen Access - Subscription Population	Population		$ 0.03		$0.00
	Total Subscription Fees					**$0.00**

Other Terms and Conditions

- Payment obligations hereunder are non-cancelable and any sums when paid shall be non-refundable.
- Agency will be responsible for payment or reimbursement to Accela, Inc. any and all federal, state, provincial and local taxes and duties that are applicable, except those based on Accela's net income.
- If the Agency requires additional on-site assistance, a separate estimate and Statement of Work will be
- Annual Subscription fees do not include hardware or equipment. Please contact your selected hardware vendor for additional hardware or software costs.

Alternate Terms Disclaimed: The parties expressly disclaim any alternate terms and conditions accompanying drafts and/or purchase orders issued by Customer.

Customer

Signature: _____
Name: _____
Title: _____
Date: _____

Accela, Inc.

Signature: _____
Name: _____
Title: _____
Date: _____

SAMPLE

Proposal for City of Bryan, Texas

RFP # 16-022 For a cloud-based "Civic Platform" solution supporting the administration of municipal land-use, permitting and code enforcement functions.

March 24, 2016
2 P.M.

Prepared by
Jim Garvey
800.325.9818 x703
jim@citizenserve.com

COVER LETTER

March 24, 2016

City of Bryan – Purchasing Department
Attn: Melanie Tigerina - Buyer
1309 E. Martin Luther King St.
Bryan, TX 77803

Ms. Tigerina,

Citizenserve® is a comprehensive software and service solution for community development departments that covers all aspects of permitting, planning & zoning, code enforcement, licensing and inspections. The software not only encompasses internal functions but also expands into an electronic relationship with citizens, contractors and businesses involved in the processes of permitting, licensing, inspections and enforcement. **The opportunity for increased service for citizens, efficiency and costs savings are profound using Citizenserve.**

The software was developed from the beginning as an internet software service, commonly referred to Software-as-a-Service (SaaS) or Cloud computing. This is the future of software. The benefits include:

1. You pay as you go; no upfront capital costs, no commitments, and no hardware or software to install and maintain.
2. You are up and running quickly. You only need an internet connection and a browser. Citizenserve works with many browser and device combinations (iPad, Android, etc.).
3. You are really paying for service not software. The Citizenserve subscription comes with unlimited customer support. This includes setting up new permits, changes in fees or letters, creation of new reports and processes, etc.
4. You get frequent updates. Through our unlimited customer support we constantly improve the service and make updates to the software monthly.

Citizenserve is already up and running with thousands of users. We simply need to add your users to the software and configure your implementation with your permit and license types, applications, fees, review and inspection activities, violation types, letters, etc. Citizenserve pricing is based on an annual subscription per named user. The number of users can be increased or decreased at any time. The annual subscription cost is $1200 per user and there is a $600 per user initial setup and training cost. For 40 named users the annual subscription is $48,000 and the initial setup and training is $24,000. The subscription includes all components, all features and unlimited support. Because Citizenserve comes with unlimited customer support there are no surprises. Need a new report, its included! Need to change your setup after going live, its included! Need training for a new staff member, its included!

Citizenserve is low cost, low risk, comes with unlimited service, does not require a multiyear commitment, provides world class data protection, disaster recovery and business continuance assurance, and has over twelve years of success solving the problems you seek help with.

Sincerely,

Jim Garvey
Manager
Online Solutions, LLC
1101 E Warner Rd Suite 160
Tempe, AZ 85284
800-325-9818 x703
jim@citizenserve.com

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SYSTEMS EXPECTATIONS AND SCOPE

Citizenserve has been on the market since 2003. Our company is solely focused on community development solutions for state and local governments concentrating on permitting, licensing, inspections and enforcement. We have over 200 state and local government customers and thousands of end users that subscribe to the software and service.

We understand the goal of the project to be to deliver a comprehensive and integrated turn-key system for permit/license applications, fees, workflow and review, document generation, inspection completion and reporting. Training of all users and ongoing support is also a requirement of the project as well as ongoing enhancements and workflow improvements once the system is live. We also understand the solution must be easy to use and browser/device independent. The following are specific features of Citizenserve in the major requirement categories:

Plan Review and Permit Tracking: Citizenserve supports a wide-variety of planning and permitting projects. An unlimited number of permit application types can be created. Each application type can have an unlimited number of custom fields. The creation of the custom fields is integrated with the online or citizen application. Each custom field can be controlled as to whether it appears and works the citizen application. An unlimited number of permit documents can be created including permits, placards, certificates of occupancy, ID cards, etc. Each permit document can have mandatory or warning conditions based on issues with the file. Such as a contractor has an expired license or a balance is due. Each application type can have a specific review route or workflow route. Each workflow route can contain different activity types and assignments. An unlimited number of activity types can be created in Citizenserve. Each activity can have its specific form or custom fields. Each activity type can also have template outputs. A review activity can be completed and template e-mail sent to the contractor or other people involved in the project. An unlimited number of inspection types can be created in Citizenserve. Each inspection type can have its specific form or custom fields and template outputs such as an inspection report. Templates can be created as letters or e-mails or any other combination of text and graphics. Documents from the file can easily be included in communications, integrated in the templates or attached. Forms and documents can be changed and configuration changes made on the fly with no system downtime. Documents can have associated processing, such as the assessing of a late fee when late notices are generated.

Permit & Issuance: Application review activities and inspections can be easily tracked in Citizenserve and optionally shown in the citizen application. A complete history of permit and application activity is maintained with the file. All permit documents can have specific conditions that must be met before issuance.

Inspection Tracking and Scheduling: Citizenserve has a built-in device/browser independent calendar feature that allows inspections and tasks to be easily assigned and managed. When task or inspections

are assigned to a user there is an option to have an e-mail reminder sent. The e-mail can contain an ICS file that adds an appointment to the inspectors Outlook or Google calendar. Inspections are activities in Citizenserve and all activities can be setup as custom forms with template outputs. For example, an inspector can receive and inspection request while in the field, complete the inspection while on the construction site, fill out the inspection form and generate an inspection report for mailing or e-mailing to a citizen or contractor.

Code Enforcement-Compliance: Citizenserve has robust case management capabilities. Code enforcement cases can be created with multiple violations. Each violation can be tracked and resolved separately. An unlimited number of people, businesses, and other contact types can be associated with cases. Each person or entity can have a different association with the case. An unlimited number of notice or letter types can be created. Each letter type can be completely customized and letters can initiate database processing such as fee assessment or file status changes. Code enforcement case processes can take a case from courtesy notice, citation, abatement to court. Violations can also be associated with specific permits or licenses.

Business/Contractor License Management: Licenses have a file structure were multiple licenses can be tracked and managed under one business. Permits and licenses are similar in Citizenserve so if you are familiar with one the other is easy to use and understand both from an end user technical user perspective. An unlimited number of license applications can be created with an unlimited number of custom fields. The custom fields can be visible on the citizen application and have specific behaviors necessary in electronic relationship and process. For example, a field for a SSN or Federal Tax ID number can be created for an application where it is entered once in the application yet never visible again via the citizen application. Each license application can have one or multiple review or work flow routes. Each review or activity in a workflow can have a custom form and template e-mails or letters. License documents can have mandatory or warning conditions. An unlimited number of inspection types with custom forms and fields can be setup in licensing. Custom renewal processes can be created. Renewal letters can direct businesses and individuals to the web site/citizen application for renewal and payment. Within the application forms custom fields can be dependent on other custom fields. For example if a user selects a business type that requires additional information those fields will be displayed.

Finance: All license, permit and code enforcement fees can be tracked and managed in Citizenserve with related general ledger codes associated with financial information.

Land Management and Tracking: Maintaining property data and GIS layers in Citizenserve is a standard part of the Citizenserve subscription. Properties can have an unlimited number of custom fields. Property data is pulled into files or projects and maintained in an as-is state for historical reference. Custom fields in Citizenserve can include http links to external systems such as external GIS systems or document management systems.

Renewable Permitting & Licensing: The renewal process is completely customizable in Citizenserve. Letters or e-mails can be generated, necessary inspections can be automatically scheduled, and

document can be generated and distributed. Changes in the process are included in the unlimited support.

Public Online Application Submittal and Inquiry Capabilities: The Citizenserve citizen access portal is a configurable and customizable solution that allows citizens, contractors and businesses to participate electronically in the process of permitting, licensing, code enforcement, inspections and requests. Your constituents can apply online, pay online, upload documents, send messages, schedule inspections, request services and get information.

Mobility-In Field Usage: Citizenserve is fully functional in the field. There is no designation between desktop or tablet users. Citizenserve uses a device and browser independent architecture. There is no software required on the local desktop or device.

Reporting: The creation of custom reports is included in the subscription. Reports can be organized into user specific folders and shared with other users. Reports can be exported in PDF format or Excel. A reporting wizard is built into the application that allows users to create their own reports.

Integration capability with Financial Management System: The fee schedule for licensing and permitting can record accounting general ledger codes for each fee type and an export can be created for allocation in financial systems. Custom integration can be via web services or by exporting a daily closeout file for input into the general ledger.

Integration capability with Geographical Information System (GIS): Google Maps is built into Citizenserve. Links to external systems can be setup easily. Keeping property information and GIS layers updated is included in the subscription. Custom real-time integration with ESRI is also possible via web services integration for an additional charge.

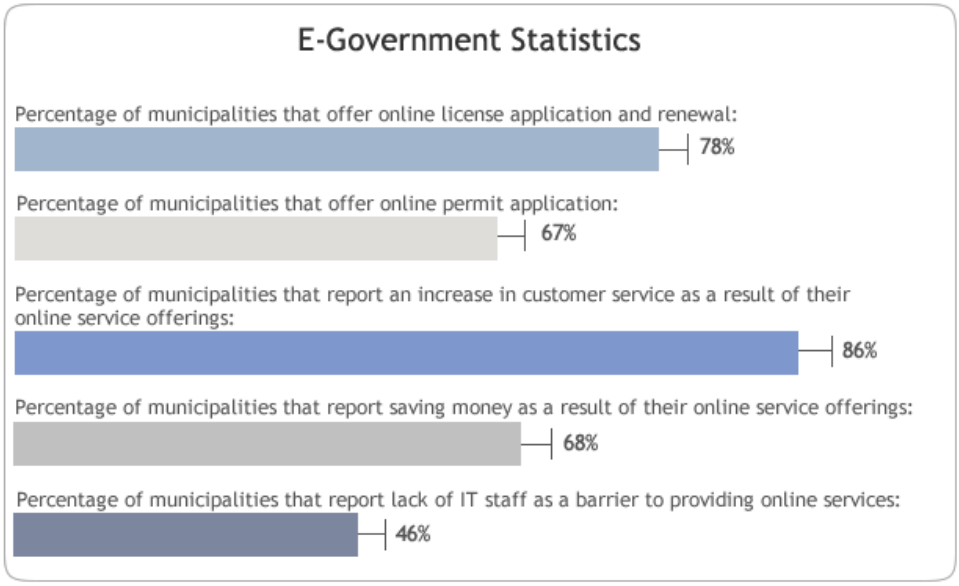
Citizenserve is an internet software service. As part of the service we maintain the data backups and disaster recovery. The Citizenserve data centers have a 100% Uptime SLA, are SSAE 16 compliant and are geographically diverse. A perpetual archive is also maintained so we can restore data to any point in time.

Citizenserve is uses all on-the-fly configuration. Custom fields can be added/removed from permits and licenses while the system is in use. This is necessary to maintain 24/7 availability which is important when providing a citizen portal. New permit and license types can be added on-the-fly. Virtually all aspects of the system can be changed while the system is live. Custom fields created for permit and license applications and for activities, such as inspections, can be used in fee tables for calculating fees, template letters/e-mails, and to create reports.

PRODUCT INFORMATION

With citizenserve® cloud computing you have access to fast, secure, leading edge technologies at a low cost. The citizenserve cloud was initially launched in 2002, and currently has processed over a billion transactions. Over the last 13 years the citizenserve cloud has had no data loss, no security breaches, and has maintained 99.9% system uptime.

As citizens' expectations for online services continue to grow, state and local agencies are pressured to provide online services without a significant increase to their budget or IT staff. With the citizenserve cloud, get your constituents' online services up and running quickly while providing and easy-to-use solution for your staff.



Source: Norris, D., & Reddick, C. (2011). *The Electronic Government Survey*. Washington, DC: International City/County Management Association.

FEATURES

Citizenserve offers robust solutions filled with rich features in a user-friendly interface. All of our components, features, and services are included with every user subscription with no hidden fees. Through our Concierge Program you'll have all the help you need configuring, implementing, and using citizenserve.

Give your citizens, contractors, and business owners access to your services 24-7 through the citizenserve device and browser independent online portal.

A fully mobile solution provides your inspectors with the ability to access all system features and functions from the field using a tablet or laptop.

Load your GIS layers such as zoning districts and parcel lines. View or look up your files or inspections due on a map.

Create your own custom reports with the report writer or let our support engineers create reports for you at no additional costs. You can easily add pie-charts, bar-charts, and line graphs to your reports.

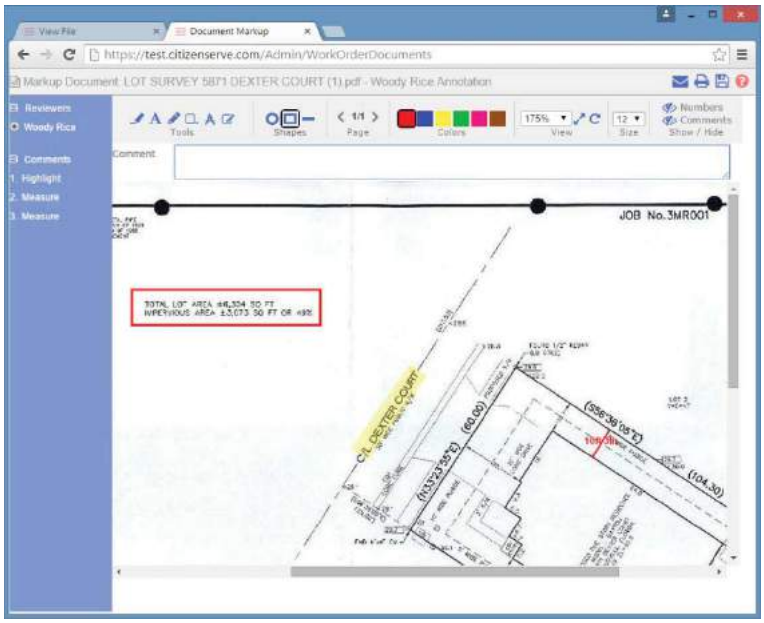
> "We began using citizenserve in 2010, the internet based feature and customization were the initial selling points for our town; however, the service response and continuing improvements to the software."
>
> -Town of Duck

PERMITTING

With citizenserve permitting software your contractors, architects, engineers, and property owners can apply for a permit, upload digital plans, and pay application fees online. Municipalities have reported online applications through the citizenserve portal making up more than 80% of total permit applications.

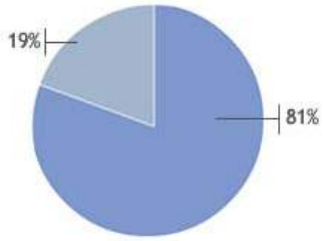
Create customized workflow routes that mimic your plan review process and digitally track plan review status and comments. With the document markup tool measure distances, add comments, shapes and highlights to plans and documents.

Custom rules will ensure permits are not issued without the required approvals. After construction begins inspections can be requested through the online portal, inspectors can enter inspection results directly from the field using a tablet or laptop. After the final inspection has been completed easily generate a certificate of occupancy that can be printed, emailed or downloaded by the applicant, contractor or property owner.



Move to the citizenserve cloud

Municipalities have reported online applications through the citizenserve portal making up more than 80% of total permit applications.

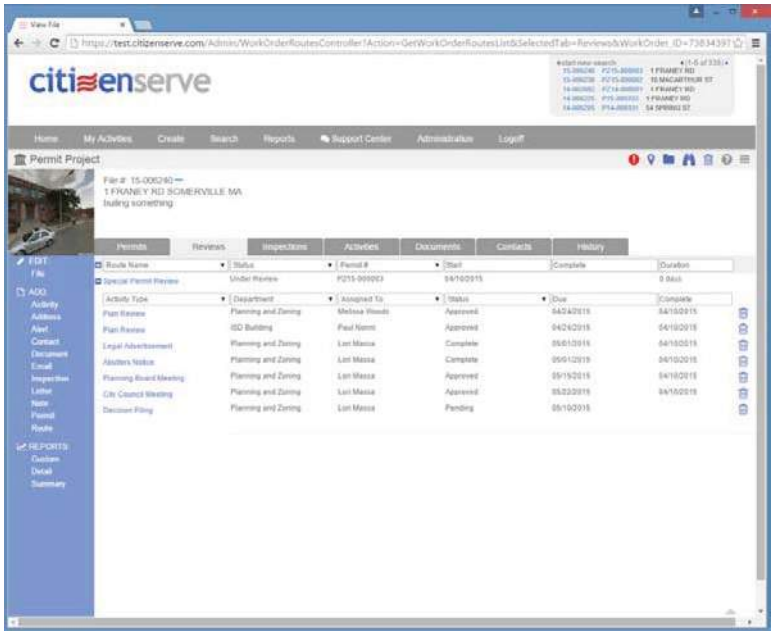


PLANNING & ZONING

Citizenserve planning and zoning software completely automates the process of application, review, routing, resubmittals, and public notification.

Applicants can submit applications, attach plan documents, and pay application fees through the online portal. Applications are automatically routed to the appropriate reviewers based on your workflow routes. Track due dates for public notice and legal advertisements based on the hearing dates you select. Build your plan review report by selecting comments from a custom library of review comments. Electronically comment on plans with the document markup tool by adding notes, highlights, and other annotations. Through a flexible and user-friendly interface, citizenserve helps keep your projects organized and on schedule.

> “The online portal has really helped cut down on the daily phone calls asking for a status on projects, with the reporting functions we can accurately track our review timelines.”
>
> -City of Lewiston



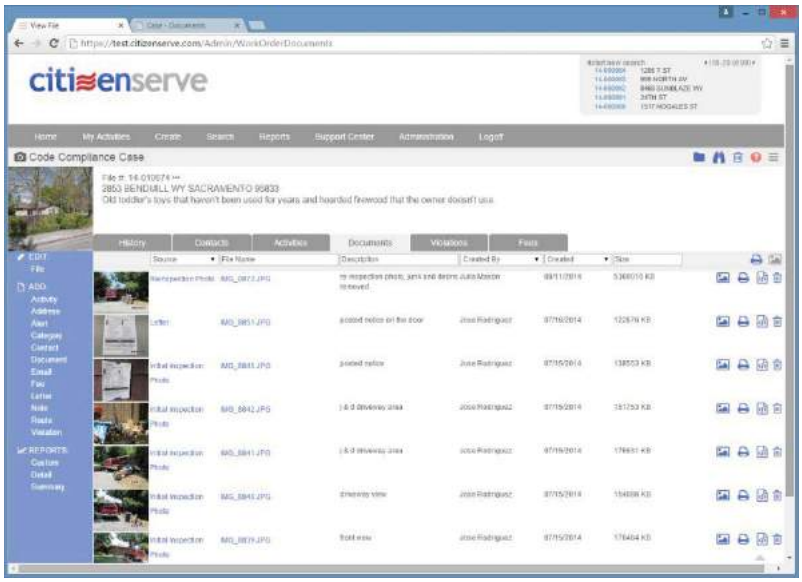
citizenserve

CODE ENFORCEMENT

Citizenserve code enforcement software completely automates the process of opening cases, scheduling inspections, recording violations, and coordinating resolutions. Property ownership, inspection results, photos, notices, violations, and notes become an electronic record of each case.

As a fully mobile solution, inspectors are notified of inspections due, can lookup property ownership information, add violations, take and attach photos, generate tickets or notices of violation, and schedule re-inspections all in the field from a tablet or laptop.

> “Citizenserve has made it possible for our officers to have access to records and the ability to enter case data in the field. This allows the officer to be accurate to the minute with code enforcement, keeping the officer in the field and not at a desk.”
>
> -City of Boulder



BUSINESS LICENSING

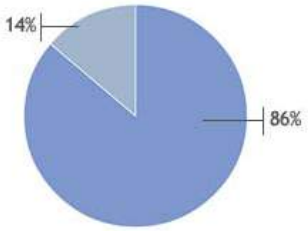
Citizenserve business licensing software automates the application, payment, review, and renewal of business licenses.

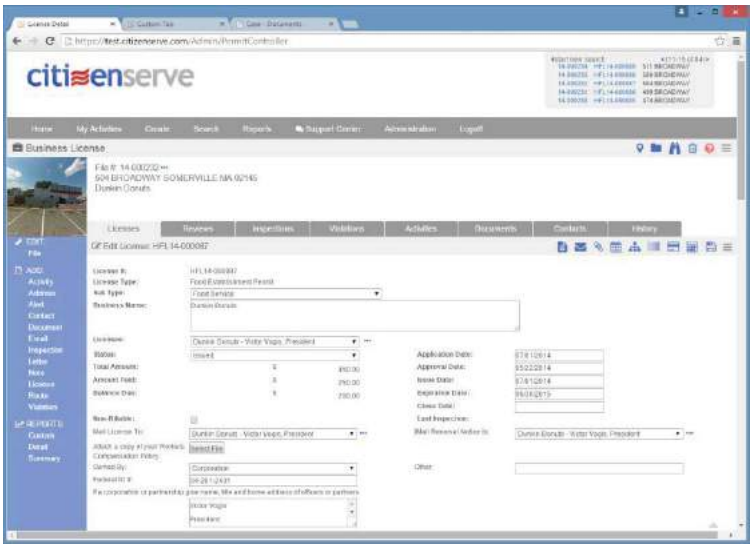
Businesses can submit applications, upload copies of required documents and pay application fees through the citizenserve online portal. Create customizable deficiency checklists based on application types and quickly generate and email of Deficiency Notices. If an inspection is required before issuance, citizenserve can automatically notify your inspectors of pending applications and required inspections. Upon final approval, generate License Certificates and ID cards that can be mailed, emailed or downloaded from the online portal.

When it comes time for renewal, create batch email or mail renewal notices quickly. Citizenserve can be configured to automatically calculate penalties and interest for late renewals. License holders can submit required documentation such as proof of identity and insurance verification through the online portal as part of their license renewal.

Move to the citizenserve cloud

Municipalities have reported online applications through the citizenserve portal make up more than 85% total business license applications.



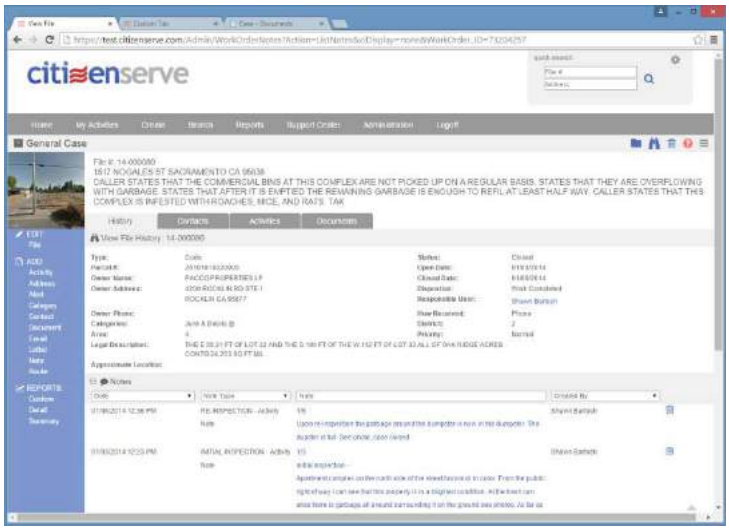


REQUEST TRACKING

Citizenserve request tracking software automates the assignment, routing, and fulfillment of your citizens' requests.

Your citizens can submit requests on your municipal website through the citizenserve online portal. With configurable automatic routing based on request type, appropriate staff will be notified and can respond to your citizens' requests immediately. Communicate with your citizens effectively and efficiently by using citizenserve's automatic notifications, automated letters, and email templates.

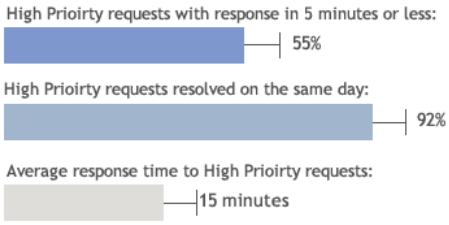
> "After years of research and studying various case management programs, we have found citizenserve to be the most comprehensive and user friendly solution on the market."
>
> -City of Sacramento



CONCIERGE PROGRAM

Through our Concierge Program every user subscription comes with unlimited training and support at no additional cost. Your dedicated, certified support engineer and project manager will work with you to configure citizenserve to meet your needs. They will coordinate any other setup tasks such as data migration or system integration to ensure your success. When you need help our staff is available. Our certified support staff members are trained on all areas of citizenserve, and they will assist you with whatever you need. We guarantee response time of one hour or less on your high priority items; our average response time is fifteen minutes. For your standard requests, we will respond on the same business day, and our average response time is less than four hours.

Concierge Program Statistics



"When it comes to customer service and tech support the staff at citizenserve is at the top of my list ranking #1. I know they have many other users but when I contact them they make me feel like I am the only user with their personal, undivided attention."

-Wood County

"We have been with citizenserve for a few years now and are very impressed with the level of service we receive and the speed of response. We would highly recommend them."

-City of Athens

"My staff and I couldn't be happier. Citizenserve has been fantastic in getting us up to speed and helping us with changes to our new procedures. It's like dealing with good friends."

-City of Oviedo

citizenserve

SOLUTION NARRATIVE & SCREEN SHOTS

SYSTEM TECHNOLOGY

Citizenserve is only offered as a cloud-based or software-as-a-service subscription. Citizenserve works on all contemporary browsers. For security reasons we recommend current versions of the major browsers, Internet Explorer, Safari, Chrome or Firefox. The unlimited support that comes with the subscription includes resolving browser configuration issues and sometimes desktop support if necessary. The application is HTML5 and JavaScript and does not require any applications be loaded locally on the desktop or device.

Citizenserve started 13 years ago running on a Java application server with a middle tier of Enterprise Java Beans using a back end database of Microsoft SQL Server. This is the same technology we use today although we incorporate much more JavaScript and HTML5 today as the current browser technology richly supports these features. Since we offer unlimited support to end users and technical staff we are motivated to keep the application easy to use and focus on usability. Our customers can submit support requests for new features and functionality. Updates containing new features and any fixes are rolled out twice a month.

We take advantage of opportunities to collaborate with our customers on new features and ideas which can expand our user community and make the software and service better. All new functions and features are included in the subscription. Citizenserve is essentially a pay-as-you-go service, we provide unlimited support and frequent upgrades to serve our clients and secure their annual renewals.

Client data is encrypted at the browser level using a VeriSign encryption certificate. Data cached in the browser is encrypted as well.

Citizenserve uses a Verisign certificate and all data sent over the internet is encrypted using HTTPS. A log of failed login attempts is monitored and maintained. A log of successful logins is monitored and maintained with IP address, MAC address, Operating System and Browser version. Each file has a transaction/history log noting important changes to the file and who performed the change with a date and time stamp.

Security in the system is role based. Each department can have different roles setting create, view, modify, delete, delete file, edit closed files, edit completed items, assign activities and accept activities. Access can also be set to each module with access to code compliance, permitting, licensing, adding permits across departments, business licensing, violation tracking, fee tracking, edit payments and access to general cases. Each department can have its own permitting, licensing, code compliance and case configurations. For example, the health department can have its own permitting setup separate from the building department and all the associated rights. Rights can also be set to manage citizen

permissions, to create, modify or delete. Management permissions are also set by department or sub department for managing configuration options, user accounts and running reports.

Personal identifying information can be setup on license and permit applications as masked so that municipal staff logged into Citizenserve cannot see information. License and permit applications can also be setup for the public that collect the secure information in the application process but that field is never shown again to the public. For instance, if applying for a business license the requirement is to collect a social security number or tax id number, this can be collected in the application but if the public user logins again they can see information about their license but no the private information. That way someone gains access to the public users account there is no private data showing.

Citizenserve has never had an electronic or physical security breach. Citizenserve has cyber security insurance in its coverage package and can name the City as additional insured.

Citizenserve is scanned daily by Intel McAfee Secure and Symantec (Qualys) for vulnerabilities and malware. Citizenserve uses Symantec Secure Site Pro with Extended Validation SSL Certificates.

Citizenserve uses secure FTP for data transfers and HTTPS for any web service interfaces.

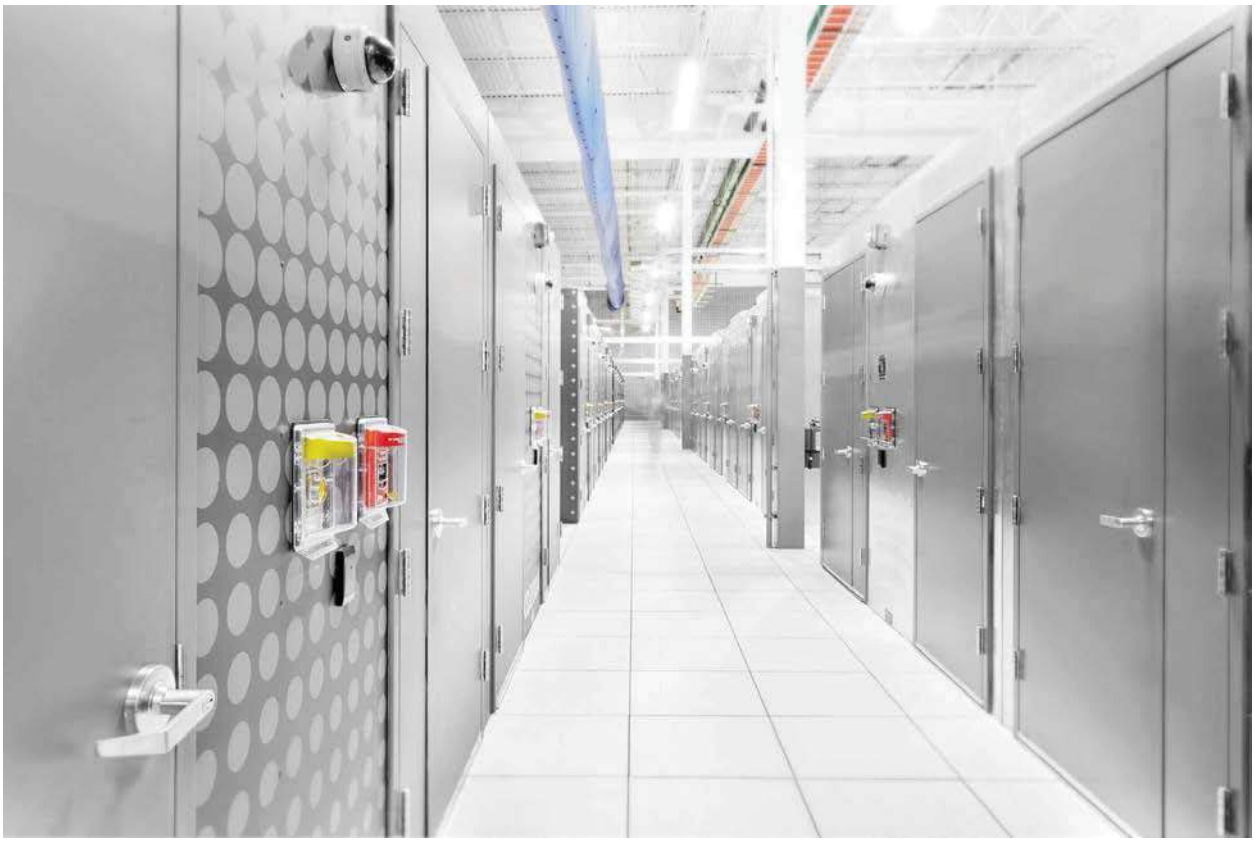
Citizenserve has two geographically diverse data centers plus a standby facility. The data centers are located in the Southwest and Northeast. Both data centers have a 100% Uptime SLA, are Uptime Institute Tier III Design Certified and SSAE 16 SOC 1 Type II Certified. The following links provide additional information:

Citizenserve has over 200 local government customers. With these customers we support thousands of end users on the same platform. Citizenserve was started 11 years ago as a cloud-based or software-as-a-service solution. Over the past 11 years we have exceeded 99.99% uptime. We have never had a security breach or lost data. In the IO Data Center Facilities the Citizenserve equipment is dual corded receiving power from two separate feeds including separate power supplies. The equipment itself has dedicated uninterruptable power supplies and staggered power to redundant power supplies. The database and application servers are backed up and replicated continuously to multiple locations. An indefinite log is keep so data can be restored to a point in time if necessary. We maintain several hundred terabytes of storage.

If a server fails, we have a backup server. If the facility fails, we have a geographically diverse backup data center. If our data center provider fails, we have a standby facility capable of restoring operations in less than an hour.

Physical security is managed by the IO Data Center, information about the facilities can be found at the following links:

http://www.io.com/colocation/io-phoenix/, http://www.io.com/colocation/io-new-jersey/



We limit the people who have direct access to the database and infrastructure. We maintain professional liability and computer crime insurance and can name the City as additional insured.

Citizenserve uses a virtual private network (VPN) for security between facilities and data centers. As well as a dedicated transport between the primary data centers. Backups are maintained in the data centers and standby facility, any external transport is encrypted. A perpetual log is kept of backups for archiving purposes.

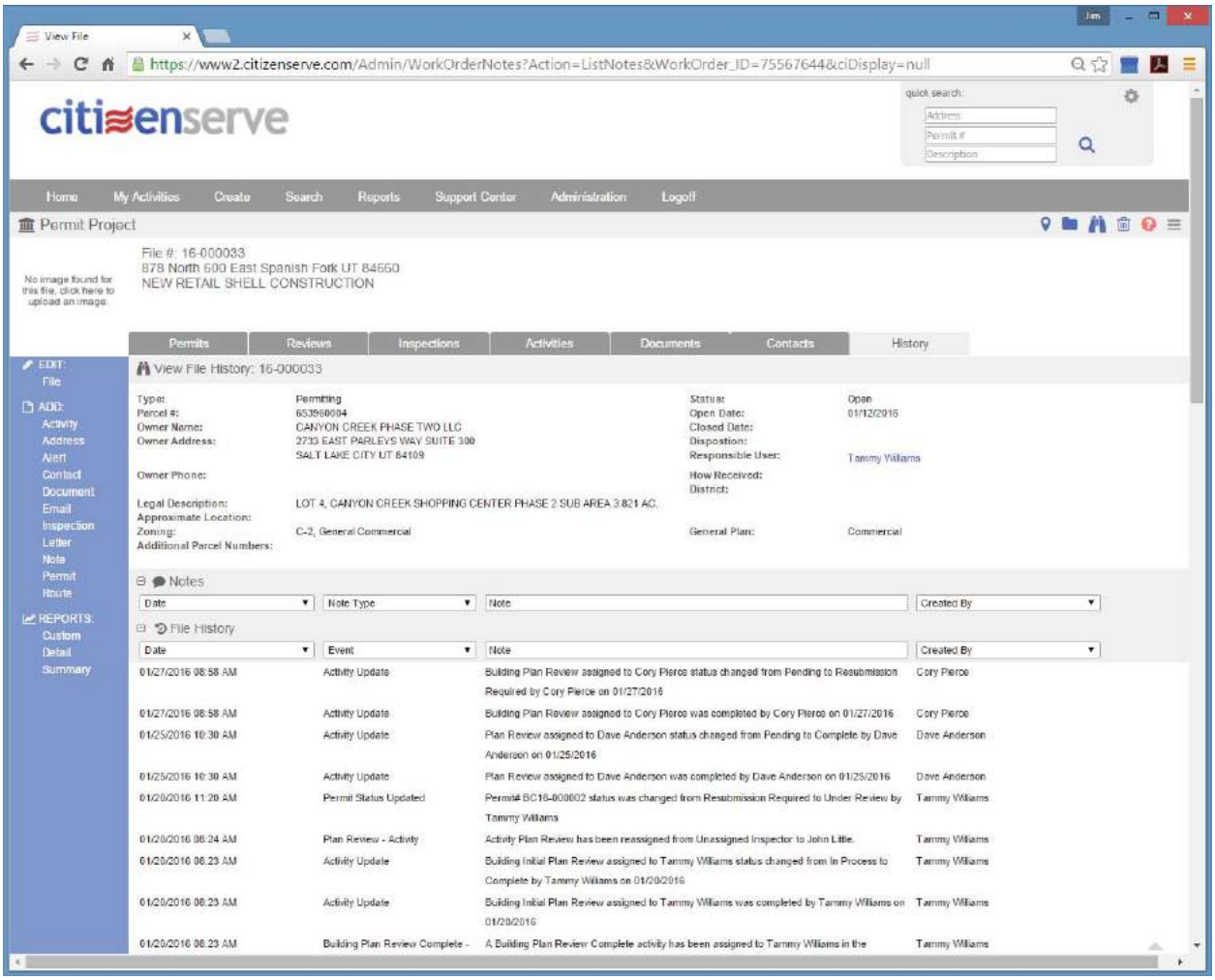
The City can schedule regular downloads of the data in Microsoft SQL Server format to mitigate risks or concerns it may have.

User and Password Management

User accounts can be added through the administrator features in Citizenserve. This can be done via a support request or by an internal administrator. Typically a user account is marked as inactive it is not being used. This preserves the work history of the individual user. Citizenserve supports a variety of password setting by customer. Strong passwords can be individually enforced as well as login attempts and password expiration. The citizen portal has different password requirements and citizens can use

the same password perpetually. Citizenserve monitors login activity storing IP address, MAC address, operating system and browser information for each login. Failed login attempts are monitored as well.

For each file in Citizenserve there is a history tab and changes to the file are included in this history. Each custom field can be optionally added to the history to track changes. On a system level we track user logins (successful and failed), IP addresses, and MAC addresses. The application also has a comprehensive system log. Custom reports can easily be created using tracked history information.



IMPLEMENTATION SERVICES

The following is an example implementation schedule. With Citizenserve is it easy to implement functionality and features at the departmental level and we recommend an implementation plan that breaks the project into functional or departmental goals with early success. We can also base goals on constituent priorities, so if citizens or contractors have burning need we can address this quickly.

City of Bryan, Texas	EXAMPLE PROJECT PLAN	
Phase/Task	**Responsible Parties**	**Duration**
Planning Define/Document all processes Identify all forms, notices, standard letters Identify all information required for setup Identify workflow routes Identify and refine gaps in current processes/policies Define user accounts and security rights Define integration requirements and gather data sources	**Citizenserve Engagement Manager, Client Team**	**8 week**
System Setup and Configuration Document integration specifications Define data migration specifications Setup basic installation Setup forms, notices letters Setup user accounts and rights System setup / configuration Create data migration programs Create integration programs	**Citizenserve Engagement Manager and Engineer**	**8 weeks**
System Readiness Review system setup configuration Refine configuration as needed	**Citizenserve Engagement Manager, Client Team**	**4 weeks**
Training Online training for basic users Online training for system administrators	**All**	**4 weeks**
Implementation Go live Supplemental online training as needed System monitoring and adjusting as needed	**All**	
Total Implementation Duration		**24 weeks**

Our project approach involves the following setups oftentimes by department or function:

1. Project Kickoff: The first portion of the project is the project kick off meeting which will include the key client team and the Citizenserve engagement manager. Key components of the project will be discussed including roles, responsibilities, timeline, objectives. The Citizenserve engagement manager will provide a Setup Checklist of supporting documentation that will be required to begin the setup. The supporting documentation typically includes things like copies of permit applications, fee structures, notices and forms, etc.

2. Completion of the Setup Checklist: The client team will work to gather all documentation and information included in the setup checklist

3. Initial setup: The Citizenserve engagement manager will work from the information on the setup checklist to configure the system, typically the initial setup 50% of the entire setup.

4. System Walkthroughs: Once the initial setup is complete a weekly meeting will be scheduled with the client team and the engagement manager. During the walkthrough meetings the team will review each area of the system and make a list of changes or additions. The walkthroughs are an iterative process that allows the client to clarify or improve upon existing processes and configure Citizenserve to support those processes.

5. Data Migration: Once the setup is nearly complete the Citizenserve team will begin creating programs to migrate and import the client data. The client will have the opportunity to review the migrated data; changes will be made to the migration script as needed. The data migration import can be modified and run as many times as needed to ensure accuracy of imported data.

6. Training: One to two weeks before go live, staff members will be trained via web conferencing in small groups. Each training session will focus on that groups core job responsibilities. Most users attend 1 or 2 ninety minute training sessions, additional one-on-one training sessions can be scheduled for users who would benefit from additional training.

7. Go Live: Final data is typically provided on a Friday afternoon. Over the weekend all test data is removed from the system and the data is imported. The weekly walkthrough meetings typically continue for 2-4 weeks after go live to identify any issues or changes that could be beneficial.

8. Ongoing Support: Users can request support for any needs or questions through the Citizenserve support center. Response time to a support request is within 4 hours, urgent requests receive a response within an hour. Our support staff is available to help you utilize existing and new features as well as modifying your setup for process changes as needed.

Risk Management

There is a reason most IT initiatives fail, especially in government. The City's staff needs to come up with requirements and plan for a budget. The requirements determine a scope for the work the vendor is to perform. Once the scope is complete the vendor needs to move on to the next project and the City

is stuck with whatever was delivered for the budget. The vendor typically provides support within the scope to fix bugs or issues under a maintenance agreement. During a project understanding of the requirements often change, sometimes City staff changes and the perception of scope or requirements change. Technology can also change and oftentimes there are good ideas that will help improve processes and service to citizens. What if these ideas weren't developed or understood and stated in the scope and requirements?

With Citizenserve the hardware and software implementation is already complete. It literally takes minutes to setup your installation, create departments and users. We can jump right into setting up permit and license applications, fees, workflows, system outputs, etc. Because we cut out most of the doldrums of the traditional software model being an internet based software and service we can offer unlimited support for our customers. This means there really isn't a scope and new requirements are included in the subscription. This is one of the reasons Citizenserve has never had a failed implementation.

Critical success factors during implementation include:

1) Getting us the information we need at the beginning of the setup.

2) Making sure key stakeholders and key users are attending setup meeting and walkthroughs.

3) There is always some resistance to change and disagreements among staff members. Strong executive sponsorship is necessary to lead the troops to the finish line.

Issue Management

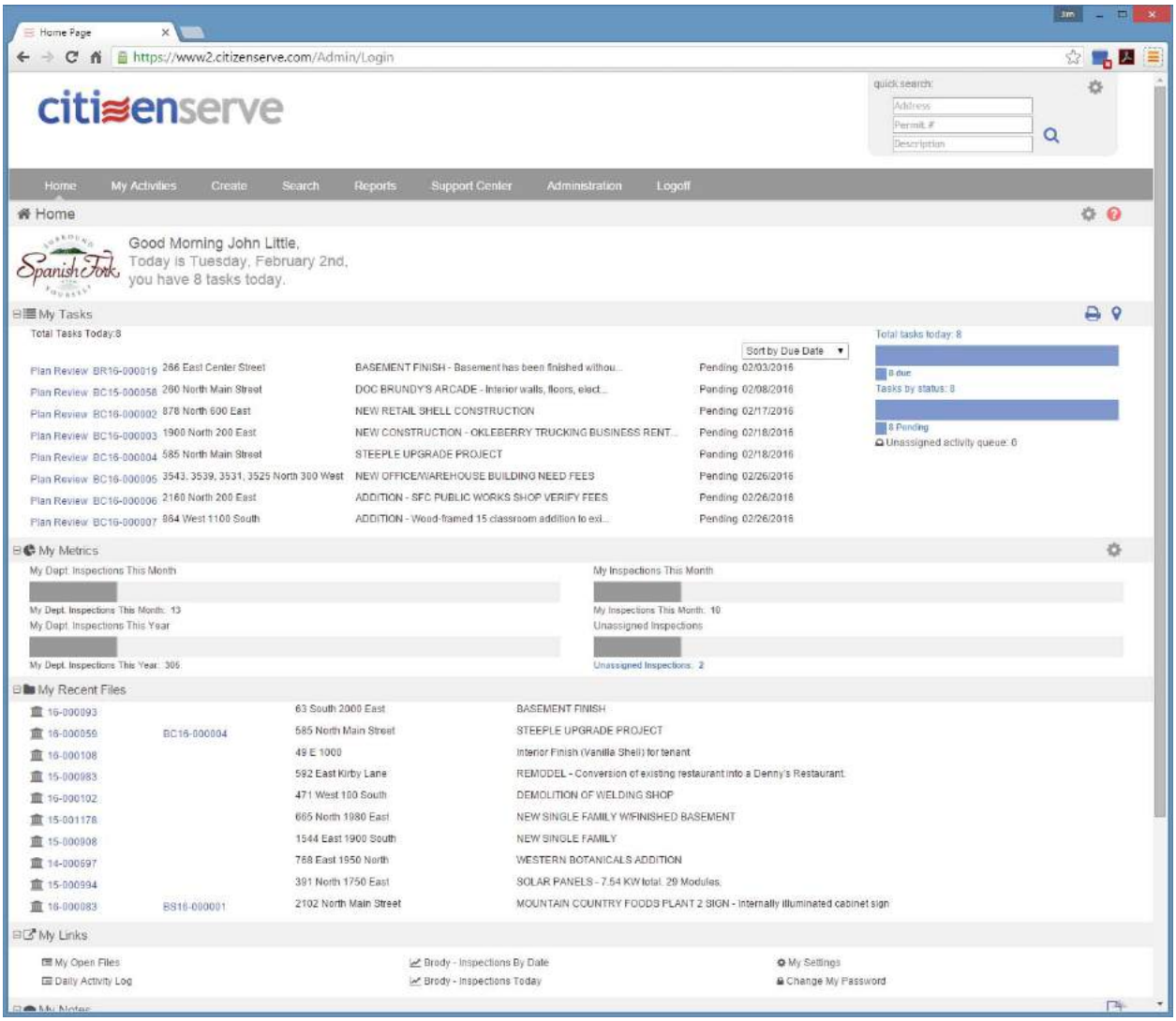
We keep an issue log with who is responsible for items that come up and what the plan is for resolution. If there is a problem issue we will need the executive leadership to make the call.

Quality Assurance

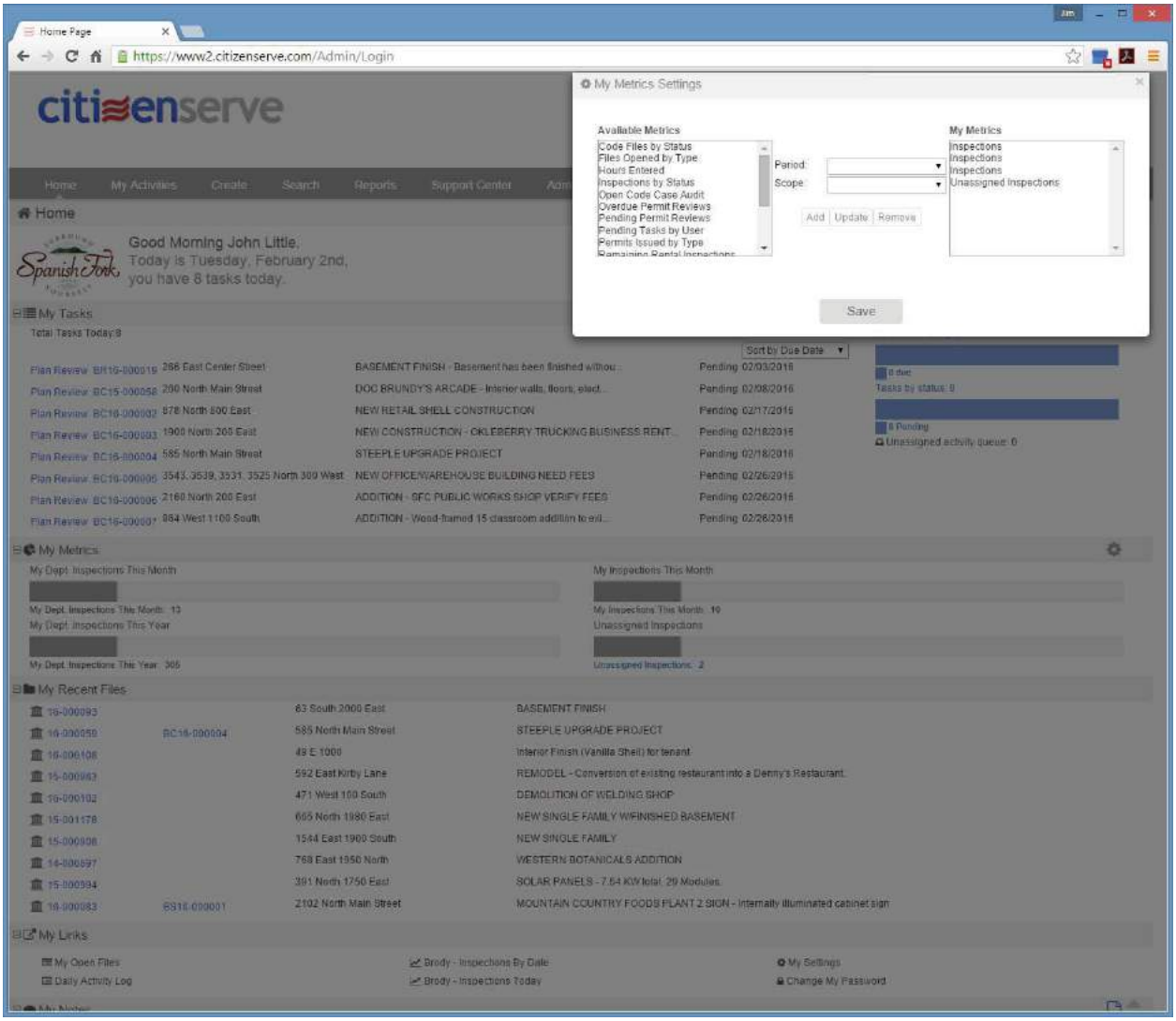
We focus on getting the initial setup in front of key stakeholders quickly to insure the setup is going in the right direction. We also do frequent walkthroughs with the key users during the project. It is important for these meetings to occur once or twice a week during setup. Setup is iterative process until the key stakeholders and key users are ready to go live. Regular meetings and engaging key personnel are important aspects of the quality of the initial setup.

SYSTEM CONFIGURATION AND FUNCTIONALITY

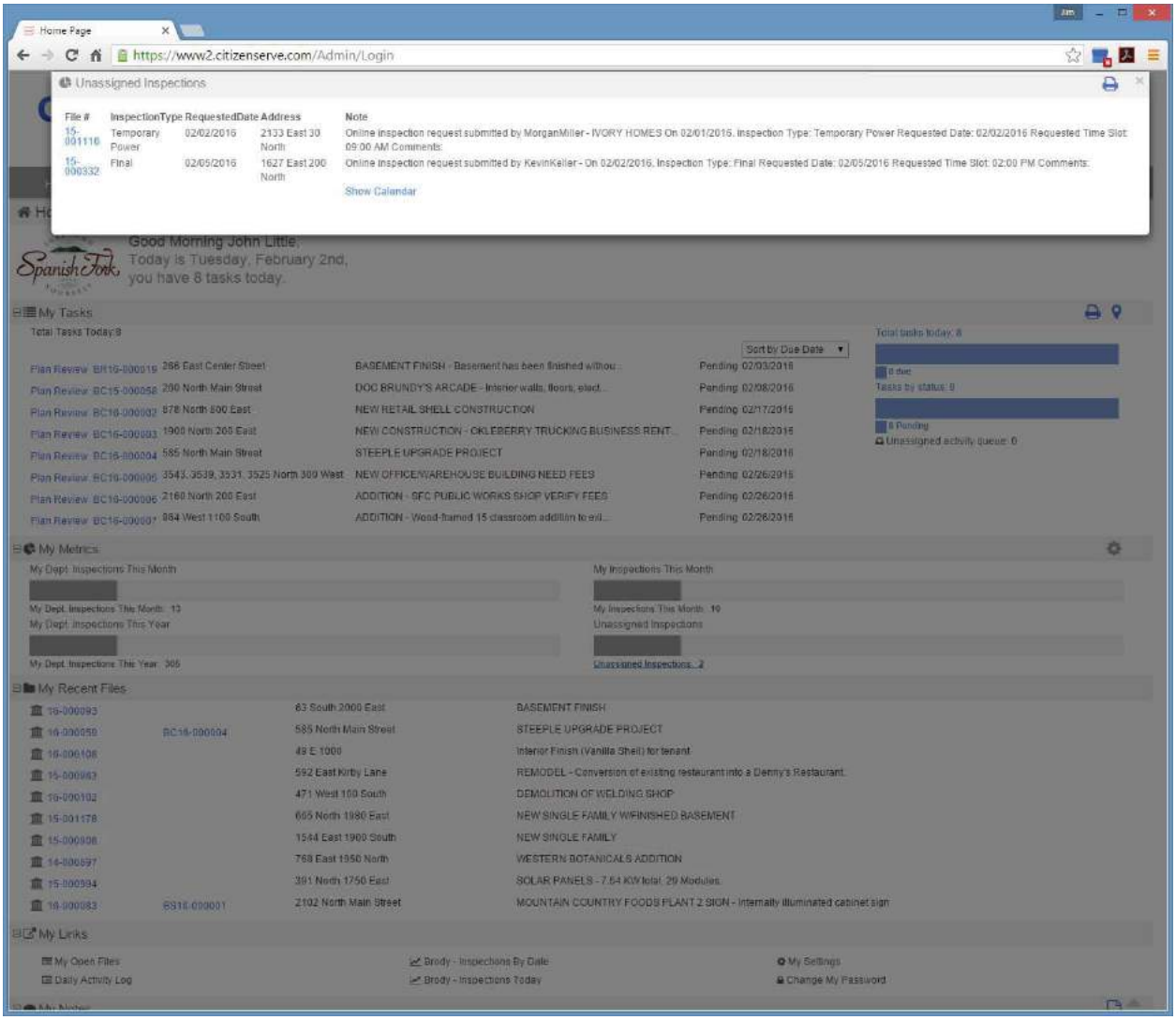
The Citizenserve home page has several features to help users manage activities and information. Metrics can be setup and displayed on the user's home page. Each user's home page is configurable. The metrics are setup using a SQL script and can be anything in the data including information from custom fields in the applications or activities. Setting up new metrics is included in the unlimited support included with the user subscription. Any user can request a new metric at any time.



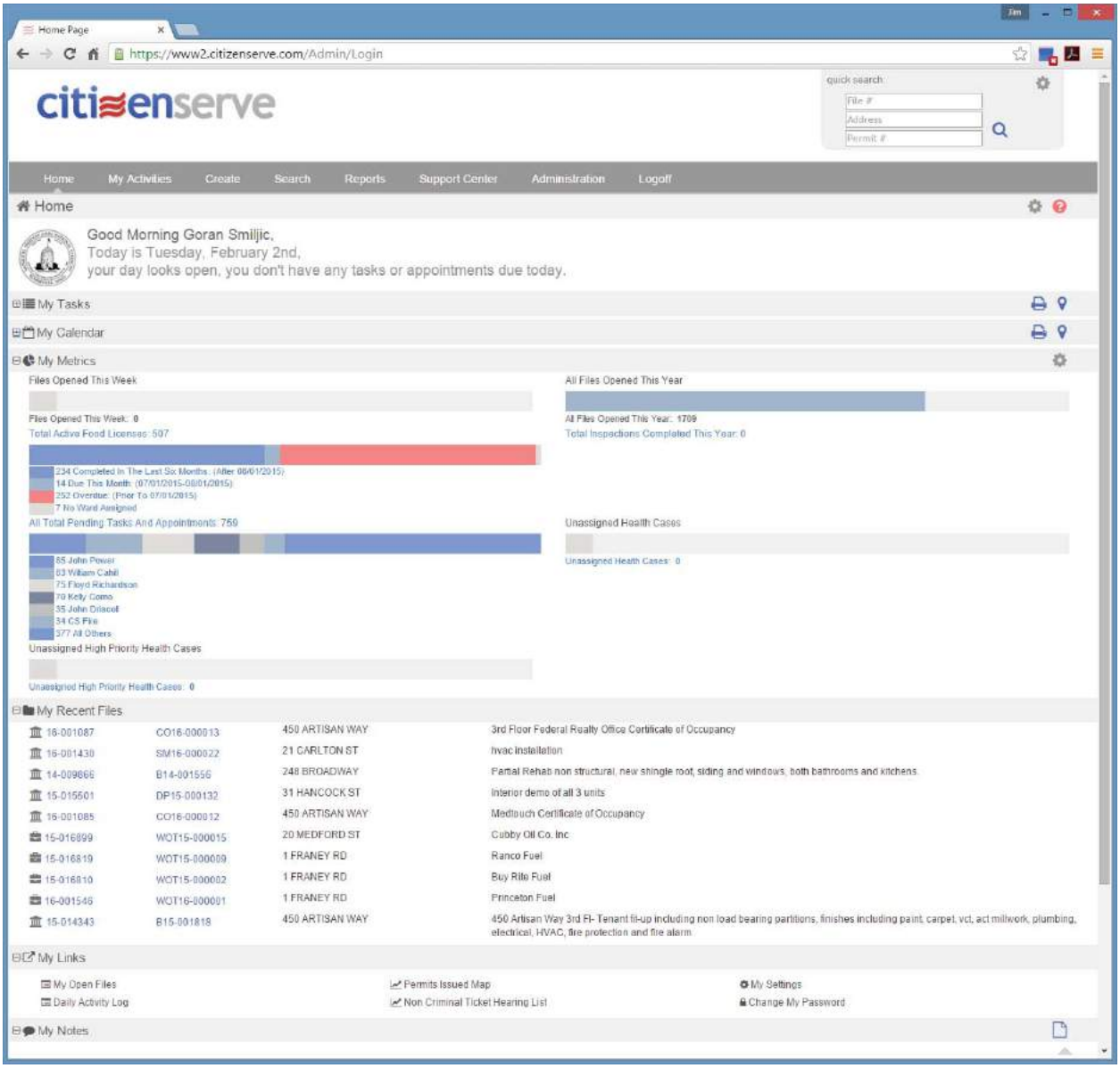
Once metrics are setup these can be selected by the users with the desired period and scope.



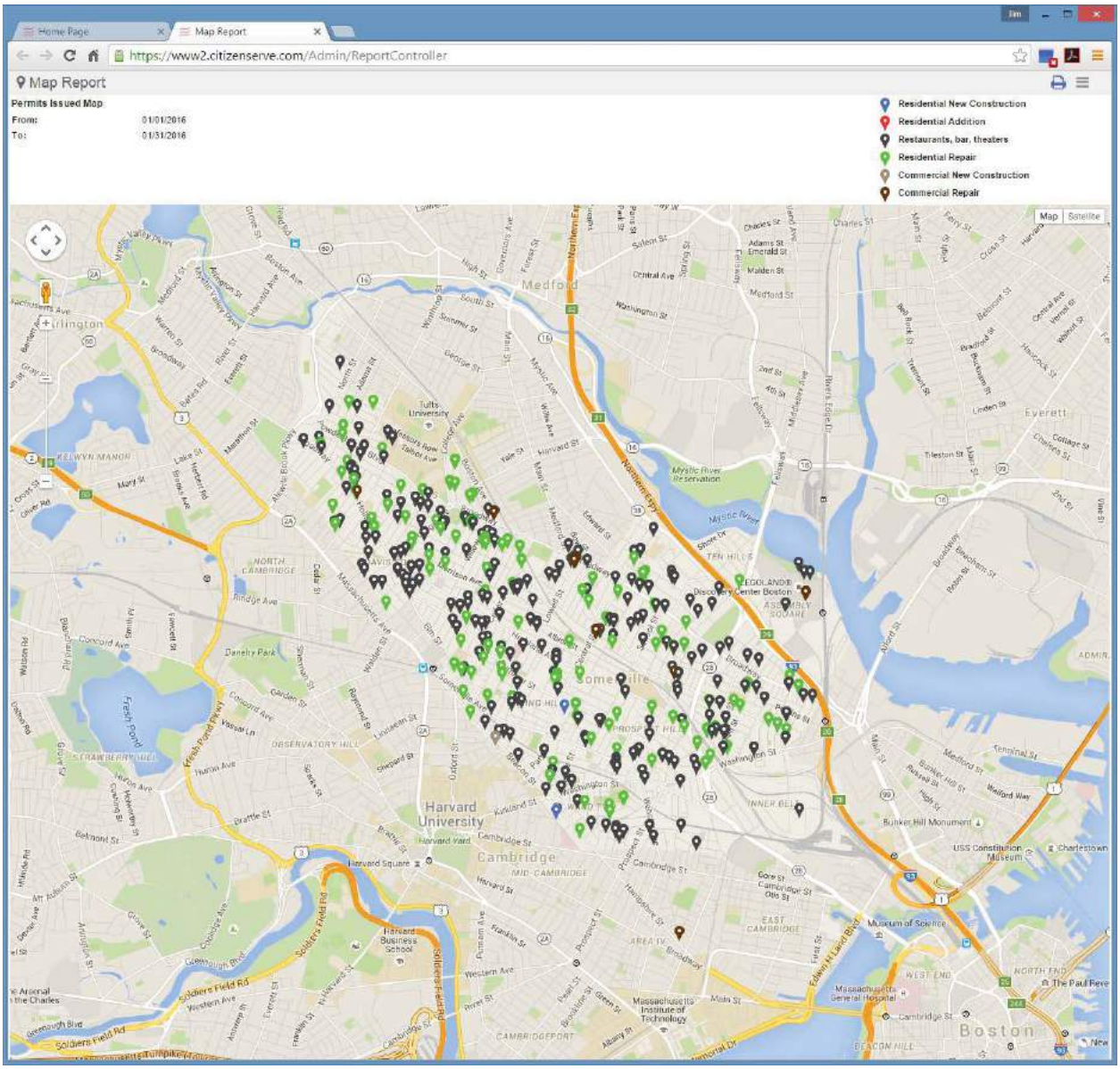
Users can drill down on the metrics to see the file information behind the data and select individual files to view from the list behind the metric.



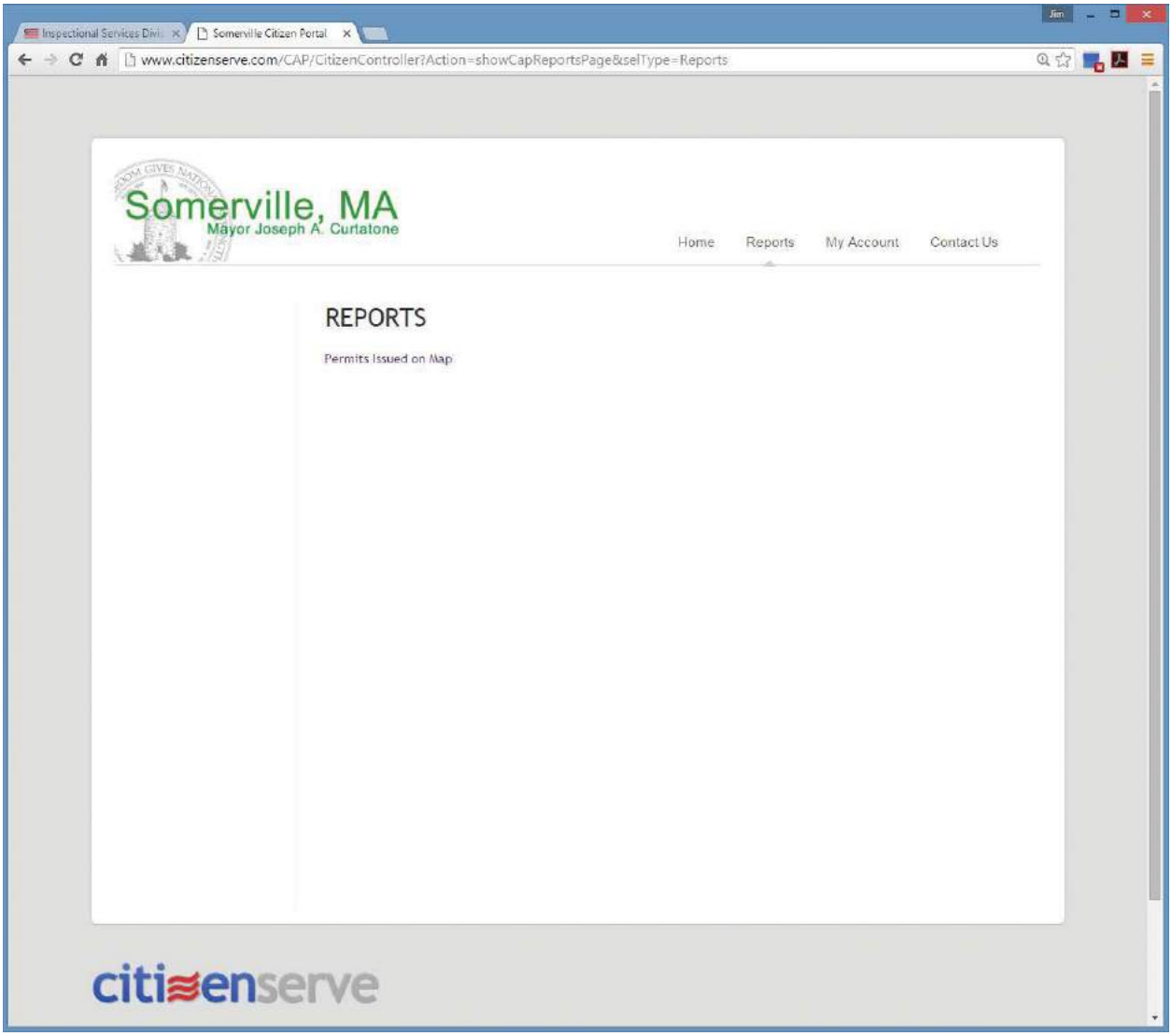
Metrics can contain detailed information about files and activities. In addition any reports can be placed on the user's home page under my links. Clicking on the link will run the report or process.



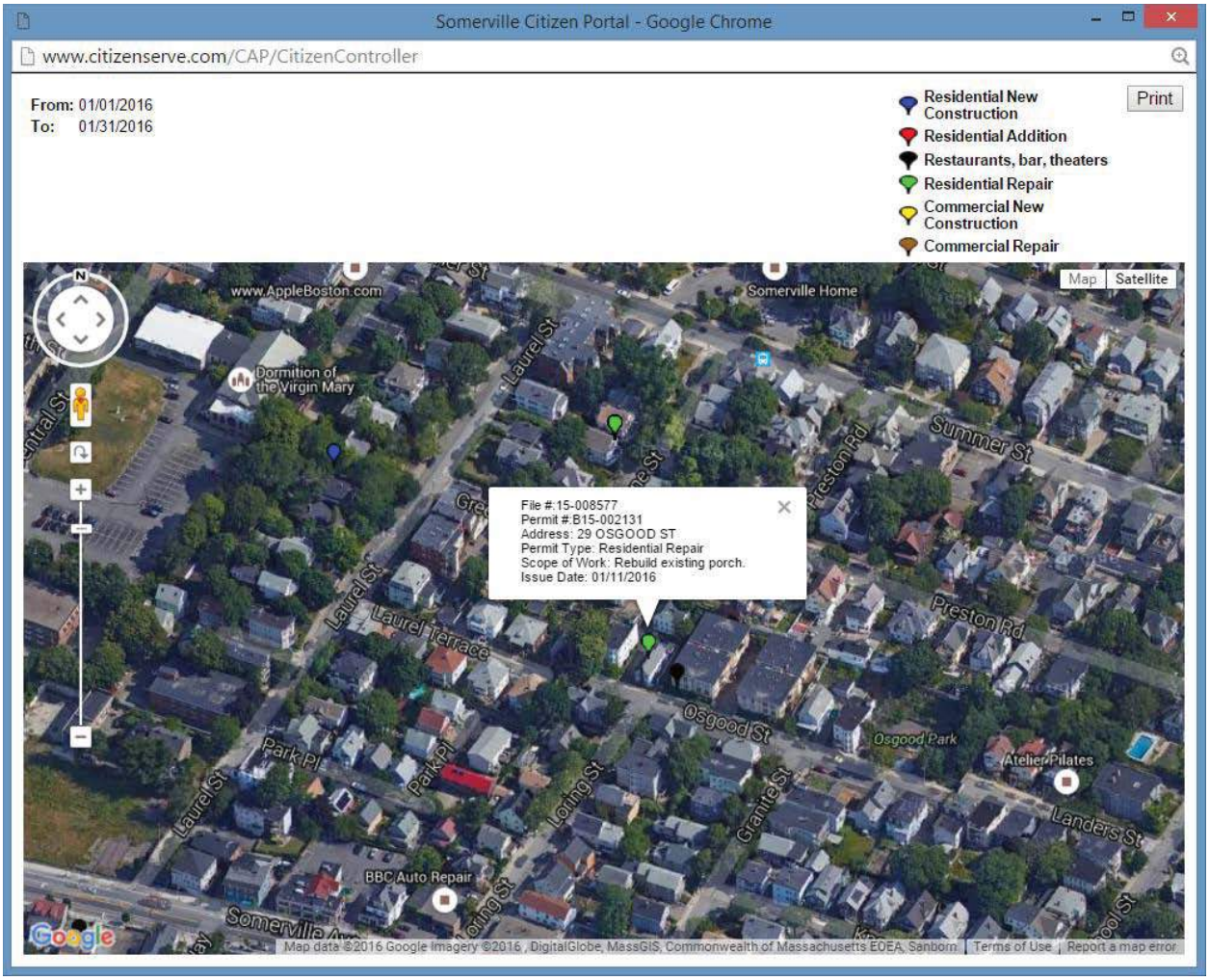
Clicking the map report in the My Links section, custom reports can be tabular lists, maps, pie or line charts and merge reports for sending template letters or e-mails. The creation of custom reports is included in the user subscription. Any user can request any type of report any time.



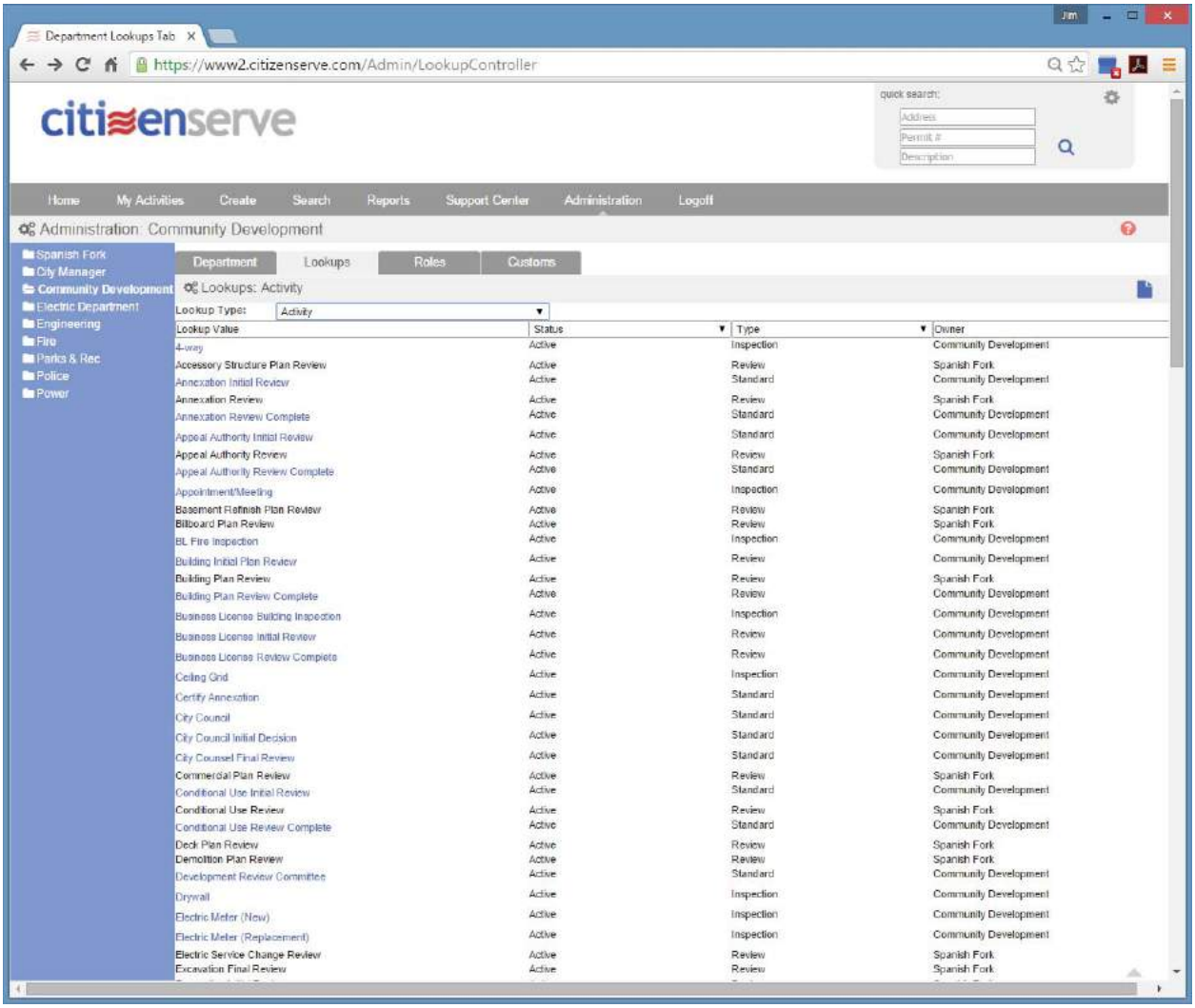
Any report created in Citizenserve can be put on the public portal.



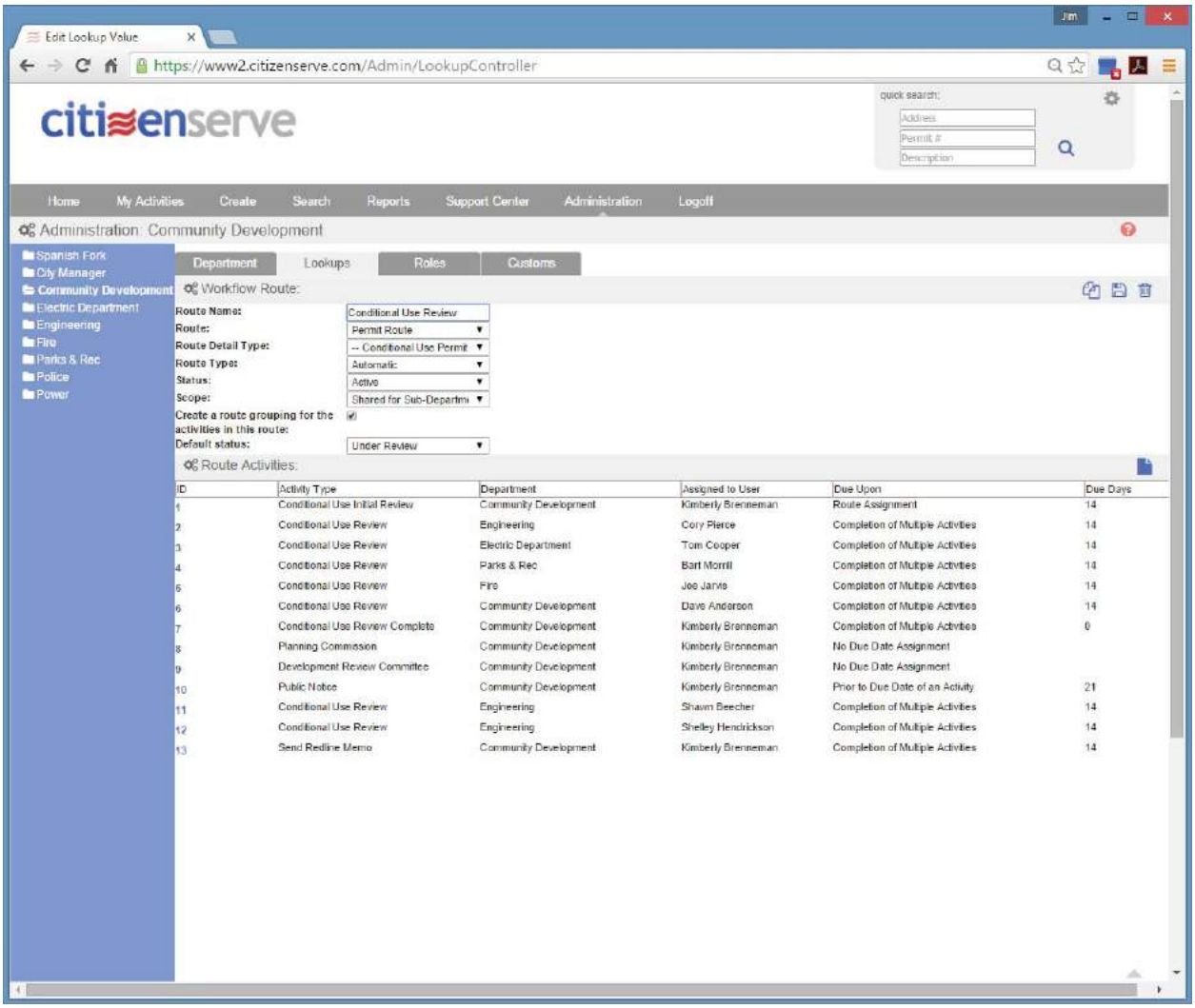
Clicking on the above report citizens can see the permits issued in selected date range and view information by clicking on the pin on the map.



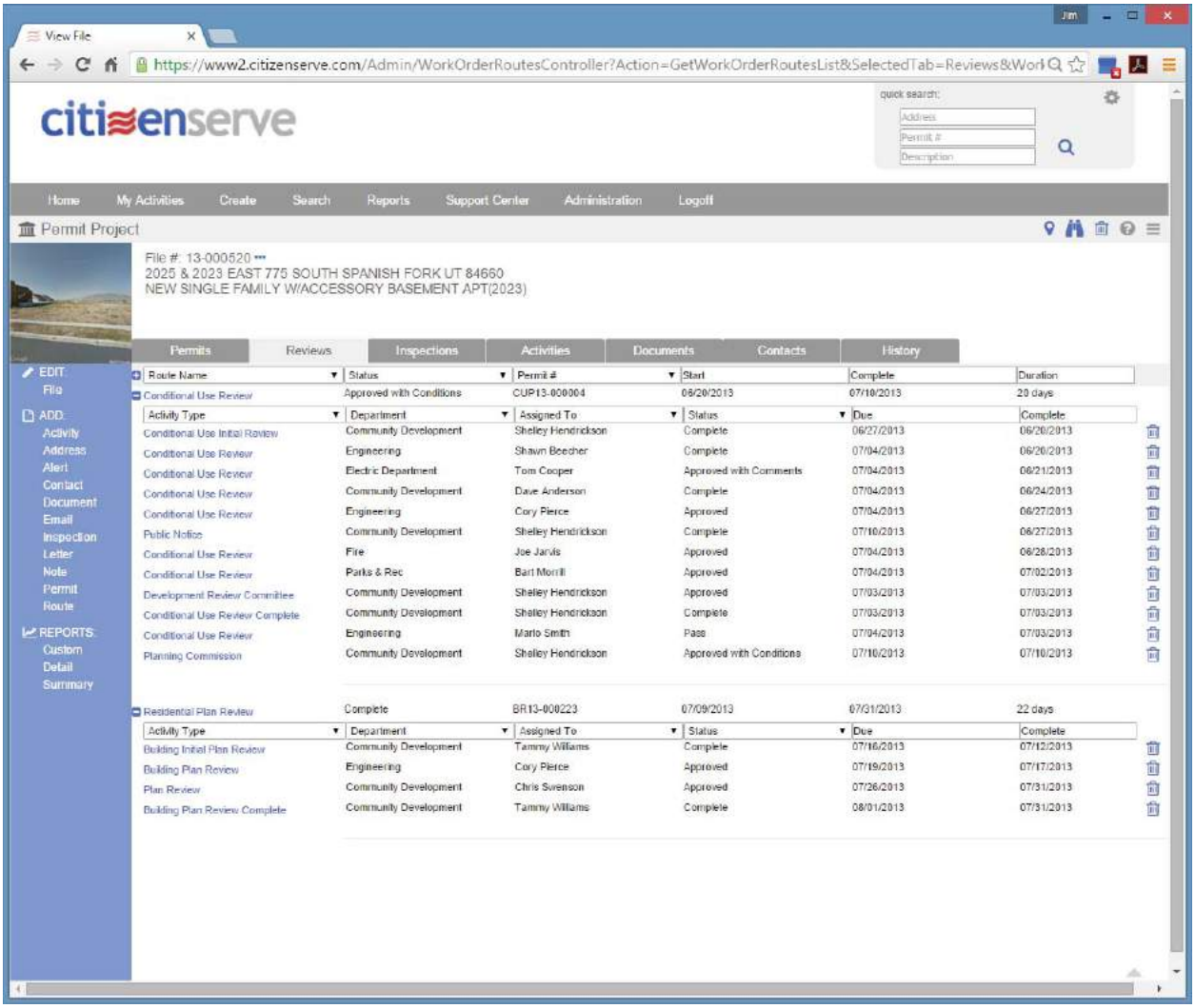
In Citizenserve an unlimited number of activities can be created. Each activity can have a custom form along with features such as common corrections or comments in a comment book. The activities can be arranged into workflow routes. The activities can be easily created in the administration area. Each department can have its own activity types and activities can be inherited from higher level departments. Custom fields on the activity forms can be used in reports and templates.



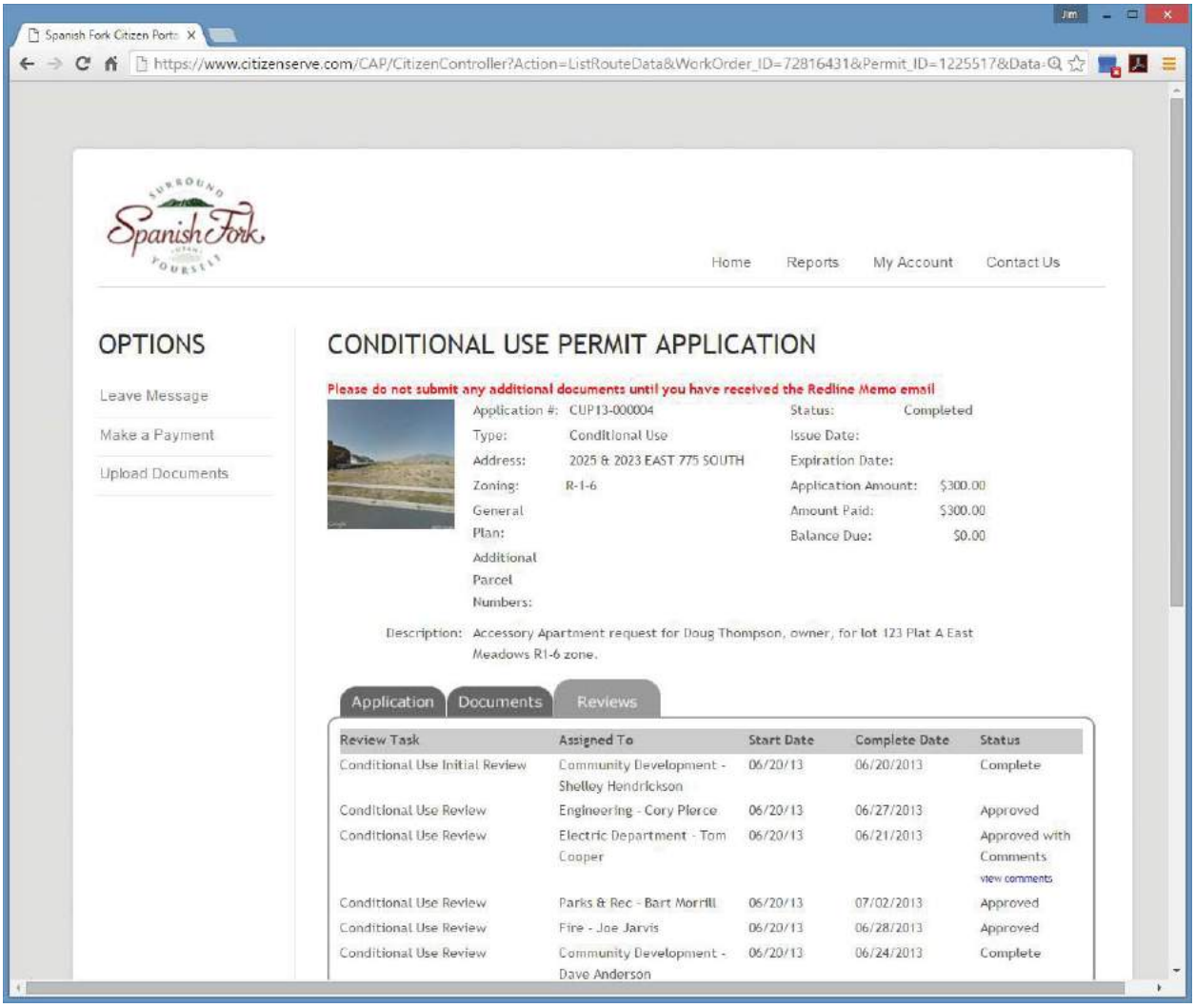
Activities can be assembled into workflow routes. Workflow routes can be automatic or manual. Multiple routes can be created for each case, permit or license type. Workflows can be any combination of parallel or sequential activities.



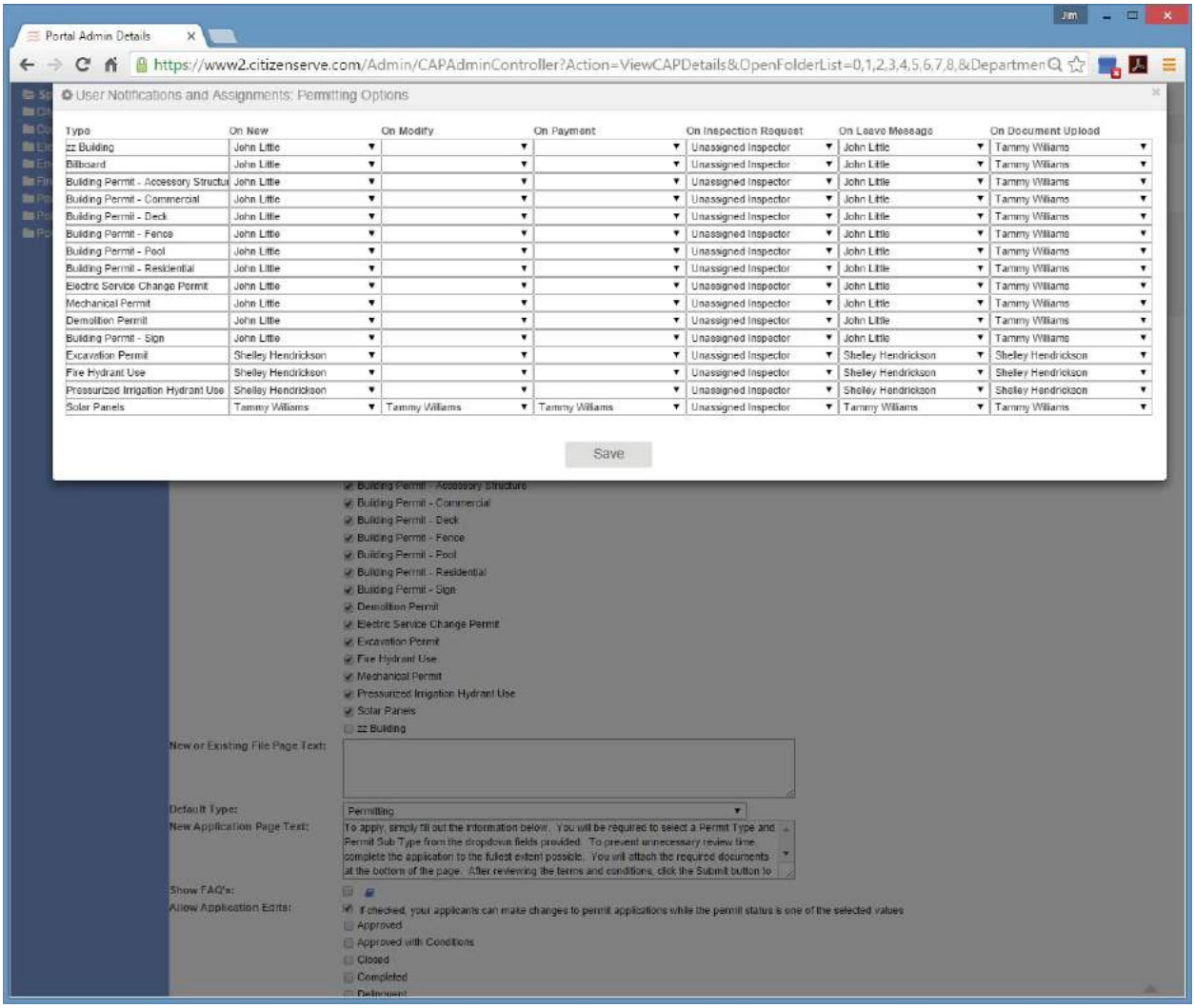
Workflows can be viewed in the reviews tab when looking at a permit or license.



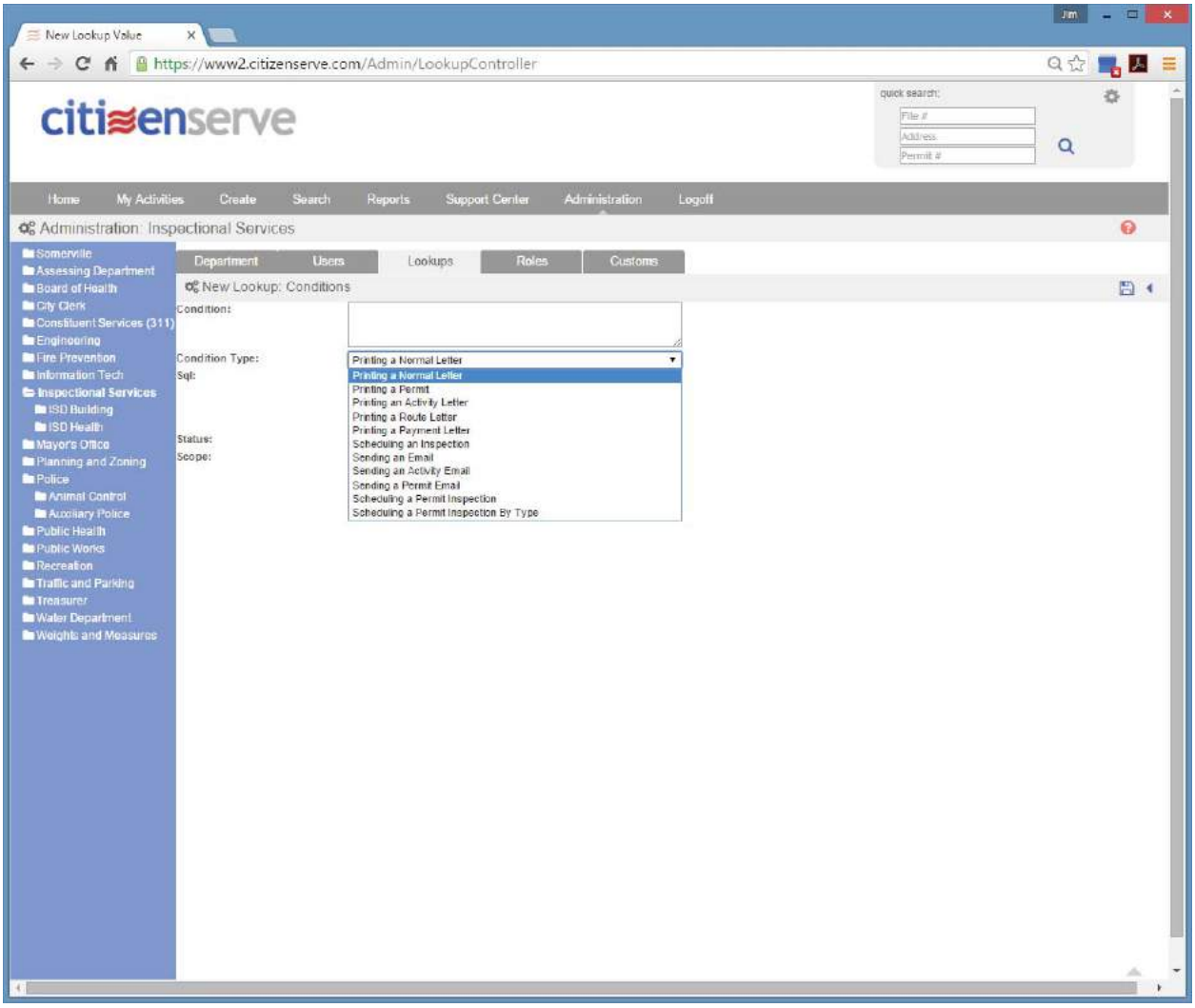
The workflow routes can also be displayed on the citizen portal with the option for the portal user to see the reviewer's comments.



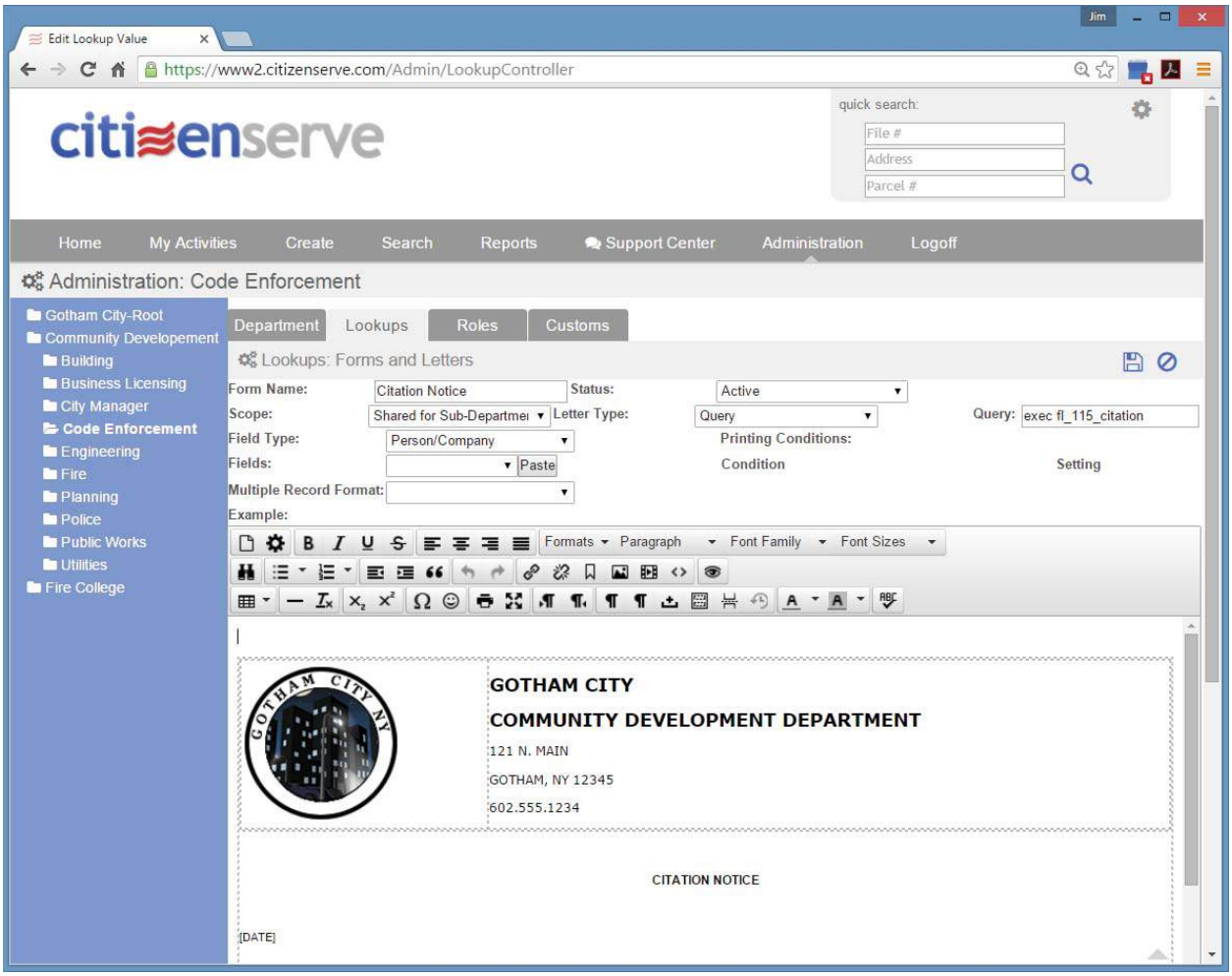
There are several areas where actions or events can create notifications or processing, most importantly the actions by citizens on the portal. Each permit type can be setup to notify different parties based on the actions taken by the citizen. For example, if you request a contractor upload a document for permit review you will get a notice when that document is uploaded so you don't have to keep looking in the file for the change. Below is the notifications and assignment configuration for the citizen portal.



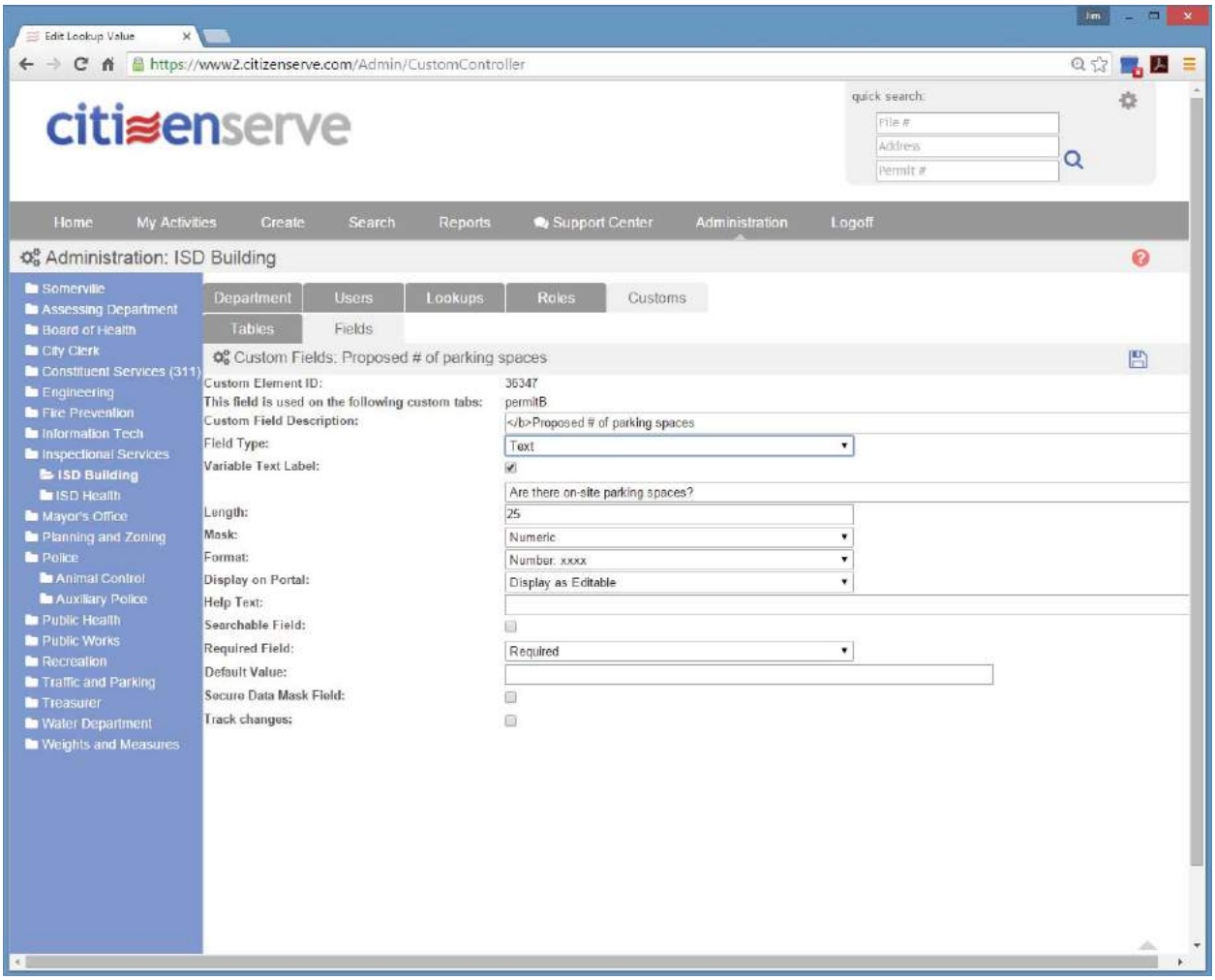
Conditions can also be setup for various events in Citizenserve. These conditions are created using a SQL script.



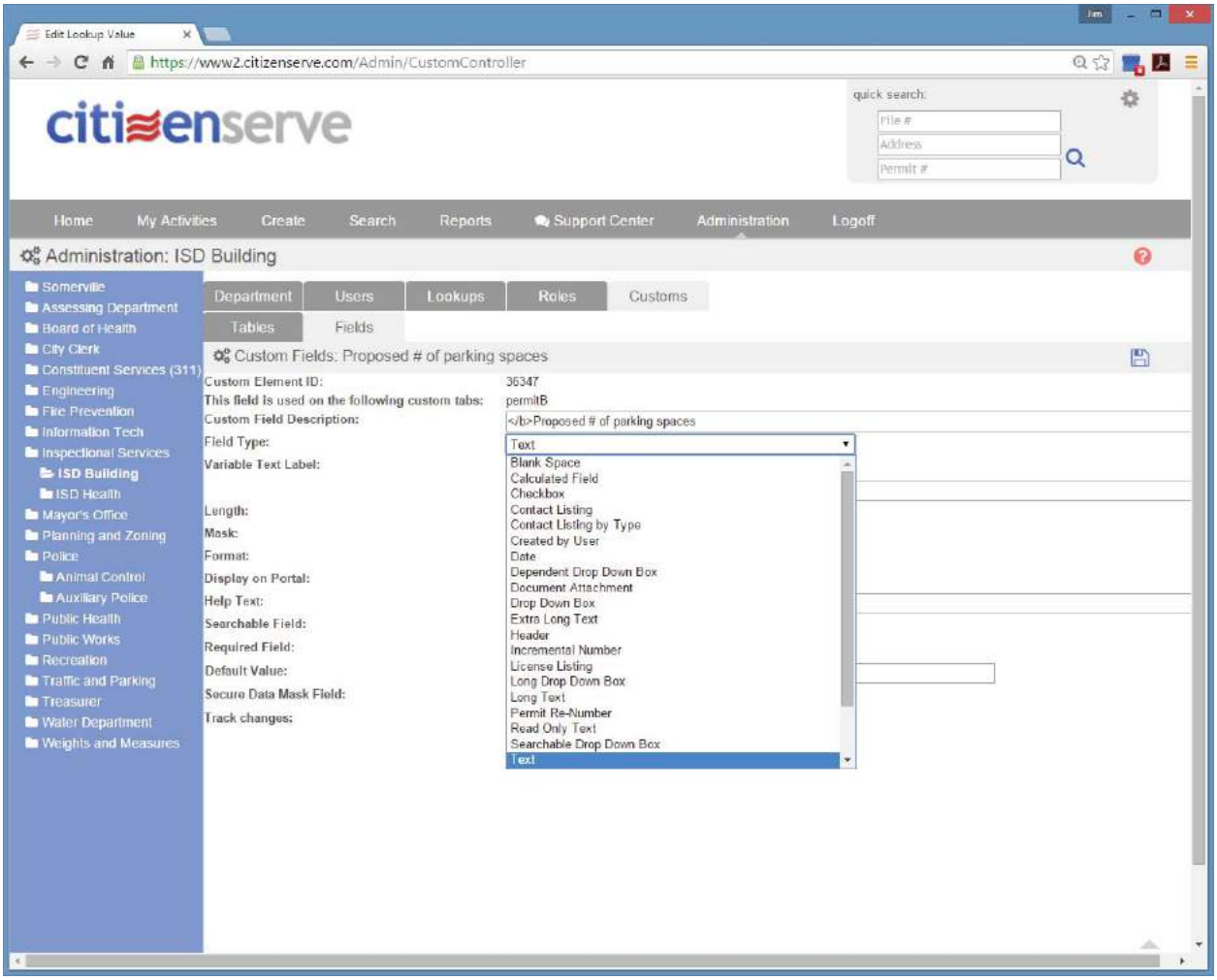
All letters and e-mail templates in Citizenserve can be created using a query or SQL script. This script can execute updates to the file when generated. An example might be a citation notice that updates fines in the file and adds future activities for follow-up or changes the status of a file.



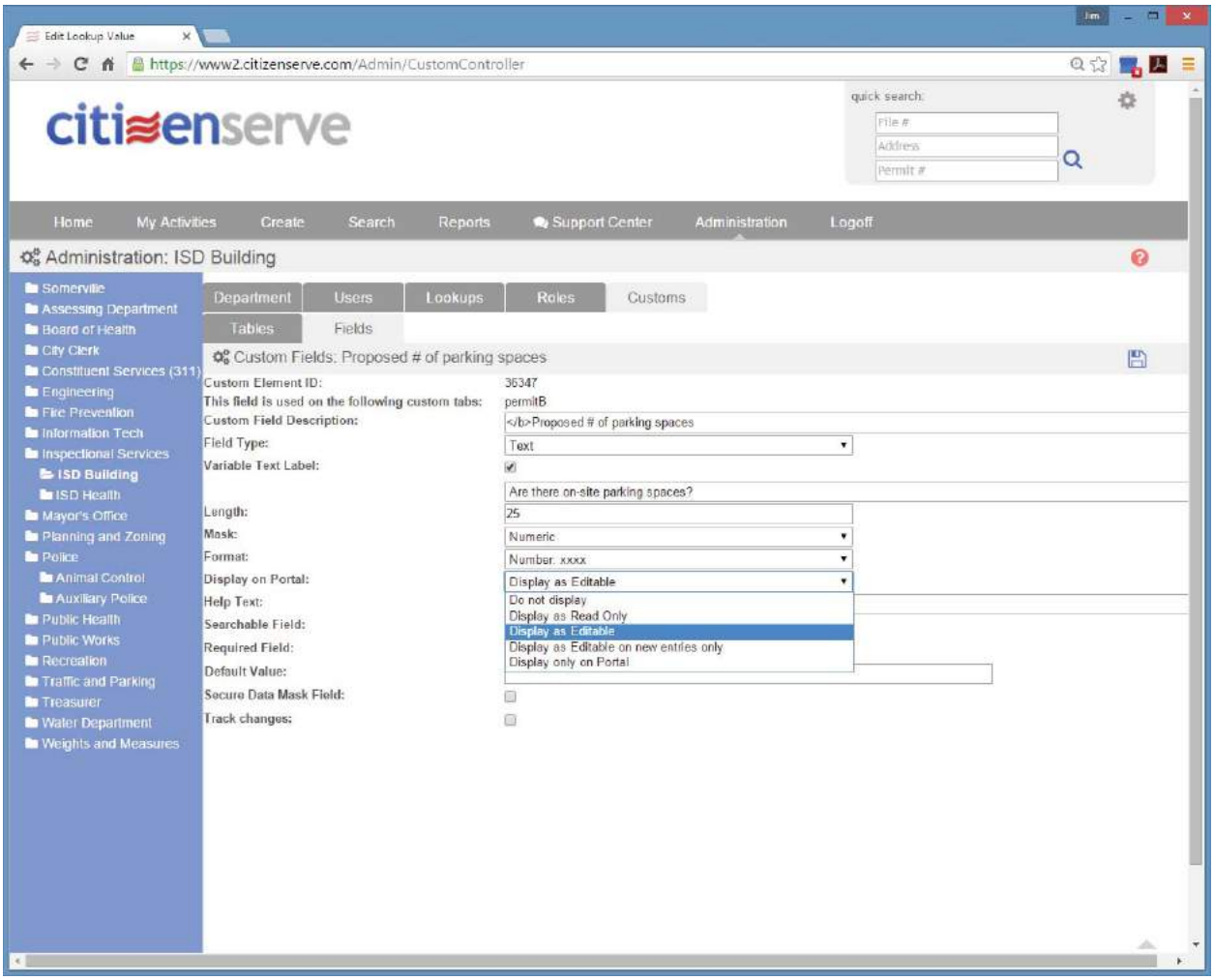
Permit and license applications, as well as any activity types, like a review or an inspection can have a form based on custom fields. Custom fields can also be setup on contact types, file types and properties. HTML is supported in the field labels and text. Field level help can be setup. Secure field masking is supported.



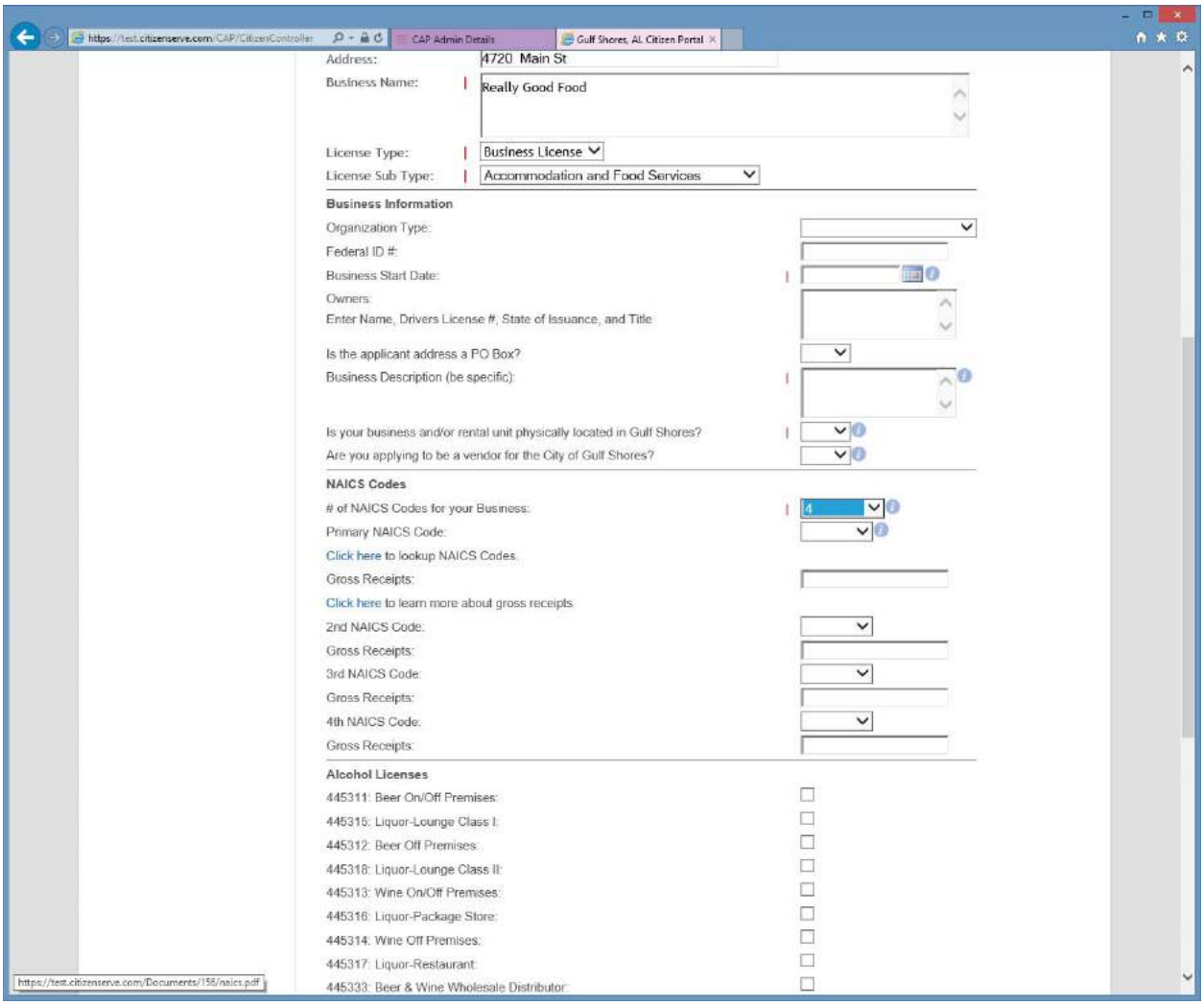
Many field types are supported.



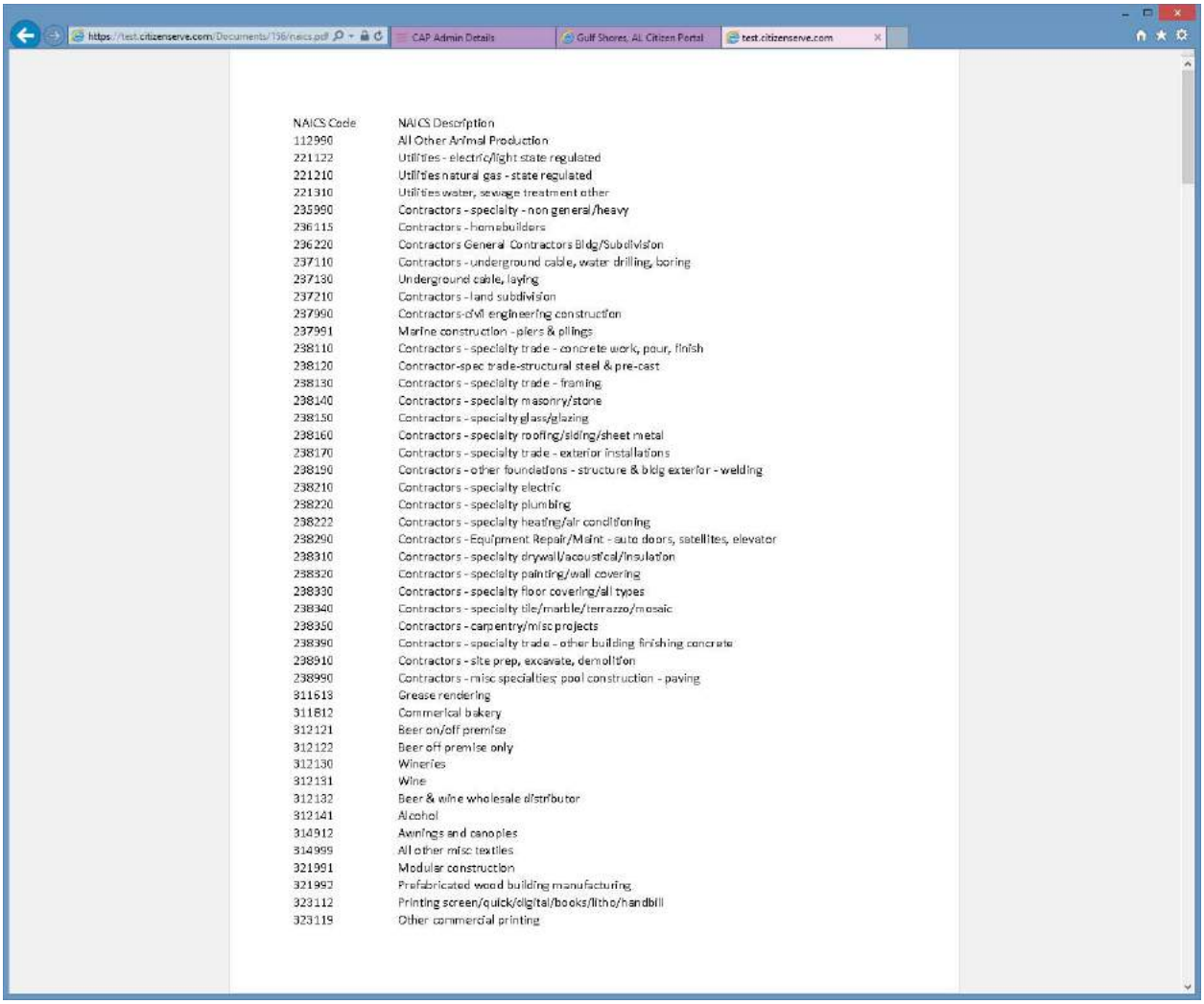
Behavior on the citizen portal can also be determined at the field level. For example, custom fields can be set to only show on the portal or only on the staff screen. Track changes can be selected to log changes in the file history. Fields can be set as searchable on the general search screens. Custom fields can also be used in templates and reporting in Citizenserve. All custom fields are also available in the fee table, so any custom field can be used in determining license and permit fees. Fields can be set as required and can be set to only be required on the citizen portal and not on the staff side.



Applications can also be setup to be dynamic making the application process easier for the business or citizen. In the license example below the user can select the number of NAICS codes for their business and the application expands based on the number selected. So a business with one NAICS code does not need to have an application cluttered with fields that are not required.

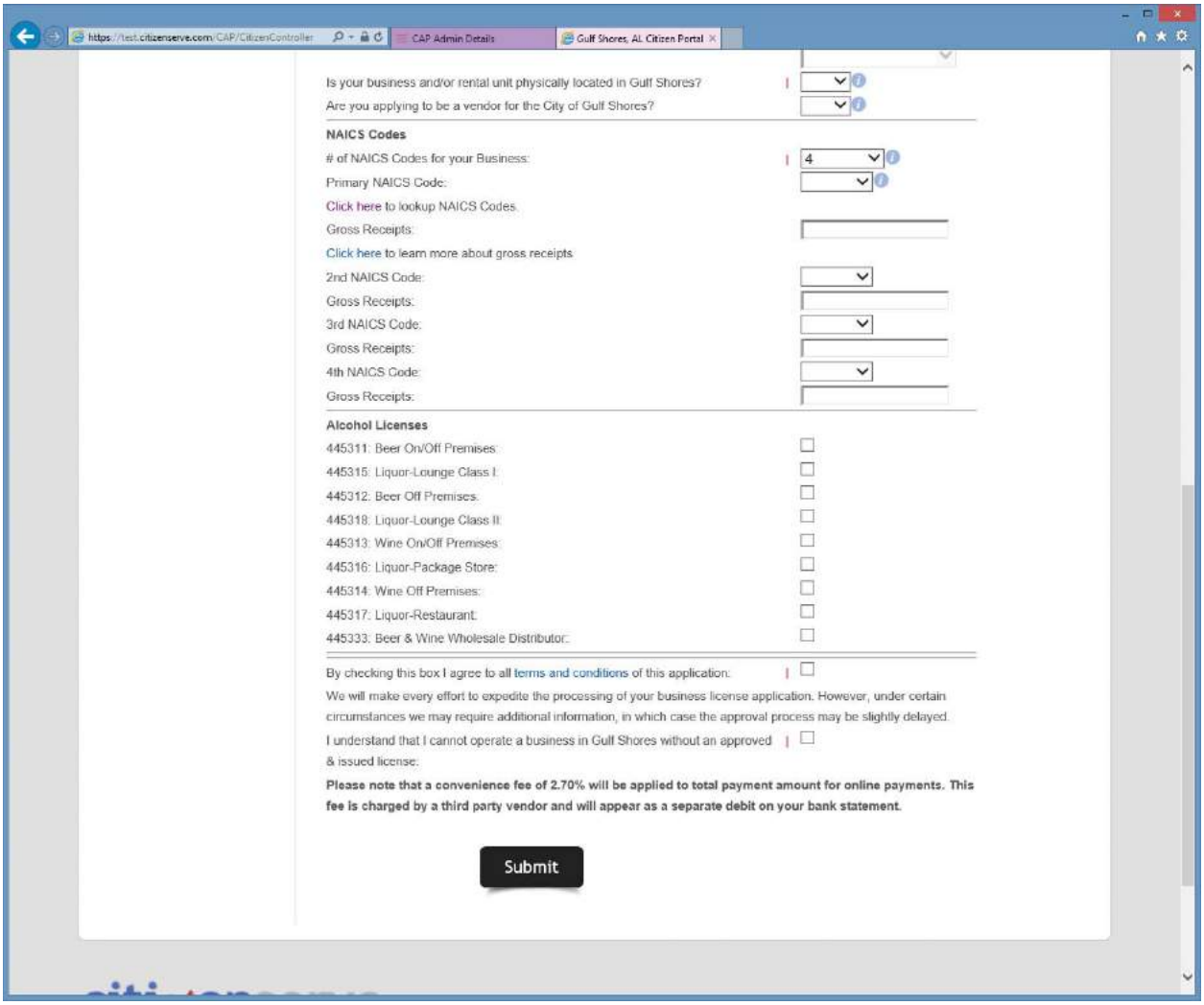


Links to helpful documents can be built in and these links can be dynamically displayed based on the application questions.

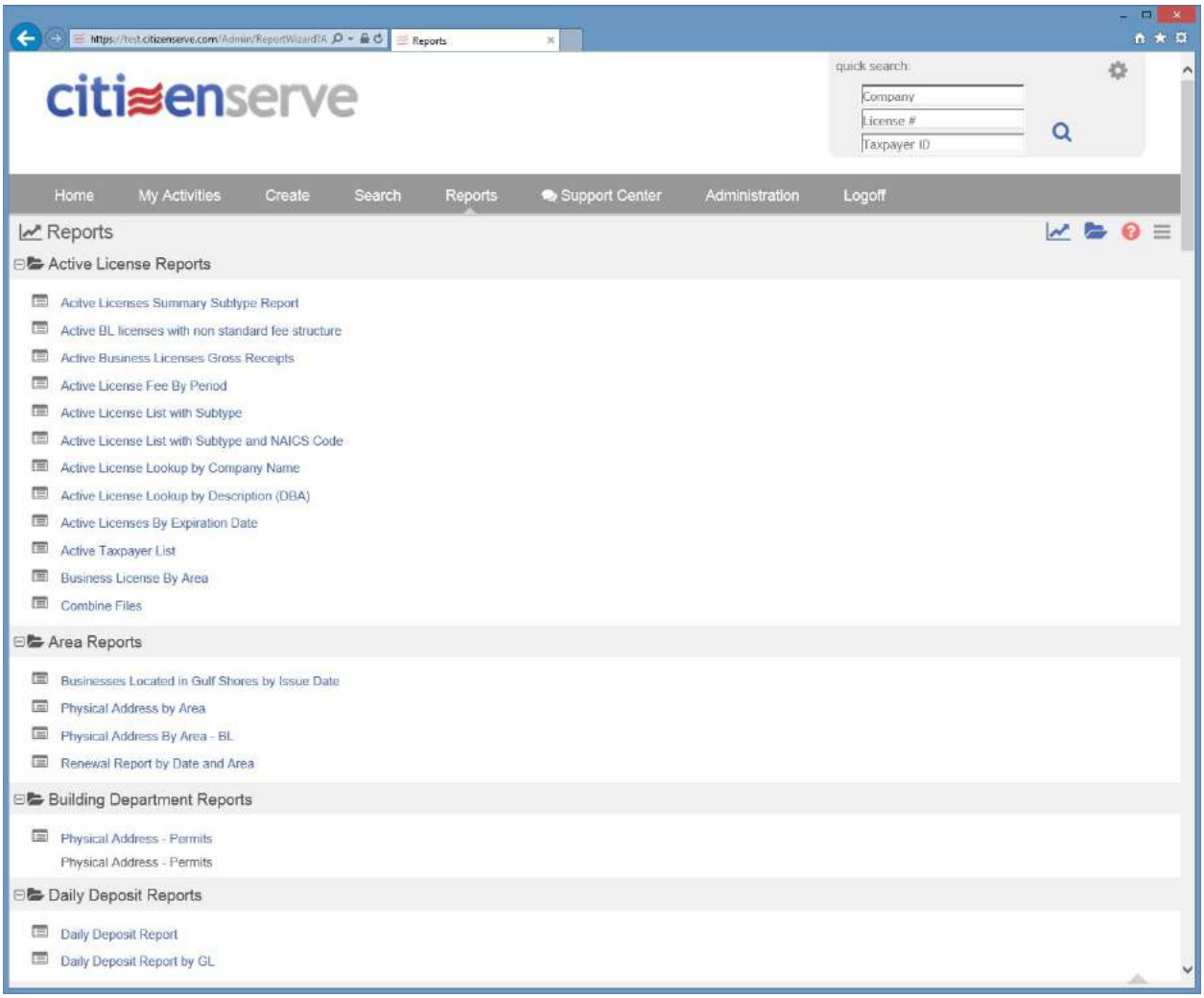


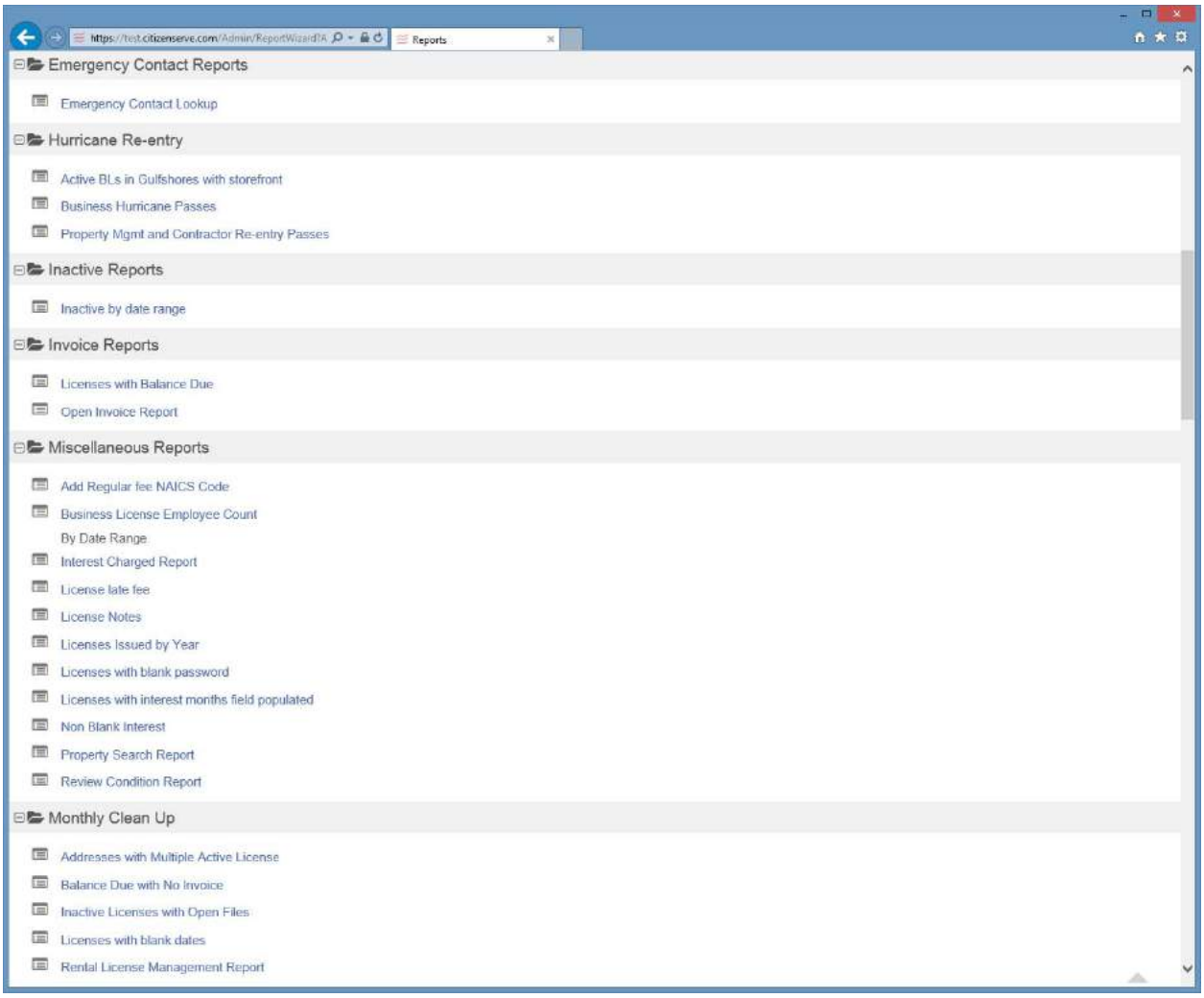
NAICS Code	NAICS Description
112990	All Other Animal Production
221122	Utilities - electric/light state regulated
221210	Utilities natural gas - state regulated
221310	Utilities water, sewage treatment other
235990	Contractors - specialty - non general/heavy
236115	Contractors - homebuilders
236220	Contractors General Contractors Bldg/Subdivision
237110	Contractors - underground cable, water drilling, boring
237130	Underground cable, laying
237210	Contractors - land subdivision
237990	Contractors-civil engineering construction
237991	Marine construction - piers & pilings
238110	Contractors - specialty trade - concrete work, pour, finish
238120	Contractor-spec trade-structural steel & pre-cast
238130	Contractors - specialty trade - framing
238140	Contractors - specialty masonry/stone
238150	Contractors - specialty glass/glazing
238160	Contractors - specialty roofing/siding/sheet metal
238170	Contractors - specialty trade - exterior installations
238190	Contractors - other foundations - structure & bldg exterior - welding
238210	Contractors - specialty electric
238220	Contractors - specialty plumbing
238222	Contractors - specialty heating/air conditioning
238290	Contractors - Equipment Repair/Maint - auto doors, satellites, elevator
238310	Contractors - specialty drywall/acoustical/insulation
238320	Contractors - specialty painting/wall covering
238330	Contractors - specialty floor covering/all types
238340	Contractors - specialty tile/marble/terrazzo/mosaic
238350	Contractors - carpentry/misc projects
238390	Contractors - specialty trade - other building finishing concrete
238910	Contractors - site prep, excavate, demolition
238990	Contractors - misc specialties; pool construction - paving
311613	Grease rendering
311812	Commerical bakery
312121	Beer on/off premise
312122	Beer off premise only
312130	Wineries
312131	Wine
312132	Beer & wine wholesale distributor
312141	Alcohol
314912	Awnings and canopies
314999	All other misc textiles
321991	Modular construction
321992	Prefabricated wood building manufacturing
323112	Printing screen/quick/digital/books/litho/handbill
323119	Other commercial printing

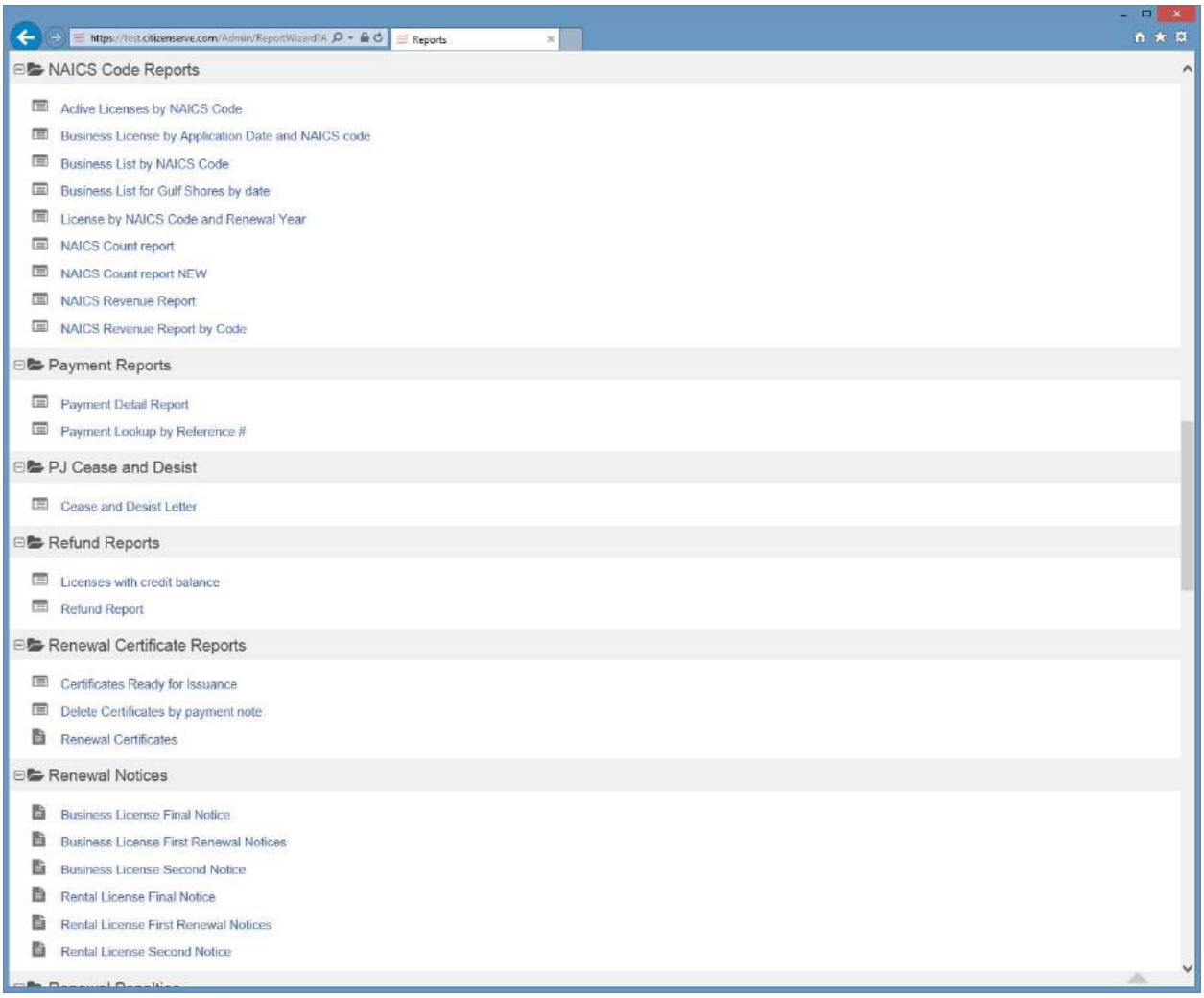
Terms and conditions can be built in with specific acknowledgements for signing the application.

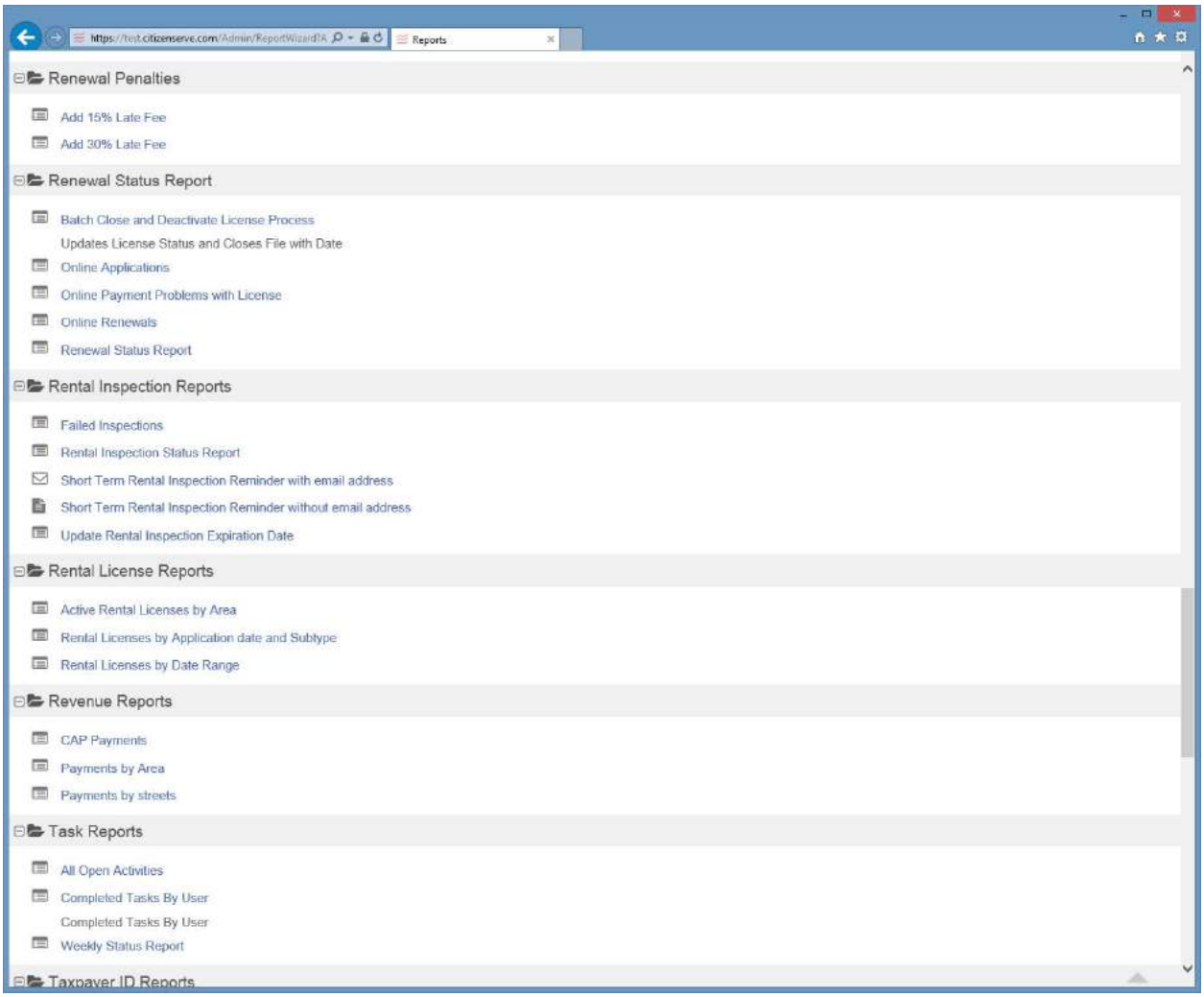


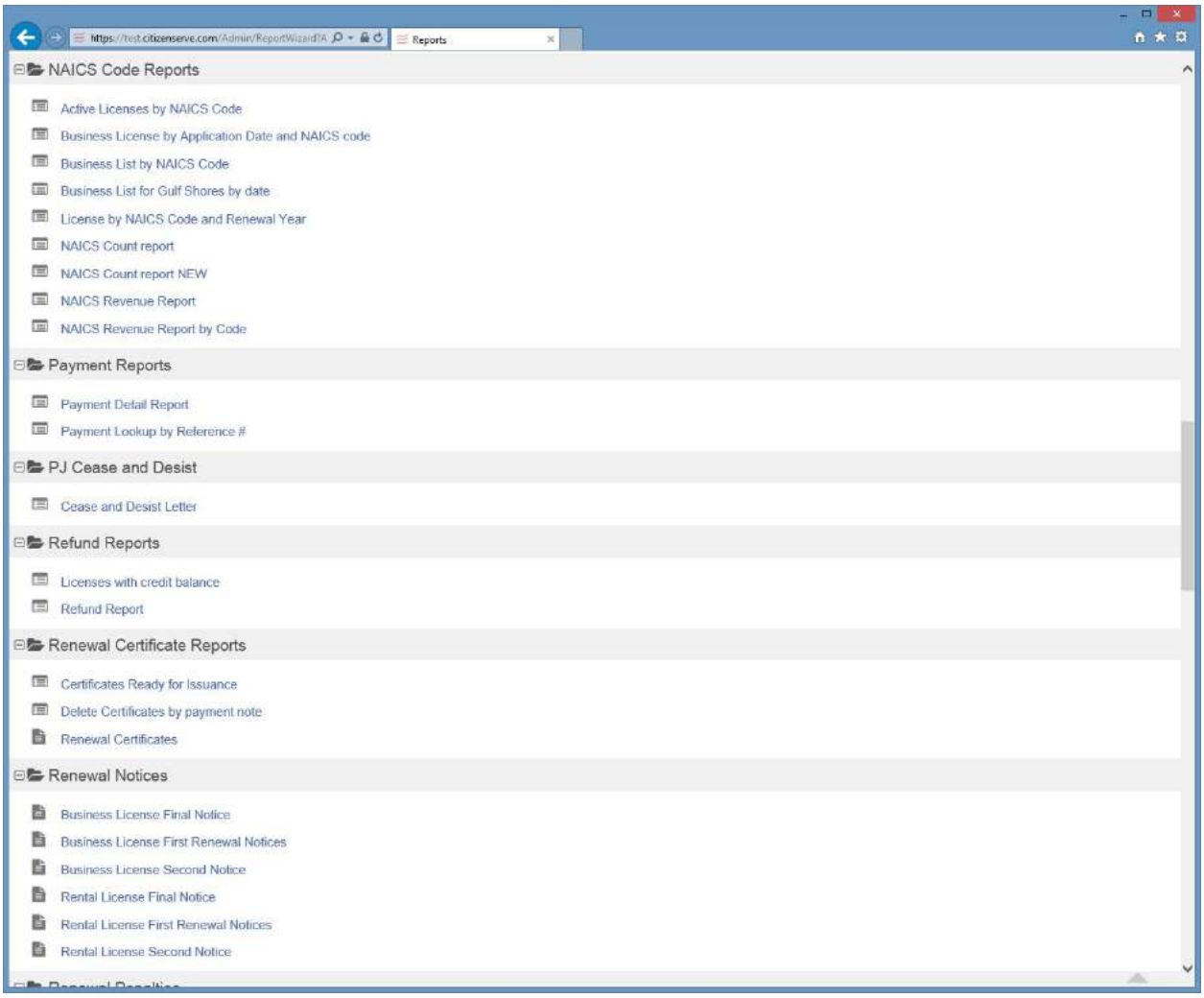
Citizenserve support includes the creation of custom reports. Reports can also be created using the end user reporting wizard. Reports can be maps, charts, tabular (exportable to excel), merge reports that can be merged with e-mail and letter templates. Our support and implementation team typically creates reports during implementation and then later during support as anything might be requested or needed. There is never a charge to add another report. Here's a typical business licensing user's reporting folders showing all the reports and categories as an example.

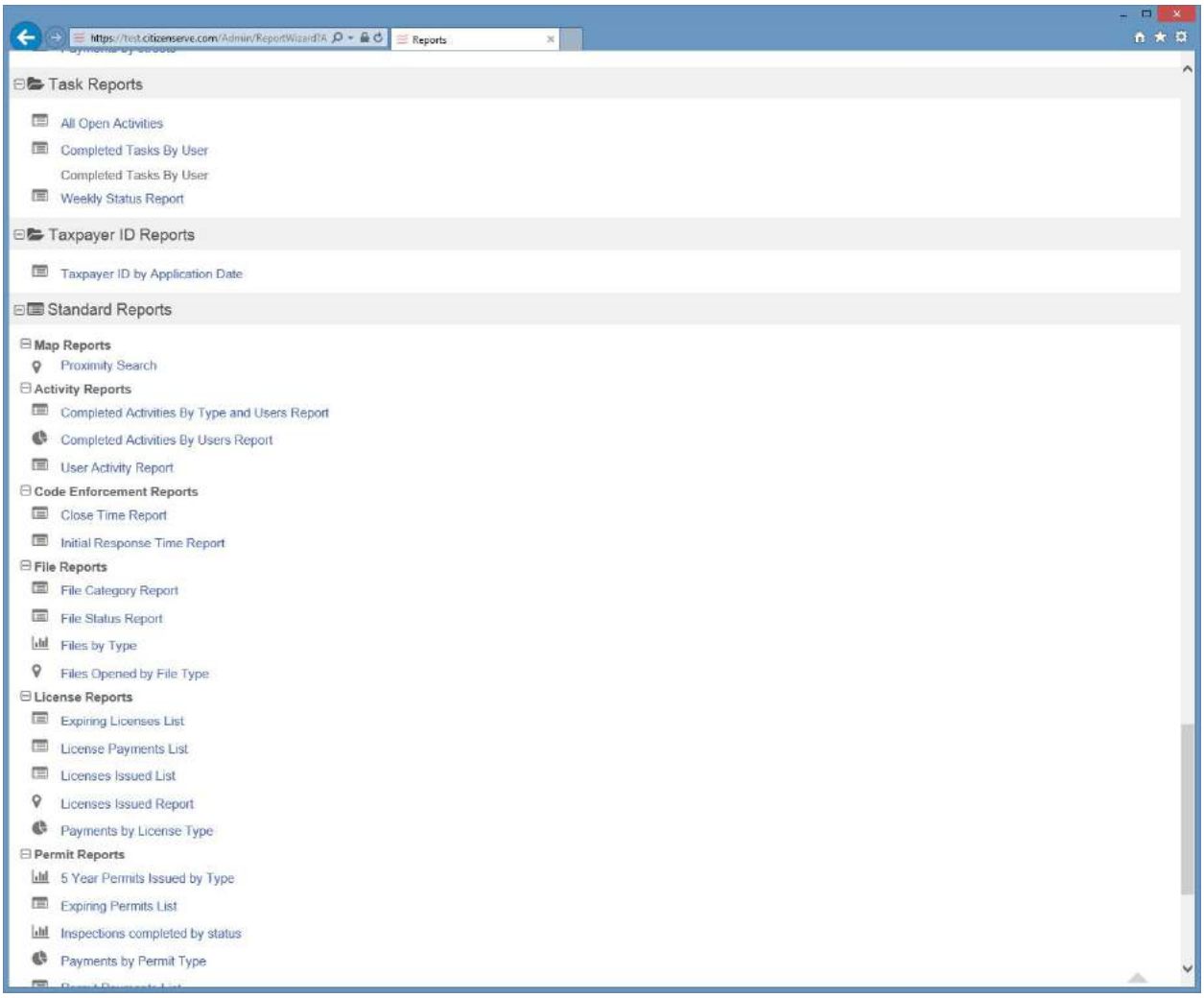



https://test.citizenserve.com/Admin/ReportWizardTA
Reports
Emergency Contact Reports
Emergency Contact Lookup
Hurricane Re-entry
Active BLs in Gulfshores with storefront
Business Hurricane Passes
Property Mgmt and Contractor Re-entry Passes
Inactive Reports
Inactive by date range
Invoice Reports
Licenses with Balance Due
Open Invoice Report
Miscellaneous Reports
Add Regular fee NAICS Code
Business License Employee Count
By Date Range
Interest Charged Report
License late fee
License Notes
Licenses Issued by Year
Licenses with blank password
Licenses with interest months field populated
Non Blank Interest
Property Search Report
Review Condition Report
Monthly Clean Up
Addresses with Multiple Active License
Balance Due with No Invoice
Inactive Licenses with Open Files
Licenses with blank dates
Rental License Management Report

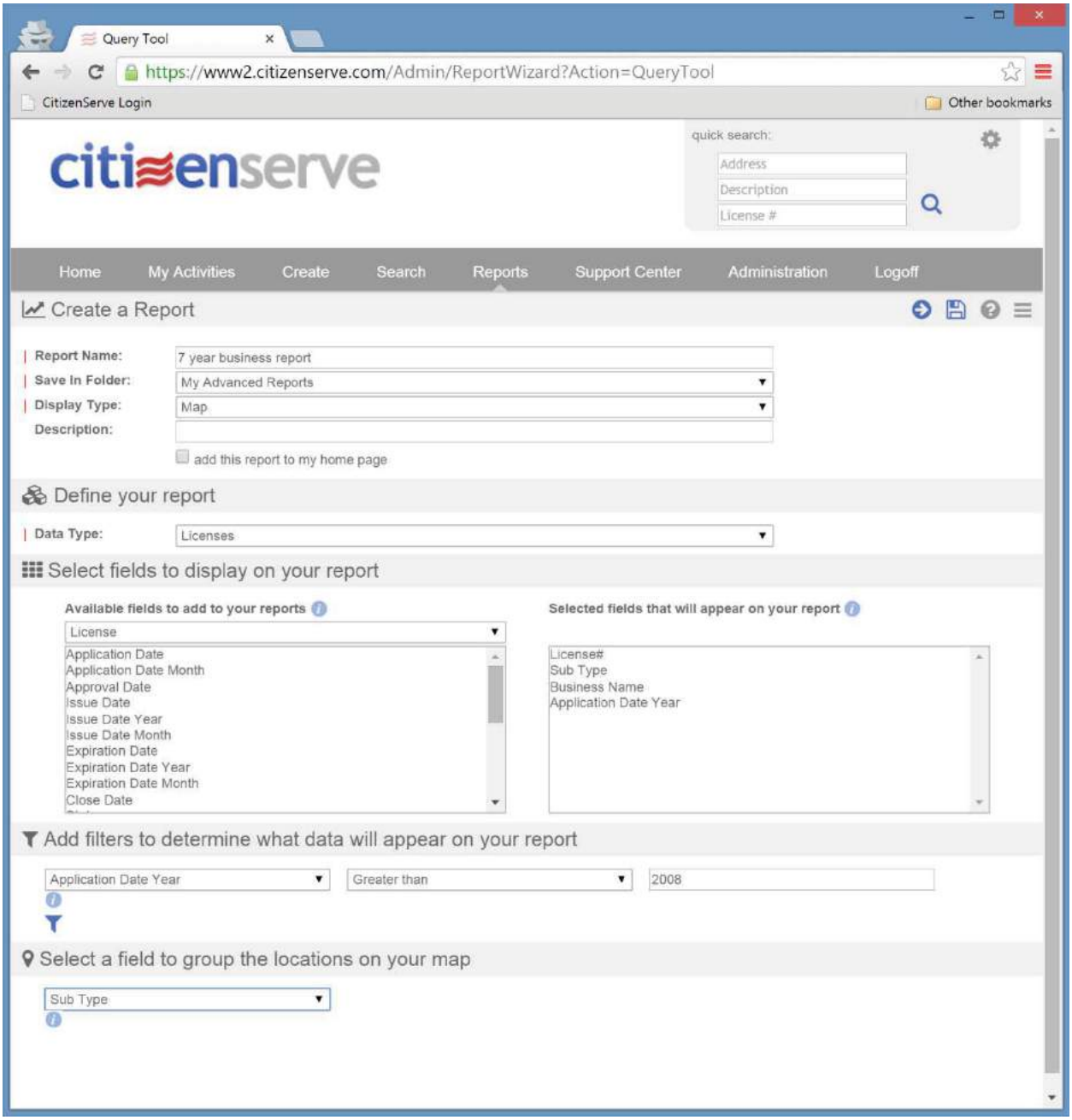

https://test.citizenserve.com/Admin/ReportWizardTA
Reports
NAICS Code Reports
Active Licenses by NAICS Code
Business License by Application Date and NAICS code
Business List by NAICS Code
Business List for Gulf Shores by date
License by NAICS Code and Renewal Year
NAICS Count report
NAICS Count report NEW
NAICS Revenue Report
NAICS Revenue Report by Code
Payment Reports
Payment Detail Report
Payment Lookup by Reference #
PJ Cease and Desist
Cease and Desist Letter
Refund Reports
Licenses with credit balance
Refund Report
Renewal Certificate Reports
Certificates Ready for Issuance
Delete Certificates by payment note
Renewal Certificates
Renewal Notices
Business License Final Notice
Business License First Renewal Notices
Business License Second Notice
Rental License Final Notice
Rental License First Renewal Notices
Rental License Second Notice


https://test.citizenserve.com/Admin/ReportWizardTA
Reports
Renewal Penalties
Add 15% Late Fee
Add 30% Late Fee
Renewal Status Report
Batch Close and Deactivate License Process
Updates License Status and Closes File with Date
Online Applications
Online Payment Problems with License
Online Renewals
Renewal Status Report
Rental Inspection Reports
Failed Inspections
Rental Inspection Status Report
Short Term Rental Inspection Reminder with email address
Short Term Rental Inspection Reminder without email address
Update Rental Inspection Expiration Date
Rental License Reports
Active Rental Licenses by Area
Rental Licenses by Application date and Subtype
Rental Licenses by Date Range
Revenue Reports
CAP Payments
Payments by Area
Payments by streets
Task Reports
All Open Activities
Completed Tasks By User
Completed Tasks By User
Weekly Status Report
Taxpayer ID Reports

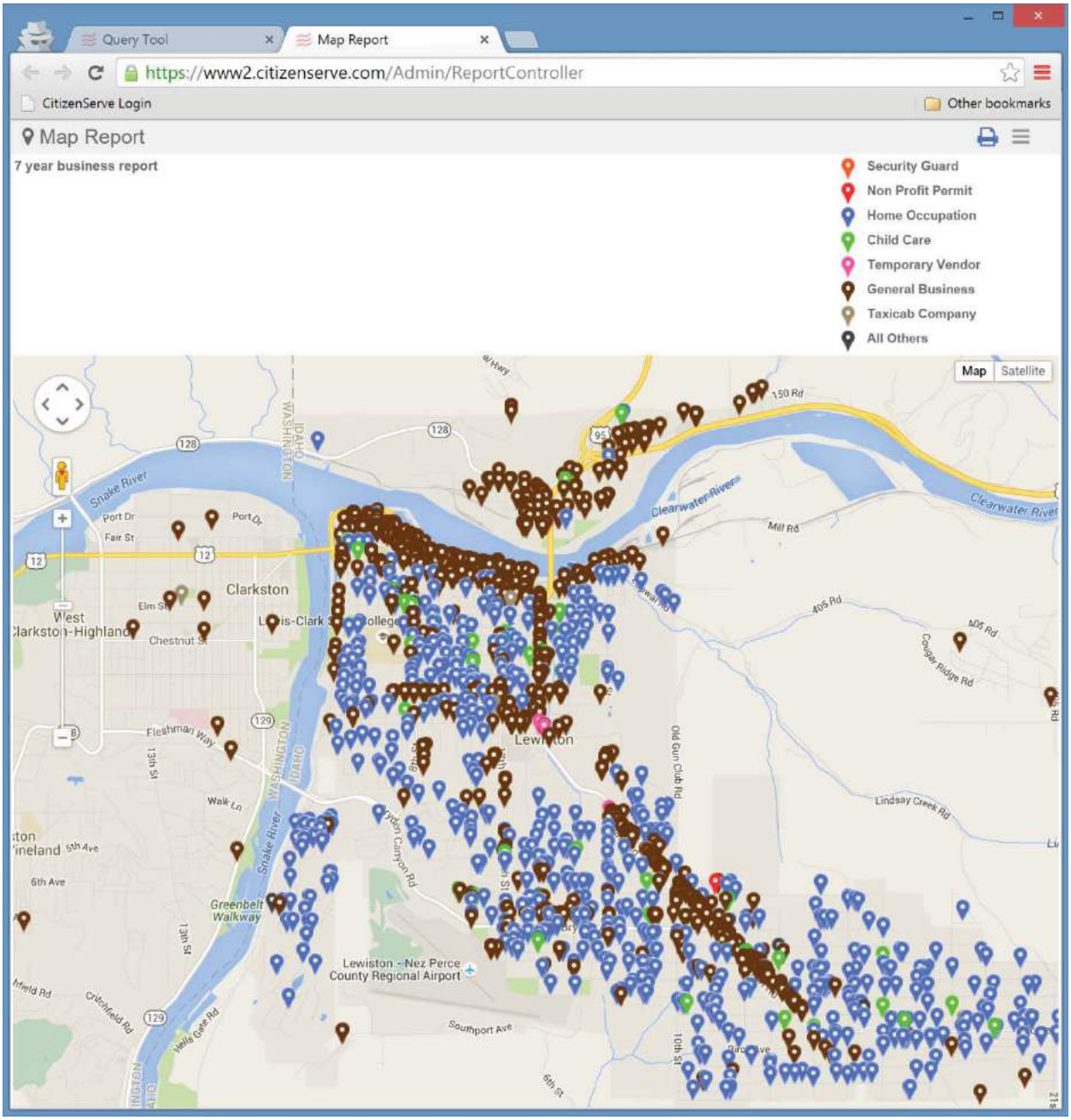

https://test.citizenserve.com/Admin/ReportWizardTA
Reports
NAICS Code Reports
Active Licenses by NAICS Code
Business License by Application Date and NAICS code
Business List by NAICS Code
Business List for Gulf Shores by date
License by NAICS Code and Renewal Year
NAICS Count report
NAICS Count report NEW
NAICS Revenue Report
NAICS Revenue Report by Code
Payment Reports
Payment Detail Report
Payment Lookup by Reference #
PJ Cease and Desist
Cease and Desist Letter
Refund Reports
Licenses with credit balance
Refund Report
Renewal Certificate Reports
Certificates Ready for Issuance
Delete Certificates by payment note
Renewal Certificates
Renewal Notices
Business License Final Notice
Business License First Renewal Notices
Business License Second Notice
Rental License Final Notice
Rental License First Renewal Notices
Rental License Second Notice


https://test.citizenserve.com/Admin/ReportWizardTA
Reports
Task Reports
All Open Activities
Completed Tasks By User
Completed Tasks By User
Weekly Status Report
Taxpayer ID Reports
Taxpayer ID by Application Date
Standard Reports
Map Reports
Proximity Search
Activity Reports
Completed Activities By Type and Users Report
Completed Activities By Users Report
User Activity Report
Code Enforcement Reports
Close Time Report
Initial Response Time Report
File Reports
File Category Report
File Status Report
Files by Type
Files Opened by File Type
License Reports
Expiring Licenses List
License Payments List
Licenses Issued List
Licenses Issued Report
Payments by License Type
Permit Reports
5 Year Permits Issued by Type
Expiring Permits List
Inspections completed by status
Payments by Permit Type

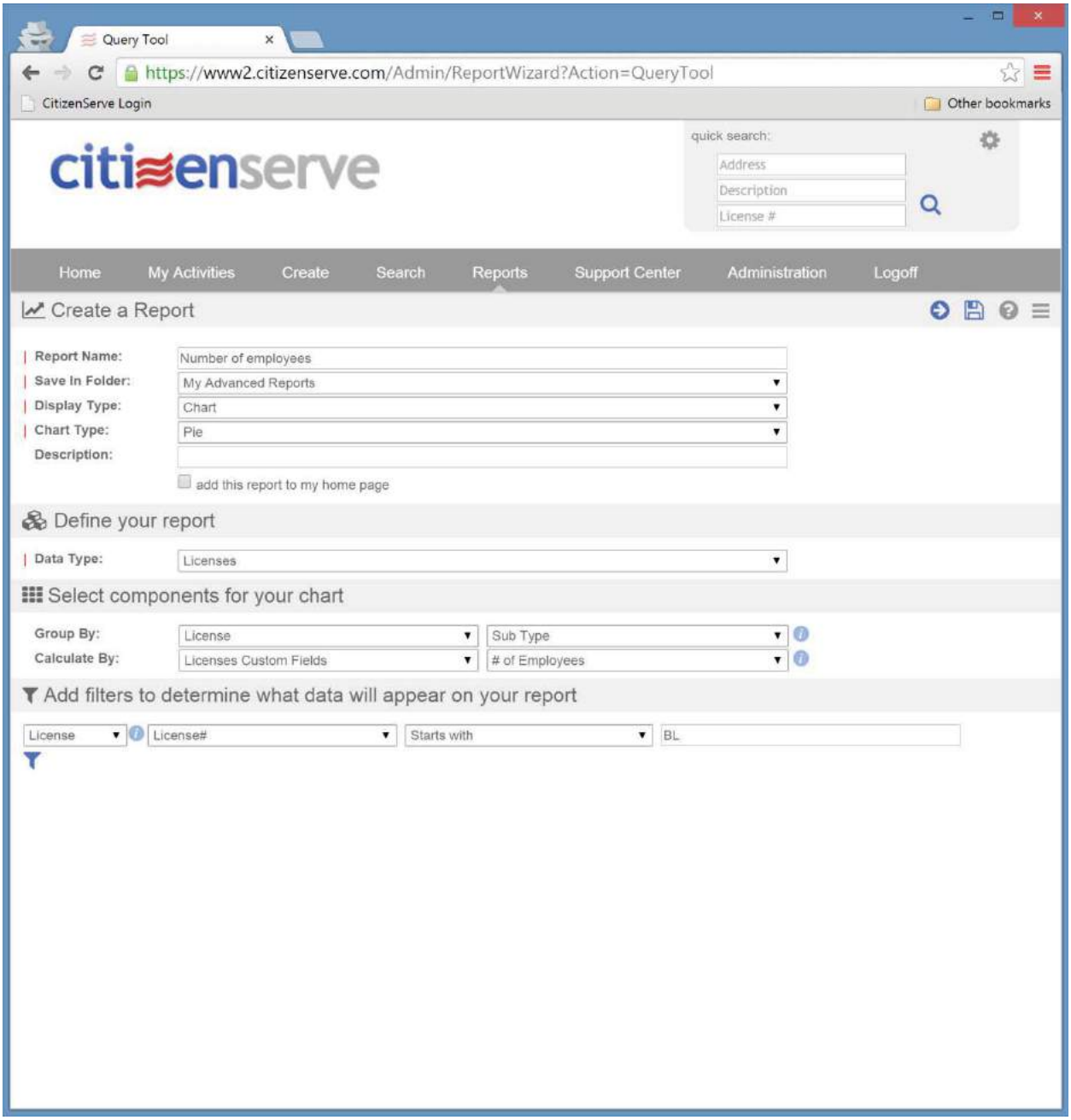
Using the reporting wizard, here is an example of the definition and report for licenses in the last 7 years.



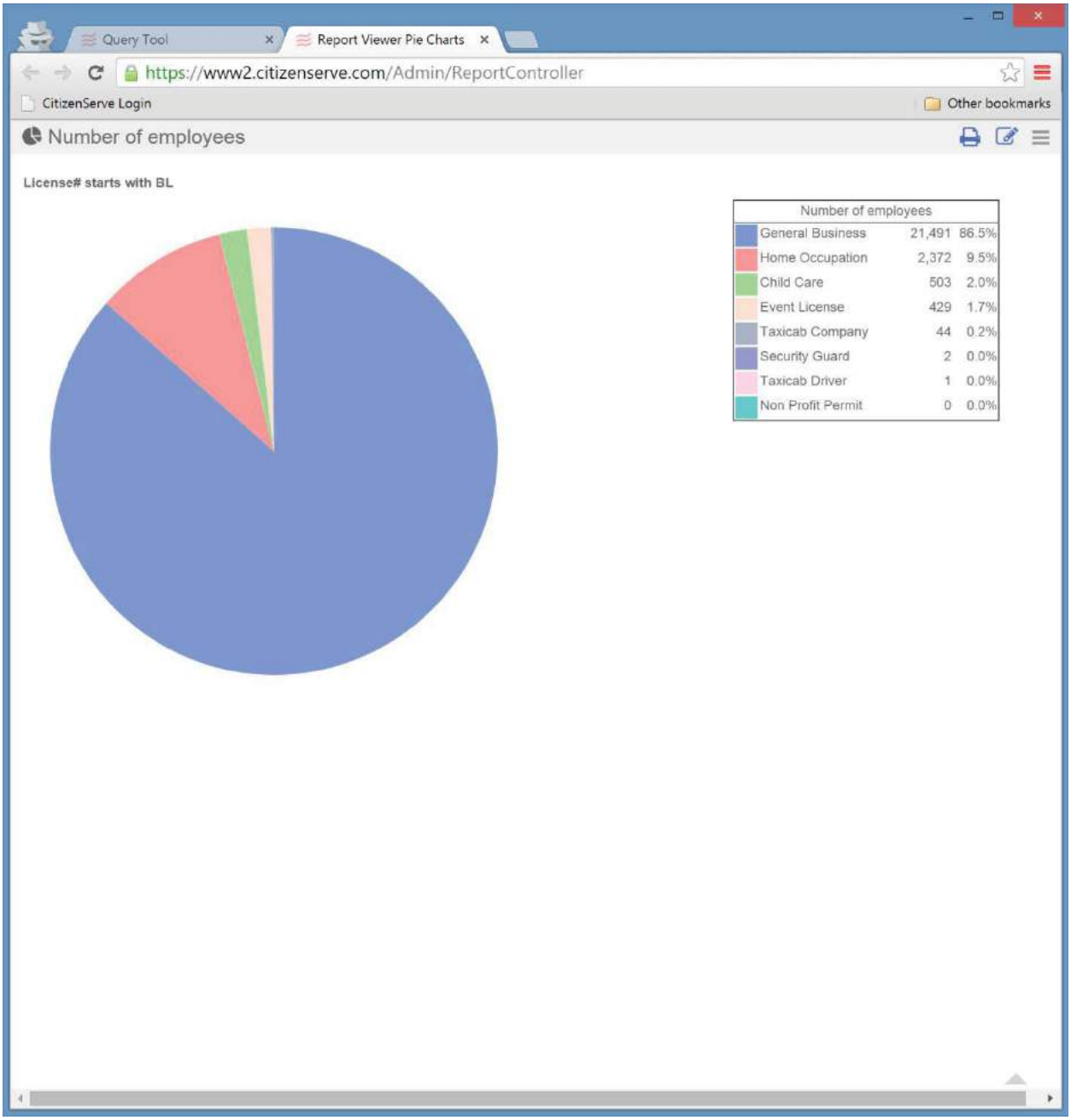
Shown in a map, although it is just as easy to create a tabular listing:



Here’s a similar example using the reporting wizard to define the report:

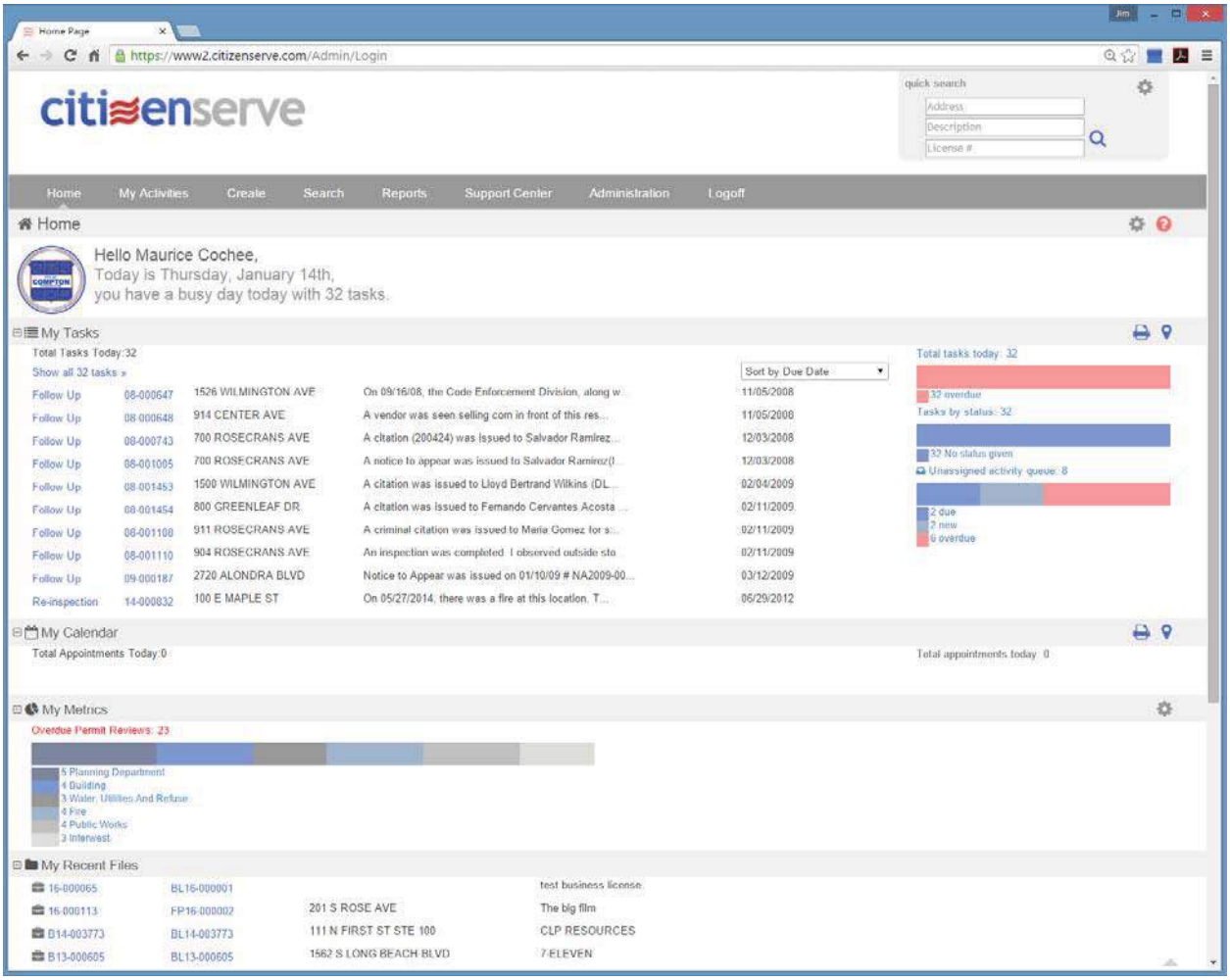


Shown as a pie chart:

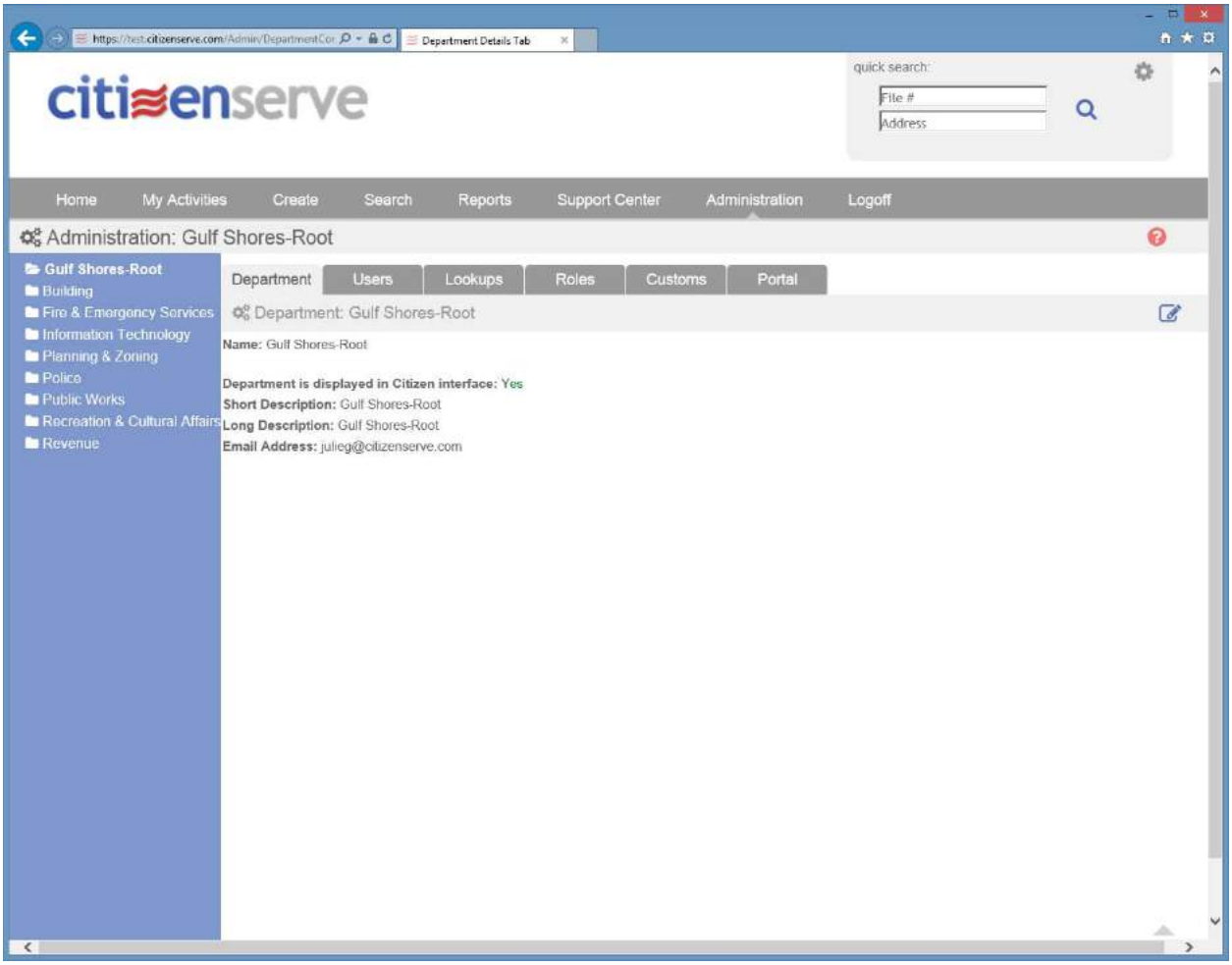


Users can receive e-mail alerts when activities are assigned to them. This is an option and is configurable at the user level. The citizen portal also supports alerts for the public involved in the process. Tasks and events show up on the user's homepage in Citizenserve. Calendar events include an ICS file so the appointments show up automatically on Outlook and Google Calendars.

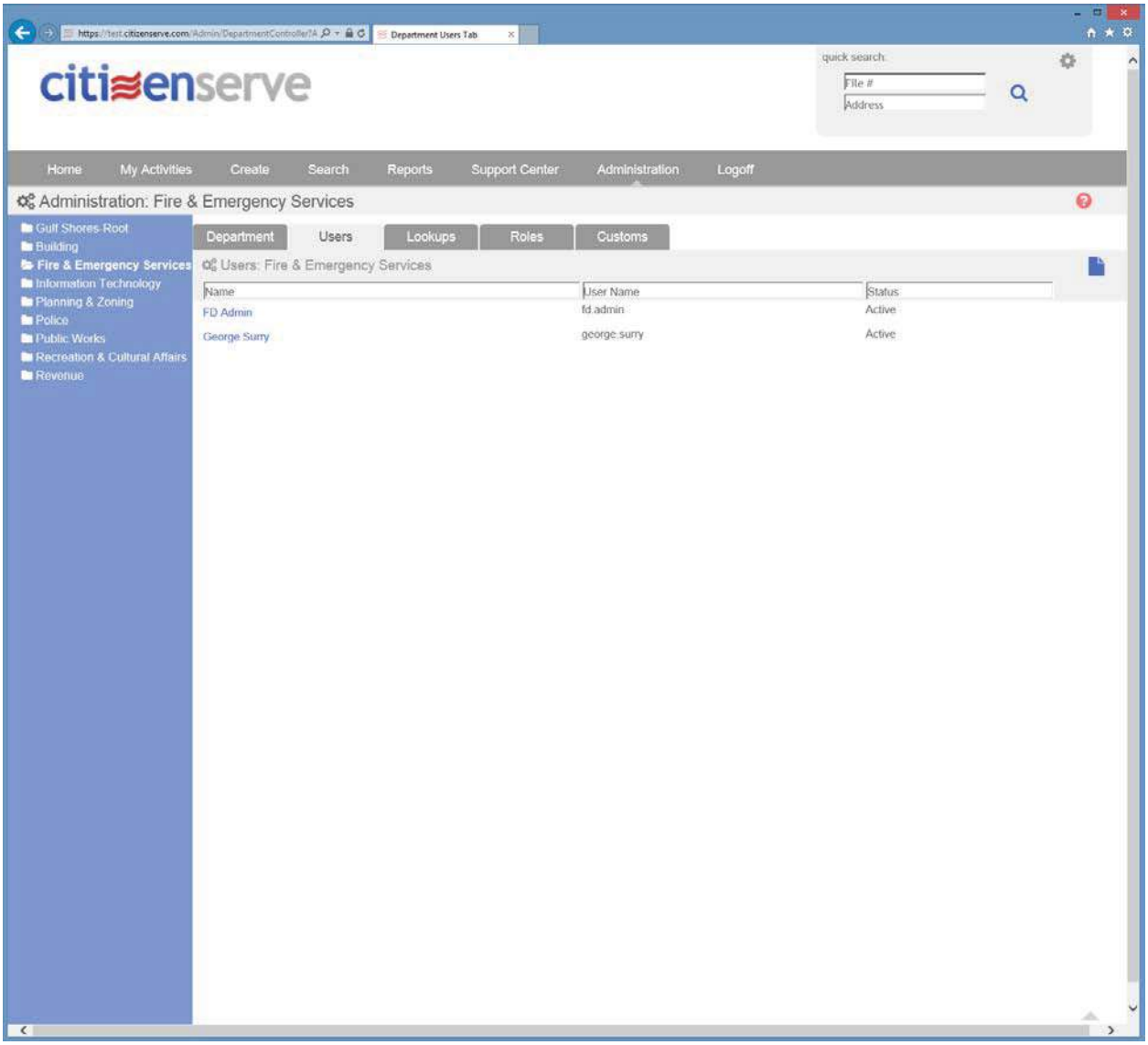
We can develop an integration point for Active Directory. Citizenserve has text messaging capabilities.



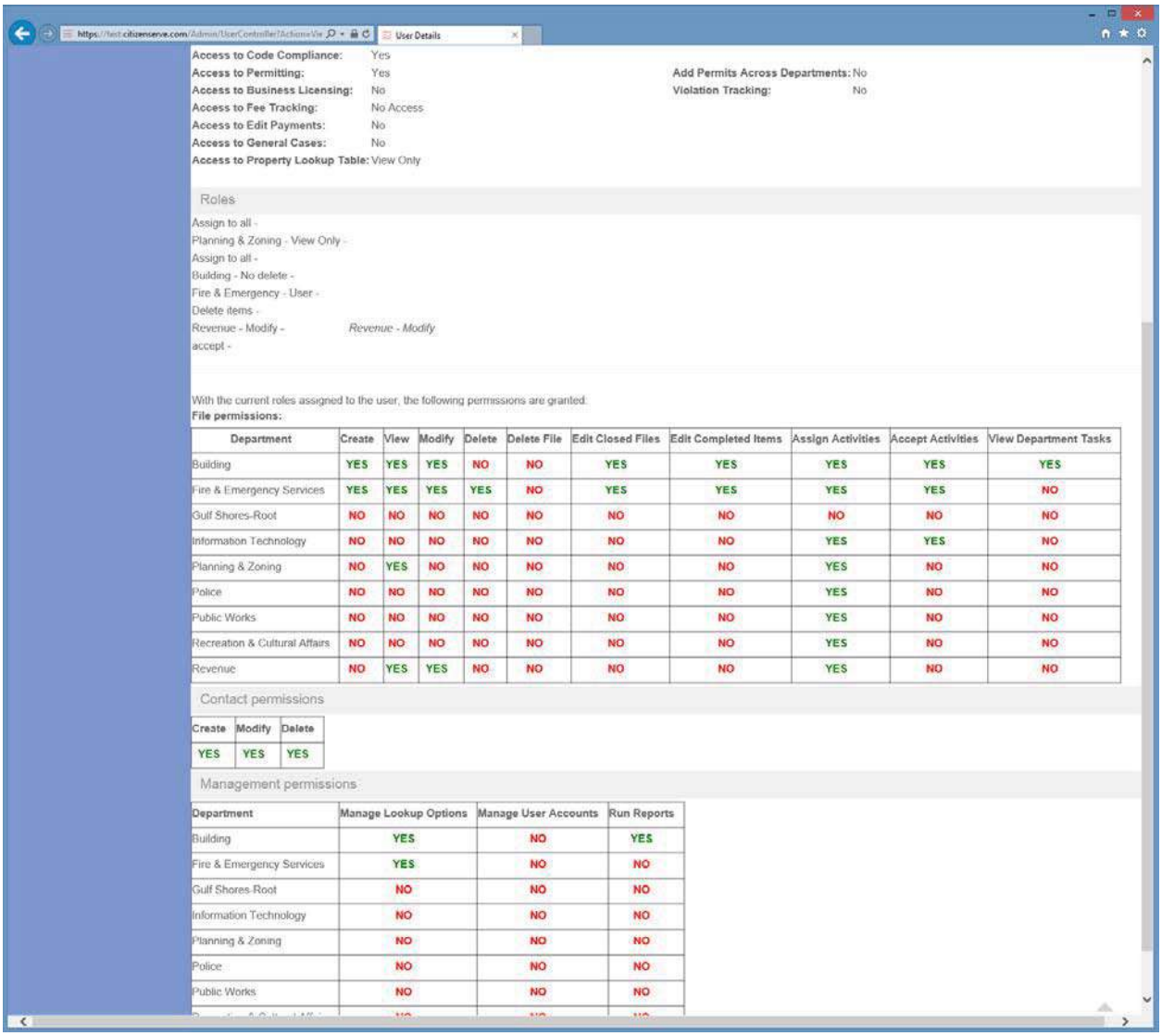
Each department can setup applications and activities that are specific to the department.



For example the “Fire & Emergency Services” can have its own users with its own specific activity types.



Roles can be setup for each department so users in other departments can be setup with view access to activities but these users will not have rights to complete department or sub department activities. Each user can also be setup with specific access to “Fee Tracking” and the ability to “Edit Payments”. Departmental rights for each user are seen in the “File permissions” section below with a matrix of departmental rights.



User Details

Access to Code Compliance: Yes
Access to Permitting: Yes
Access to Business Licensing: No
Access to Fee Tracking: No Access
Access to Edit Payments: No
Access to General Cases: No
Access to Property Lookup Table: View Only
Add Permits Across Departments: No
Violation Tracking: No

Roles

Assign to all -
Planning & Zoning - View Only -
Assign to all -
Building - No delete -
Fire & Emergency - User -
Delete items -
Revenue - Modify - *Revenue - Modify*
accept -

With the current roles assigned to the user, the following permissions are granted:
File permissions:

Department	Create	View	Modify	Delete	Delete File	Edit Closed Files	Edit Completed Items	Assign Activities	Accept Activities	View Department Tasks
Building	YES	YES	YES	NO	NO	YES	YES	YES	YES	YES
Fire & Emergency Services	YES	YES	YES	YES	NO	YES	YES	YES	YES	NO
Gulf Shores-Root	NO	NO	NO	NO	NO	NO	NO	NO	NO	NO
Information Technology	NO	NO	NO	NO	NO	NO	NO	YES	YES	NO
Planning & Zoning	NO	YES	NO	NO	NO	NO	NO	YES	NO	NO
Police	NO	NO	NO	NO	NO	NO	NO	YES	NO	NO
Public Works	NO	NO	NO	NO	NO	NO	NO	YES	NO	NO
Recreation & Cultural Affairs	NO	NO	NO	NO	NO	NO	NO	YES	NO	NO
Revenue	NO	YES	YES	NO	NO	NO	NO	YES	NO	NO

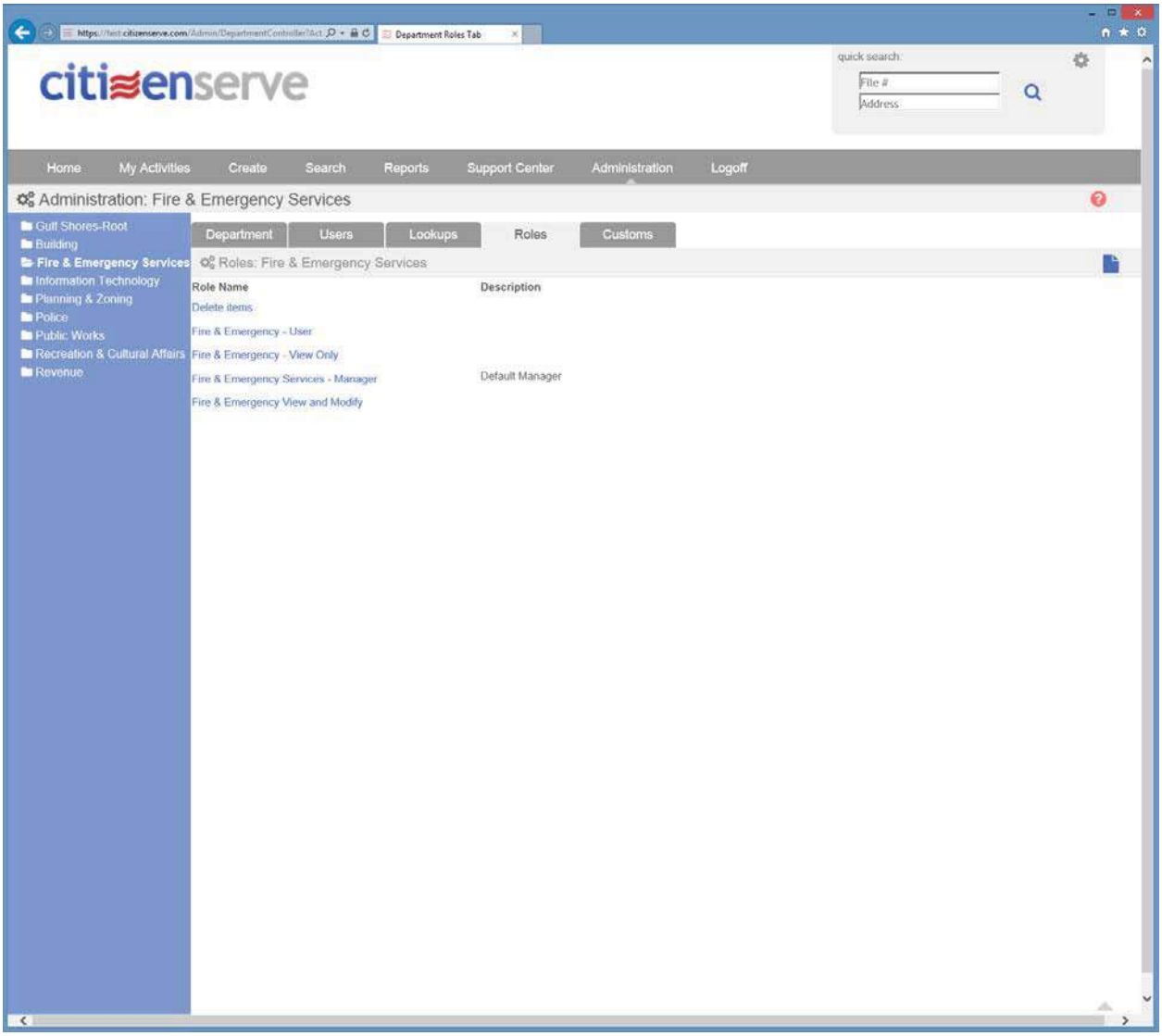
Contact permissions

Create	Modify	Delete
YES	YES	YES

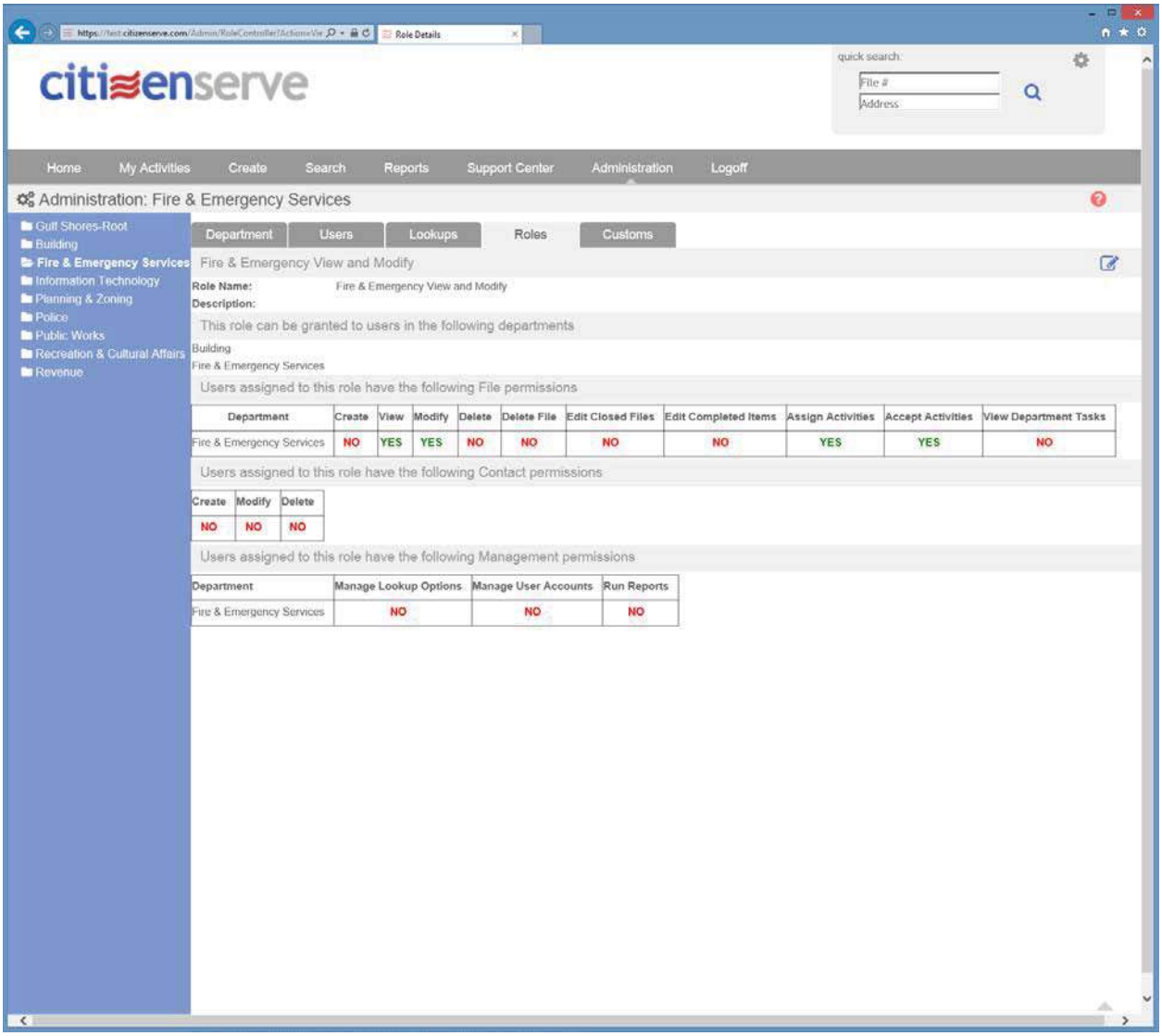
Management permissions

Department	Manage Lookup Options	Manage User Accounts	Run Reports
Building	YES	NO	YES
Fire & Emergency Services	YES	NO	NO
Gulf Shores-Root	NO	NO	NO
Information Technology	NO	NO	NO
Planning & Zoning	NO	NO	NO
Police	NO	NO	NO
Public Works	NO	NO	NO

Roles can be easily setup and managed under the “Roles” tab.

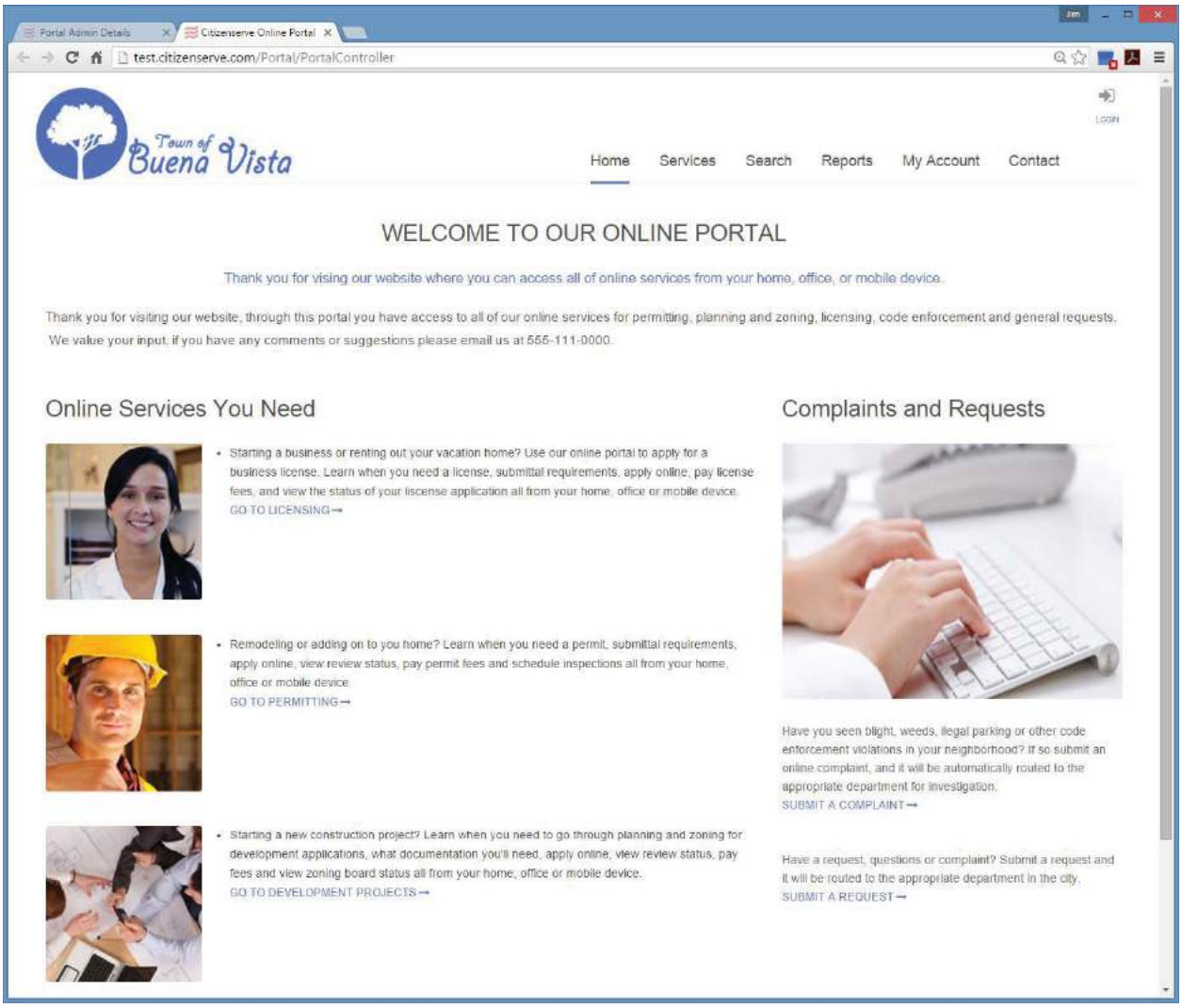


This is an example of the “Fire & Emergency View and Modify” role setup in this example.

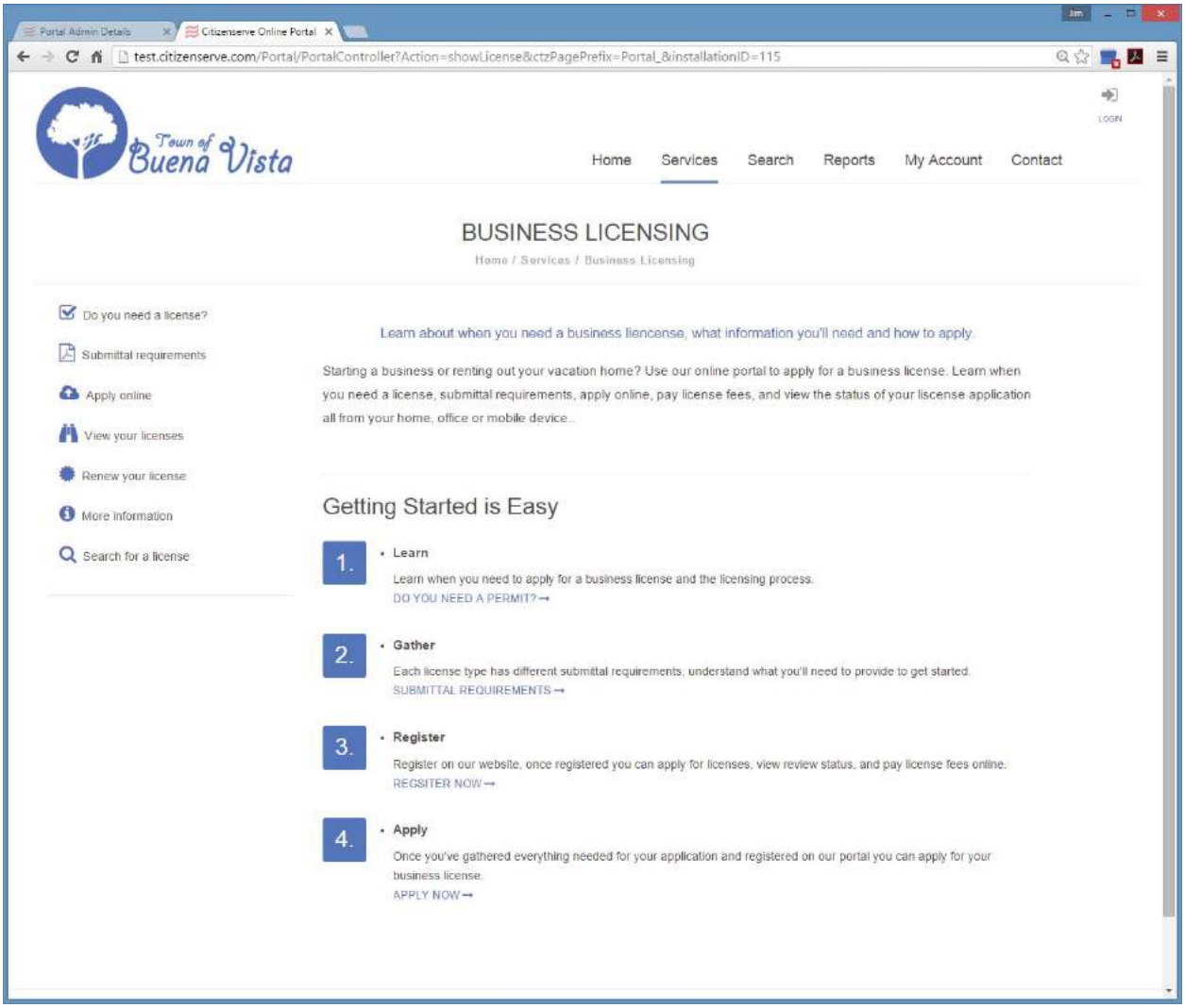


In Citizenserve activity types, like an application review or inspection, can be setup under departments so that the activities are only available to those in the department. See “Assign Activities” and “Accept Activities” in the example above. Rights can also be setup so completed items (activities) cannot be edited by other users. This is the “Edit Completed Items” right.

The Citizenserve portal is highly customizable and uses HTML5 responsive design to morph into a device friendly appearance on various form factors. HTML is used to configure the pages, any combination of colors, fonts, images and links can be used.

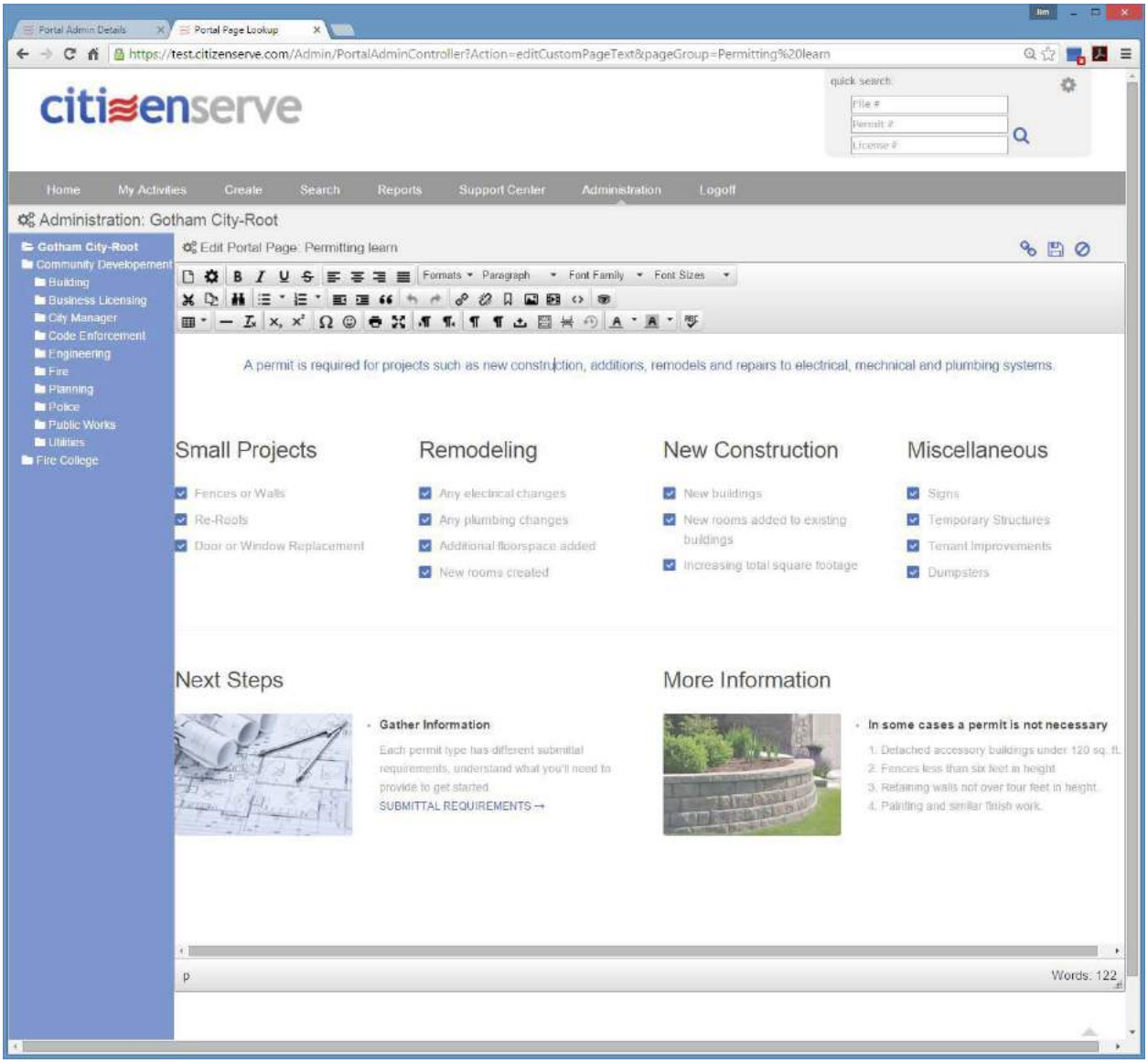


Each area has pages that can be customized.

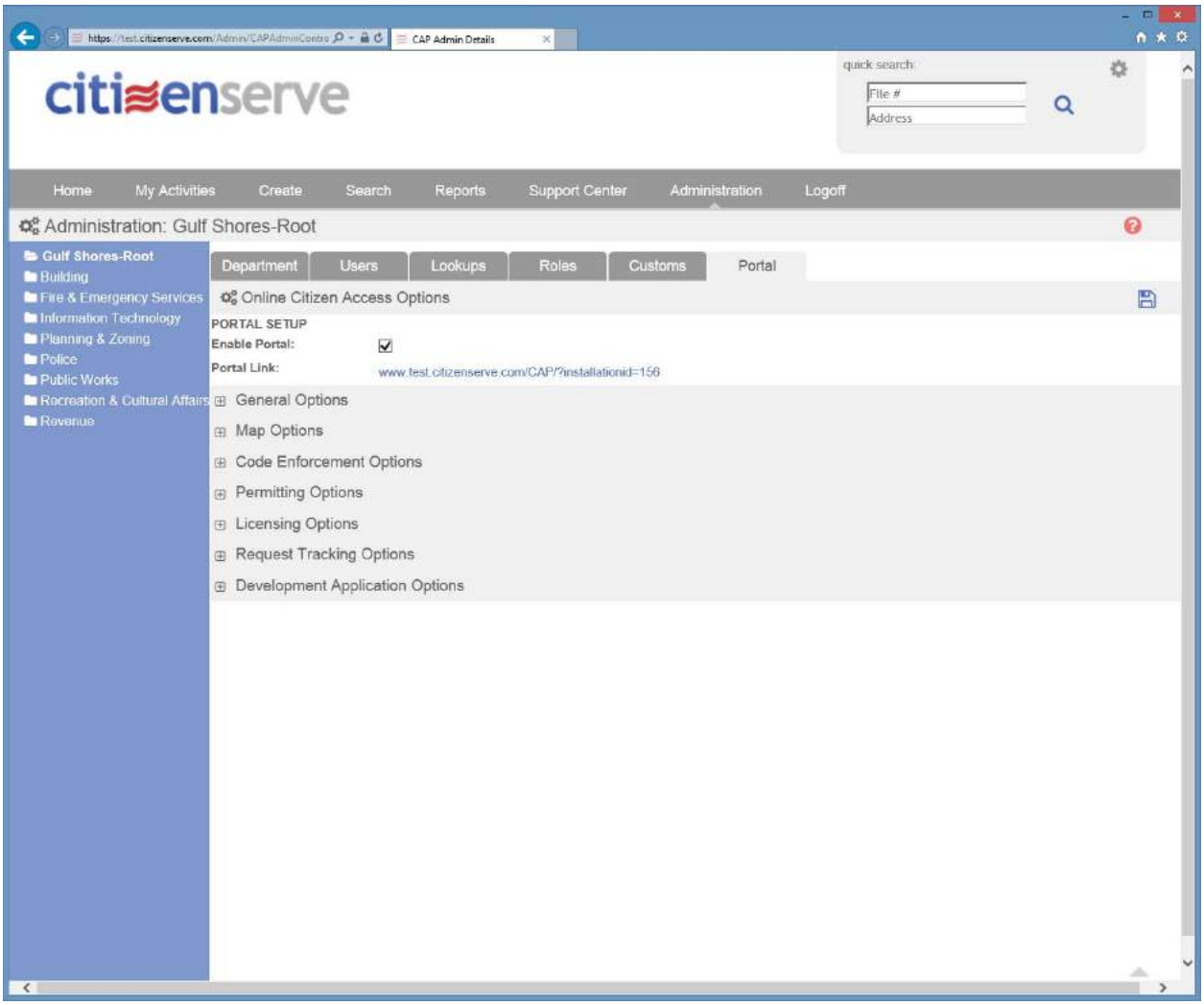


The portal uses responsive HTML5 design and information tiles down the page when the screen size is smaller, such as a smart phone.

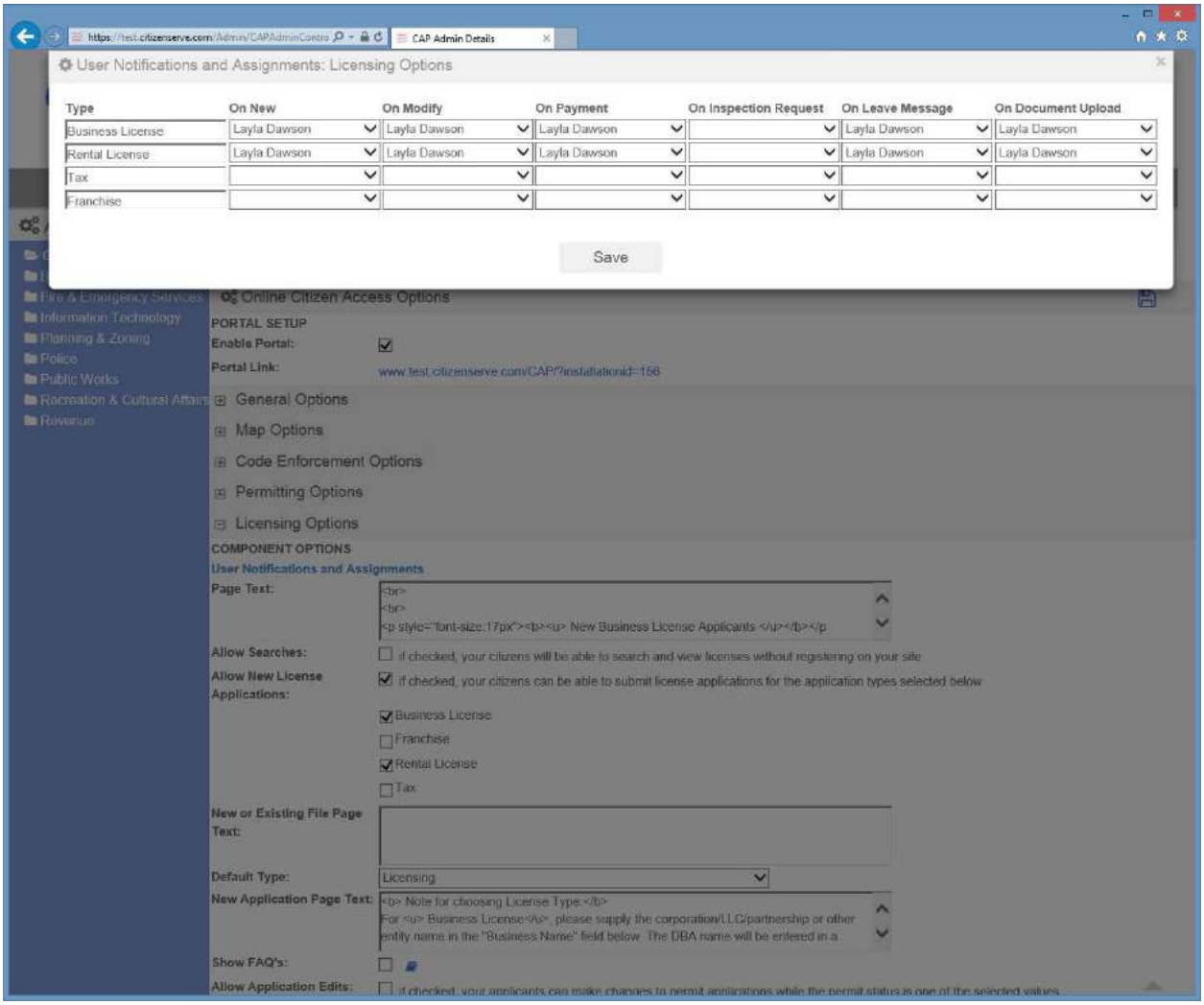
There is a built in HTML editor for making changes to the portal pages, this is the same editor used to create templates for letters and e-mails.



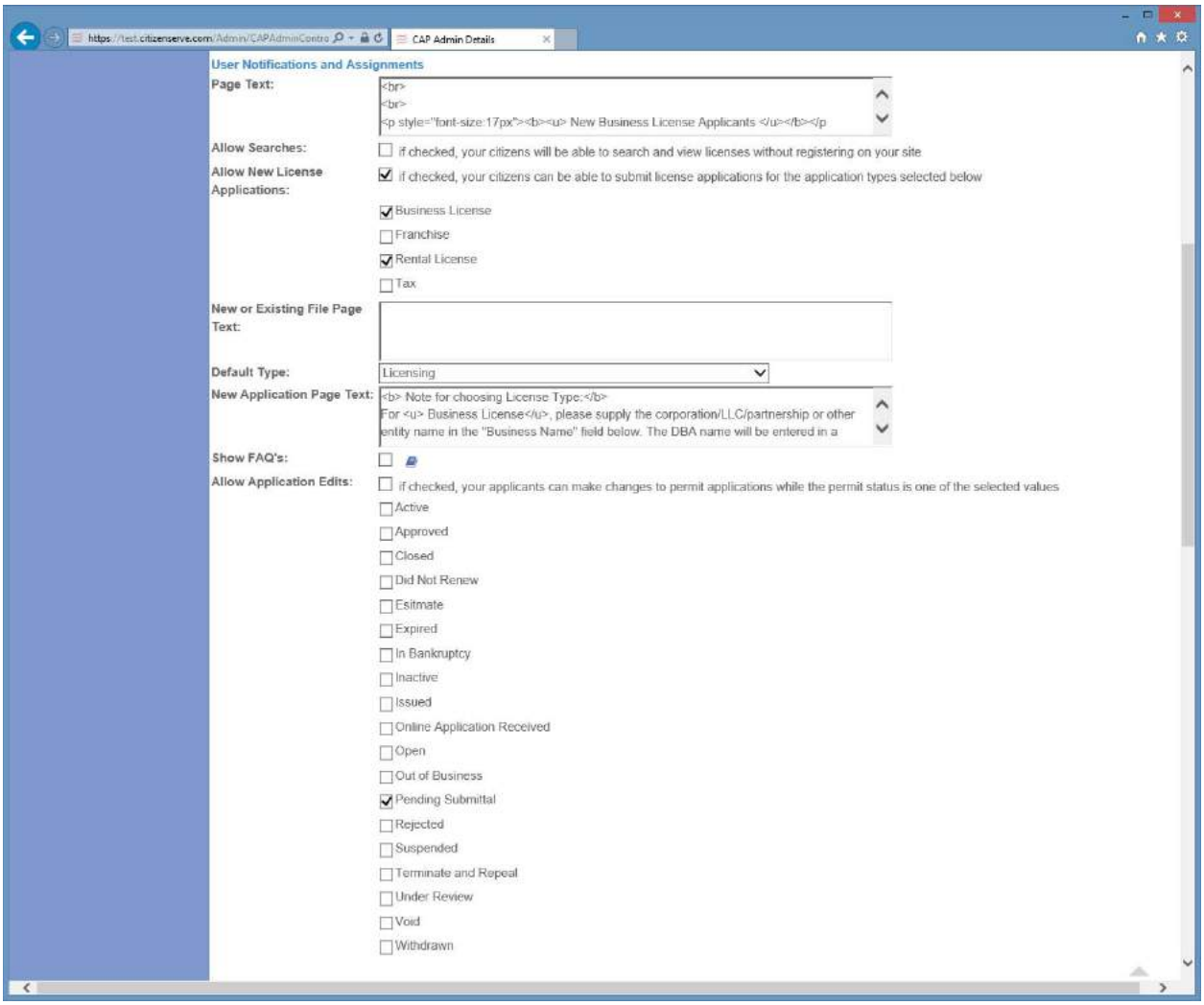
The portal is highly customizable through the administration features in Citizenserve. All the customization and configuration is on the fly. There is no need to stop services to make a change. Just make the change in administration and click save and the changes are immediately available on the portal.



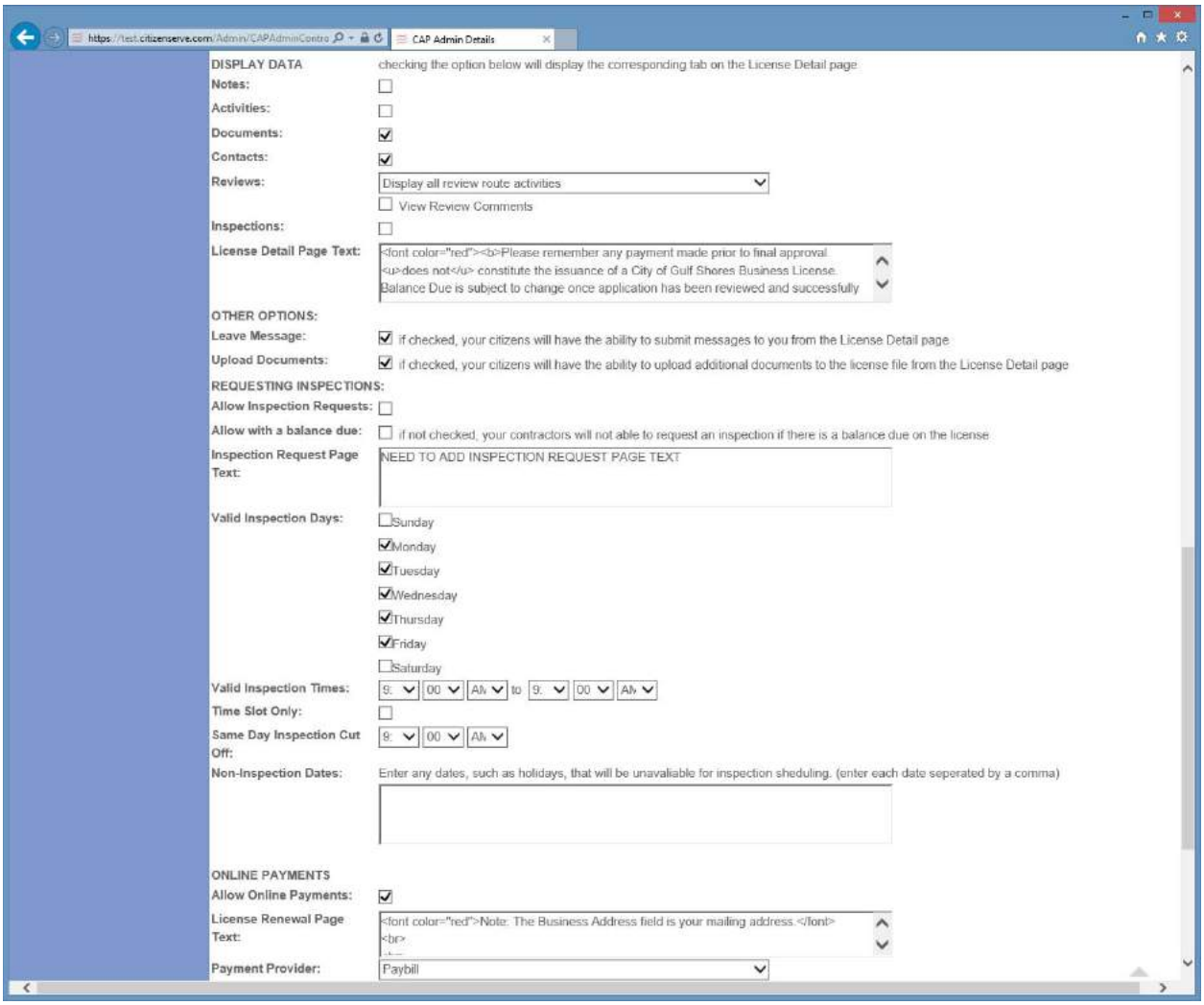
One of the most important features in the portal is the “User Notifications and Assignments” in the Licensing Options. For each license type notifications and e-mails can be setup to inform staff of changes on a license, these notices can also include dynamic user assignments such as “Responsible User” which is defined in the individual file. You don’t want to request a customer upload and document and then have to keep checking to see if is there. With Citizenserve you will get a notice when the requested document has been uploaded. These can be through the task manager and include an e-mail to the staff user.



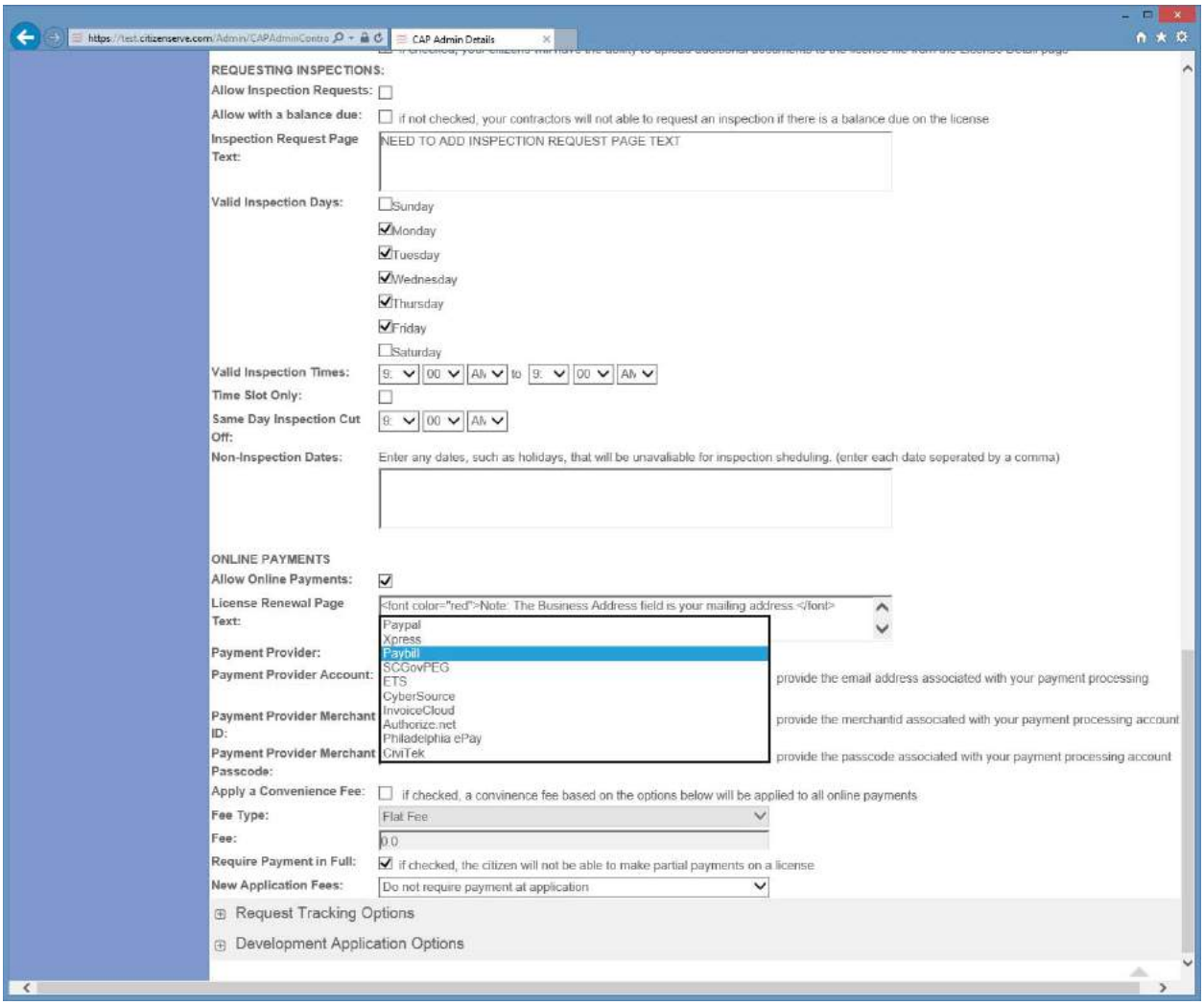
Page HTML for each department is just pasted into the text boxes on the configuration page. See “Page Text” text boxes below. There are also many other options such as the ability to select which license types are available on the portal and the status options for editing.



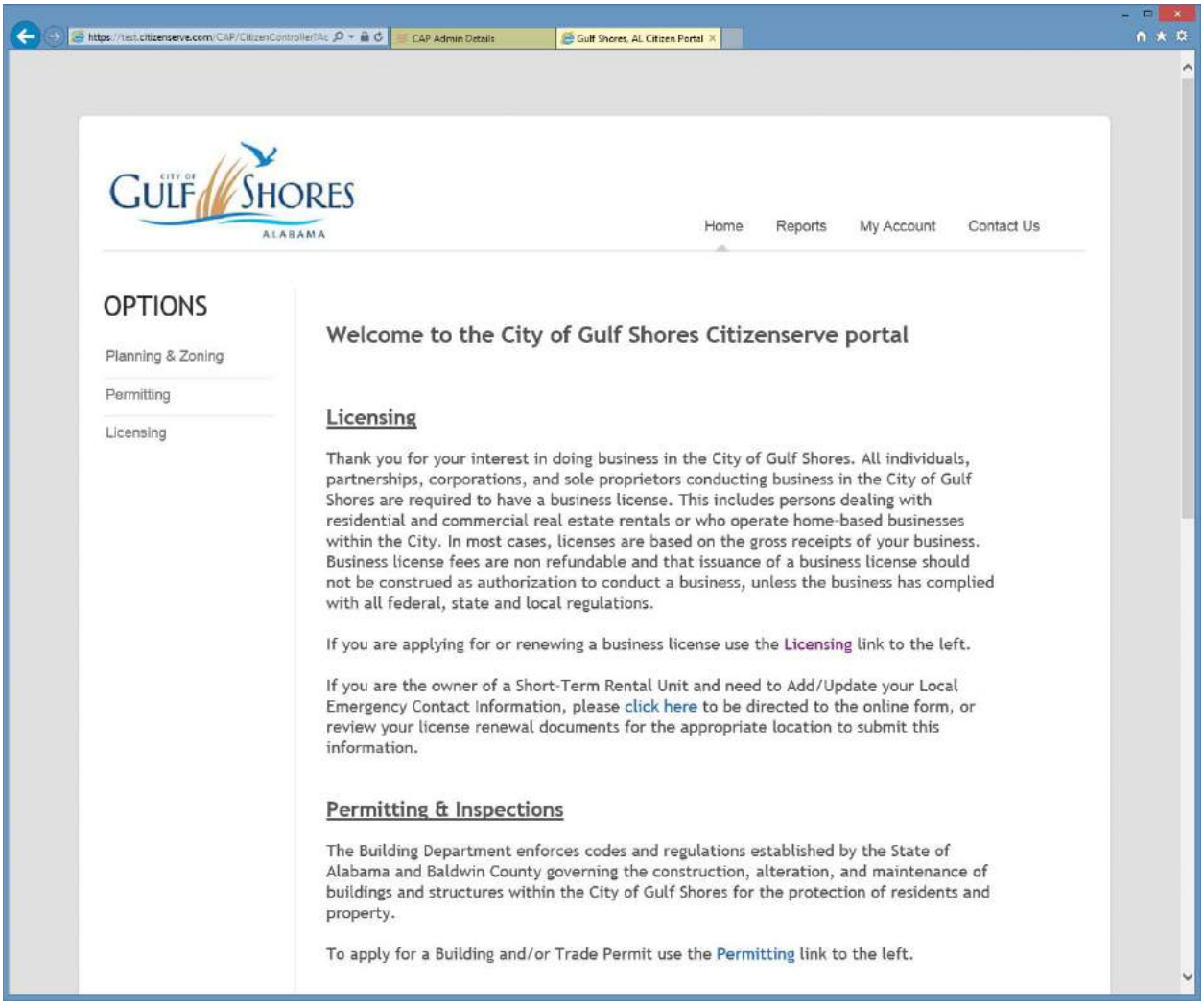
Different elements of information can also be selected, for example below the Notes and Activity tabs are not selected and therefore cannot be viewed on the portal. When notes are created on the staff side there is also an ability to select whether each note will be visible or not on the portal.



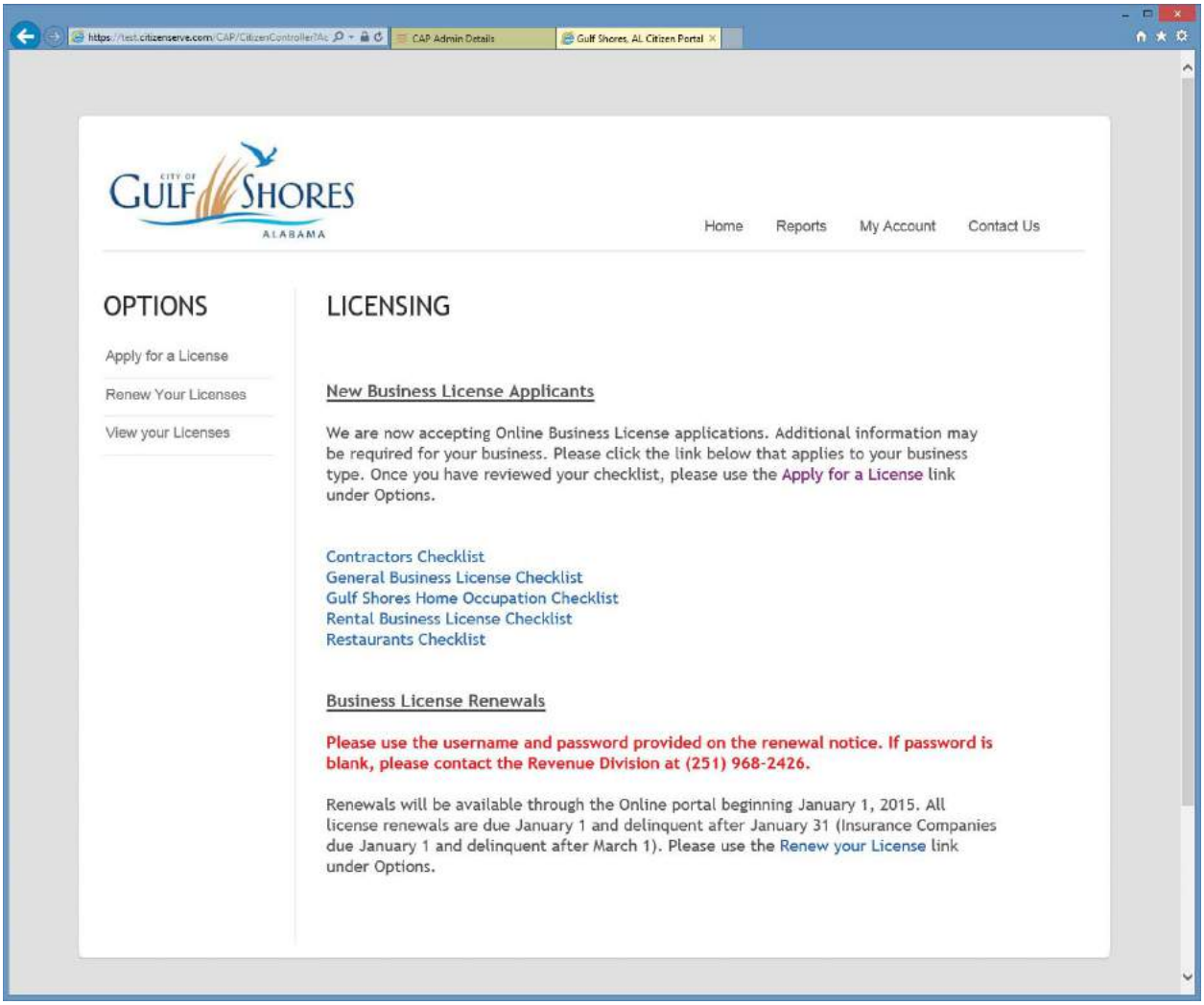
Payment processors can also be easily configured or changed. There is also an ability to set convenience fees and control what is required for payment when the application is submitted. For example some jurisdictions require an application fee at the time of the application and full payment later after the license is approved.



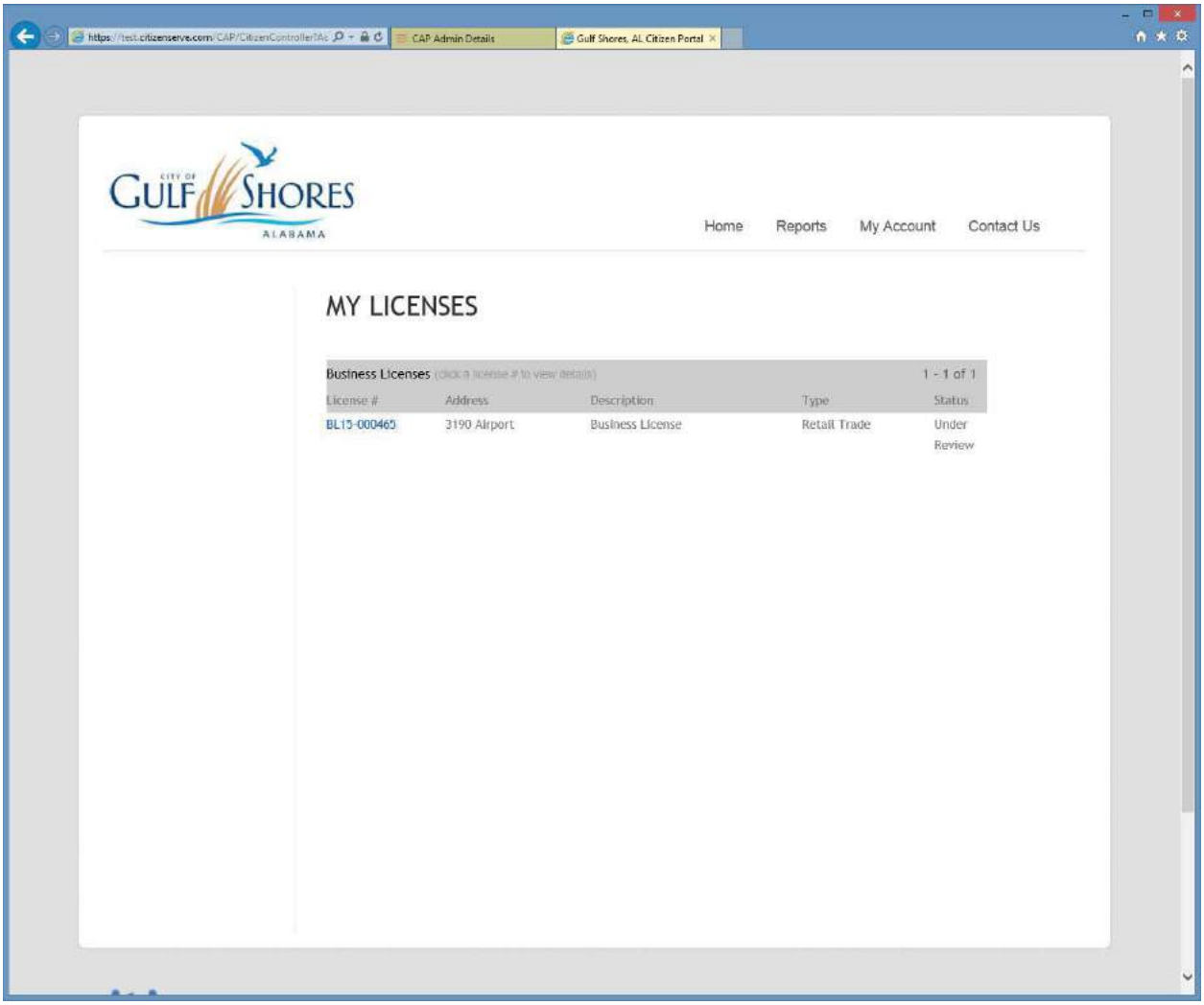
This is an example of the main portal page.



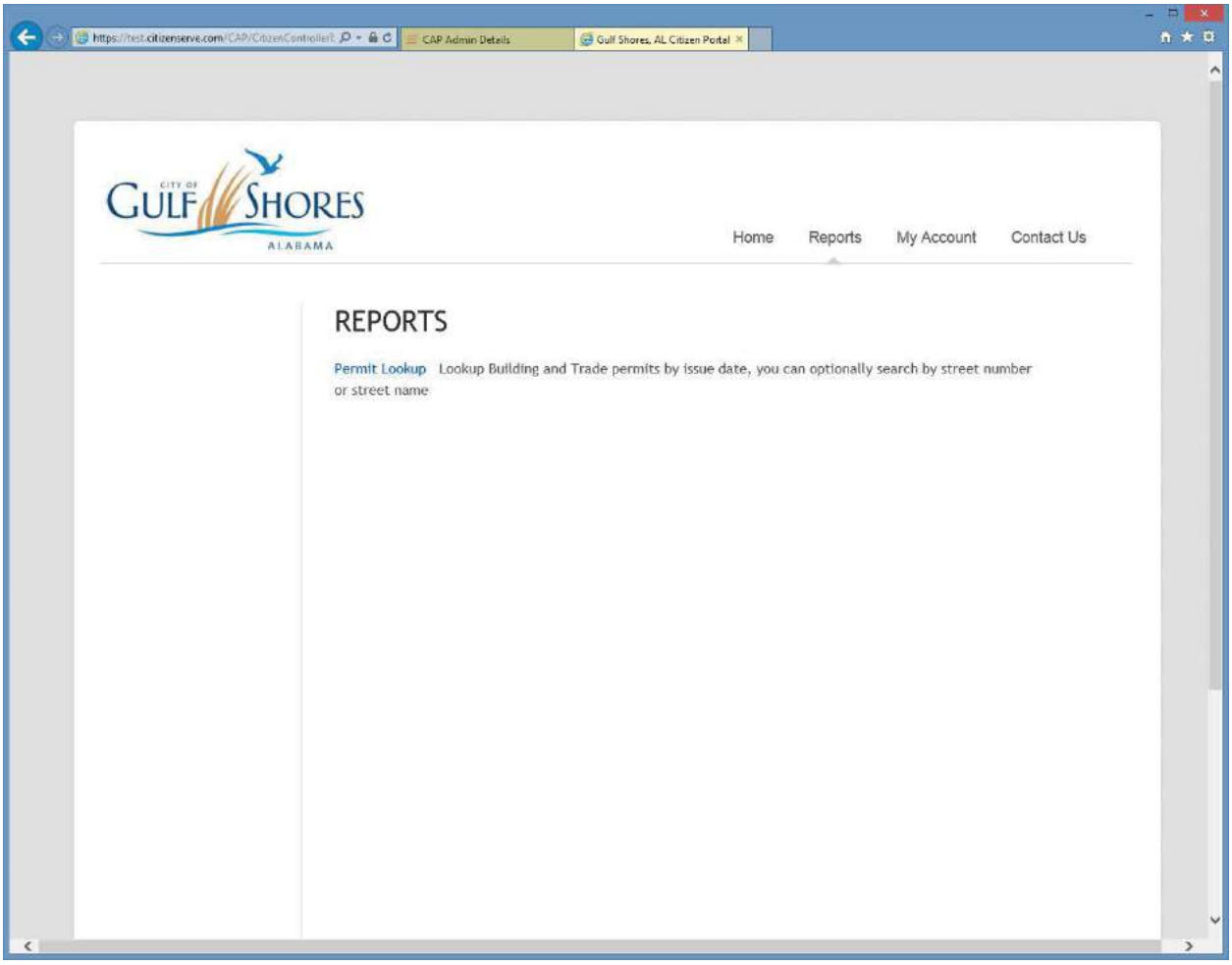
After selecting licensing that page text for licensing will appear.



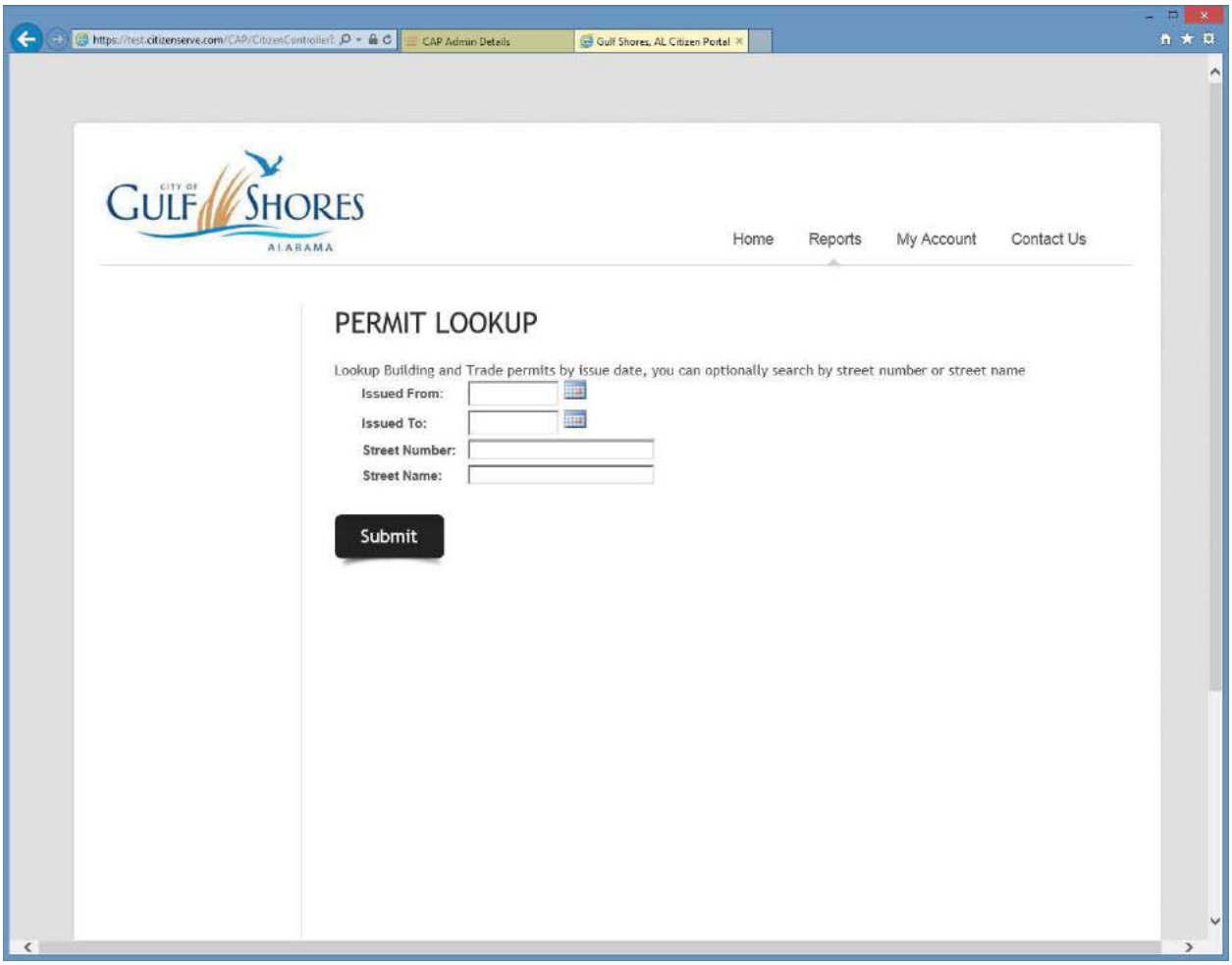
Clicking “View your Licenses” will pull up all the licenses for that business or citizen.



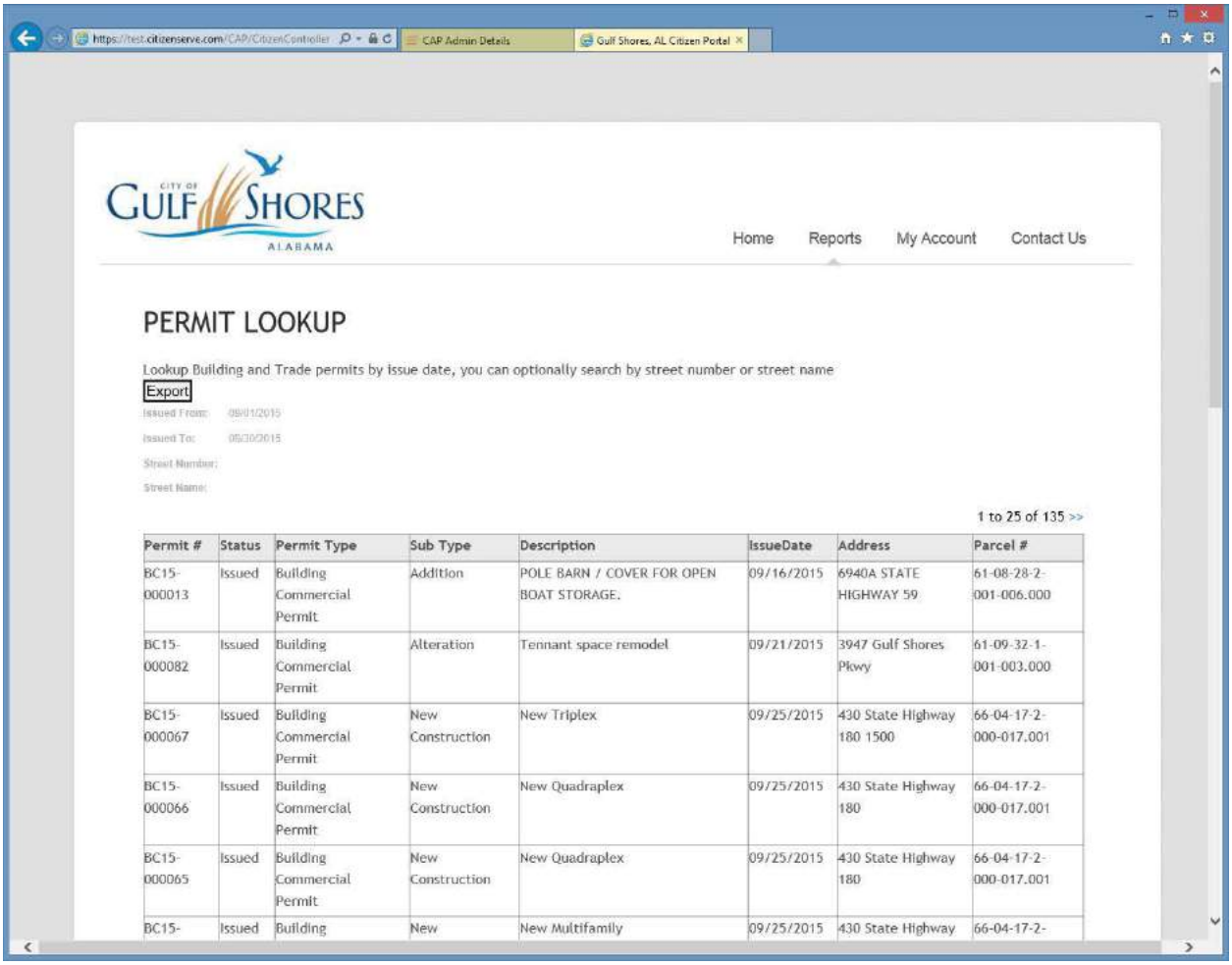
The portal can also be customized by adding custom reports or processes to the “Reports” tab. These reports can be any report or process that is created in Citizenserve, including map reports.



Each report or process on the portal can have custom parameters for query and report generation. The report definition is done once on the staff side and then can be run by staff or the public. Reports created for the staff can be easily made available on the portal as Citizenserve is one integrated system.

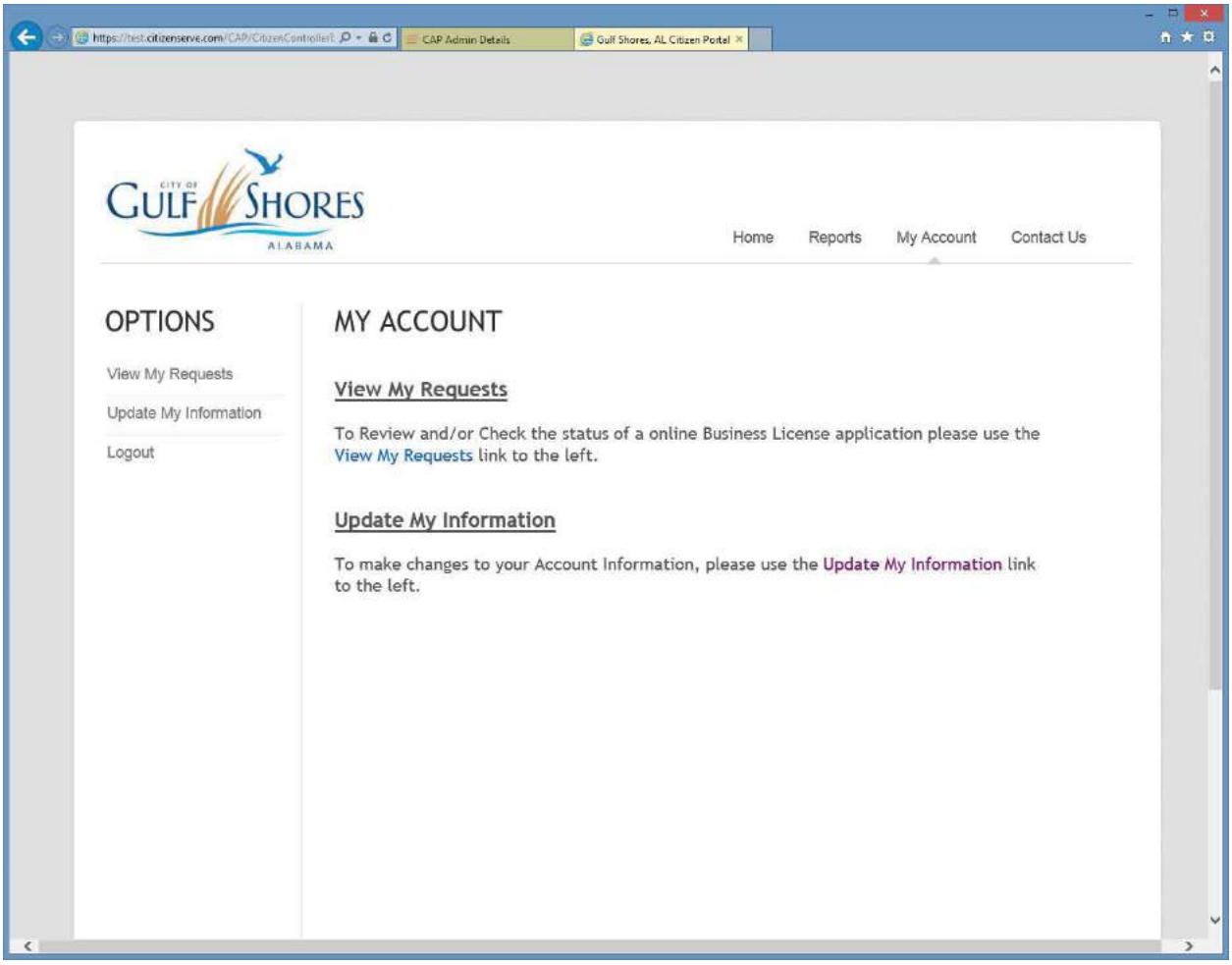


Tabular reports can be exported to an Excel file format.

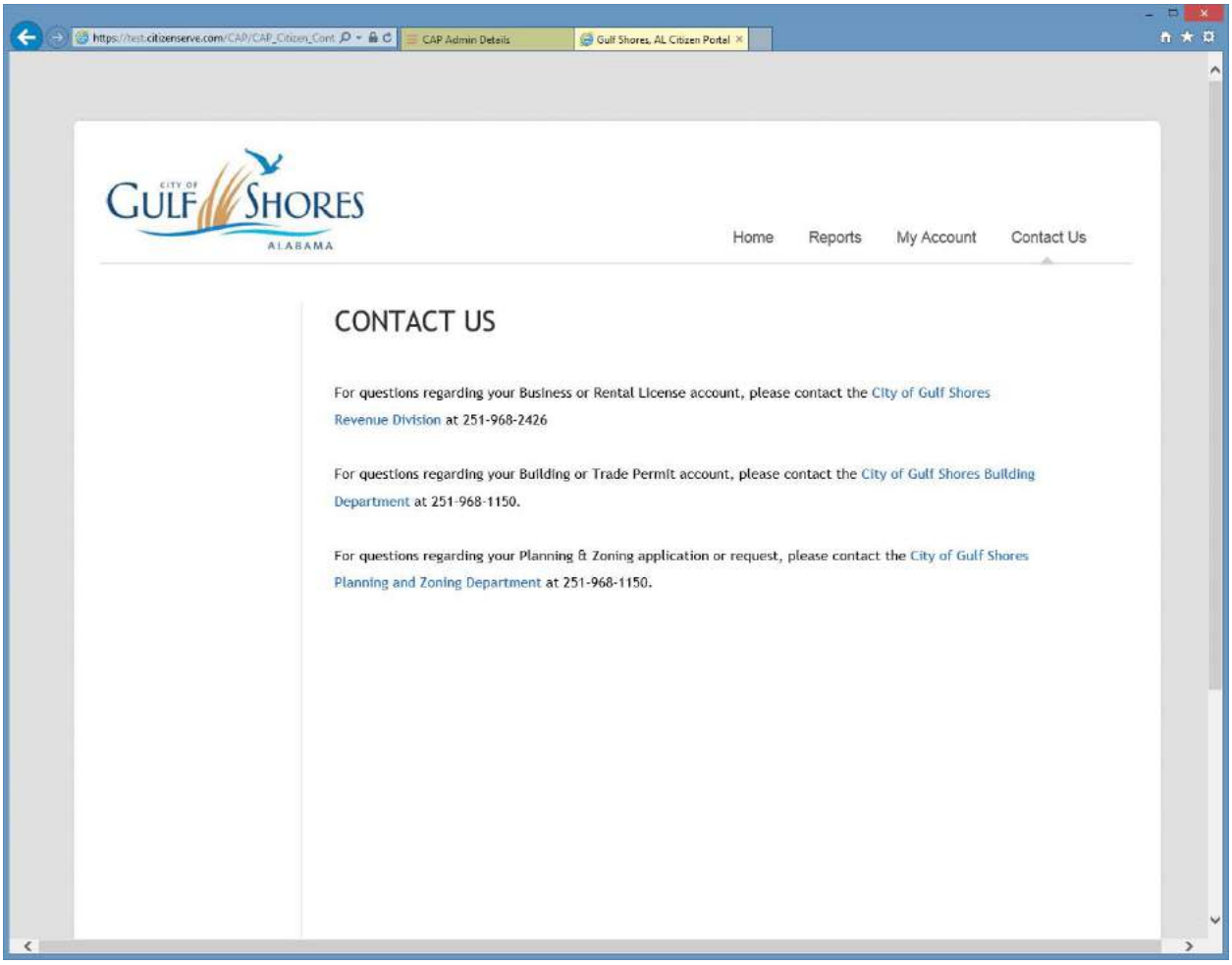


Permit #	Status	Permit Type	Sub Type	Description	IssueDate	Address	Parcel #
BC15-000013	Issued	Building Commercial Permit	Addition	POLE BARN / COVER FOR OPEN BOAT STORAGE.	09/16/2015	6940A STATE HIGHWAY 59	61-08-28-2-001-006.000
BC15-000082	Issued	Building Commercial Permit	Alteration	Tennant space remodel	09/21/2015	3947 Gulf Shores Pkwy	61-09-32-1-001-003.000
BC15-000067	Issued	Building Commercial Permit	New Construction	New Triplex	09/25/2015	430 State Highway 180 1500	66-04-17-2-000-017.001
BC15-000066	Issued	Building Commercial Permit	New Construction	New Quadraplex	09/25/2015	430 State Highway 180	66-04-17-2-000-017.001
BC15-000065	Issued	Building Commercial Permit	New Construction	New Quadraplex	09/25/2015	430 State Highway 180	66-04-17-2-000-017.001
BC15-	Issued	Building	New	New Multifamily	09/25/2015	430 State Highway	66-04-17-2-

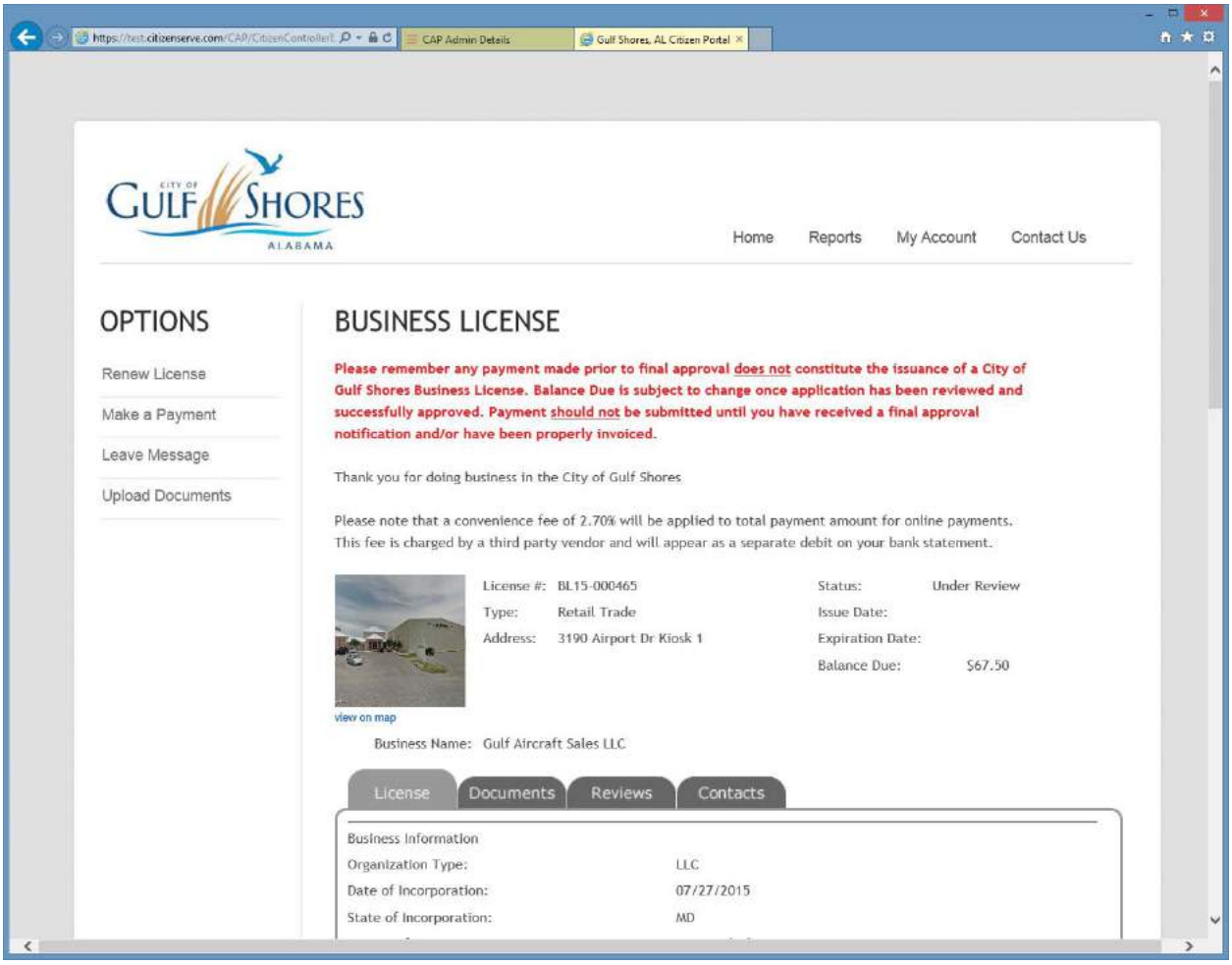
The “My Account” page can also be customized with HTML including external links and links to other parts of the portal.



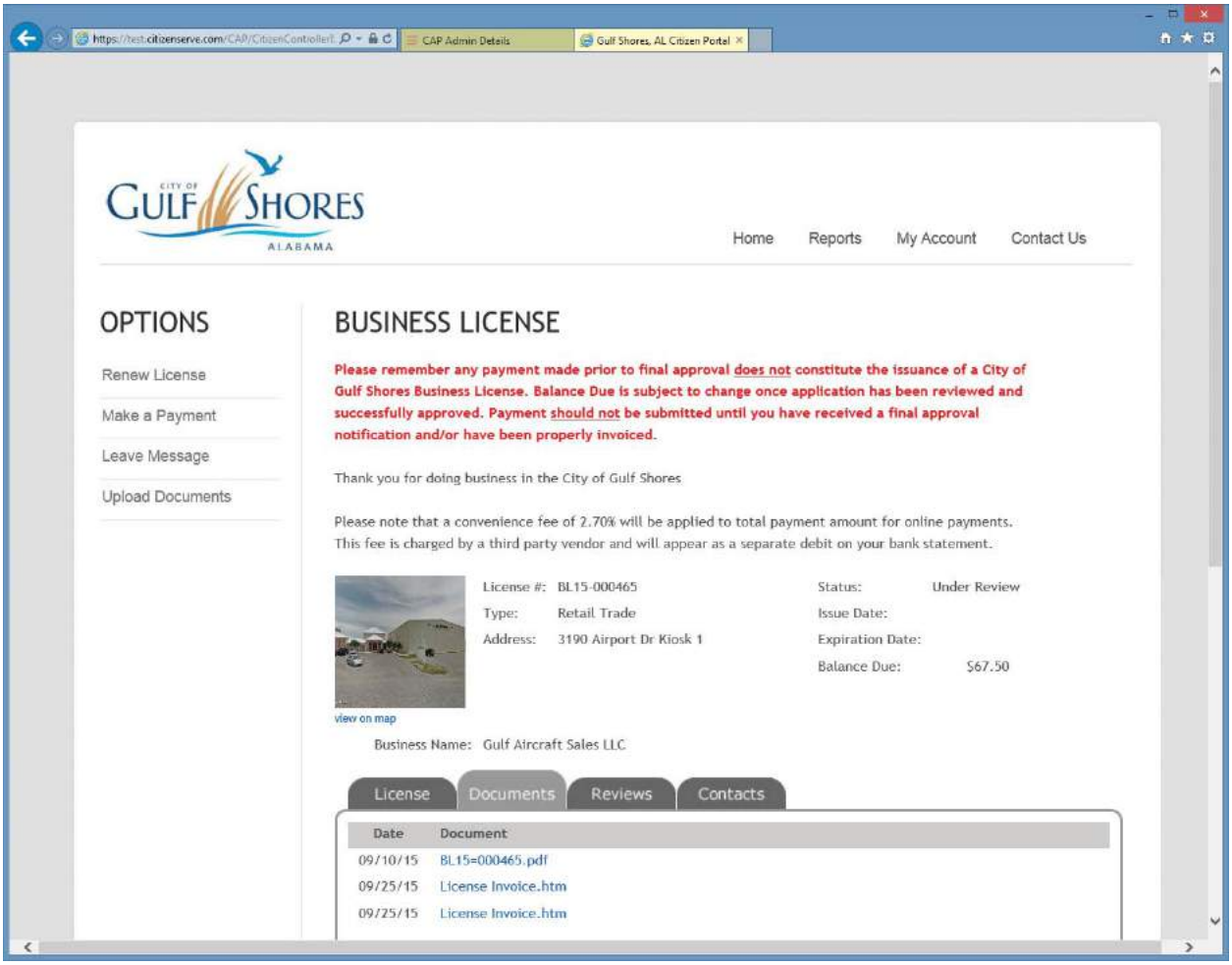
“Contact Us” can be customized with HTML with links to external system, such as the City’s main web site or any other web pages on the internet.



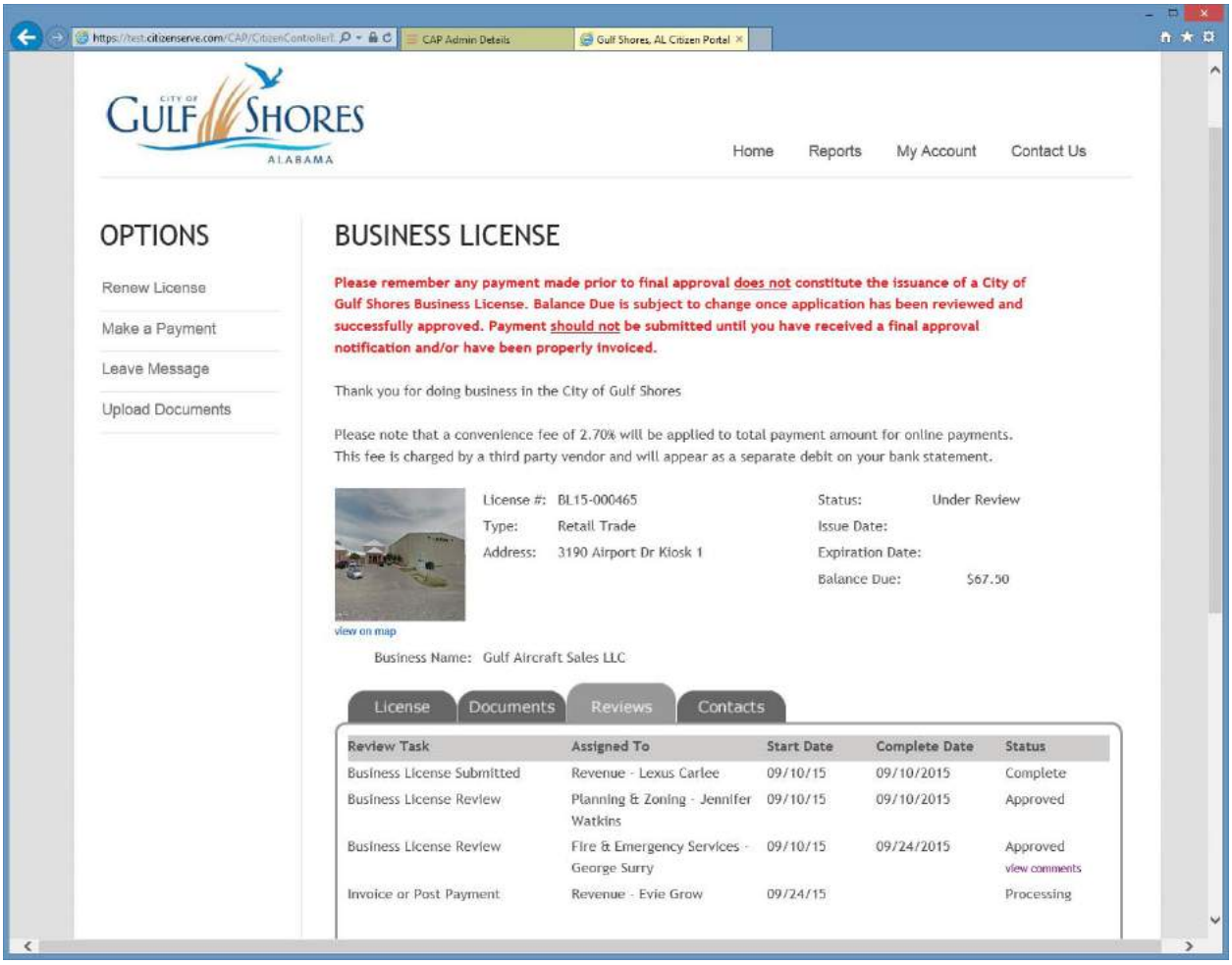
Businesses and citizens can view their license information and the status of the review. Specific instructions can be easily embedded with HTML in the page or on the license application.



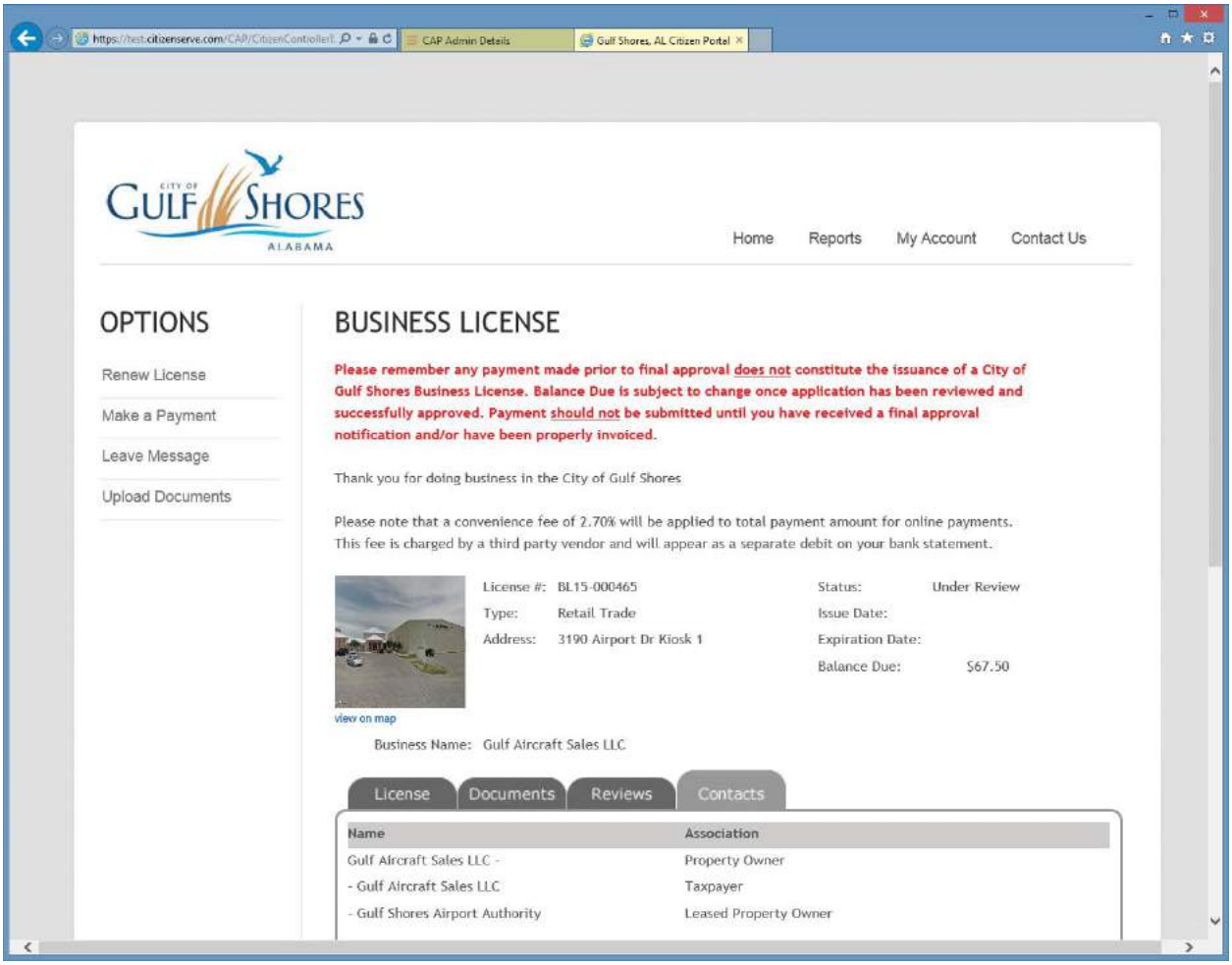
Documents can be seen on the “Documents” tab on the portal.

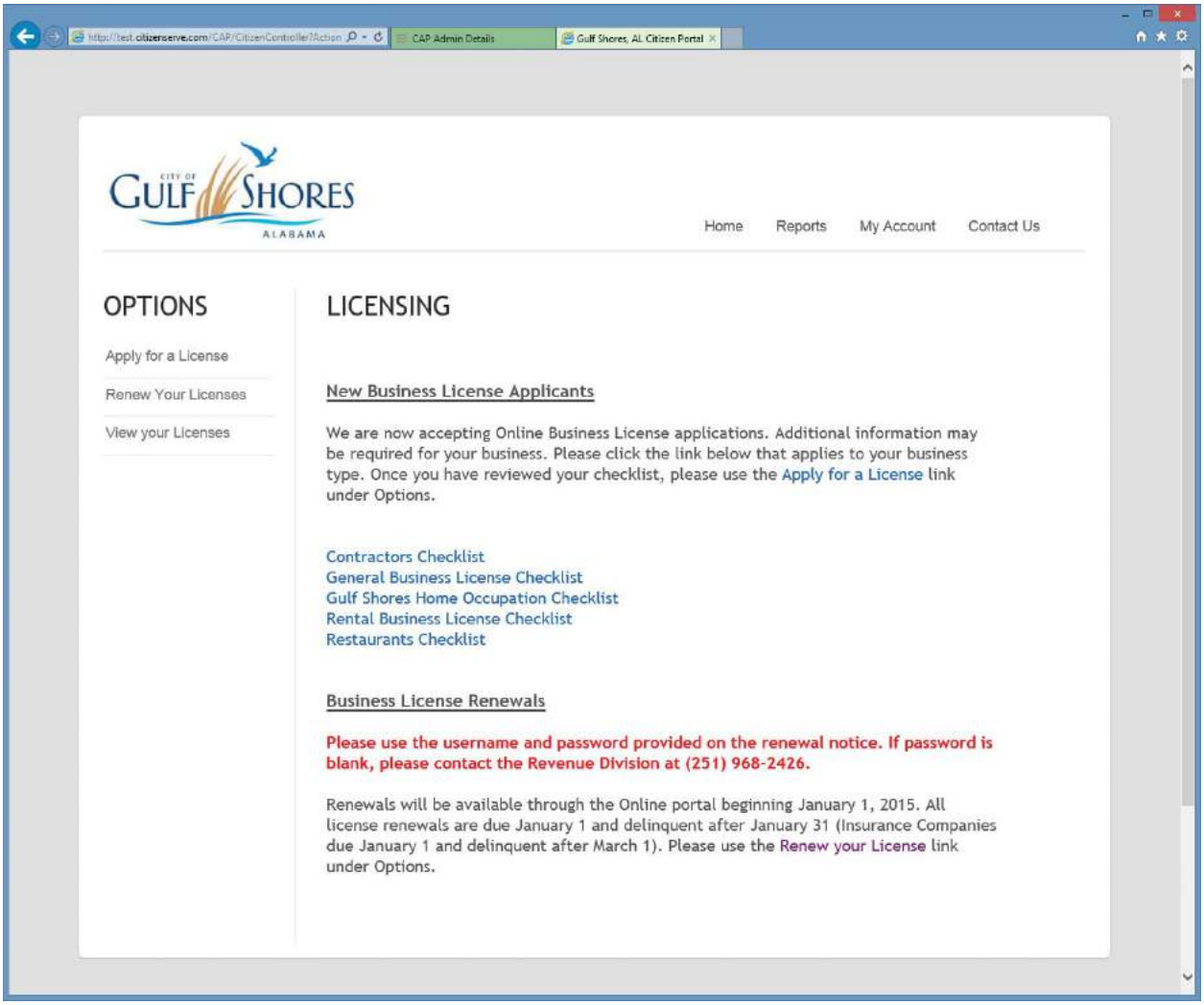


The “Reviews” tab show the review activities and the ability to view comments can also be enable on the portal.

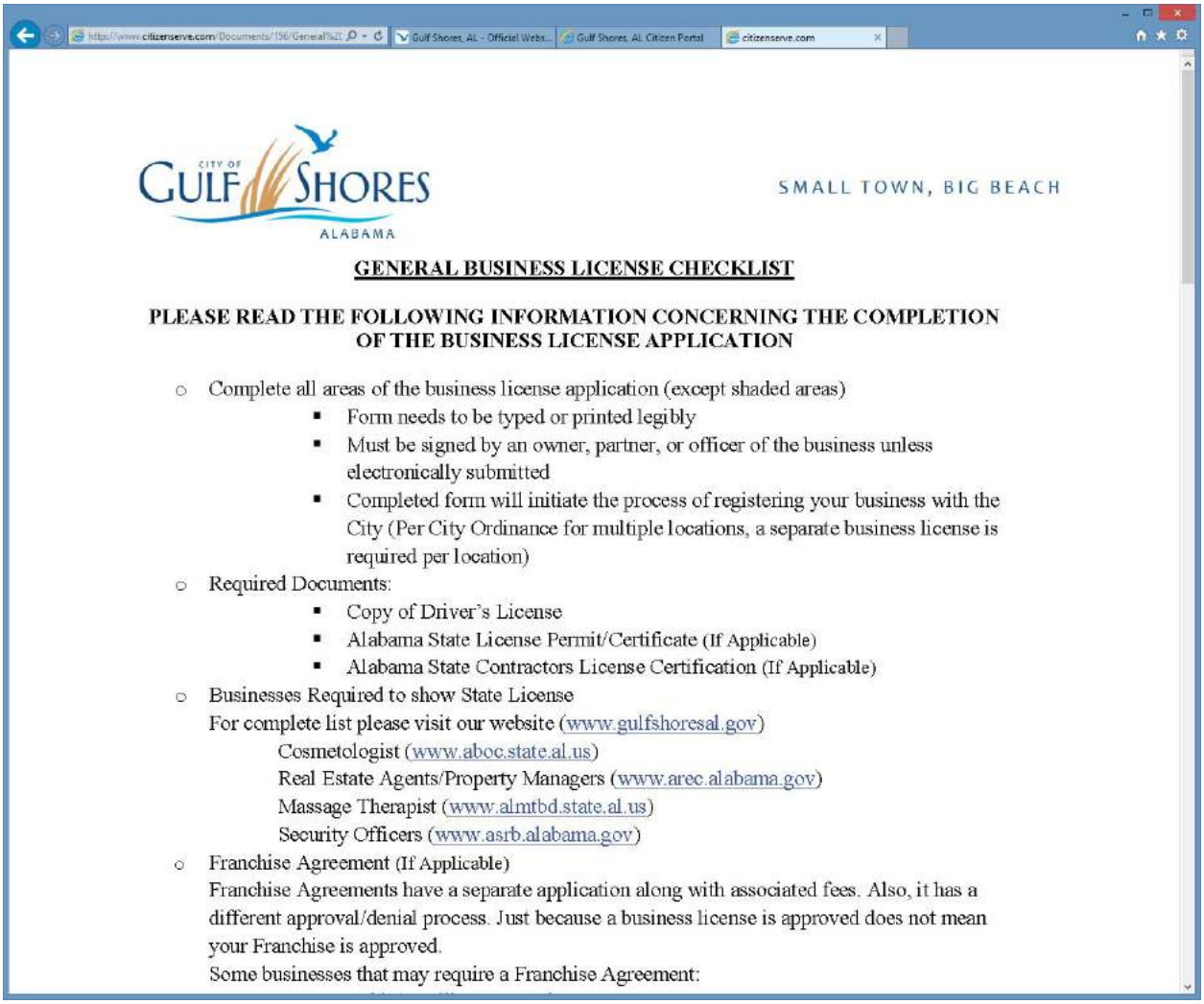


The ability to see all the contacts associate with the license is under the “Contacts” tab.




CAP Admin Details
Gulf Shores, AL Citizen Portal
CITY OF GULF SHORES ALABAMA
Home
Reports
My Account
Contact Us
OPTIONS
Apply for a License
Renew Your Licenses
View your Licenses
LICENSING
New Business License Applicants
We are now accepting Online Business License applications. Additional information may be required for your business. Please click the link below that applies to your business type. Once you have reviewed your checklist, please use the Apply for a License link under Options.
Contractors Checklist
General Business License Checklist
Gulf Shores Home Occupation Checklist
Rental Business License Checklist
Restaurants Checklist
Business License Renewals
Please use the username and password provided on the renewal notice. If password is blank, please contact the Revenue Division at (251) 968-2426.
Renewals will be available through the Online portal beginning January 1, 2015. All license renewals are due January 1 and delinquent after January 31 (Insurance Companies due January 1 and delinquent after March 1). Please use the Renew your License link under Options.

For example clicking the “General Business License Checklist” opens the document in another tab providing helpful instructions.



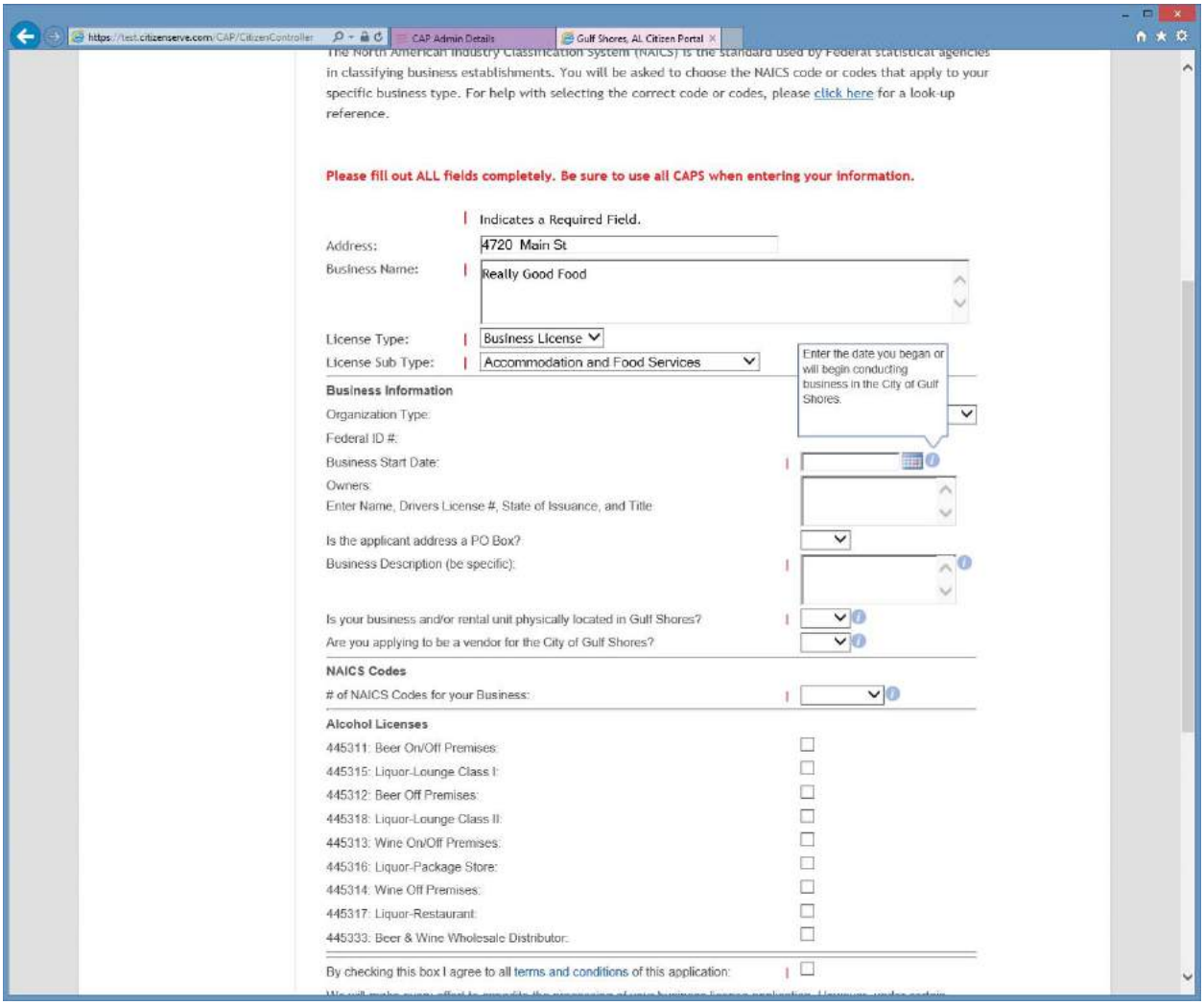
SMALL TOWN, BIG BEACH

GENERAL BUSINESS LICENSE CHECKLIST

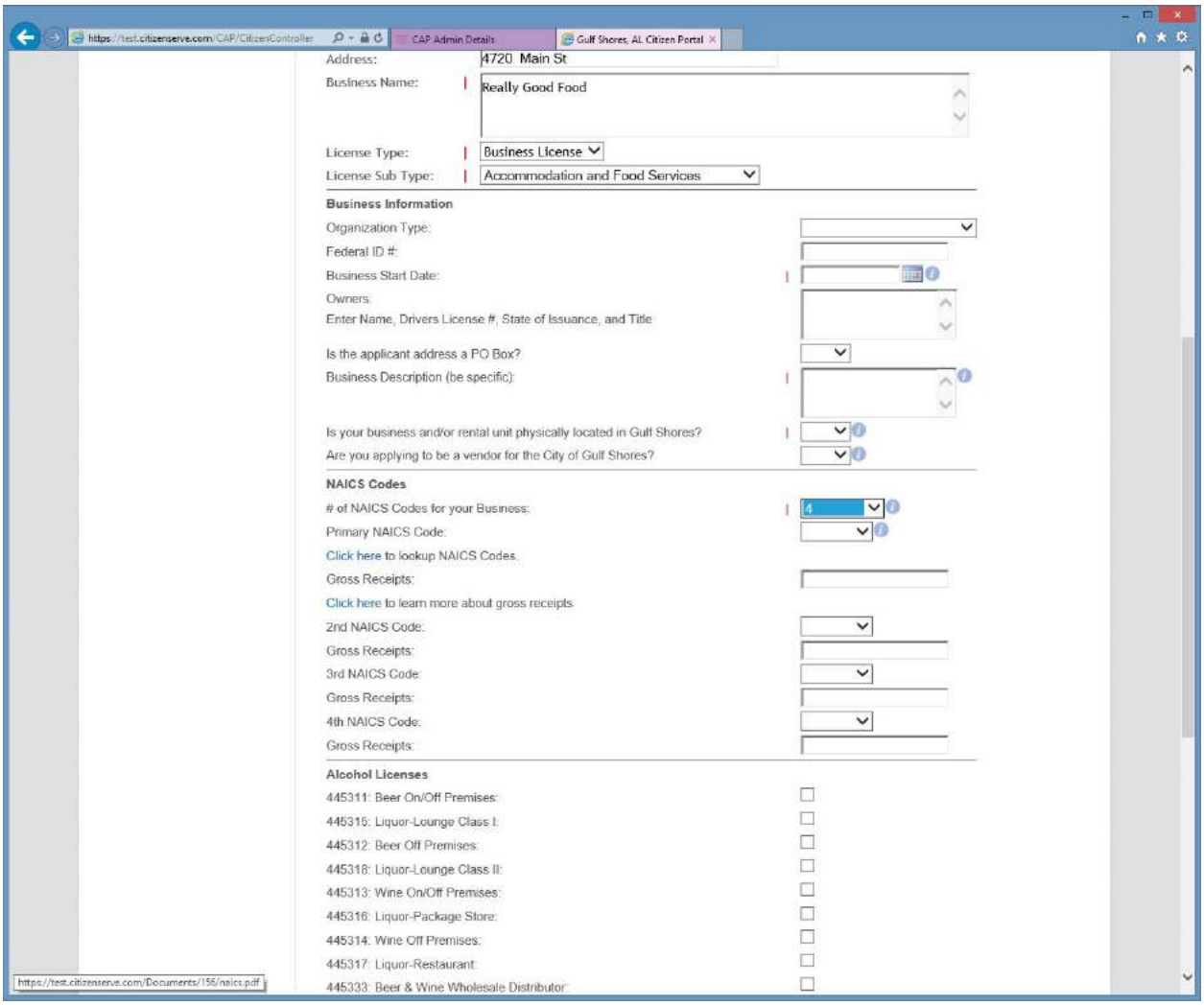
PLEASE READ THE FOLLOWING INFORMATION CONCERNING THE COMPLETION OF THE BUSINESS LICENSE APPLICATION

- Complete all areas of the business license application (except shaded areas)
  - Form needs to be typed or printed legibly
  - Must be signed by an owner, partner, or officer of the business unless electronically submitted
  - Completed form will initiate the process of registering your business with the City (Per City Ordinance for multiple locations, a separate business license is required per location)
- Required Documents:
  - Copy of Driver’s License
  - Alabama State License Permit/Certificate (If Applicable)
  - Alabama State Contractors License Certification (If Applicable)
- Businesses Required to show State License
  For complete list please visit our website (www.gulfshoresal.gov)
  Cosmetologist (www.aboc.state.al.us)
  Real Estate Agents/Property Managers (www.arec.alabama.gov)
  Massage Therapist (www.almtbd.state.al.us)
  Security Officers (www.asrb.alabama.gov)
- Franchise Agreement (If Applicable)
  Franchise Agreements have a separate application along with associated fees. Also, it has a different approval/denial process. Just because a business license is approved does not mean your Franchise is approved.
  Some businesses that may require a Franchise Agreement:

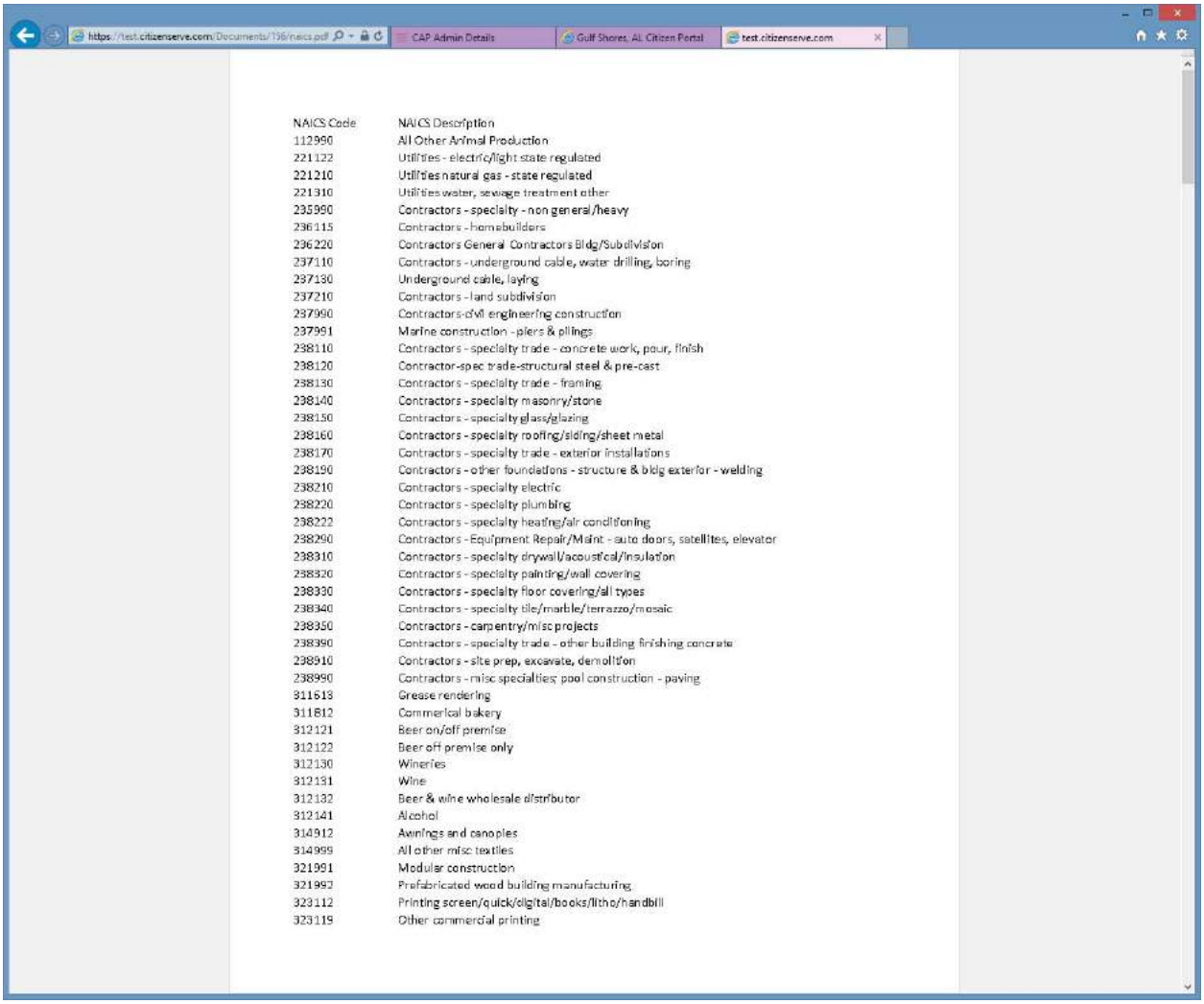
Helpful text, field level help or links to documents are general built into the application.



Applications can also be setup to be dynamic making the application process easier for the business or citizen. In the example below the user can select the number of NAICS codes for their business and the application expands based on the number selected. So a business with one NAICS code does not need to have an application cluttered with fields that are not required.

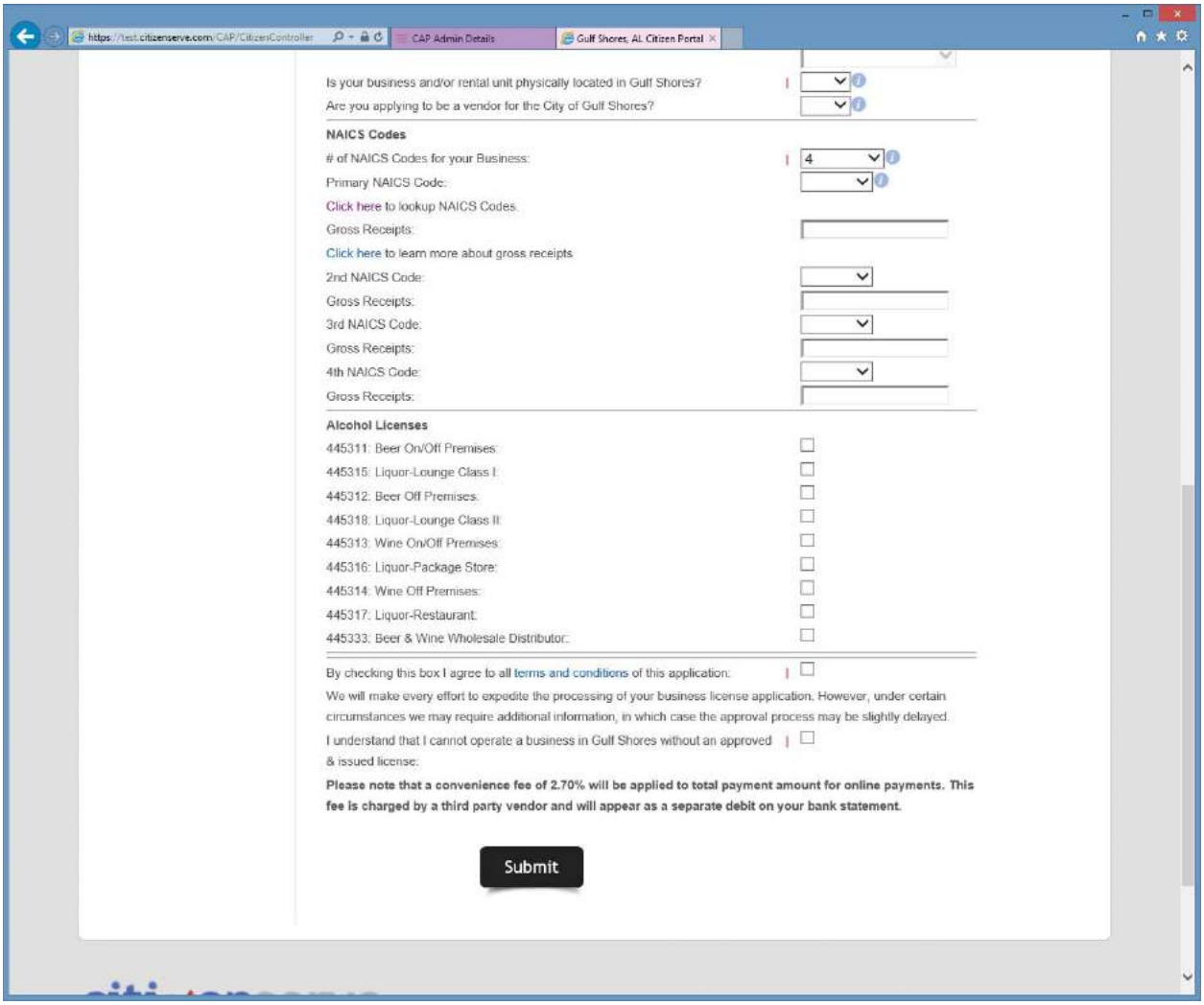


Links to helpful documents can be built in and these links can be dynamically displayed based on the application questions.

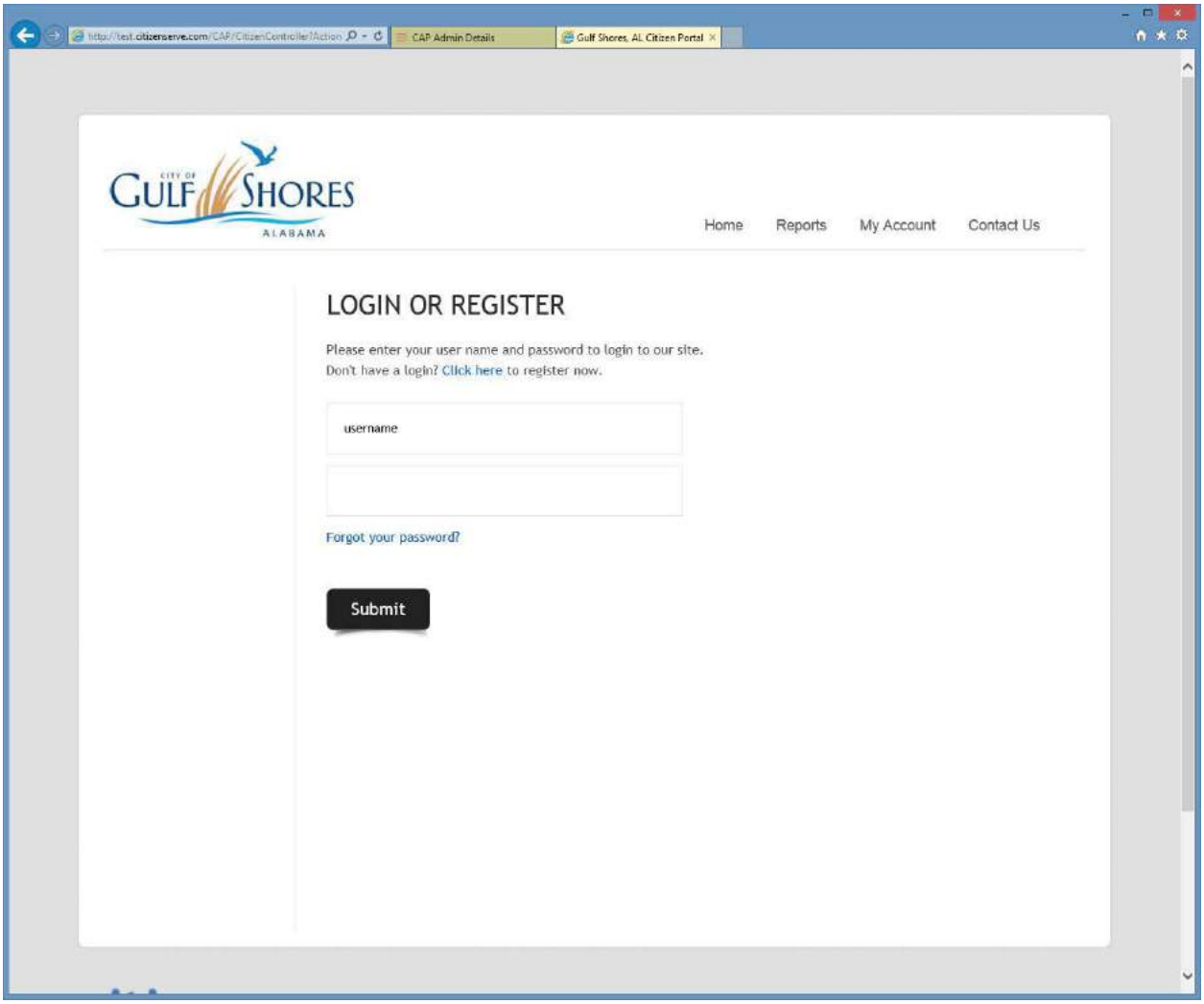


NAICS Code	NAICS Description
112990	All Other Animal Production
221122	Utilities - electric/light state regulated
221210	Utilities natural gas - state regulated
221310	Utilities water, sewage treatment other
235990	Contractors - specialty - non general/heavy
236115	Contractors - homebuilders
236220	Contractors General Contractors Bldg/Subdivision
237110	Contractors - underground cable, water drilling, boring
237130	Underground cable, laying
237210	Contractors - land subdivision
237990	Contractors-civil engineering construction
237991	Marine construction - piers & pilings
238110	Contractors - specialty trade - concrete work, pour, finish
238120	Contractor-spec trade-structural steel & pre-cast
238130	Contractors - specialty trade - framing
238140	Contractors - specialty masonry/stone
238150	Contractors - specialty glass/glazing
238160	Contractors - specialty roofing/siding/sheet metal
238170	Contractors - specialty trade - exterior installations
238190	Contractors - other foundations - structure & bldg exterior - welding
238210	Contractors - specialty electric
238220	Contractors - specialty plumbing
238222	Contractors - specialty heating/air conditioning
238290	Contractors - Equipment Repair/Maint - auto doors, satellites, elevator
238310	Contractors - specialty drywall/acoustical/insulation
238320	Contractors - specialty painting/wall covering
238330	Contractors - specialty floor covering/all types
238340	Contractors - specialty tile/marble/terrazzo/mosaic
238350	Contractors - carpentry/misc projects
238390	Contractors - specialty trade - other building finishing concrete
238910	Contractors - site prep, excavate, demolition
238990	Contractors - misc specialties; pool construction - paving
311613	Grease rendering
311812	Commerical bakery
312121	Beer on/off premise
312122	Beer off premise only
312130	Wineries
312131	Wine
312132	Beer & wine wholesale distributor
312141	Alcohol
314912	Awnings and canopies
314999	All other misc textiles
321991	Modular construction
321992	Prefabricated wood building manufacturing
323112	Printing screen/quick/digital/books/litho/handbill
323119	Other commercial printing

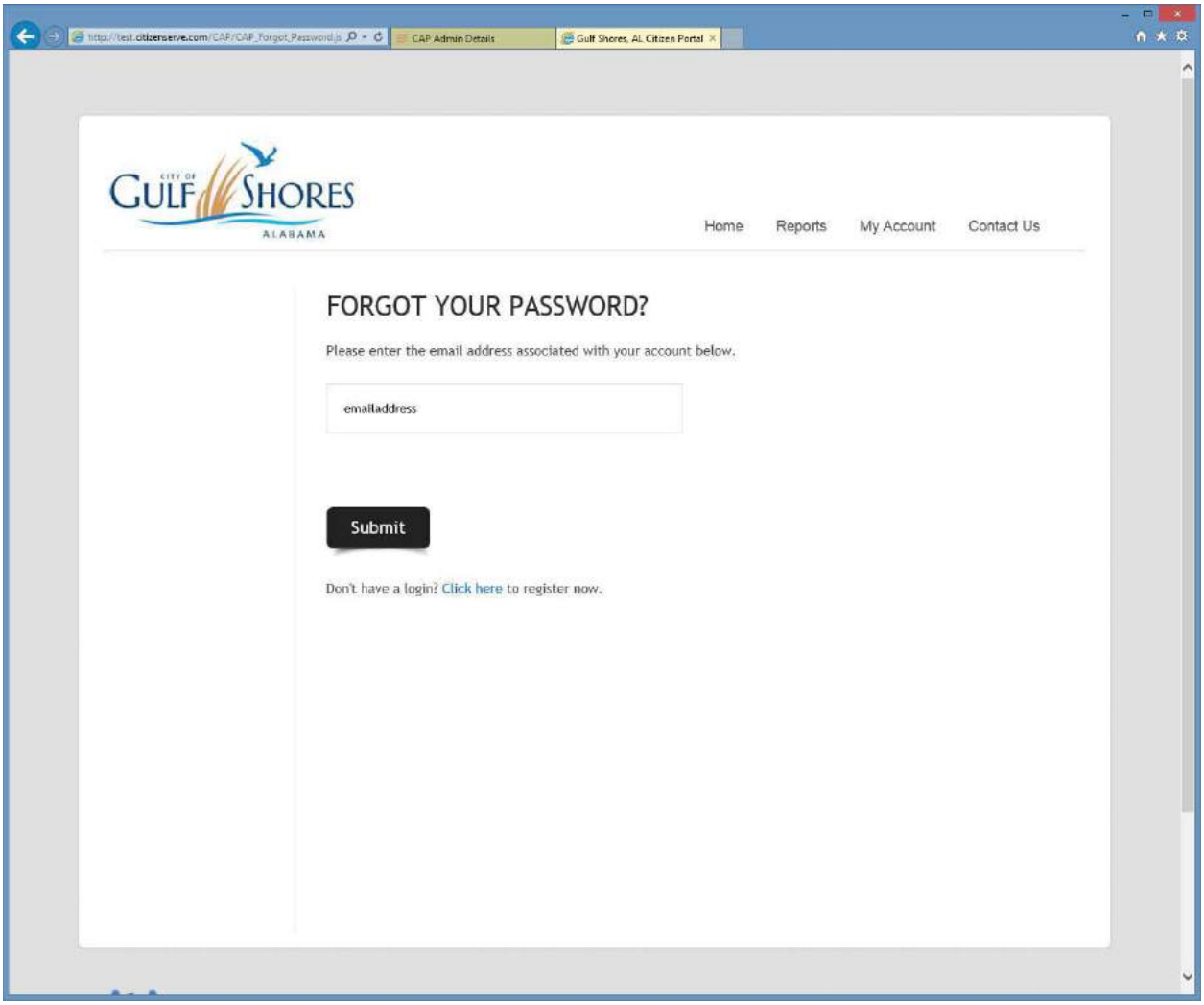
Terms and conditions can be built in with specific acknowledgements for signing the application.



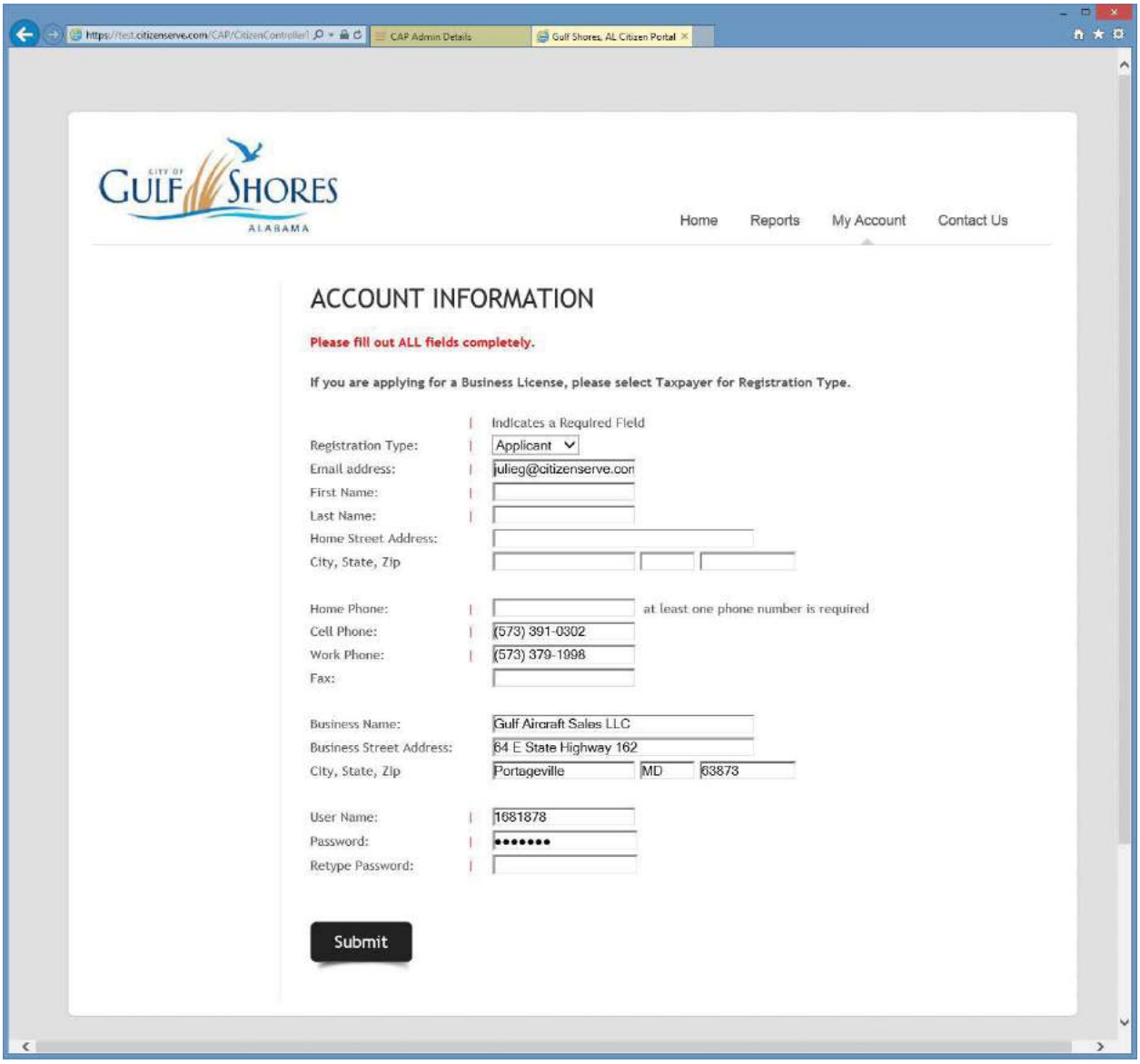
Citizens and businesses using the portal can select “Forgot your password?” on the login screen to reset their password.



After selecting “Forgot your password?” the users are prompted for their e-mail address.



Users can also select “Update My Information” on the portal to change their e-mail address, user name, password or other contact related information.



For online payments, each department can configure its own payment processor for portal payments. Standard integration is used with payment providers where the transaction is conducted using the payment providers secure connection. Citizenserve does not store or capture any credit card data. PCI compliance is maintained by the payment provider.

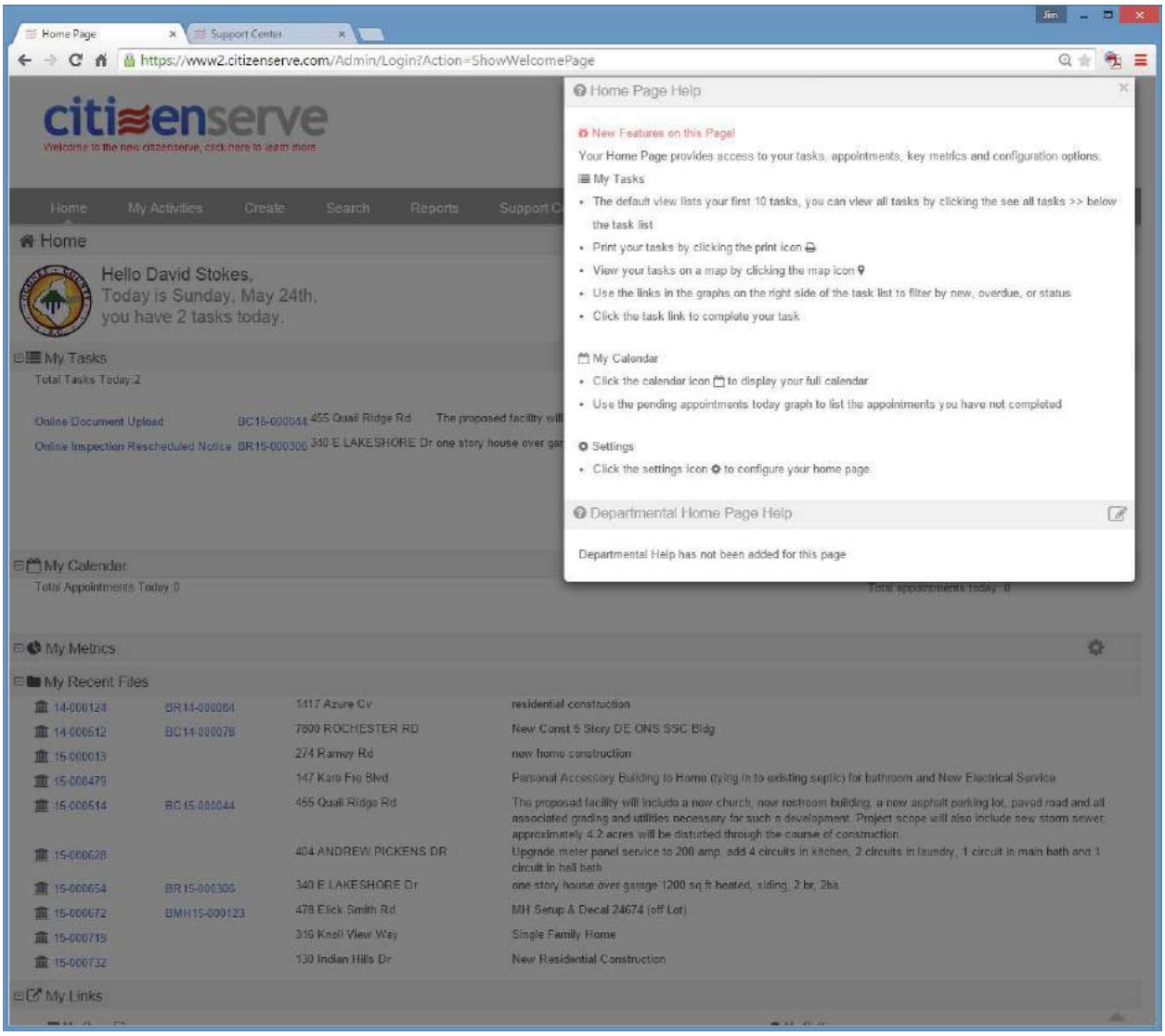
In person payments are made with existing point of sale terminals. The payments are entered into the permit or license.

Citizenserve custom fields can include http calls that can open external systems. This approach will work for opening all the documents related to a parcel or permit number. Documents can be exported to external systems for archiving or organization wide research capabilities. Depending on the requirements this may involve developing an integration point.

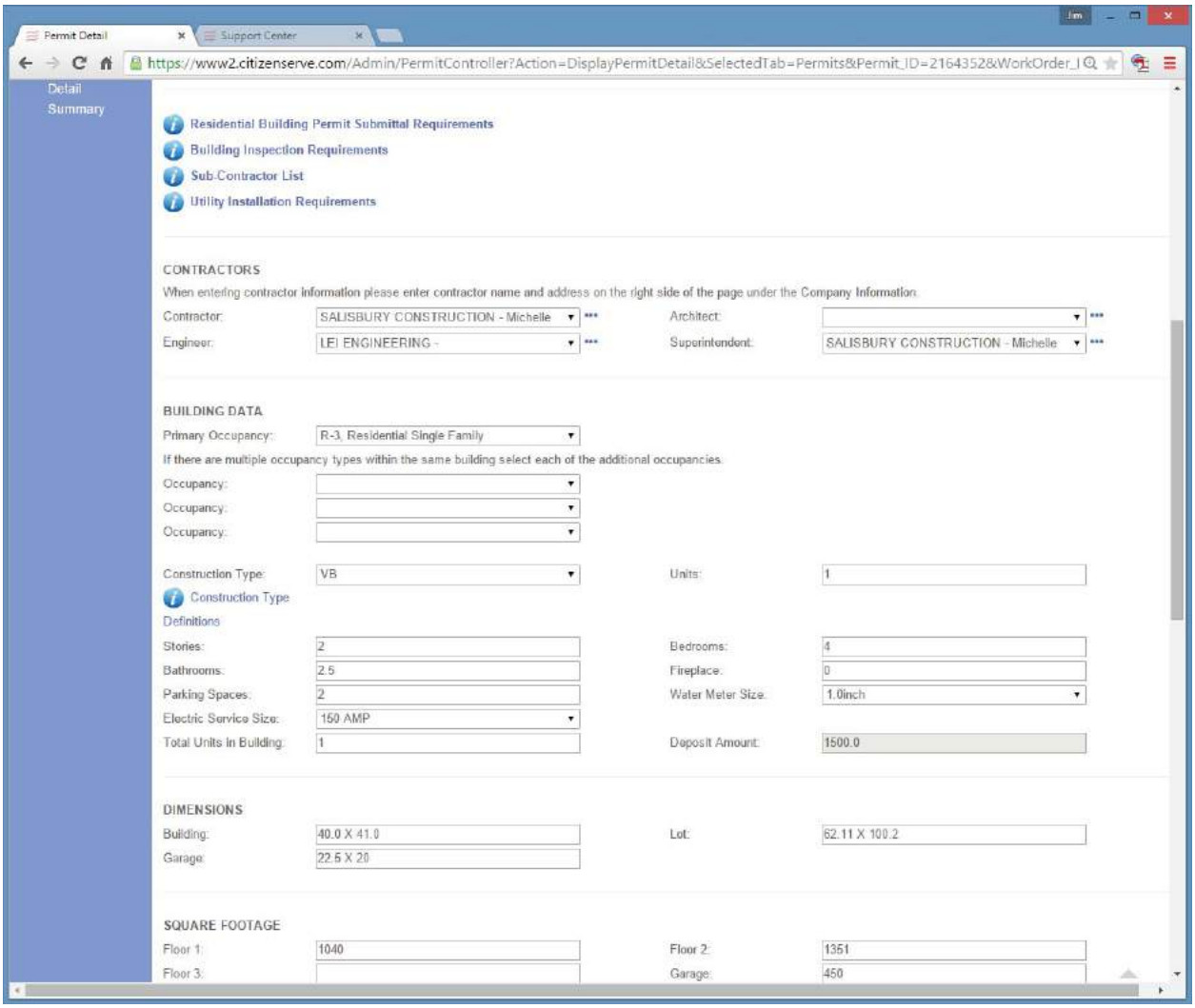
Citizenserve is a browser based application and supports the features that the browsers bring to the table. For example, spell checking is available in all major browsers. Auto fill is supported. Other features, such as speech-to-text data entry, are supported on tablets with that capability.

The Citizenserve portal has a configurable notification for citizens. The activities in the review can also be setup with templates for each review activity. Citizenserve can support text messaging as well as e-mail notifications. The review and review comments can be seen by citizens on the portal.

Help is embedded in the application. Standard help is included and departmental help can be customized and added to each help screen.



Links to helpful documents can be embedded directly in the permit and license applications and made available on the online portal.



https://www.citizenserve.com/Documents/134/bir.pdf

Spanish Fork City
Building Inspection Requirements

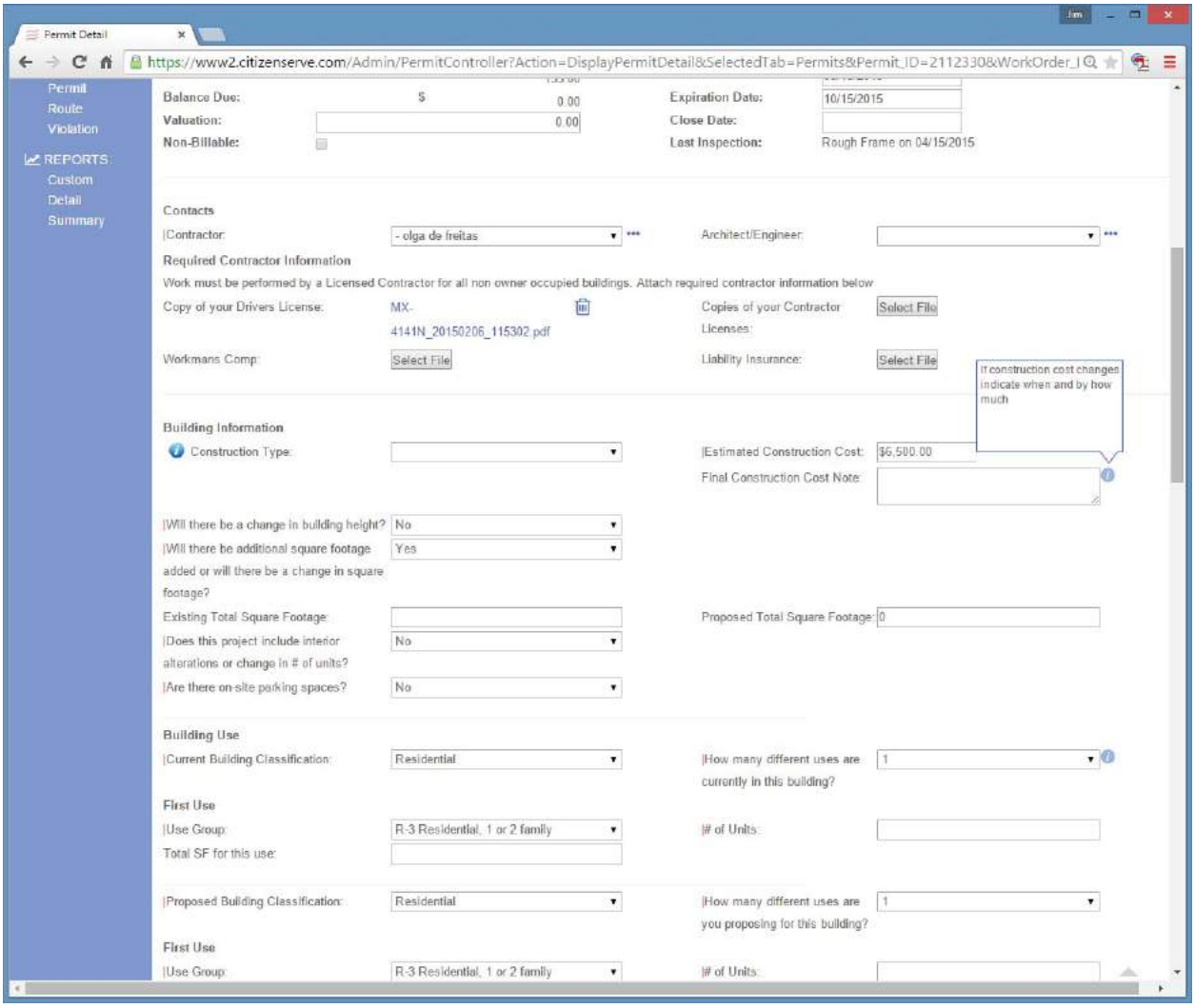
40 South Main Street, Spanish Fork, Utah 84660
801.804.4540 www.spanishfork.org

Spanish Fork City Building Inspection Requirements

General Information and Requirements:

- All inspections will need to be scheduled a minimum of 24 hours in advance. To schedule inspections go to www.citizenserve.com/SpanishFork, or you can call 801-804-4540. When calling in any inspection you must have the building permit number and the exact address. Do not call the office to see if an inspection has passed. An inspection report will be emailed to the applicant on file.
- Address must be posted on site from footings to final. No inspections will be done without address being posted.
- Approved plans must be on site for inspections on commercial permits.
- Re-inspection fees may be assessed if additional inspections are required due to inaccessible buildings, uncompleted correction items, or projects that are flagrantly not ready for the requested inspection.
- Timed Inspections will only be scheduled for the following inspections:
  - Concrete pours (One hour window)
  - Basements and interior remodels (two hours window)
- Top of building foundation shall be a minimum of 24" above the lowest point of the gutter.
- No changes to approved site plan can be made without the approval of the Community Development Department.
- Backwater valve is required as per The International Building Code.

Field level help can also be easily configured.

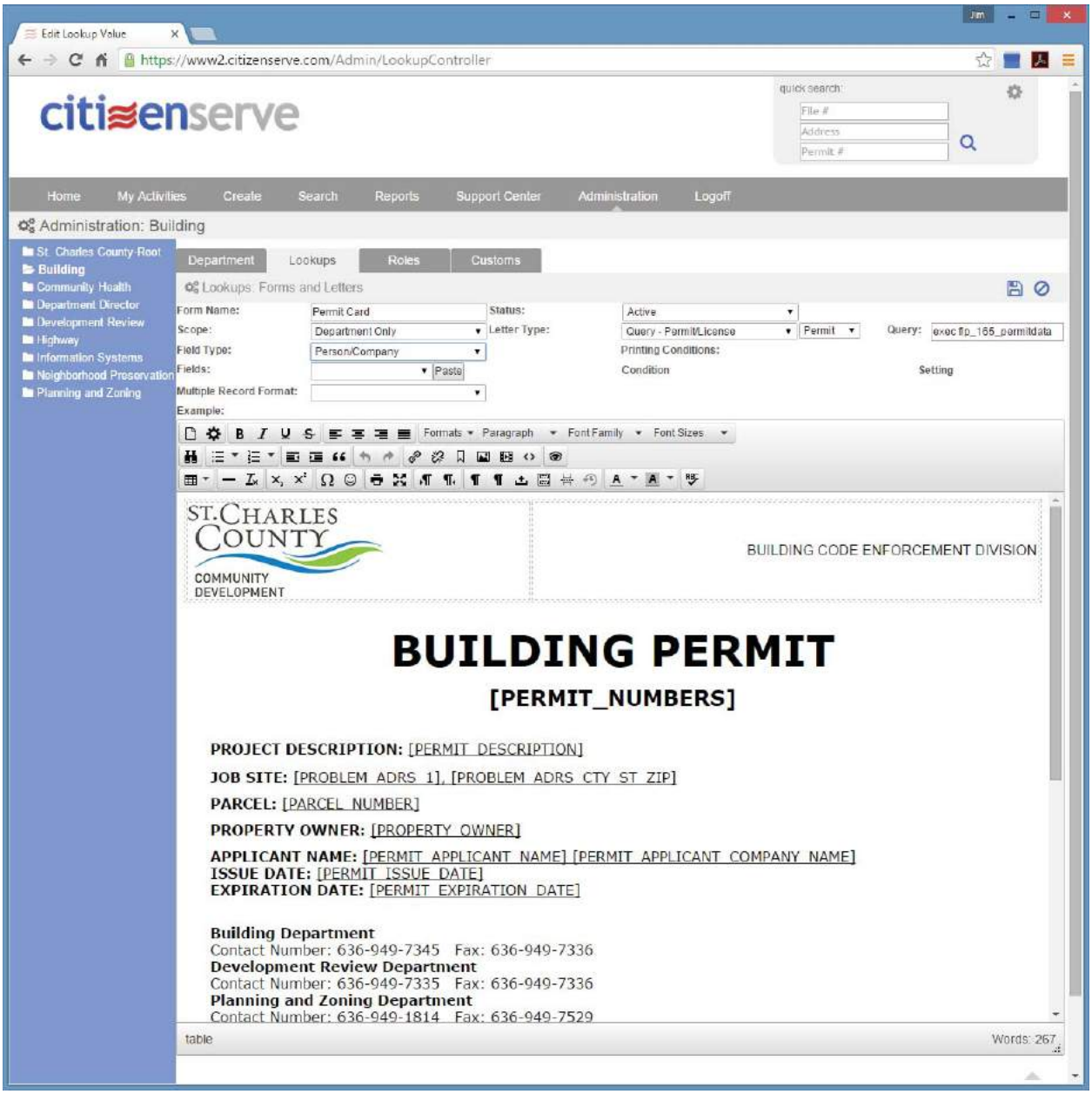


When a citizen, business or contractor completes and application on the citizen portal the planner is notified there is a new application in their task list. This can also be an e-mail notification. The first step in the review typically is an initial application review, at this stage the application can be rejected and a template e-mail sent to the application identifying any issues and actions that the applicate needs to take. If the application is accepted the next steps in the defined workflow for that application type will be assigned and the reviewers will be notified in their task list and optionally via e-mail when an assignment of an activity takes place.

In the citizen portal valid statuses for editing an application can be set. If the application is for example in a resubmittal status the application can be edited by the applicate. Applicants can also begin an application without submitting it and submit later when it is completed. New required fields are custom fields in the application type and are added on-the-fly and dynamically.

Each application type can have static or dynamic assignments in the workflow routes for that application type. Activities can also be setup to determine the path of an application review route.

Citizenserve has a device and browser independent HTML editor built into the system. This editor can be used to easily incorporate any data from the database into any type of document, including mailing labels. HTML source code can also be directly edited in the editor.



View File | Letter View

file:///C:/Users/jim/Downloads/Permit%20Card%20(2).htm

ST. CHARLES COUNTY
COMMUNITY DEVELOPMENT

BUILDING CODE ENFORCEMENT DIVISION

BUILDING PERMIT

LUP15-001361 - Land Use - Building

PROJECT DESCRIPTION: SINGLE FAM RES
JOB SITE: 1610 HWY Y, OFALLON, MO 63366
PARCEL: T160300017
PROPERTY OWNER: ANTHONY AUCHLY
APPLICANT NAME: ANTHONY AUCHLY
ISSUE DATE:
EXPIRATION DATE:

Building Department
Contact Number: 636-949-7345 Fax: 636-949-7336
Development Review Department
Contact Number: 636-949-7335 Fax: 636-949-7336
Planning and Zoning Department
Contact Number: 636-949-1814 Fax: 636-949-7529

This permit is issued based on the application and plans that were submitted. If any changes are made to this approval application or the plans submitted, you MUST submit and RECEIVE APPROVAL of those changes BEFORE work on those changes is started.

Compliance with State Immigration Laws:
Your permit or license is subject to the provisions of the Code of Ordinances of St. Charles County Section 622.525 through 622.555, which prohibit the knowing employment of unauthorized aliens to perform work within the unincorporated area of St. Charles County and which further authorizes the investigation of complaints against business entities doing business in the unincorporated area of the county and alleged to be employing unauthorized aliens, providing for prosecution and enacting penalty provisions Section 622.530-543 provides for the suspension of any permit or license if a business entity fails to provide identification information of persons working on the site and the municipal court may also determine to suspend permits and licenses if it concludes a business entity knowingly violated the ordinance.

ST. CHARLES COUNTY
COMMUNITY DEVELOPMENT

ST CHARLES COUNTY BUILDING DEPARTMENT
201 N SECOND ST, ROOM 412
ST CHARLES MO 63301
PHONE: 636-949-7345, OPTION 1
FAX: 636-949-7336
EMAIL: bldgpermit@sccmo.org

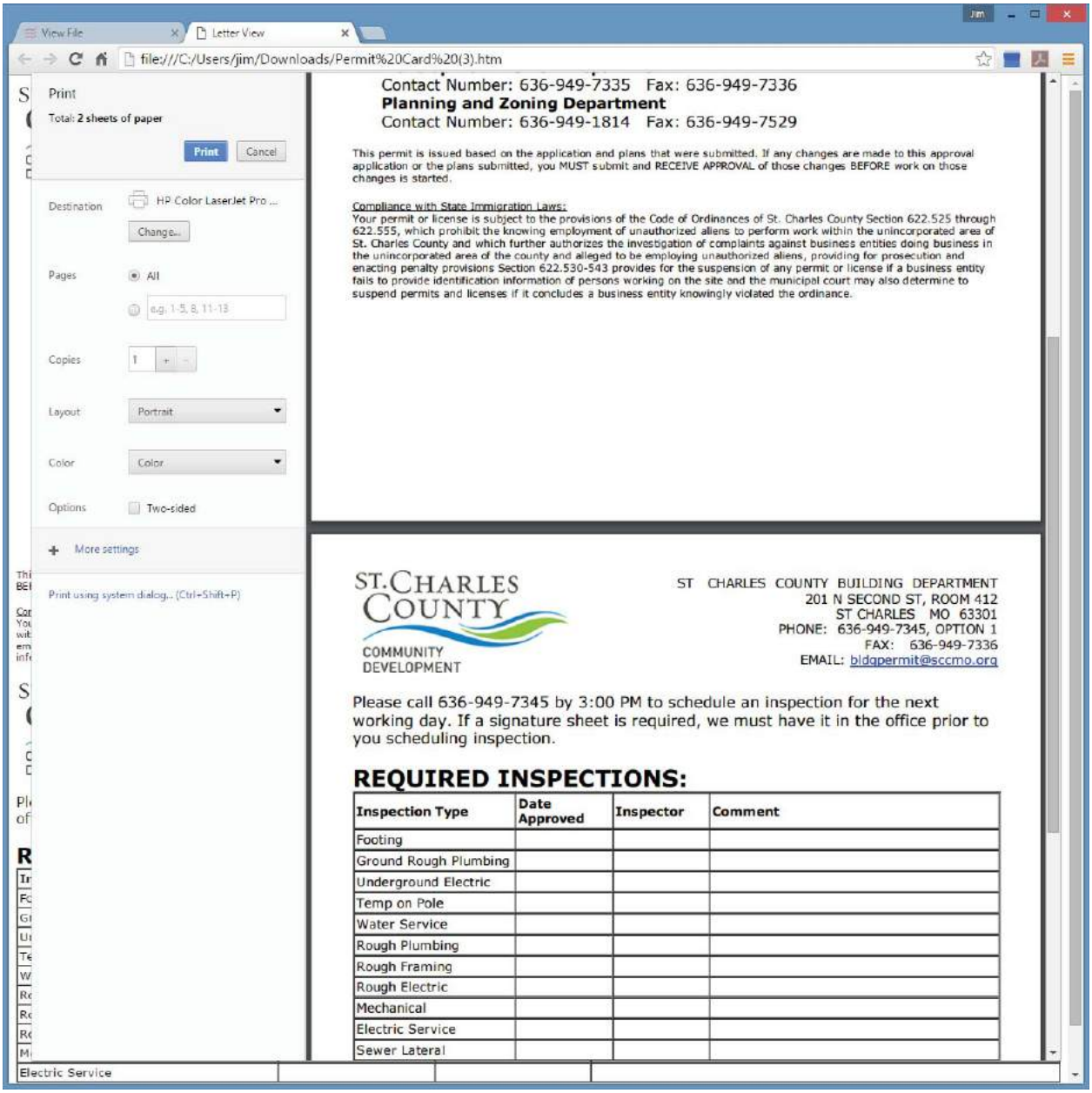
Please call 636-949-7345 by 3:00 PM to schedule an inspection for the next working day. If a signature sheet is required, we must have it in the office prior to you scheduling inspection.

REQUIRED INSPECTIONS:

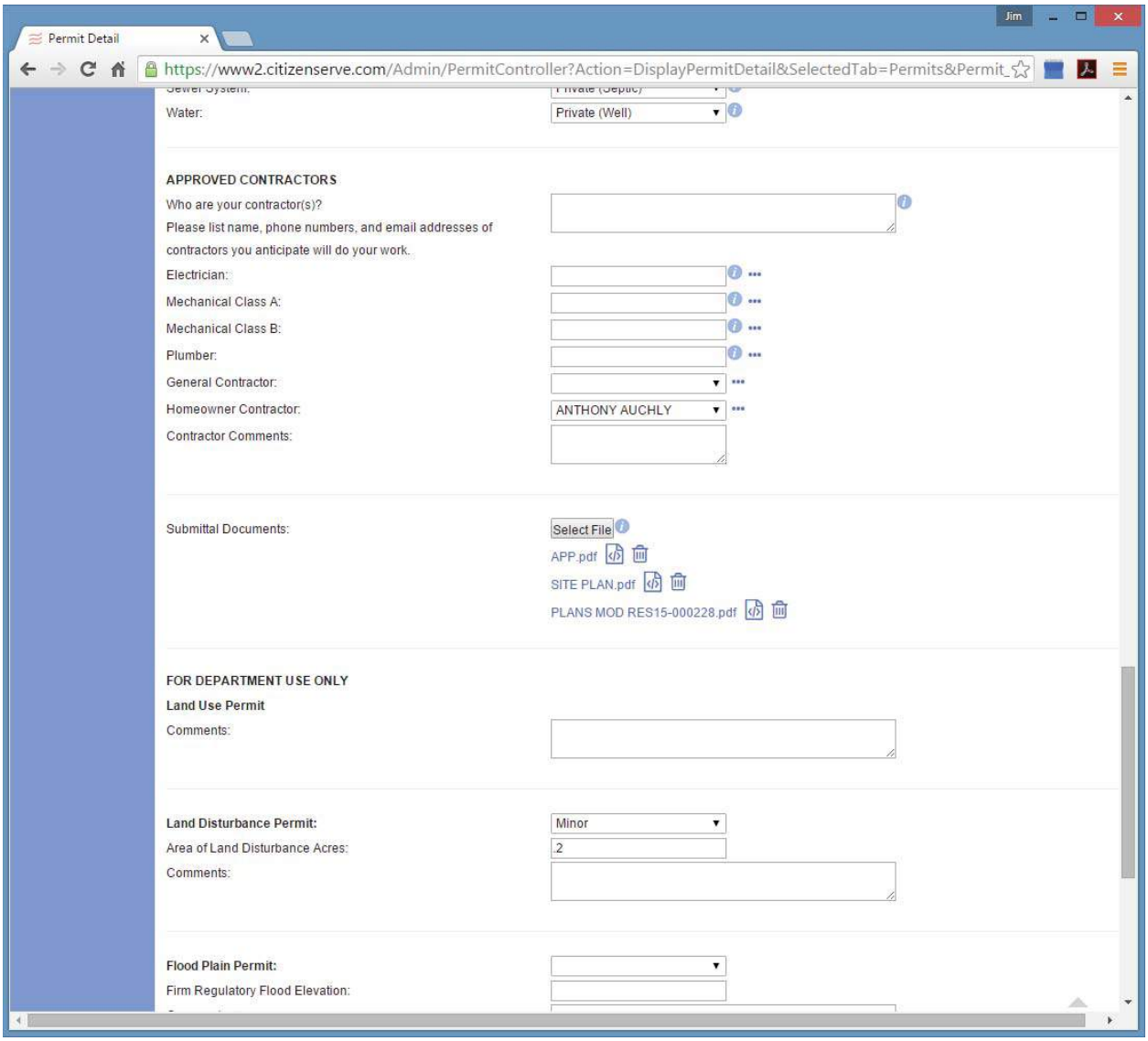
Inspection Type	Date Approved	Inspector	Comment
Footing			
Ground Rough Plumbing			
Underground Electric			
Temp on Pole			
Water Service			
Rough Plumbing			
Rough Framing			
Rough Electric			
Mechanical			
Electric Service			
Sewer Lateral			
Final Inspection			

citizenserve

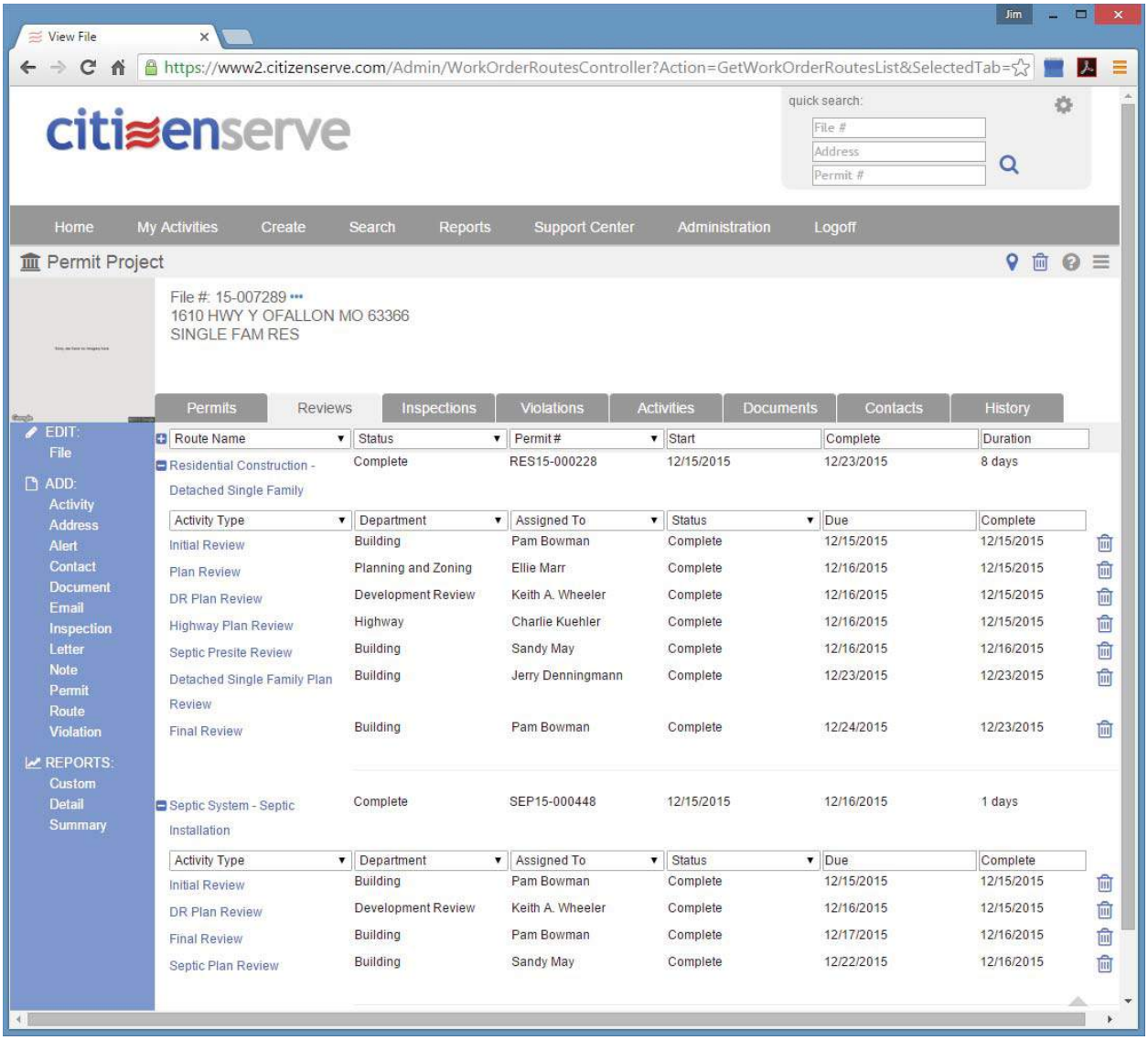
Documents can be printed to standard printers or other devices like a label printer or ID card printer.



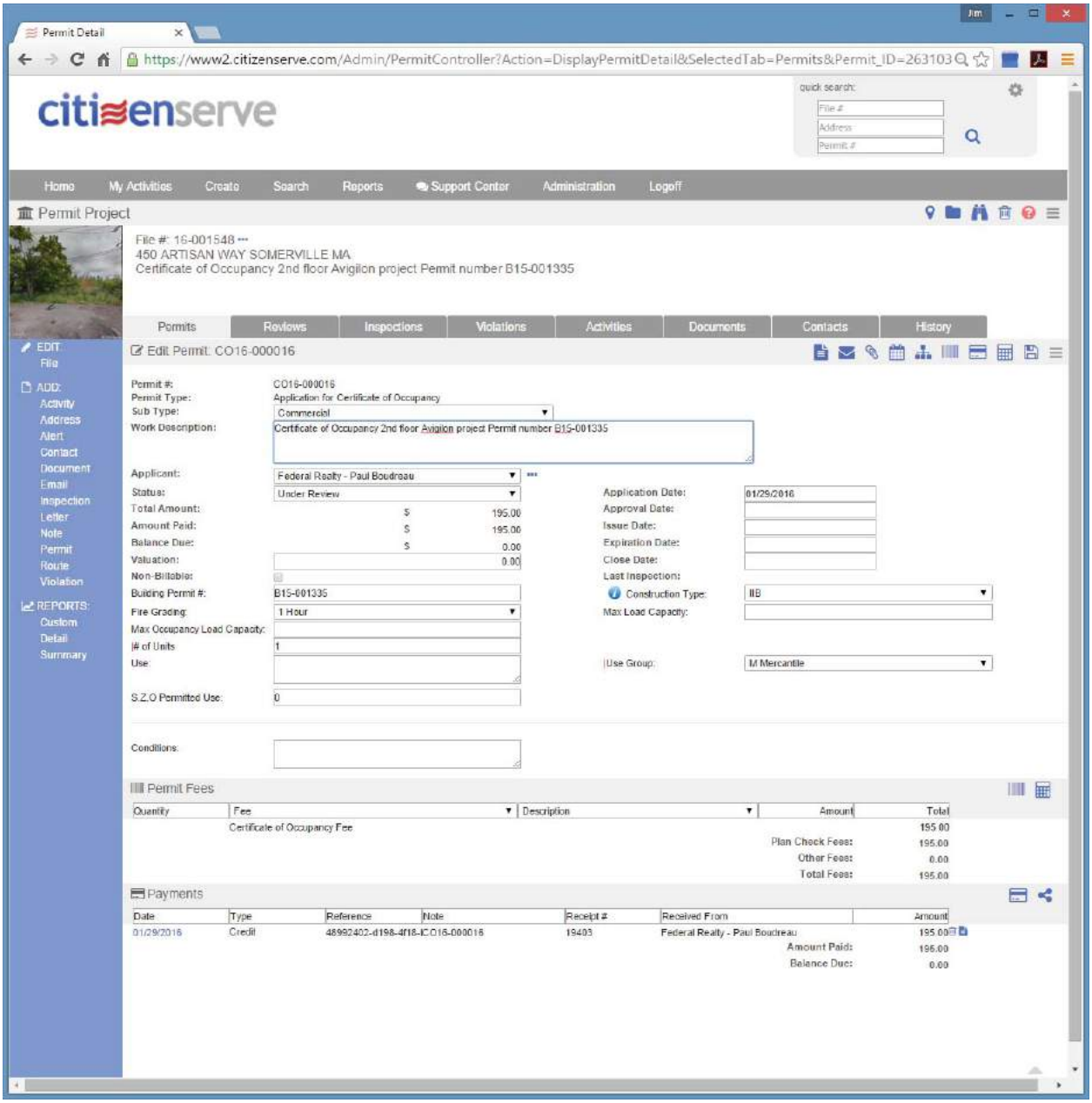
Submittal documents can be embedded anywhere in the application. These can also be uploaded by the contractor or citizen on the citizen portal. For instance when a revision is requested or an additional document is required.



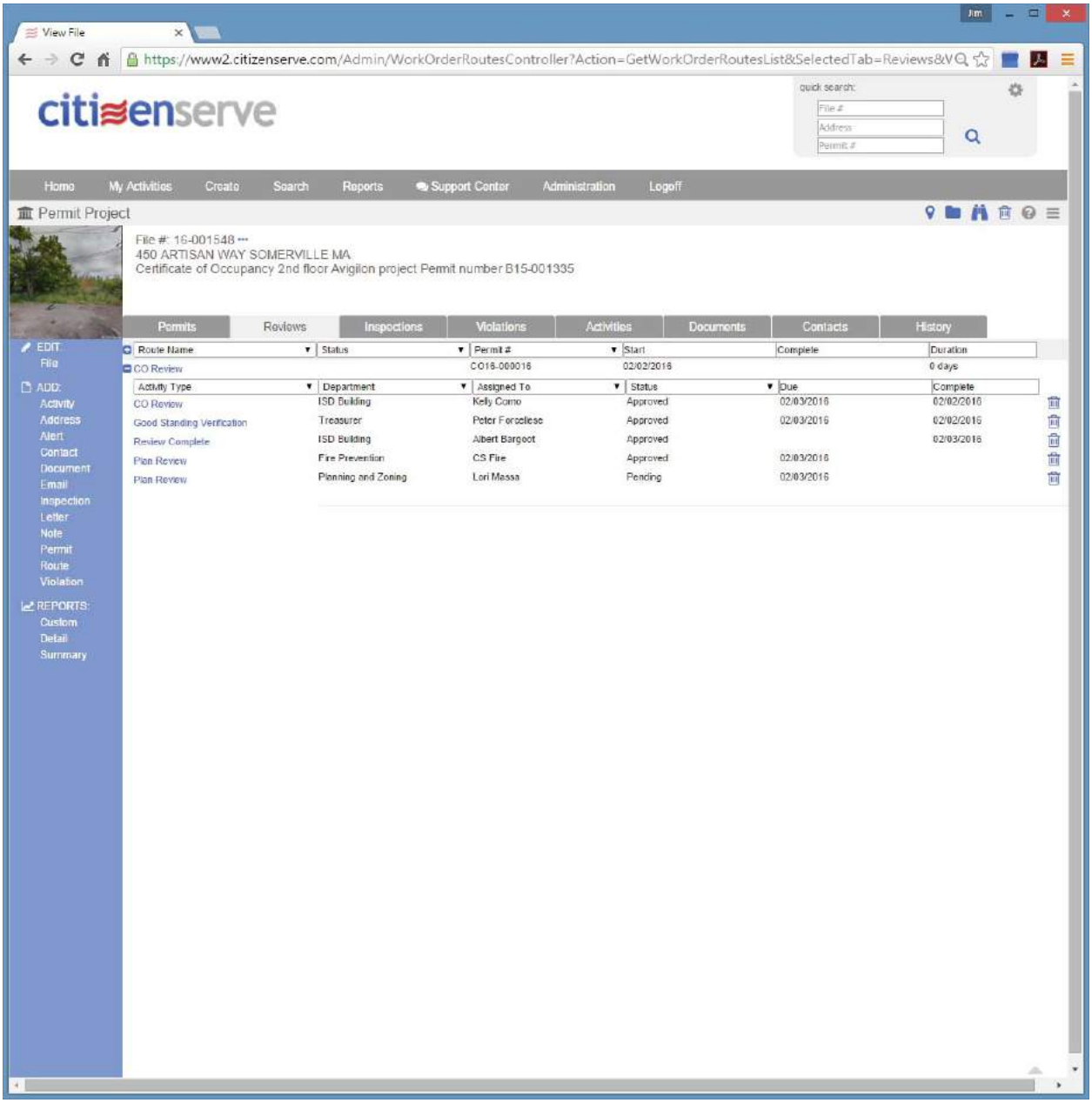
The review routes can be automatic once an application is submitted or can be manually added. Each application in the project can have its own review route and resubmittal routes if necessary.



Certificate of Occupancy applications can be setup in Citizenserve like any other applications.



The CO can have a review route like any other application.



The CO can be generated in Citizenserve and is available on the citizen portal or can be e-mailed to the contractor. The CO can also have conditions that prevent printing due to any data parameters on the file that restrict printing.

Certificate of Use and/or Occupancy

City of Somerville
ISD-Inspectional Services Department
CO16-000011

Issue Date:01/29/2016

This certificate is issued in accordance with the provisions of Section 111 of the State Building Code.

Zone: CBD Ward: 6 Map: 21 Block: B Lot: 12
Address: 17 COLLEGE AVE A
Owner: CONNOLLY JOHN M & GAIL F TRS
Building Permit #: b15-000751
Type of Construction: VB
Fire Grading: 2 Hour
Maximum Load Capacity: 100 P.S.F.
Maximum Occupancy Load Capacity: 100 GROSS SQUARE FEET PER OCCUPANT
Use: **BARBER SHOP**
Use Group: B-- Business

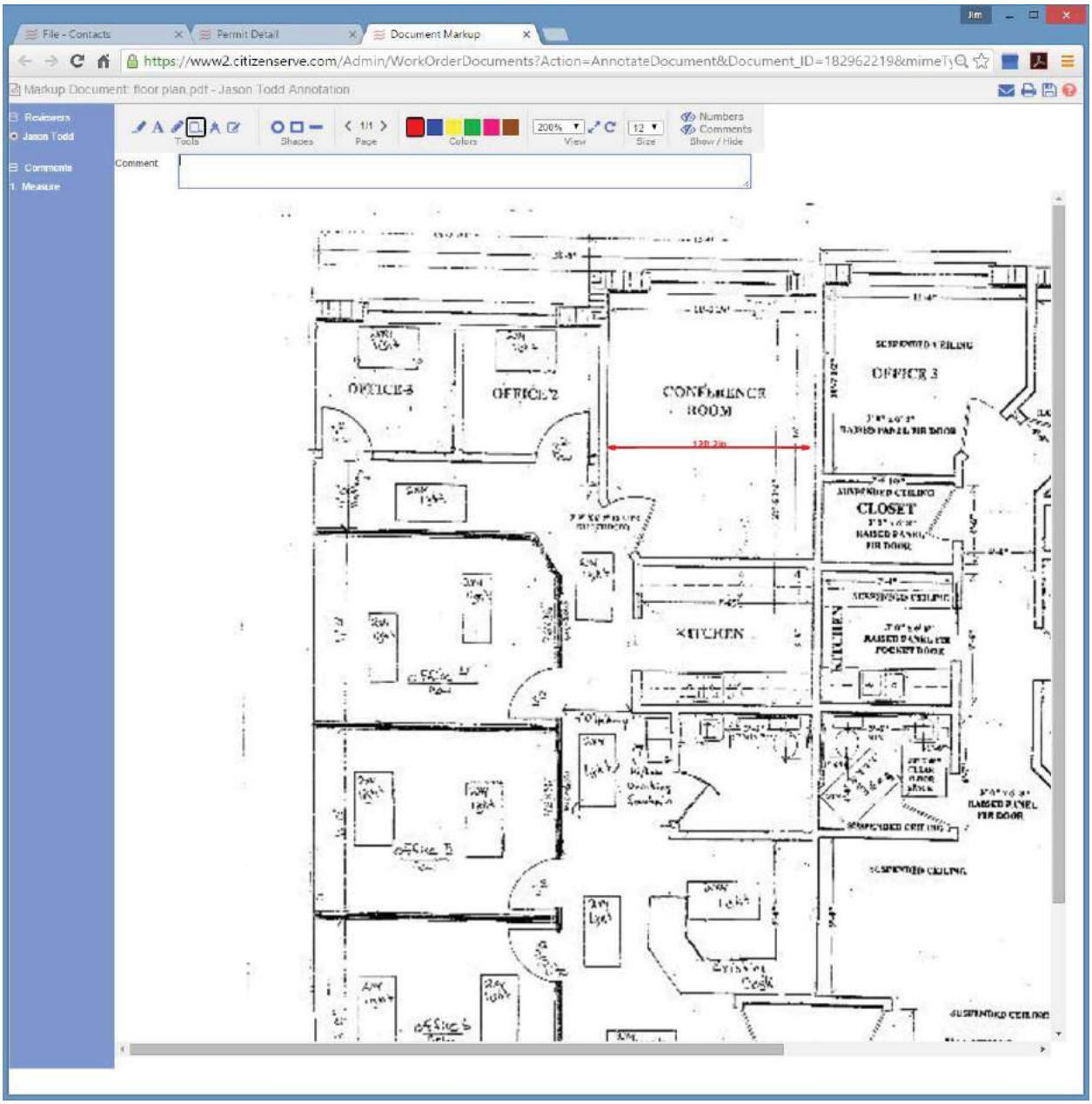
Special Conditions:

This certificate of use and occupancy certifies that the work has been completed in accordance with the provisions of the applicable codes for which a permit is required on the date of its issuance and that the building or structure may be used in its several parts as stipulated.

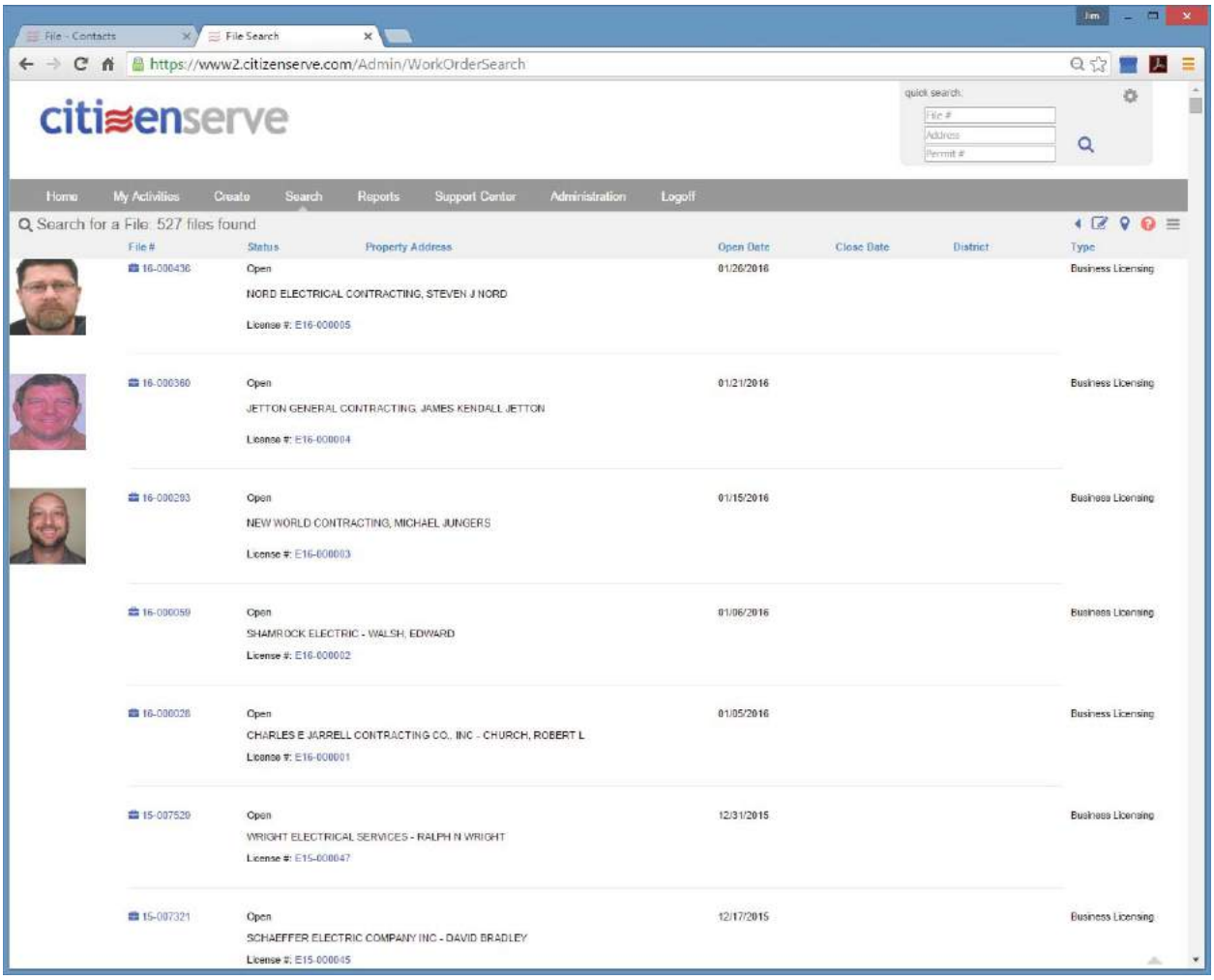
Jim Aurilio
Building Inspector

Paul Nonni
Building Official

The markup tool in Citizenserve has a calibration tool that can be used to setup measurements on any drawing. Text comments can be added and associated with each measurement. Desktop tools, such as Adobe or BlueBeam Revu, can also be used to markup documents.



Citizenserve has a comprehensive licensing module which is used for business licensing including contractor licenses. Applications can be taken on the citizen portal, documents uploaded and licenses and ID cards issued.



File - Contacts | License Detail

https://www2.citizenserve.com/Admin/PermitController?Action=DisplayPermitDetail&SelectedTab=Permits&Permit_ID=262898

citizenserve

quick search: File # | Address | Permit #

Home | My Activities | Create | Search | Reports | Support Center | Administration | Logoff

Business License

File #: 16-000436
NORD ELECTRICAL CONTRACTING, STEVEN J NORD

Licenses | Reviews | Inspections | Violations | Activities | Documents | Contacts | History

EDIT
File

ADD:
Activity
Address
Alert
Contact
Document
Email
Inspection
Letter
Note
License
Route
Violation

REPORTS:
Custom
Detail
Summary

Edit License: E16-000005

License #: E16-000005
License Type: Electrician
Sub Type: Electrician
Business Name: NORD ELECTRICAL CONTRACTING, STEVEN J NORD

Licensee: NORD ELECTRICAL CONTRACTING - STEVEN J
Status: Active
Total Amount: $ 200.00
Amount Paid: $ 200.00
Balance Due: $ 0.00

Application Date: 01/26/2016
Approval Date: 01/26/2016
Issue Date: 01/26/2016
Expiration Date: 12/31/2017
Close Date:
Last Inspection:

Non-Billable:
Application Type: Renewal
Local License Number: E4906

Bond Information
Bond Company: FEDERATED MUTUAL INSURAN
Bond Number: 9205445
Bond Expiration Date: 01/18/2999
Comments:

Liability Information
Insurance Company: FEDERATED MUTUAL INSURAN
Insurance Policy Number: 9069669
Insurance Expiration Date: 03/11/2017
Comments:

Submit with your license application
License Application: Select File
ICC test results OR proof of St. Louis County License: Select File
E16-000006 160126 STL CO LIC.pdf
Photograph of front facial view: Select File
E16-000006 160126 PHOTO.jpg
Bond: Select File
E16-000006 160126 BOND.pdf
Liability: Select File
E16-000006 160126 LIAB.pdf
E16-000005 160126 LIAB.pdf

POST IN A CONSPICUOUS PLACE	**ST. CHARLES COUNTY** **Master Electrician License** **This License Expires 12/31/2017**	LICENSE NUMBER E16-000005 E4908

By receipt of this signed certificate, so identifies	Mailing Name & Address:
STEVEN J NORD 1588 GLENAGE DR, MARYLAND HEIGHTS MO 63043	STEVEN J NORD NORD ELECTRICAL CONTRACTING 1588 GLENAGE DR, MARYLAND HEIGHTS MO 63043

as having complied with all requirements of the COUNTY OF ST. CHARLES, MISSOURI to perform the duties of a Licensed Master Electrician in said County.

Classification: Electrician

ST. CHARLES COUNTY
COMMUNITY DEVELOPMENT

Total Received: $200.00

By

BUILDING OFFICIAL

citizenserve

File - Contacts | View File | Letter View

file:///C:/Users/jim/Downloads/License%20ID-Electricians%20&%20Plumbers.htm

E16-
000005/ E4908
License No

THIS CERTIFIES THAT ST. CHARLES COUNTY, STATE OF MISSOURI MASTER Electrician LICENSE HOLDER
STEVEN J NORD
has been duly examined by the St. Charles County Building Division and qualified for a Master Electrician's license. This license is valid unless suspended or revoked.
Expiration Date: 12/31/2017

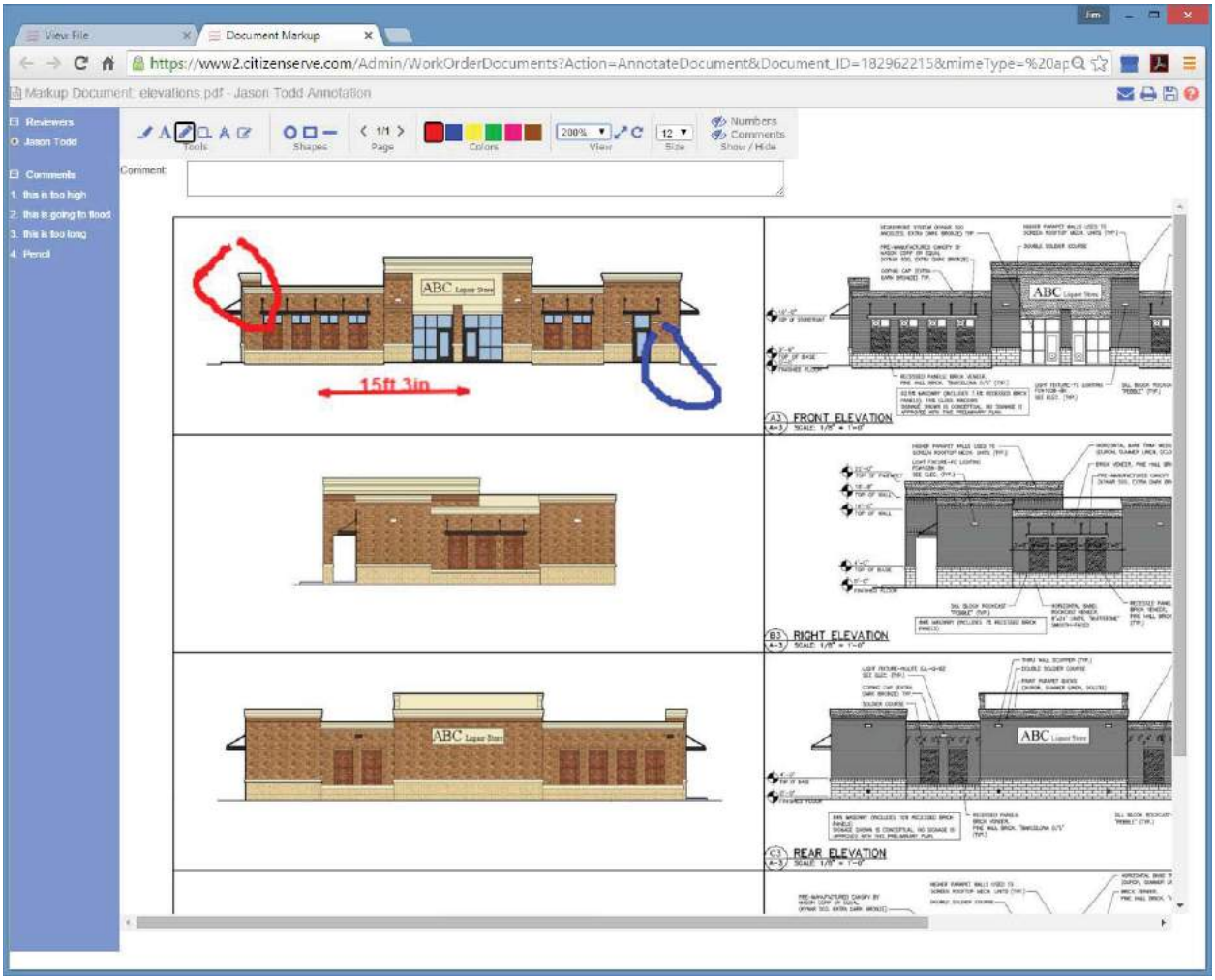
BUILDING DIRECTOR

ST. CHARLES COUNTY

IF FOUND, PLEASE RETURN TO:
ST. CHARLES COUNTY BUILDING DIVISION
201 N. SECOND ST., ROOM 412
ST. CHARLES, MO 63301

citizenserve

Citizenserve has a built in markup tool. Different reviewers can insert markup and comments into any document. Markups and comments can be e-mailed to the contractor or anyone involved in the project. Clicking on the text comment highlights the markup on the plan related to the text. Adobe or BlueBeam Revu can also be used if loaded on the desktop. The Citizenserve markup tool is device and browser independent and does not require any downloaded software.



Citizenserve reports can be setup as mail or e-mail merge processes. These processes can send out notices and put the notice in the related file. These processes are considered custom reports and are included in the unlimited support. So a user can request a new process at any time and it will be setup and put in their report folders. The letters or notice templates are generated in the built in HTML editor and can easily pull information from database.

Citizenserve is fully functional in the field on any contemporary device with a browser and an internet connection. A data plan is required on the device, such as LTE or 4G. Inspectors have access to all file data including documents. Inspection reports can be can be completed in the field and e-mailed to the contractor or customer. All notices, such as citation and violation notes are also available and can be printed in the field.

Fees are configured in fee tables. Each fee table has a date range the fee schedule is effective. The fee schedules are setup by permit or license type. Custom fields on the applications can be used in the fee tables. Changes are easy to make through the administration interface. General ledger codes are stored with each fee line item for integration with the County's financial systems.

General ledger codes are tracked and financial reports can be created to import or integrate with financial system. Citizenserve keeps track of all fee line items and payments. Partial payments can be allocated to accounts.

Payments can be recorded in Citizenserve and daily close out reports can be created individually or for a group.

Multiple custom receipt documents can be created in Citizenserve. Refunds can be created and partial payments can be processed.

Each fee line item can have a general ledger code and group for reporting and reconciliation.

Bond, trust or escrow funds can be tracked on projects and reported.

Citizenserve uses industry standard integration with payment providers for online payments. For staff or counter payments existing point of sale systems can be used and payments noted in Citizenserve. Reports can be created to reconcile payment processor information with information recorded in Citizenserve.

PCI compliance is through the payment provider. Citizenserve does not track, store or forward credit card information. Information is entered directly into the payment providers secure interface.

Editing fees can be assigned as a user right.

Voids and custom receipts can be setup for these transactions.

Funds are posted by the payment provider.

Separate receipts can be created if one payment is made at the counter for multiple permits or licenses.

Receipts are viewed before printing.

Multiple payments can be made on a permit or license.

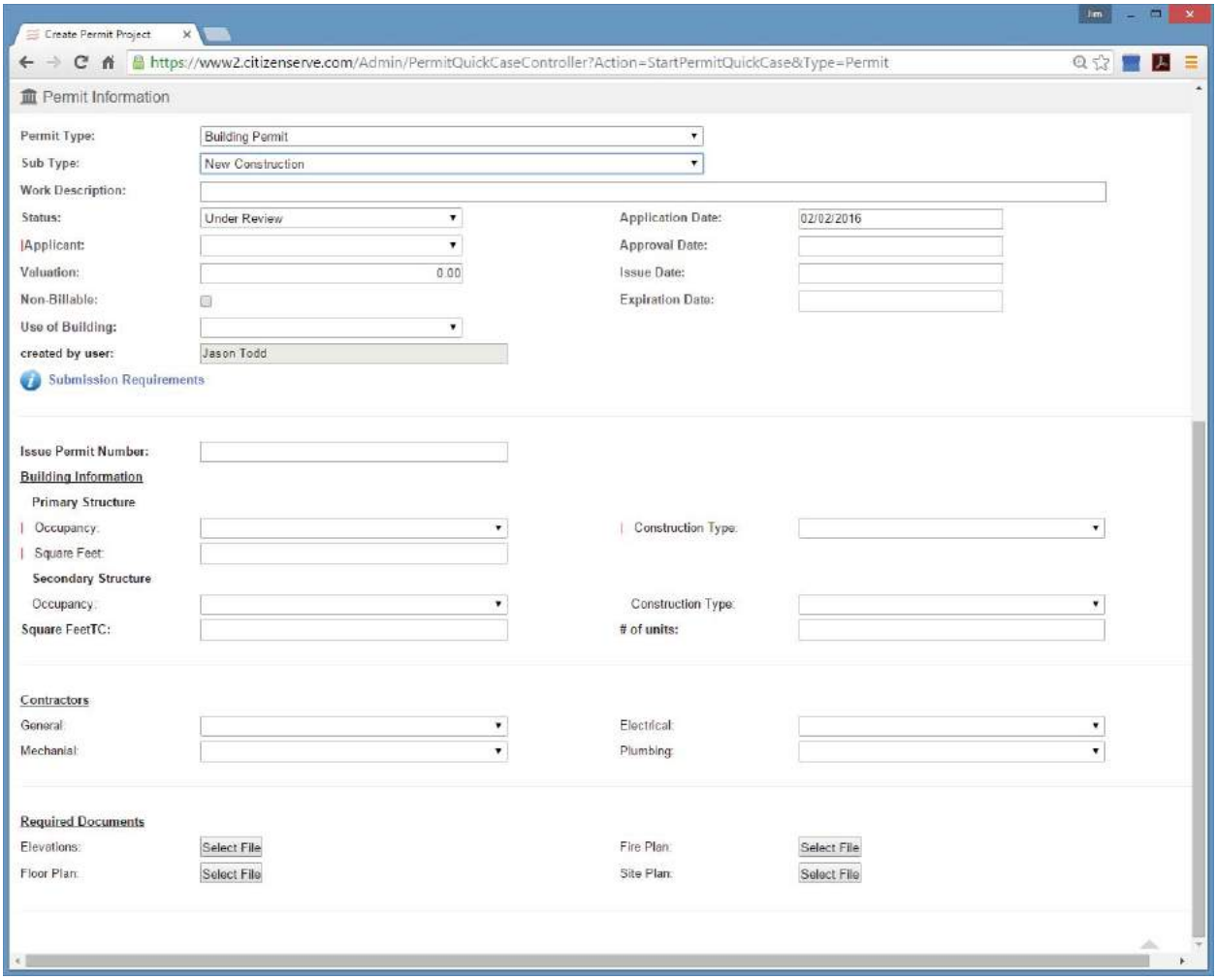
Waivers are supported.

Citizenserve includes an integrated IVR capability. The IVR solution used is cloud-based and supports CCXML and VoiceXML. Database side scripting is SQL server. A web service is used to integrate with the IVR which has both voice and text capabilities as well as advanced voice recognition.

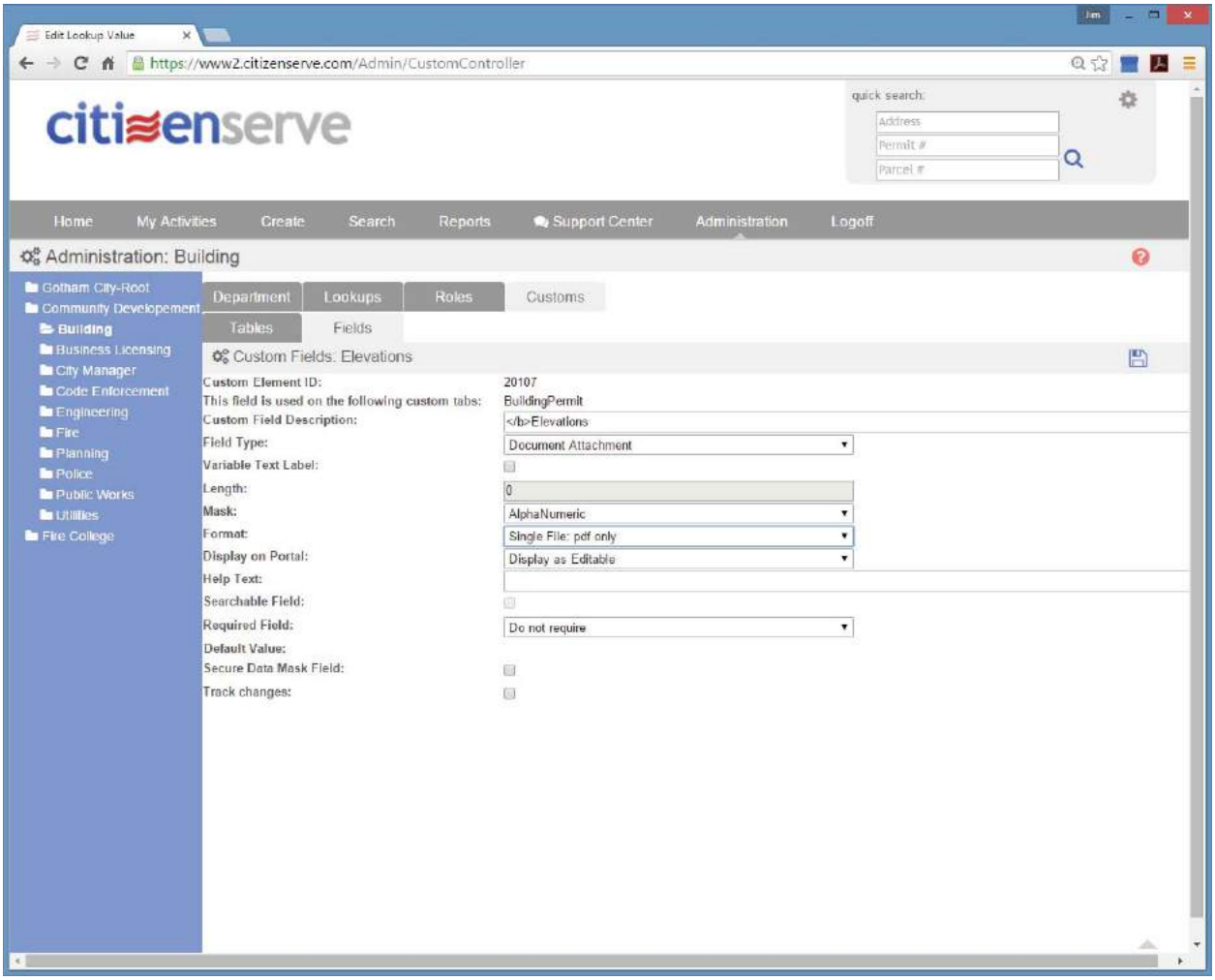
Citizenserve is device and browser independent. Only a device, browser and internet connection are required. No software is required on the desktop or device. All interface functionality is JavaScript and HTML5 (no Flash or ActiveX). Browser and device independence is critical in fostering an electronic relationship with businesses, contractors and citizens.

Citizenserve maintains a production environment as well as two test environments. One for testing new versions of the software and the other for running test data migrations. The test environments are available to customers as needed. We typically use the production environment for system walk-throughs and training as the test data is easily removed before a department goes live.

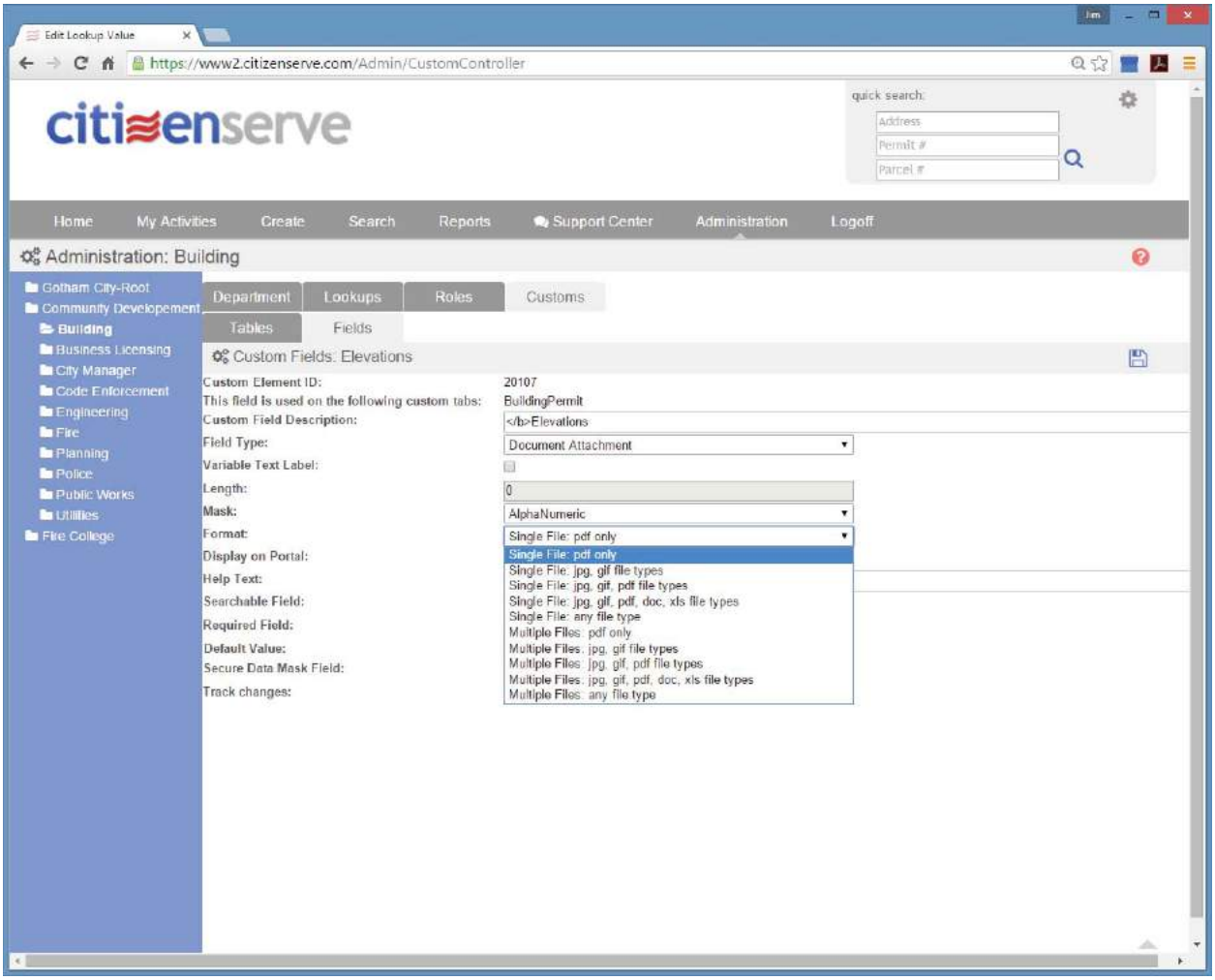
Documentation requirements can be embedded anywhere in a license or permit application as well as in review or inspection forms for related activities.



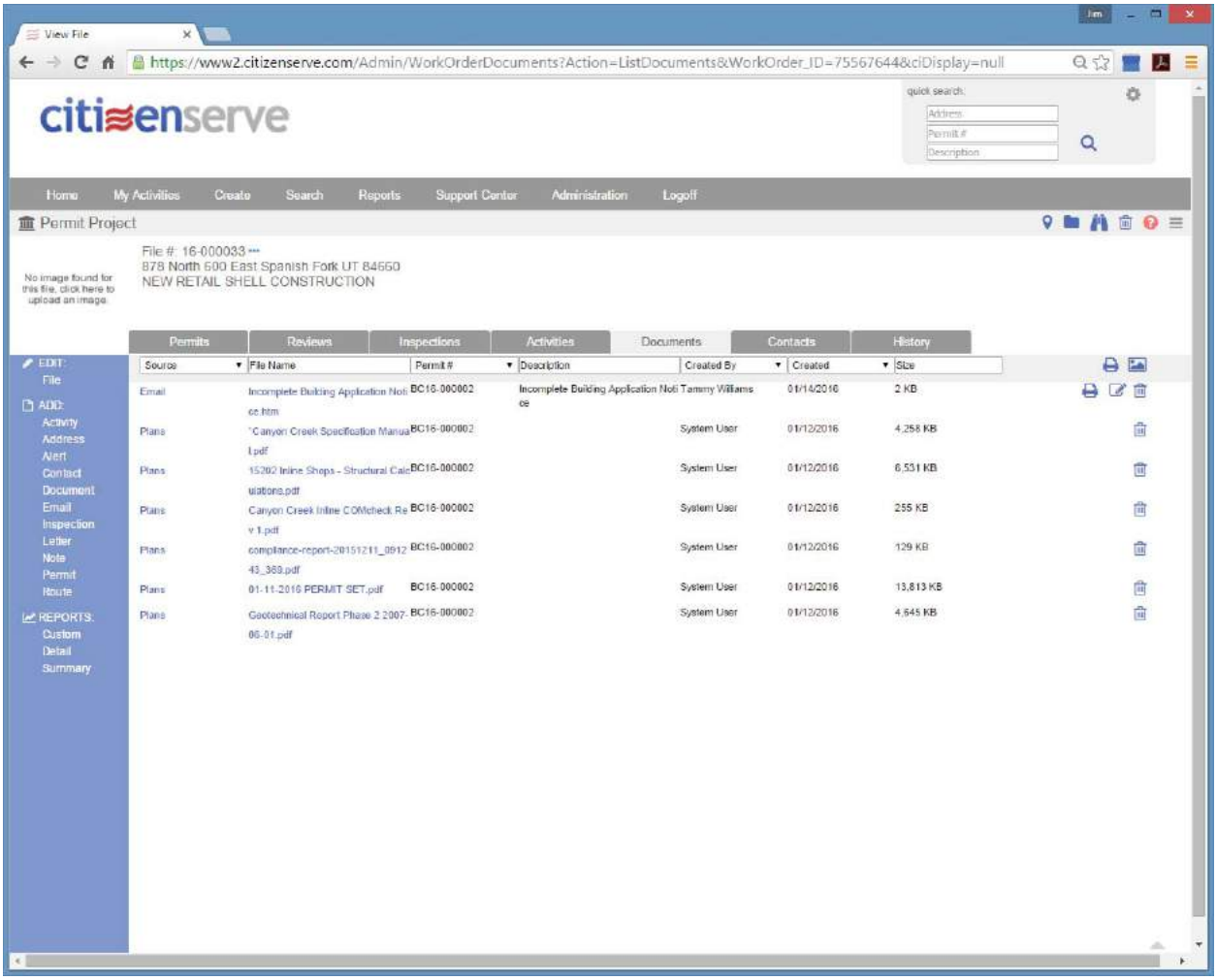
This is just another custom field type in Citizenserve.



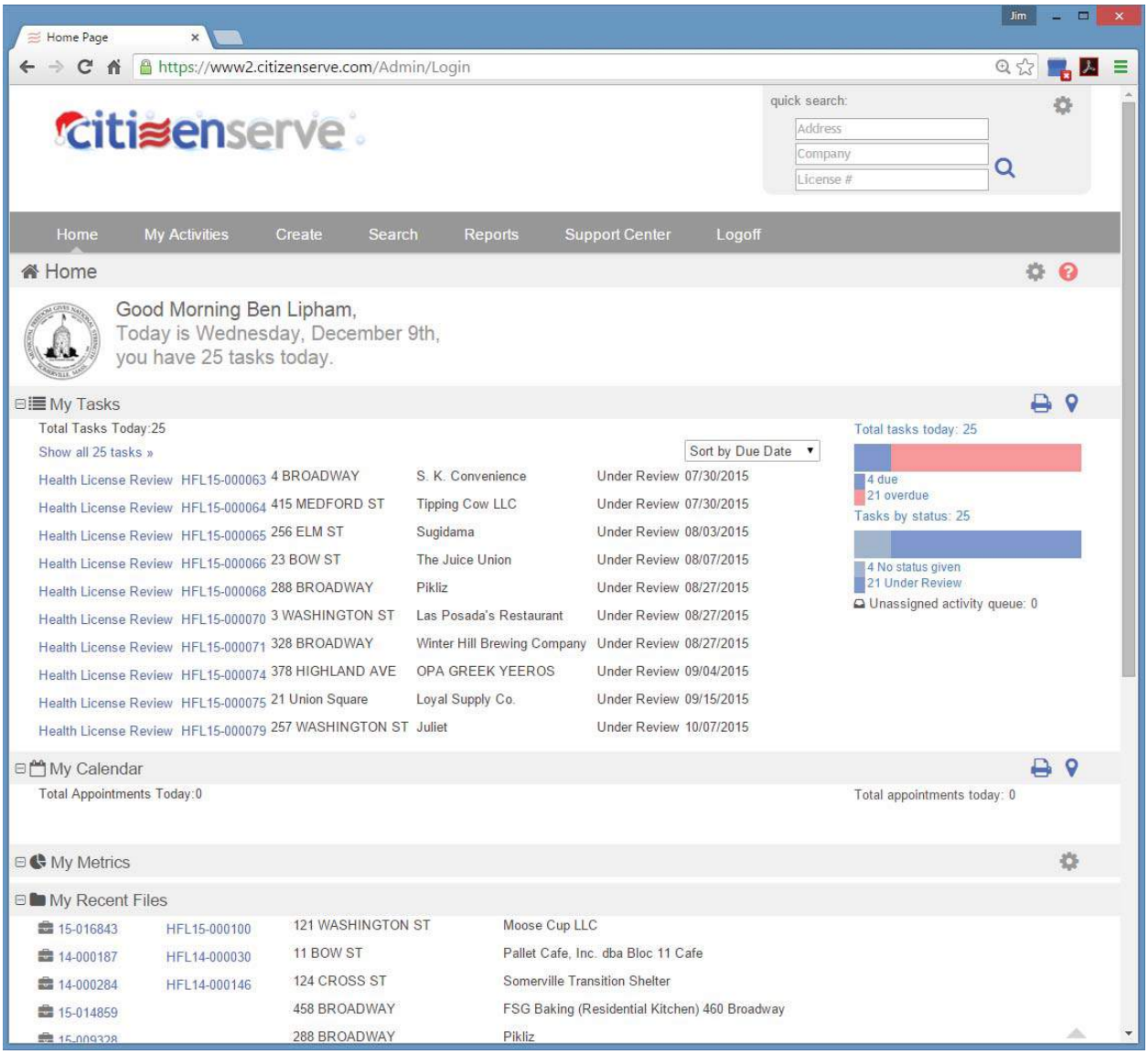
The acceptable document types can be determined at the custom field level.



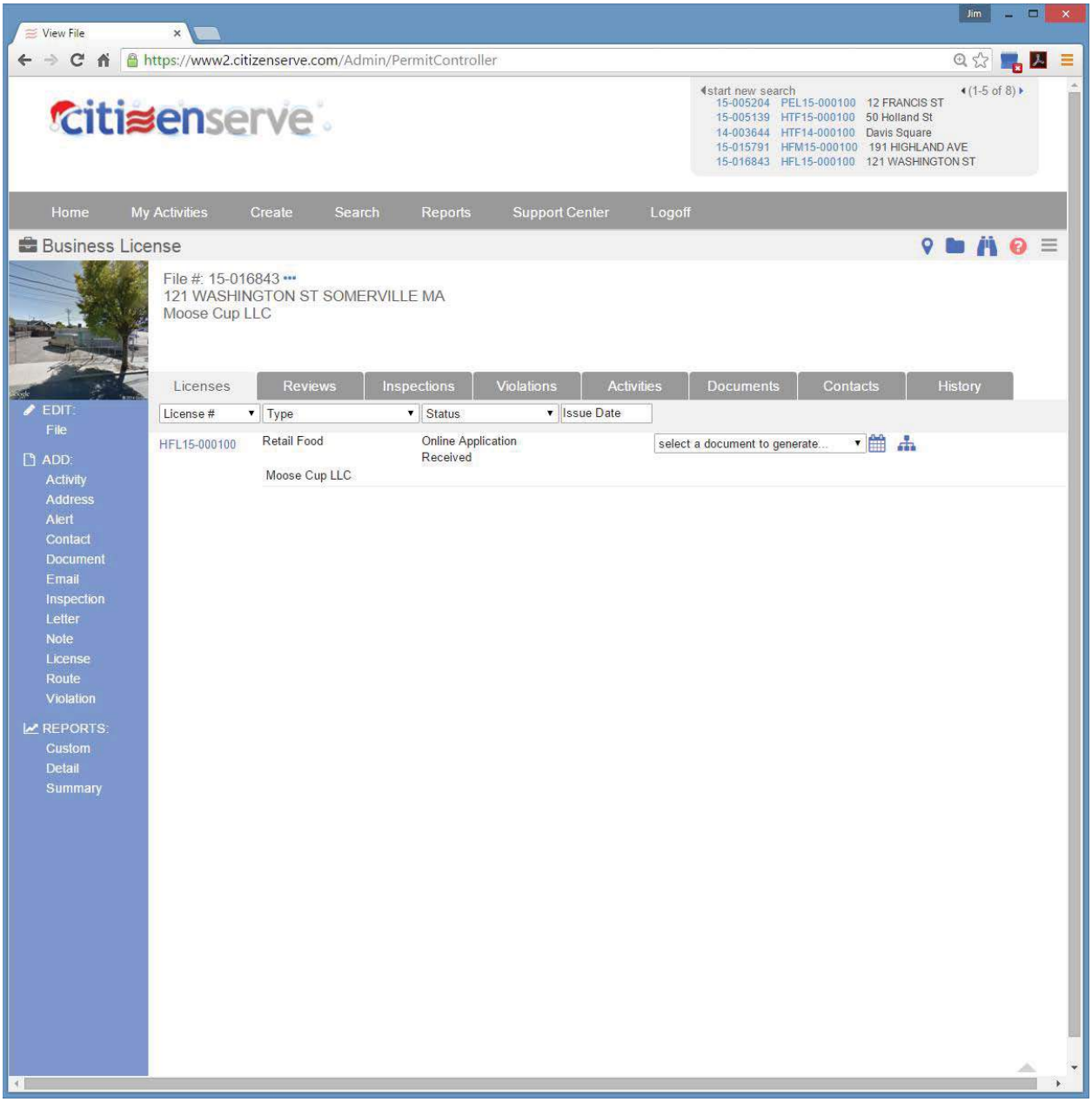
Any documents attached to an application are available in the documents tab. Documents can be viewed directly from the application or from the documents tab by clicking on the document.



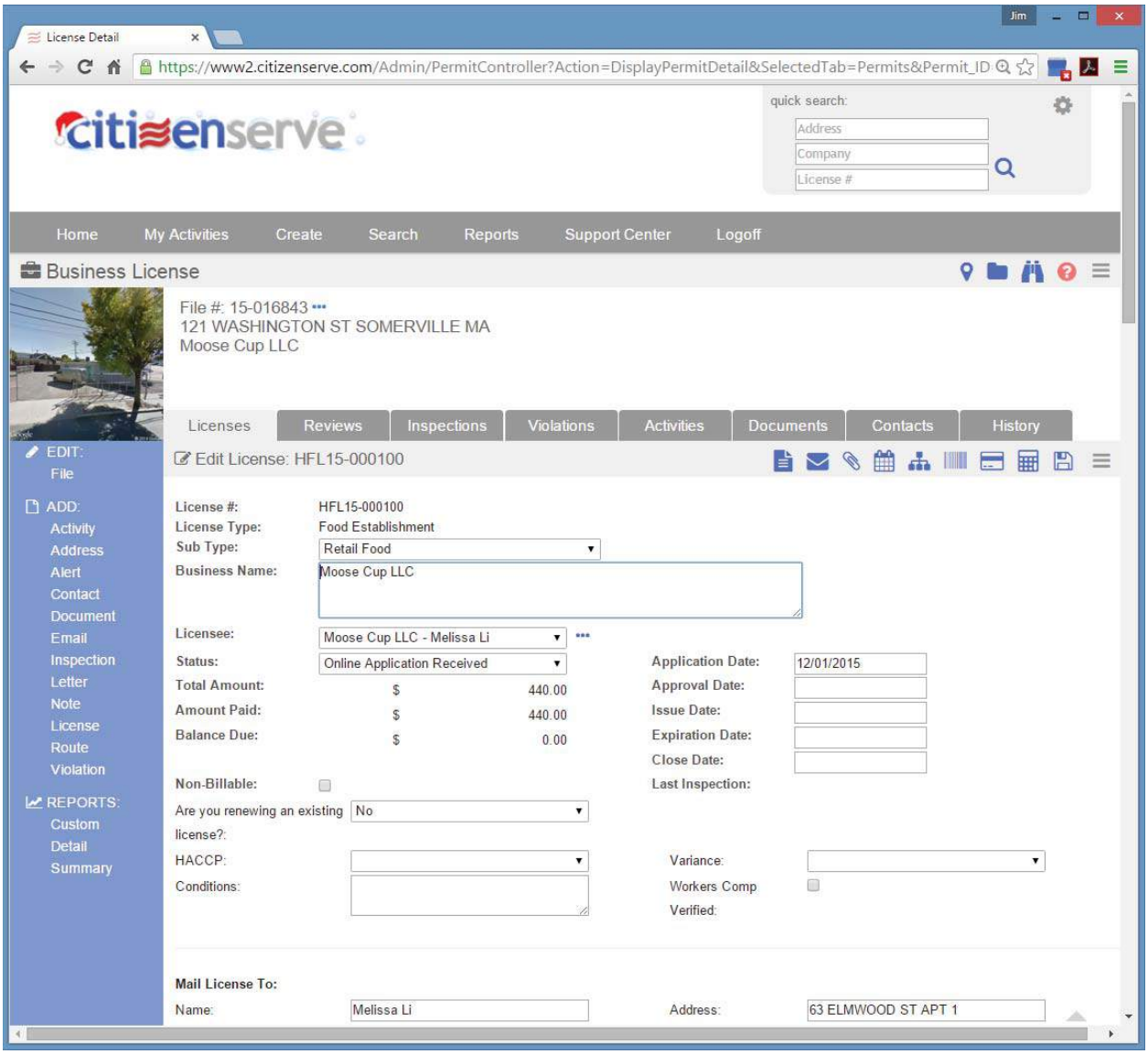
Each user has a customizable home page that helps with task management, inspection scheduling, recently accessed files, frequently run processes and reports and customizable quick search features. The user home page can be accessed at any time by clicking on the Citizenserve logo. General help can also be incorporated into all the screens as well as departmental specific help.



Multiple licenses can be setup in one file, for example a restaurant with an alcohol license.



The license application is completely customizable with a wide variety of field options. Each field can have a variety of behaviors, such as a required field or a field that doesn't show up in the citizen application on the portal.



Documentation requirements can be built right into the application. Field level help can also be defined in the field definition. All the custom application fields can be used in searching, fee calculations, templates and reporting.

License Detail

https://www2.citizenserve.com/Admin/PermitController?Action=DisplayPermitDetail&SelectedTab=Permits&Permit_ID

Mail License To:

Name:	Melissa Li	Address:	63 ELMWOOD ST APT 1
Address Line 2:		City:	SOMERVILLE
State:	Massachusetts	Zip:	02144

The following forms are required to submit a license application

Workers Compensation Insurance Affidavit - General click here for template:	Insurance Affidavit.pdf	Please upload information page of workers compensation policy:	Select File
I have applied for a Workers Compensation Policy and have not received the final documentation:	☐		

Business Information

Owned By:	Corporation	Other:	
Federal ID # (do not enter a Social Security #-if no FID #, enter 999999999):	[redacted]	If a corporation or partnership give name, title and home address of officers or partners:	Linda Li, Owner, 3563 88th St, Apt 2K Jackson Heights, NY 11372;
Days and Hours of Operation:	Ad hoc, most likely 2-4 hours on Friday evenings every other week	Number of Food Employees:	1
Location:	Permanent Structure		

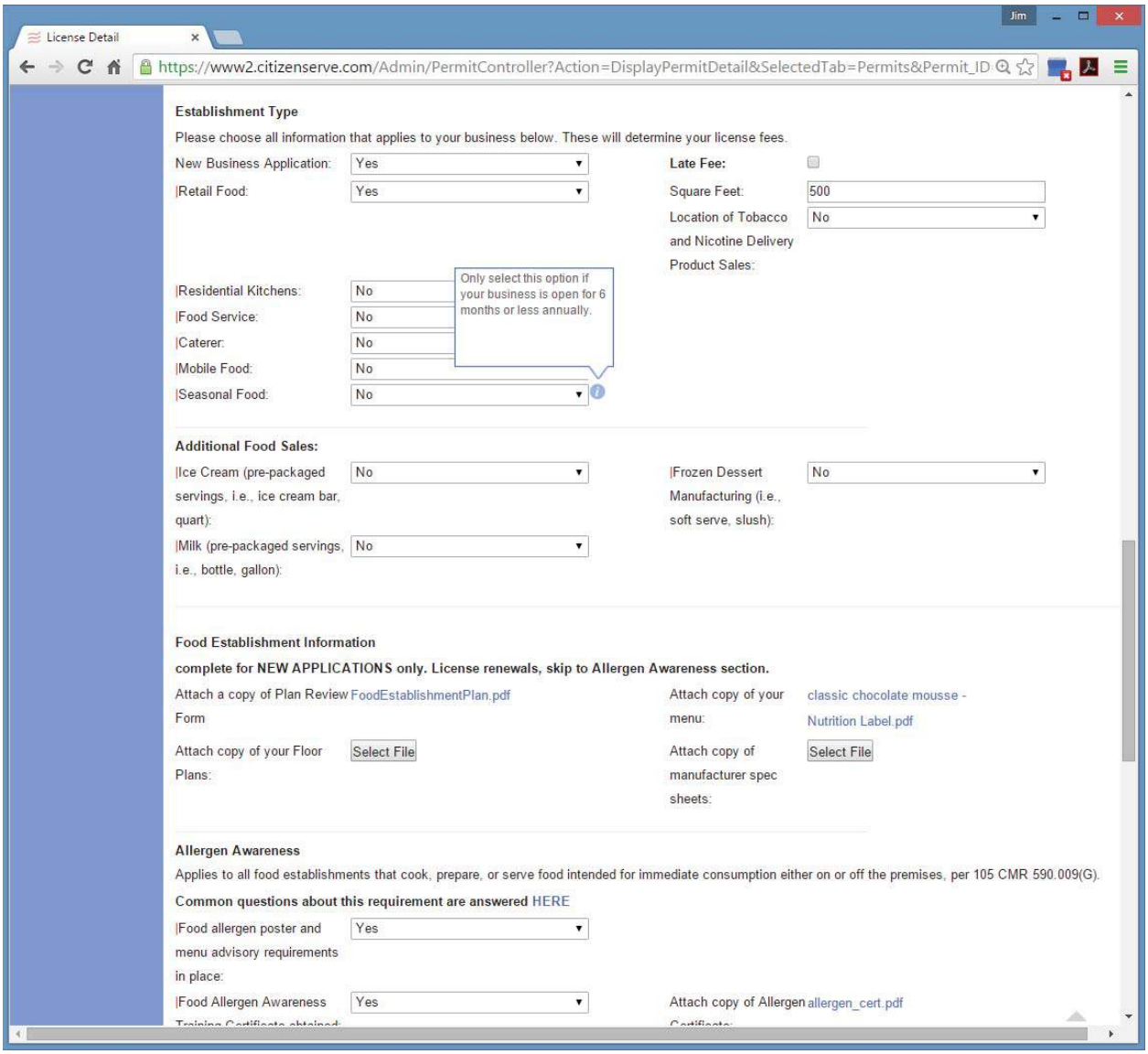
Person Responsible for Daily Operations

Name:	Melissa Li	Address:	63 Elmwood St APT 1
Address Line 2:		City:	Somerville
State:	Massachusetts	Zip:	02144
Emergency Contact Phone:	4253019385	Fax:	

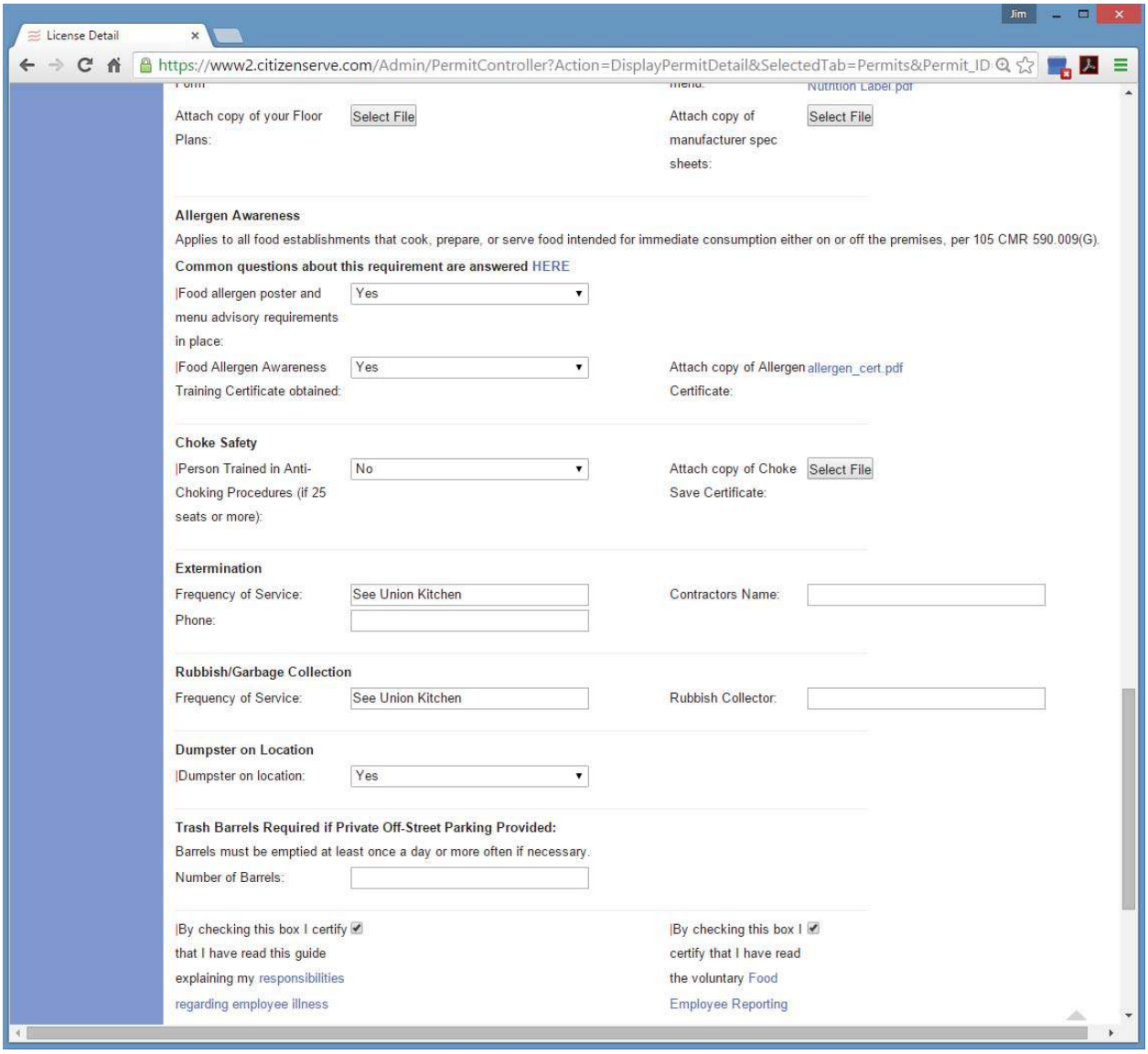
Person(s) in Charge that is Certified in Food Protection Management

Name:	Melissa Li	Certification Expiration:	11/09/2020
Name:		Certification Expiration:	
Attach copy of your FPM	servsafe_cert.pdf		

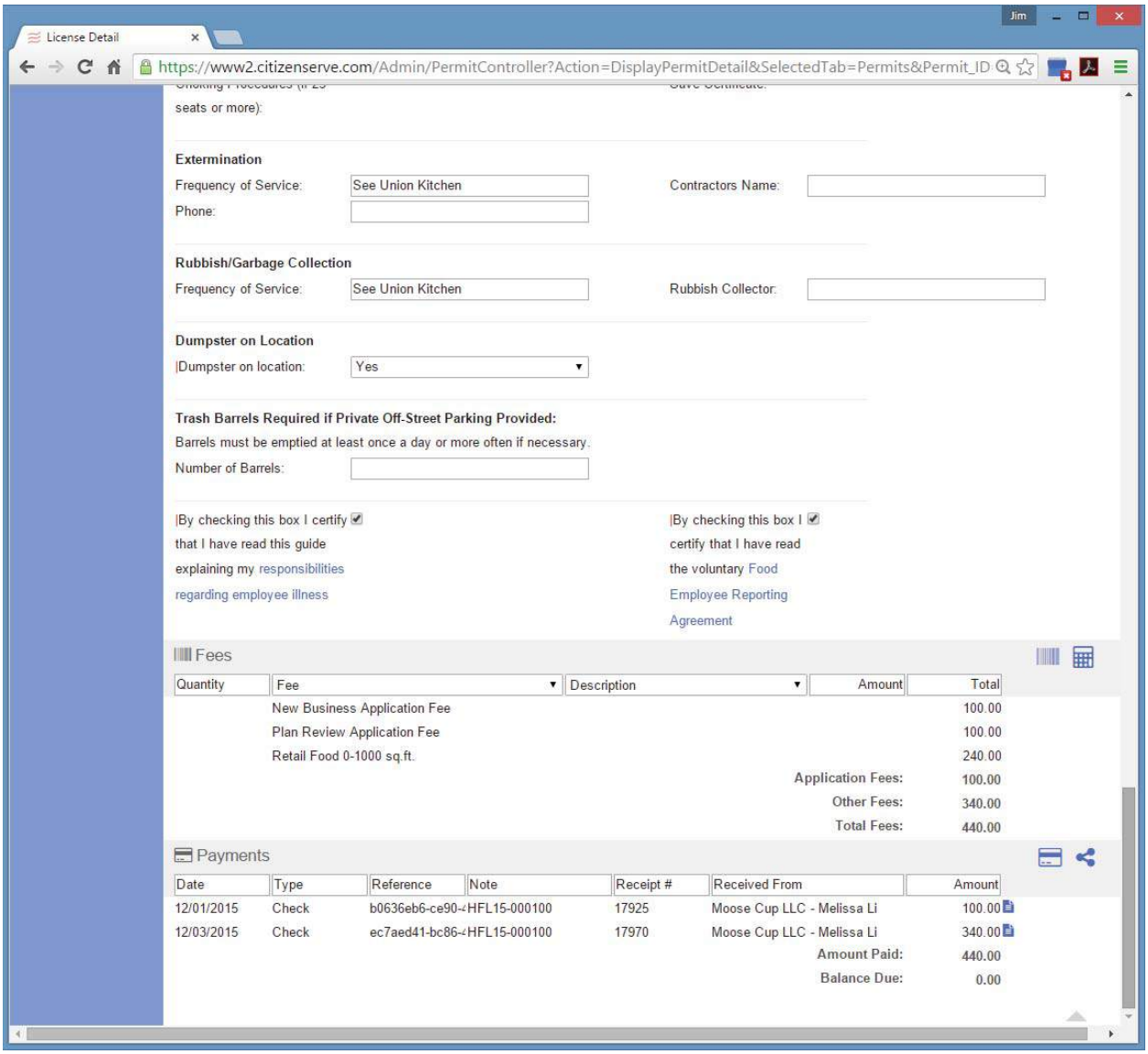
Custom application fields can also be dynamic. For example answering yes one question might expand the application to ask for more details. This keeps the standard application simple and more complex application questions can be dependent on prior answers.



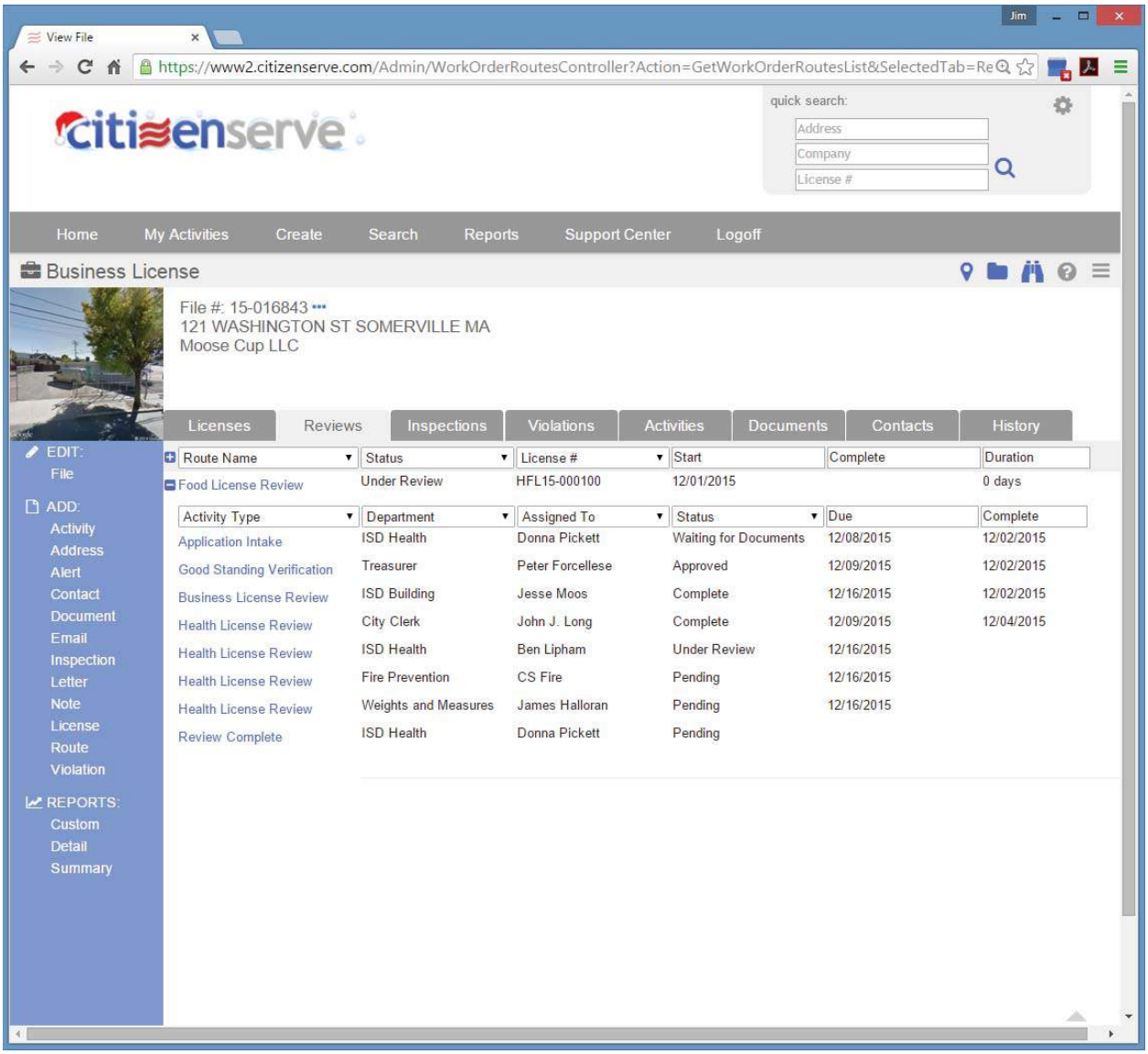
Text and HTML can be included anywhere in the application. Links to documents or other web sites are easily incorporated right in the application.



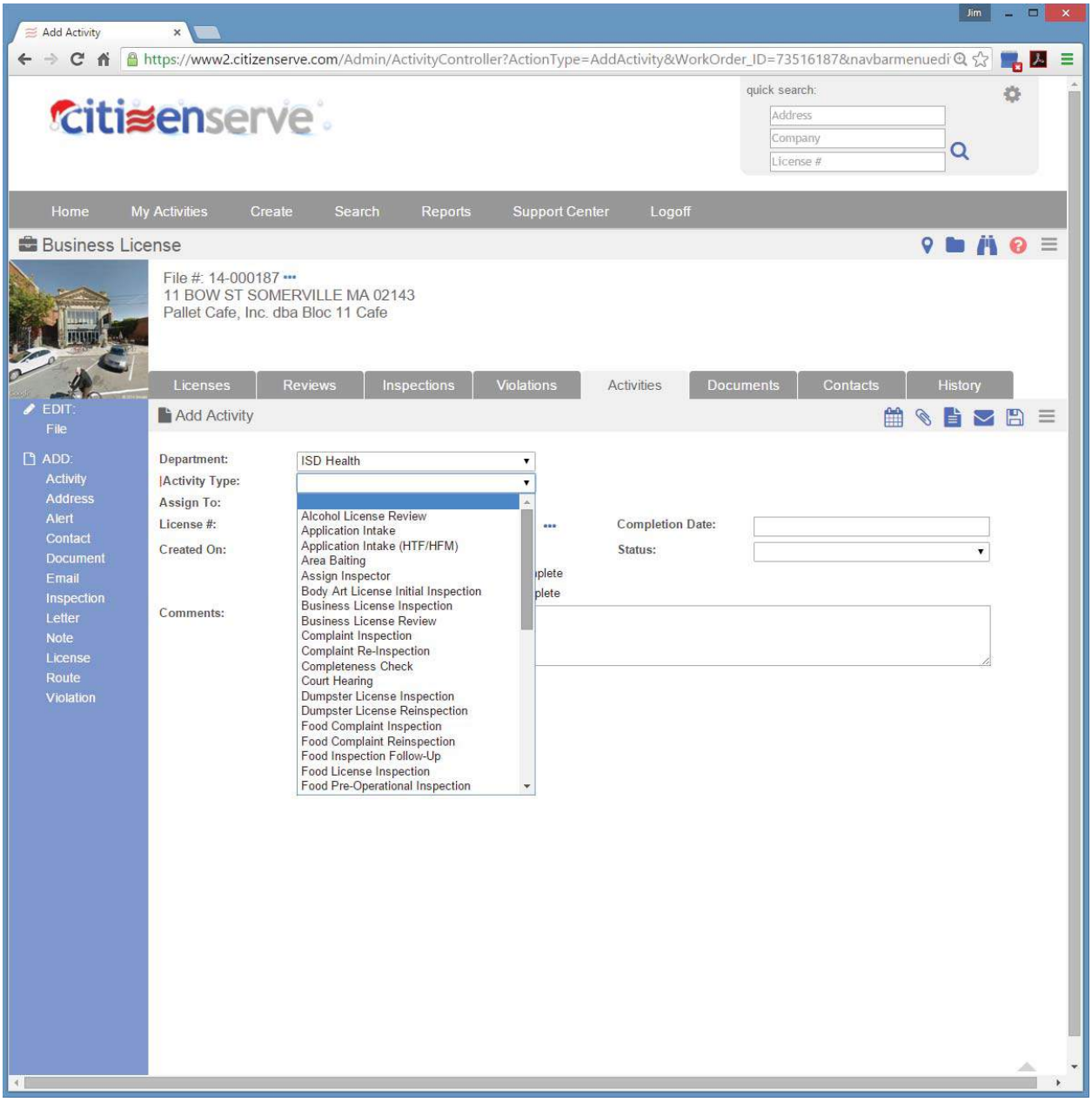
Fees and payments are tracked. Partial payments can also be allocated to specific accounts. For each fee type the general ledger code is specified so integration with financial systems and financial reports can be created. Multiple receipt documents can also be created as templates in the system.



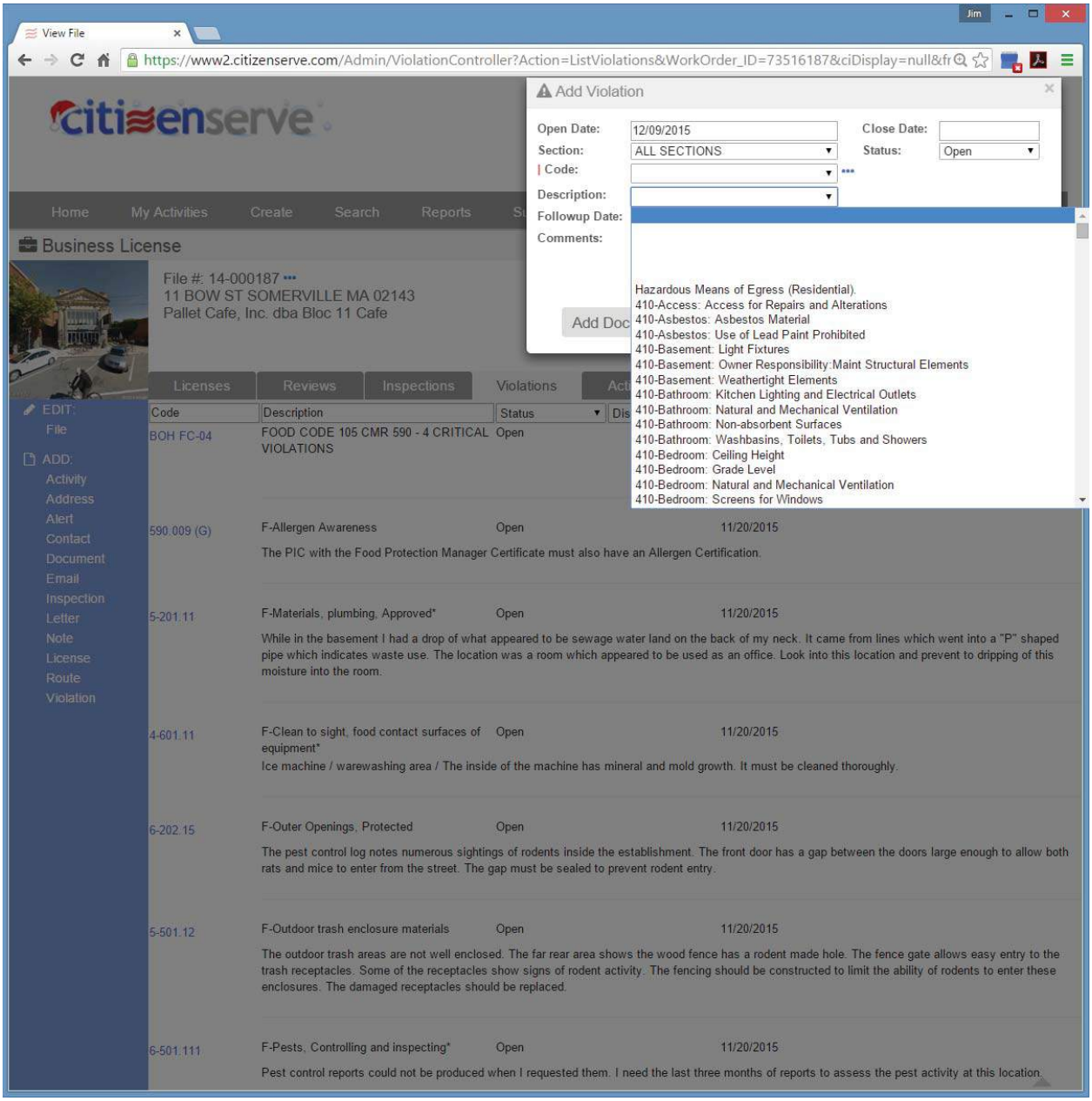
Each license or permit type can have multiple review routes. A review route contains the activities that need to be completed to approve the license or permit. Multiple review routes can be created; review routes can be automatic or manual. Resubmittals are also supported. Citizens and businesses can optionally see the status of the review and comments on the portal.



An unlimited number of activities can be setup in Citizenserve. Activities can be general activities, inspections or reviews.



Violations can be included in the permit or license features. Each violation can belong to a section with a specified code, short description and long description. When violations are added pictures can be associated with the specific violation, comments can be added as well as a follow up date specific to that violation. Violations can be tracked separately and an unlimited number of violations can be associated with a file.



An inspection report can be created to match existing forms, listing the type of inspection as well as any violations found. Inspections can be completed in the field, obtaining a signature from the "Person in Charge" or business principal on a tablet device in field. Inspection reports can be e-mailed and can be shown in the citizen portal.

View File | Letter View

file:///C:/Users/jim/Downloads/Inspection%20Report%20-%20Food%20(21).htm

CITY OF SOMERVILLE
FOOD ESTABLISHMENT INSPECTION REPORT

Address: 1 Franey Road Somerville, MA 02145
Tel. (617) 625-6600 Ext. 4331

Name: Pallet Cafe, Inc. dba Bloc 11 Cafe	Date 12/09/2015	*Type of Operation(s):*	*Type of Inspection:*
Address: 11 BOW ST	Risk Level:	☑ Food Service ☑ Retail ☐ Residential Kitchen ☐ Mobile ☐ Temporary ☐ Caterer ☐ Bed and Breakfast	☐ Routine ☑ Re-Inspection Previous Inspection Date: 11/20/2015 ☐ Pre-Operation ☐ Suspect Illness ☐ General Complaint ☐ HACCP ☐ Other
Telephone: 617-623-0000	HACCP:		
Owner: Tucker Lewis Tucker Lewis, Clerk	Time In: Out:		
Person-in-Charge (PIC): Megan Lethem			
Inspector: Ben Lipham		Permit No. HFL14-000030	

Each violation checked requires an explanation on the narrative page(s) and a citation of specific provision(s) violated.

Violations Related to Foodborne Illness Interventions and Risk Factors(Red Items)
Violations marked may pose an imminent health hazard and require immediate corrective action as determined by the Board of Health.

Anti-Choking	590.009 (E)	☐
Tobacco	590.009 (F)	☐
Allergen Awareness	590.009 (G)	1

FOOD PROTECTION MANAGEMENT
- ☐ 1. PIC Assigned/Knowledgeable/Duties

EMPLOYEE HEALTH
- ☐ 2. Reporting of Diseases by Food Employee and PIC
- ☐ 3. Personnel with Infections Restricted/Excluded

FOOD FROM APPROVED SOURCE
- ☐ 4. Food and Water from Approved Source
- ☐ 5. Receiving/Condition
- ☐ 6. Tags/Records/Accuracy of Ingredient Statements
- ☐ 7. Conformance with Approved Procedures/HACCP Plans

PROTECTION FROM CONTAMINATION
- ☐ 8. Separation/Segregation/Protection
- 1 9. Food Contact Surfaces Cleaning and Sanitizing
- ☐ 10. Proper Adequate Handwashing
- ☐ 11. Good Hygienic Practices
- ☐ 12. Prevention of Contamination from Hands
- ☐ 13. Handwash Facilities

PROTECTION FROM CHEMICALS
- ☐ 14. Approved Food or Color Additives
- ☐ 15. Toxic Chemicals

TIME/TEMPERATURE CONTROLS (Potentially Hazardous Foods)
- ☐ 16. Cooking Temperatures
- ☐ 17. Reheating
- ☐ 18. Cooling
- ☐ 19. Hot and Cold Holding
- ☐ 20. Time as a Public Health Control

REQUIREMENTS FOR HIGHLY-SUSCEPTIBLE-POPULATIONS (HSP)
- ☐ 21. Food and Food Preparation for HSP

CONSUMER ADVISORY
- ☐ 22. Posting of Consumer Advisories

Violations Related to Good Retail Practices (Blue Items) Critical (C) violations marked must be corrected immediately or within 10 days as determined by the Board of Health. Non-critical (N) violations must be corrected immediately or within 90 days as determined by the Board of Health.

C	N		
☐	☐	23. Management and Personnel	(FC-2)(590.003)
☐	☐	24. Food and Food Protection	(FC-3)(590.004)
☐	☐	25. Equipment and Utensils	(FC-4)(590.005)
1	1	26. Water, Plumbing and Waste	(FC-5)(590.006)
1	1	27. Physical Facility	(FC-6)(590.007)
☐	☐	28. Poisonous or Toxic Materials	(FC-7)(590.008)
☐	☐	29. Special Requirements	(590.009)
☐	☐	30. Other	

Number of Violated Provisions Related To Foodborne Illnesses Interventions and Risk Factors (Red Items 1-22): 1

Official Order for Correction: Based on an inspection today, the items checked indicate violations of 105 CMR 590.000/federal Food Code. This report, when signed below by a Board of Health member or its agent constitutes an order of the Board of Health. Failure to correct violations cited in this report may result in suspension or revocation of the food establishment permit and cessation of food establishment operations. If aggrieved by this order, you have a right to a hearing. Your request must be in writing and submitted to the Board of Health at the above address within 10 days of receipt of this order.
DATE OF RE-INSPECTION: 12/16/2015

Inspector Signature: Print: Ben Lipham

PIC's Signature: Print: Megan Lethem

FOOD ESTABLISHMENT INSPECTION REPORT - Violation Listing

Name: Pallet Cafe, Inc. dba Bloc 11 Cafe
Address: 11 BOW ST

Inspector: Ben Lipham
Date:12/09/2015

Violation Code	Description	Comments
590.009 (G)	Allergen Awareness	The PIC with the Food Protection Manager Certificate must also have an Allergen Certification
5-201.11	Materials, plumbing, Approved*	While in the basement I had a drop of what appeared to be sewage water land on the back of my neck. It came from lines which went into a "P" shaped pipe which indicates waste use. The location was a room which appeared to be used as an office. Look into this location and prevent to dripping of this moisture into the room

citizenserve

Violation listings are easily incorporated into documents. Violations can be managed separately in the file.

View File | Letter View

https://www2.citizenserve.com/Admin/ViolationController?Action=ListViolations&WorkOrder_ID=73516187&ciDisplay=null&fr

citizenserve

quick search: Address | Company | License #

Home | My Activities | Create | Search | Reports | Support Center | Logoff

Business License

File #: 14-000187
11 BOW ST SOMERVILLE MA 02143
Pallet Cafe, Inc. dba Bloc 11 Cafe

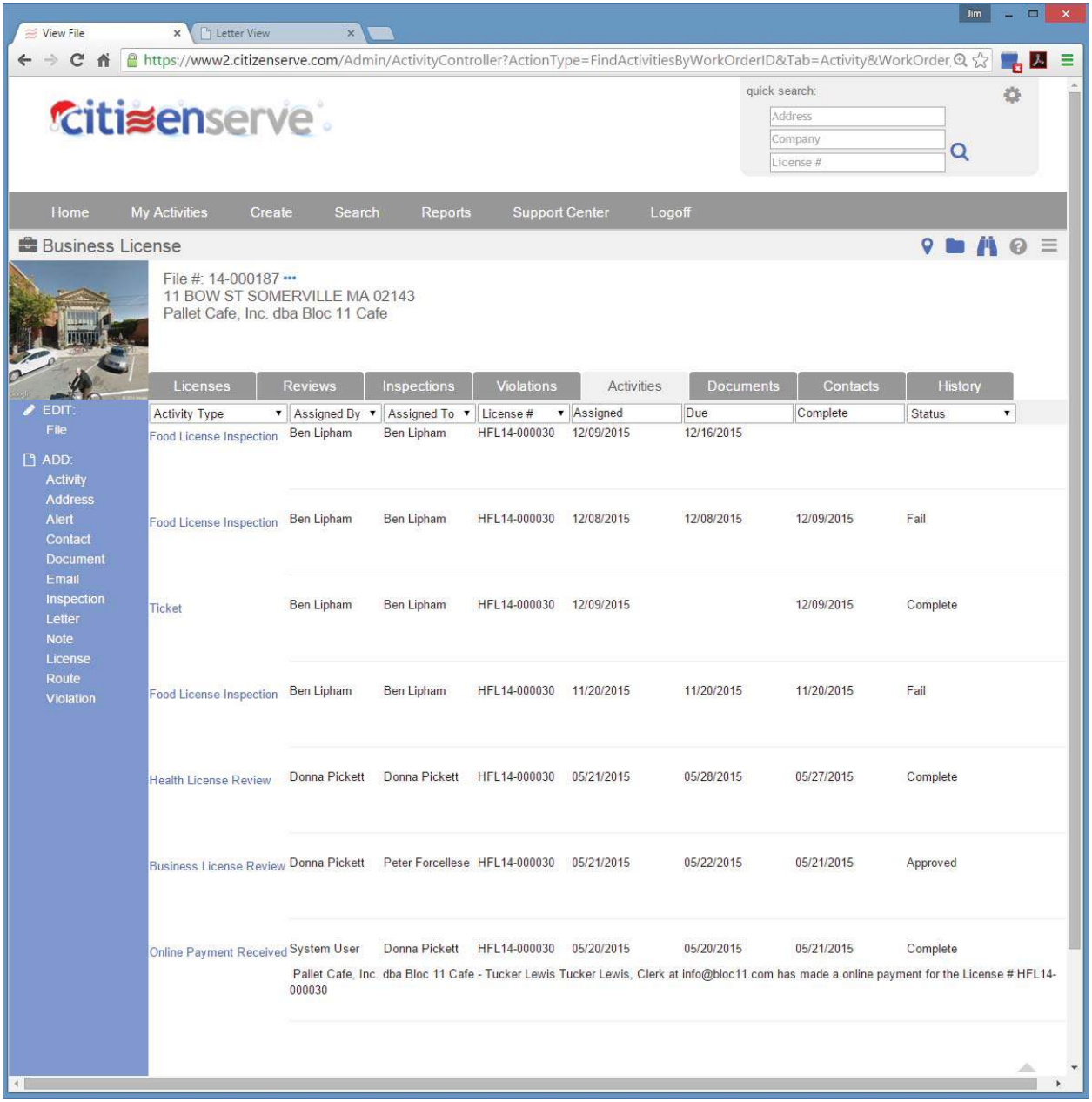
Licenses | Reviews | Inspections | Violations | Activities | Documents | Contacts | History

EDIT: File

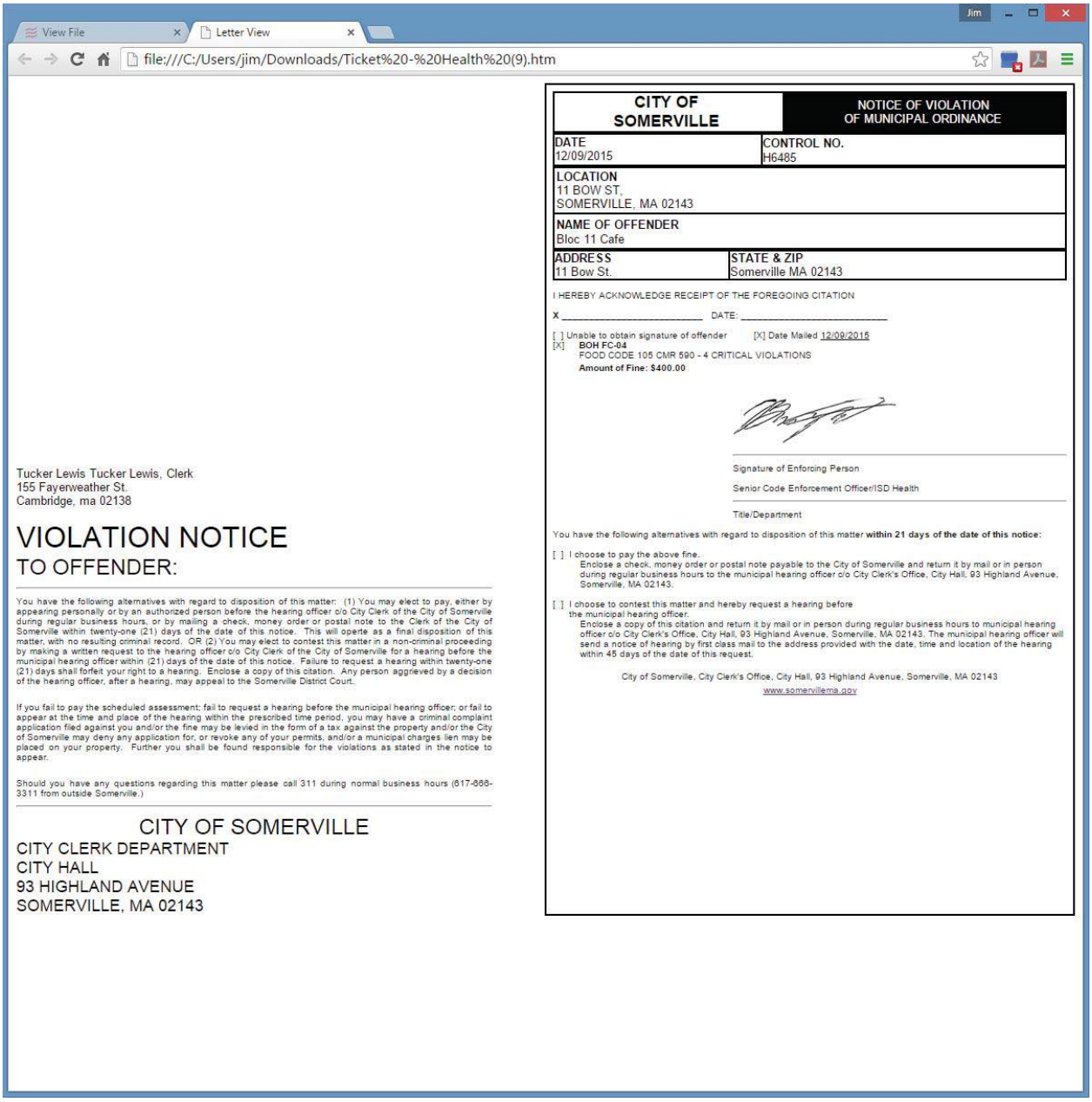
ADD: Activity, Address, Alert, Contact, Document, Email, Inspection, Letter, Note, License, Route, Violation

Code	Description	Status	Disposition	Opened	Closed	Followup Date
5-201.11	F-Materials, plumbing, Approved*	Open		11/20/2015		
	While in the basement I had a drop of what appeared to be sewage water land on the back of my neck. It came from lines which went into a "P" shaped pipe which indicates waste use. The location was a room which appeared to be used as an office. Look into this location and prevent to dripping of this moisture into the room.					
4-601.11	F-Clean to sight, food contact surfaces of equipment*	Open		11/20/2015		
	Ice machine / warewashing area / The inside of the machine has mineral and mold growth. It must be cleaned thoroughly.					
6-202.15	F-Outer Openings, Protected	Open		11/20/2015		
	The pest control log notes numerous sightings of rodents inside the establishment. The front door has a gap between the doors large enough to allow both rats and mice to enter from the street. The gap must be sealed to prevent rodent entry.					
5-501.12	F-Outdoor trash enclosure materials	Open		11/20/2015		
	The outdoor trash areas are not well enclosed. The far rear area shows the wood fence has a rodent made hole. The fence gate allows easy entry to the trash receptacles. Some of the receptacles show signs of rodent activity. The fencing should be constructed to limit the ability of rodents to enter these enclosures. The damaged receptacles should be replaced.					
6-501.111	F-Pests, Controlling and Inspecting*	Open		11/20/2015		
	Pest control reports could not be produced when I requested them. I need the last three months of reports to assess the pest activity at this location.					
590.009 (G)	F-Allergen Awareness	Open		11/20/2015		
	The PIC with the Food Protection Manager Certificate must also have an Allergen Certification.					
3-501.16	F-Hot and Cold Holding temperature requirements*	Closed		11/20/2015	12/08/2015	
	The prep refrigerator was found at 43-44 degrees. All PHF /TCS food must be held at 41 degrees or below. The food was tested during a down time (arou 11:00) which indicates that the unit probably has a higher temperature when very busy.					
2-101.11	F-assigned food safety responsibility*	Closed		11/20/2015	12/08/2015	
	There was no full time on-site food protection manager working at this location. Clark Seiler is a company wide manager. The code states that a certified					

An unlimited number of activity types can be setup. These are viewed under the activities tab.



Tickets or violation notices can be easily created and printed in the field. Any type of format can be used and it is easy to include data from the file in the templates.



View File | Letter View

file:///C:/Users/jim/Downloads/Ticket%20-%20Health%20(9).htm

Tucker Lewis Tucker Lewis, Clerk
155 Fayerweather St.
Cambridge, ma 02138

VIOLATION NOTICE

TO OFFENDER:

You have the following alternatives with regard to disposition of this matter: (1) You may elect to pay, either by appearing personally or by an authorized person before the hearing officer c/o City Clerk of the City of Somerville during regular business hours, or by mailing a check, money order or postal note to the Clerk of the City of Somerville within twenty-one (21) days of the date of this notice. This will operte as a final disposition of this matter, with no resulting criminal record. OR (2) You may elect to contest this matter in a non-criminal proceeding by making a written request to the hearing officer c/o City Clerk of the City of Somerville for a hearing before the municipal hearing officer within (21) days of the date of this notice. Failure to request a hearing within twenty-one (21) days shall forfeit your right to a hearing. Enclose a copy of this citation. Any person aggrieved by a decision of the hearing officer, after a hearing, may appeal to the Somerville District Court.

If you fail to pay the scheduled assessment; fail to request a hearing before the municipal hearing officer; or fail to appear at the time and place of the hearing within the prescribed time period, you may have a criminal complaint application filed against you and/or the fine may be levied in the form of a tax against the property and/or the City of Somerville may deny any application for, or revoke any of your permits, and/or a municipal charges lien may be placed on your property. Further you shall be found responsible for the violations as stated in the notice to appear.

Should you have any questions regarding this matter please call 311 during normal business hours (617-666-3311 from outside Somerville.)

CITY OF SOMERVILLE
CITY CLERK DEPARTMENT
CITY HALL
93 HIGHLAND AVENUE
SOMERVILLE, MA 02143

CITY OF SOMERVILLE	NOTICE OF VIOLATION OF MUNICIPAL ORDINANCE
DATE 12/09/2015	CONTROL NO. H6485
LOCATION 11 BOW ST, SOMERVILLE, MA 02143	
NAME OF OFFENDER Bloc 11 Cafe	
ADDRESS 11 Bow St.	STATE & ZIP Somerville MA 02143

I HEREBY ACKNOWLEDGE RECEIPT OF THE FOREGOING CITATION

X _____ DATE: _____

[ ] Unable to obtain signature of offender [X] Date Mailed 12/09/2015

[X] **BOH FC-04**
FOOD CODE 105 CMR 590 - 4 CRITICAL VIOLATIONS
Amount of Fine: $400.00

Signature of Enforcing Person

Senior Code Enforcement Officer/ISD Health

Title/Department

You have the following alternatives with regard to disposition of this matter **within 21 days of the date of this notice:**

[ ] I choose to pay the above fine.
Enclose a check, money order or postal note payable to the City of Somerville and return it by mail or in person during regular business hours to the municipal hearing officer c/o City Clerk's Office, City Hall, 93 Highland Avenue, Somerville, MA 02143.

[ ] I choose to contest this matter and hereby request a hearing before the municipal hearing officer.
Enclose a copy of this citation and return it by mail or in person during regular business hours to municipal hearing officer c/o City Clerk's Office, City Hall, 93 Highland Avenue, Somerville, MA 02143. The municipal hearing officer will send a notice of hearing by first class mail to the address provided with the date, time and location of the hearing within 45 days of the date of this request.

City of Somerville, City Clerk's Office, City Hall, 93 Highland Avenue, Somerville, MA 02143
www.somervillema.gov

citizenserve

Detailed information on the property can be pulled into the file from the property look up table.

View File

https://www2.citizenserve.com/Admin/WorkOrderNotes?Action=ListNotes&WorkOrder_ID=73516187&ciDisplay=null

Business License

File #: 14-000187
11 BOW ST SOMERVILLE MA 02143
Pallet Cafe, Inc. dba Bloc 11 Cafe

Licenses | Reviews | Inspections | Violations | Activities | Documents | Contacts | History

EDIT:
File

ADD:
Activity
Address
Alert
Contact
Document
Email
Inspection
Letter
Note
License
Route
Violation

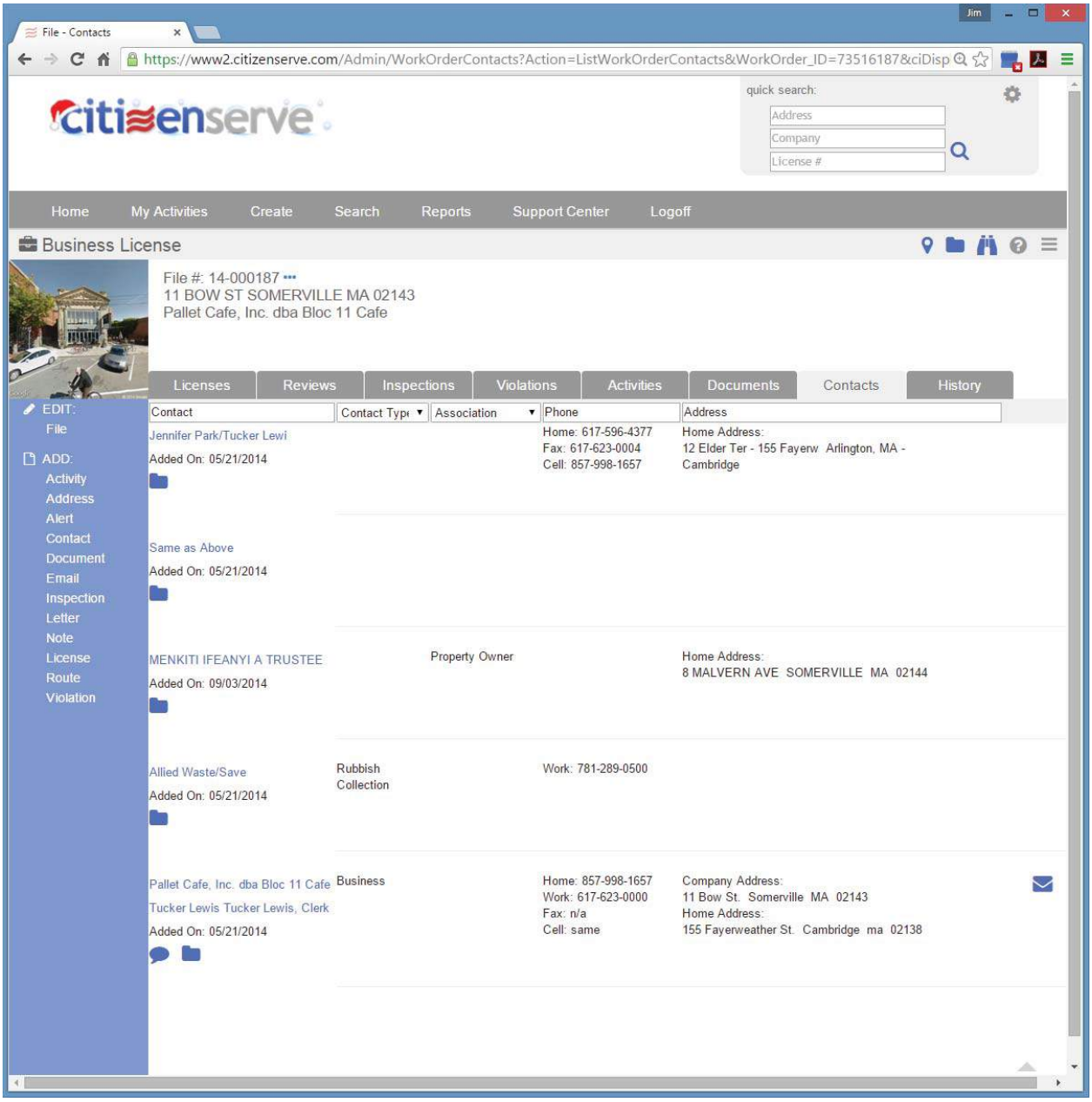
View File History: 14-000187

Type:	Health License	Status:	Open
Parcel #:	073-C-00011-000000	Open Date:	07/01/2014
Owner Name:	MENKITI IFEANYI A TRUSTEE	Closed Date:	
Owner Address:	8 MALVERN AVE SOMERVILLE MA 02144	Dispostion:	
		Responsible User:	Donna Pickett
Owner Phone:		How Received:	
		District:	
Legal Description:			
Approximate Location:			

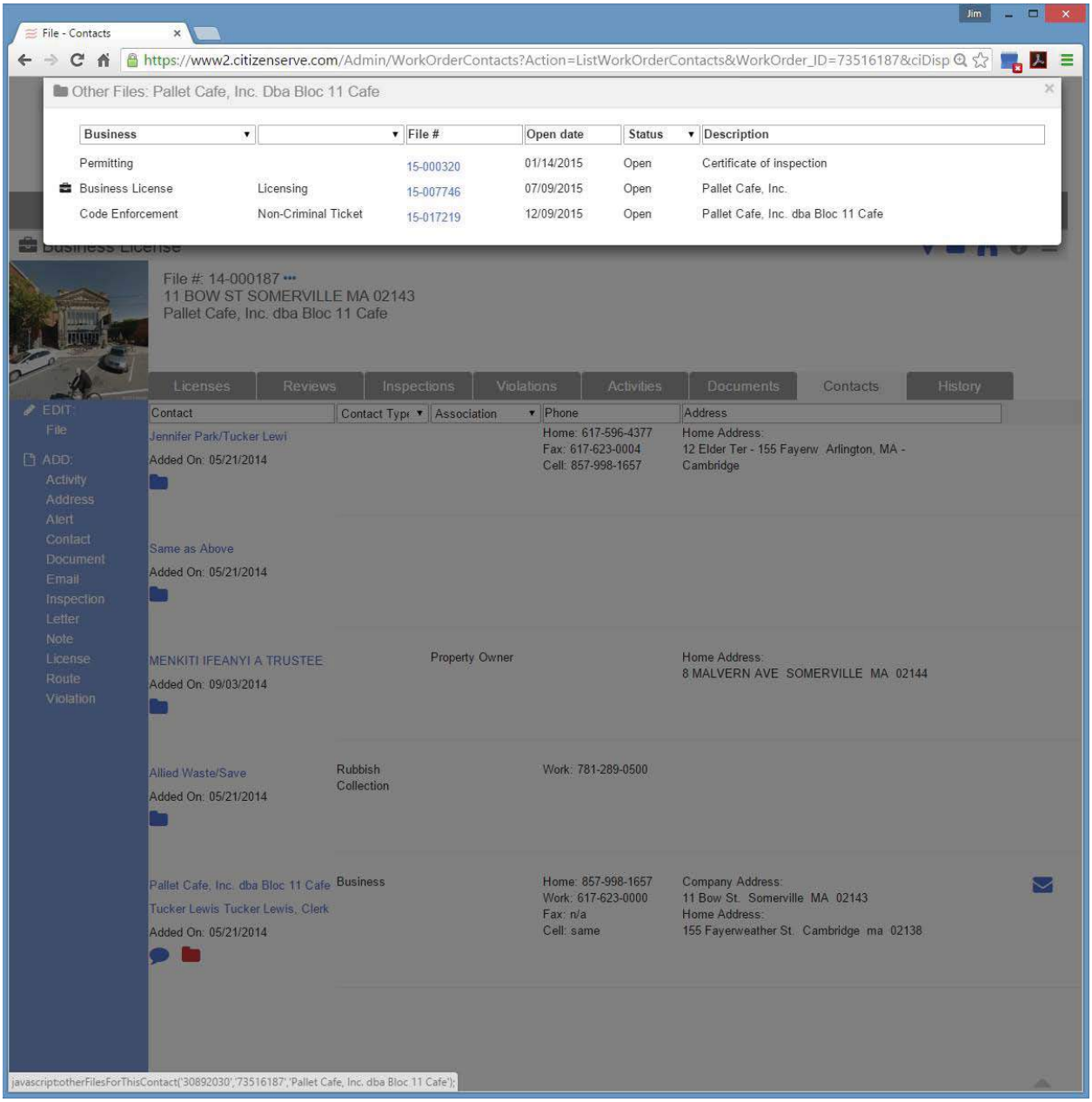
Property Information			
Status:	ACTIVE		
Parent Parcel Number:		Child Parcel Numbers:	
Map:	73	Block:	C
Lot:	11	T Code:	274
Book Page:	46668/ 409	Cert #:	
PCC Code:	3260	PCC Description:	REST/CLUBS
Precinct:	1	Ward:	3
Lot Information			
Zone Code:	NB	Zone Description:	NEIGHBORHOOD BUSINESS
Acres:	0.142332	Grade Descriptionon:	Average
Rental:	No	Corner Lot:	No
Vacant Lot:	No	Government Owned:	No
Local Historical:	No	National Historical:	No
Public Sewer:	Yes	Public Water:	Yes
Structure Information			
Building #:	1	Square Feet:	6200
Living Area:	7486	Gross Area:	11325
Occupancy:	32	Stories:	2.00
Rooms:		Bedrooms:	
Baths:		Kitchen Description:	
Bath Description:		Wall Type 1:	MASONRY
Wall Type 2:	Brick/Masonry	Heating type:	Forced Air-Duc
AC Type:	None	Fuel Type:	Gas
Year:	1920	Style Description:	
Miscellaneous information			
Commitment Owner:	MENKITI IFEANYI A TRUSTEE	Account:	19634100
Sale Price:	1300000	Sale Date:	12/15/2005
Sale Valid:	U	Boarder Flag:	N
Land Value:	472600	Improvement Value:	716200
NHBD:	8003	Site Index:	H

citizenserve

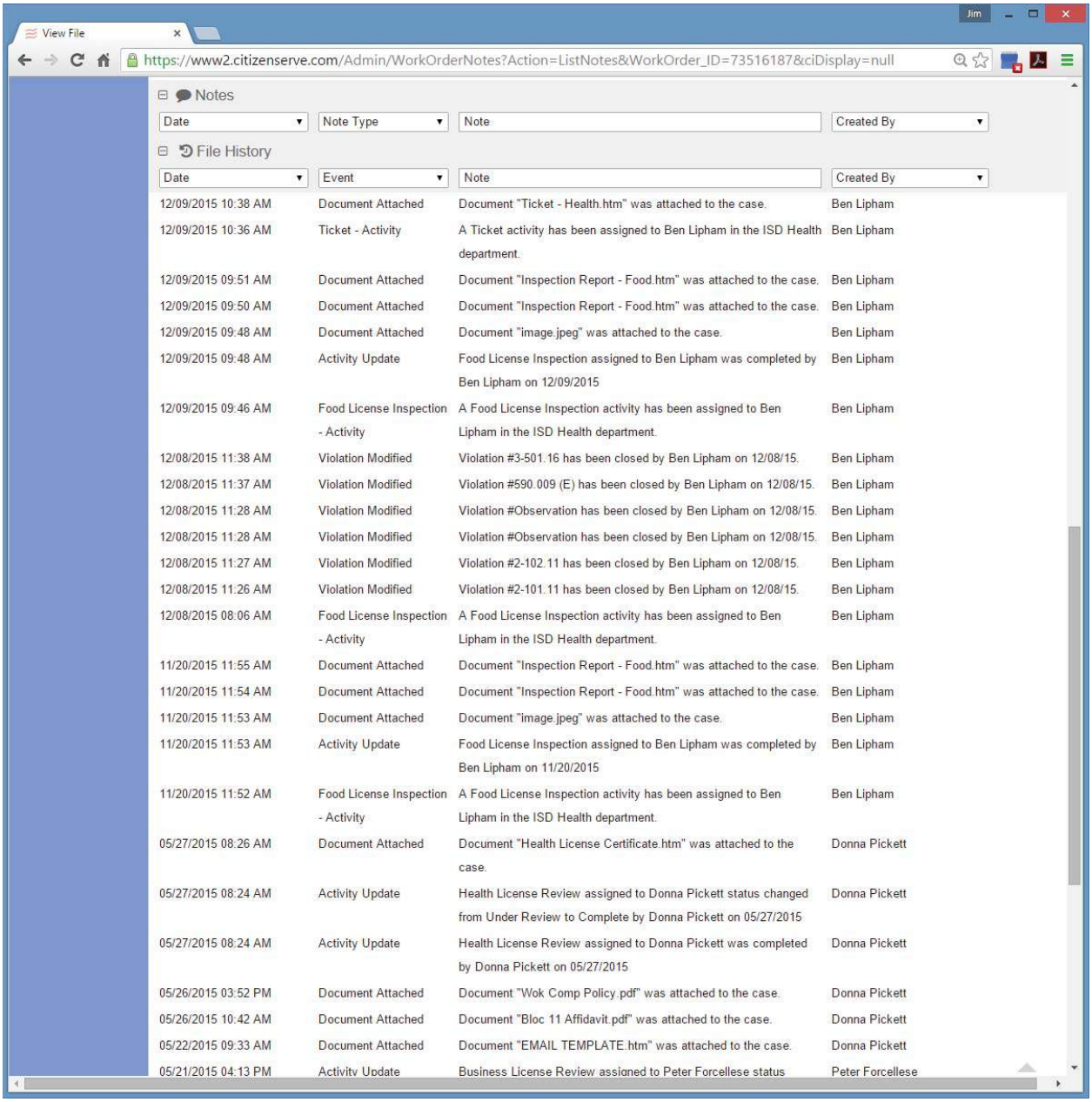
An unlimited number of contacts can be associated with a file. E-mails can be sent directly form the contacts tab. Templates are easily created for common e-mails.



It is easy to quickly see other files the citizens or businesses are involved in.



A complete history of the file with all important events in maintained.



View File

https://www2.citizenserve.com/Admin/WorkOrderNotes?Action=ListNotes&WorkOrder_ID=73516187&ciDisplay=null

Notes

Date	Note Type	Note	Created By

File History

Date	Event	Note	Created By
12/09/2015 10:38 AM	Document Attached	Document "Ticket - Health.htm" was attached to the case.	Ben Lipham
12/09/2015 10:36 AM	Ticket - Activity	A Ticket activity has been assigned to Ben Lipham in the ISD Health department.	Ben Lipham
12/09/2015 09:51 AM	Document Attached	Document "Inspection Report - Food.htm" was attached to the case.	Ben Lipham
12/09/2015 09:50 AM	Document Attached	Document "Inspection Report - Food.htm" was attached to the case.	Ben Lipham
12/09/2015 09:48 AM	Document Attached	Document "image.jpeg" was attached to the case.	Ben Lipham
12/09/2015 09:48 AM	Activity Update	Food License Inspection assigned to Ben Lipham was completed by Ben Lipham on 12/09/2015	Ben Lipham
12/09/2015 09:46 AM	Food License Inspection - Activity	A Food License Inspection activity has been assigned to Ben Lipham in the ISD Health department.	Ben Lipham
12/08/2015 11:38 AM	Violation Modified	Violation #3-501.16 has been closed by Ben Lipham on 12/08/15.	Ben Lipham
12/08/2015 11:37 AM	Violation Modified	Violation #590.009 (E) has been closed by Ben Lipham on 12/08/15.	Ben Lipham
12/08/2015 11:28 AM	Violation Modified	Violation #Observation has been closed by Ben Lipham on 12/08/15.	Ben Lipham
12/08/2015 11:28 AM	Violation Modified	Violation #Observation has been closed by Ben Lipham on 12/08/15.	Ben Lipham
12/08/2015 11:27 AM	Violation Modified	Violation #2-102.11 has been closed by Ben Lipham on 12/08/15.	Ben Lipham
12/08/2015 11:26 AM	Violation Modified	Violation #2-101.11 has been closed by Ben Lipham on 12/08/15.	Ben Lipham
12/08/2015 08:06 AM	Food License Inspection - Activity	A Food License Inspection activity has been assigned to Ben Lipham in the ISD Health department.	Ben Lipham
11/20/2015 11:55 AM	Document Attached	Document "Inspection Report - Food.htm" was attached to the case.	Ben Lipham
11/20/2015 11:54 AM	Document Attached	Document "Inspection Report - Food.htm" was attached to the case.	Ben Lipham
11/20/2015 11:53 AM	Document Attached	Document "image.jpeg" was attached to the case.	Ben Lipham
11/20/2015 11:53 AM	Activity Update	Food License Inspection assigned to Ben Lipham was completed by Ben Lipham on 11/20/2015	Ben Lipham
11/20/2015 11:52 AM	Food License Inspection - Activity	A Food License Inspection activity has been assigned to Ben Lipham in the ISD Health department.	Ben Lipham
05/27/2015 08:26 AM	Document Attached	Document "Health License Certificate.htm" was attached to the case.	Donna Pickett
05/27/2015 08:24 AM	Activity Update	Health License Review assigned to Donna Pickett status changed from Under Review to Complete by Donna Pickett on 05/27/2015	Donna Pickett
05/27/2015 08:24 AM	Activity Update	Health License Review assigned to Donna Pickett was completed by Donna Pickett on 05/27/2015	Donna Pickett
05/26/2015 03:52 PM	Document Attached	Document "Wok Comp Policy.pdf" was attached to the case.	Donna Pickett
05/26/2015 10:42 AM	Document Attached	Document "Bloc 11 Affidavit.pdf" was attached to the case.	Donna Pickett
05/22/2015 09:33 AM	Document Attached	Document "EMAIL TEMPLATE.htm" was attached to the case.	Donna Pickett
05/21/2015 04:13 PM	Activity Update	Business License Review assigned to Peter Forcellese status	Peter Forcellese

DATA CONVERSION

Our team developed custom systems in the 1990s for state and local government completing many major projects in community development, case management and financial systems. For the past 12 years we have worked exclusively in community development and have extensive experience working with community development data such as permitting and licensing data. We have extensive experience with legacy systems and the architecture of systems development and databases extending back to the late 1980s. In our business we are frequently tasked with migrating data from twenty year old systems and getting it done efficiently and quickly. Our approach is to first complete the setup of your permit and license applications and fees in Citizenserve. Then we map the data from legacy systems to the Citizenserve setup. Once this is complete we write a migration script and run a test migration. We do walkthroughs with key users to make sure files are getting setup properly. We have a test migration environment where we can do this or we run the migration into production. All migrated records are marked so we can easily delete the migration and rerun it. With Citizenserve we can do the migration before going live, we can also do the migration after the system is live. Some of our customers opt to start using Citizenserve for new records and close out files in their older systems. Depending on the implementation plan, we can also run the migration by department or function if the departments are going live separately.

We prefer to get the raw source data from the system that is being migrated. There is no requirement for the City to provide data transformation for file manipulation.

SYSTEM/DATA INTEGRATION

The Citizenserve user subscription includes maintaining property information and importing static GIS layers. Web service integration can be used to dynamically pull property and layer information directly from the City's GIS server. Dynamic HTTP links are also supported to open GIS systems or other systems available via an HTTP call with parameters such as a parcel number to pull up a GIS system going right to the information needed.

Citizenserve has a multi-tier architecture. The client tier is HTML and JavaScript. The web tier is java server pages (jsp) and servlets. The business tier is enterprise java beans (EJB). The database tier is stored procedures, triggers, tables and views. We use web services for integration with client systems or can use nightly batch processing with an import or export. Since there is a large variation in integration requirements we develop custom integration points for a fixed one-time fee of $5,000. Web services integration is used to have real-time information from an ESRI GIS server available.

APPLICATION TRAINING & SUPPORT

We use web conferencing, GoToMeeting, for all training and support. Initial training is usually two or three 90 minute sessions in small groups of three to five users. We can transfer screen control to the users so they get experience using the system during the training. Because we offer unlimited support which includes ongoing training the pressure to learn everything you will ever need to know in a one-time classroom training doesn't exist. Ongoing training included in support can be end user training or technical training.

Within the system the permit or license application instructions are usually where staff or the public might need help. Links can be embedded in the applications to help documents. There is also context sensitive help that can be place on each field in the application.

If we find documentation is necessary at any point in time our support staff can assemble written instructions or a training video for an additional cost to be determined based on the documentation needs.

The Citizenserve subscription includes unlimited support. This support includes unlimited end user and technical training. We use web conferencing for training. Any of the web conferences can be recorded and edited for later viewing. In most cases embedded help and training is necessary to explain the specific permit or license process rather than how to use an internet browser-based software application.

The configuration of Citizenserve is mostly performed using HTML and SQL scripting. These skills are helpful for any technical users configuring the system. The user subscription includes unlimited support which includes unlimited technical training. Administrative support is included in the subscription. So we can either provide support to administrators or provide direct administrative support as required or desired.

We have a support line that users can call anytime. This includes end user support and technical support. The software has a built-in support center and we encourage users to use this for submitting requests. Support requests can be marked as standard or urgent. Standard requests are resolved in four hours, urgent requests within an hour. We realize that sometimes support is needed when a customer is waiting at the permit counter, so urgent requests get jumped on by the support team. Our historical average response time on urgent requests is 15 minutes. We adjust our support staffing based on whether we are resolving support requests in a timely fashion.

Support requests can range from help dealing with a complex permit issue, creating a custom report, requesting additional training, setting up new permit or license applications, setting up new fee schedules, creating or modifying letters or other system outputs, changing workflows, changing or creating inspection forms, setting up a new process such as a batch letter, etc. We also frequently help users with browser configuration issues and sometimes desktop or device support. If we need to see what the user is seeing or show them something we initiate a GoToMeeting conference. Using web

conferencing for training and support allows us to provide higher quality resources in a more timely fashion while providing consistency in the people your staff will be working with.

Software updates are rolled out twice monthly. If the update addresses an issue that was part of a support request, like adding a new feature, the user receives an e-mail noting resolution. All other users receive a notification on their home page about the recent changes.

COMPANY INFORMATION

Company Name:	Online Solutions, LLC (DBA Citizenserve)
Address:	1101 E Warner Rd, Suite 160 Tempe, AZ 85284
Telephone Number:	800-325-9818 x703
Fax Number:	800-325-9818
E-mail Address:	jim@citizenserve.com
Point of Contact:	Jim Garvey
Binding Authority:	Jim Garvey

Citizenserve was introduced into the market in 2003, in response to the need for a low-cost, high efficiency community development solution for government agencies. Prior to the Citizenserve launch, our team worked with government agencies across the country for over a decade to design, implement and maintain custom software applications. Through these experiences, we gained first-hand, in-depth knowledge of community development needs. We discovered that many agencies had similar problems. Without a readily available solution to address these needs, many agencies were forced to spend hundreds of thousands of dollars developing and implementing software applications or rely on manual processes to track and manage community development activities. We applied the experience and knowledge gained from working with these agencies to create Citizenserve.

As demonstrated with clients like the City of Sacramento, we excel in helping our clients migrate off of older more expensive, less efficient applications. Citizenserve provided a low risk opportunity for the City of Sacramento to get online quickly with minimal time and budgetary investments. Sacramento engaged Citizenserve to help them migrate from their legacy code enforcement application, Permits Plus from Accela Systems, to a web based, fully mobile solution to support the needs of the Code Enforcement and Dangerous Buildings Department. The Citizenserve team worked with the City of Sacramento to understand their objectives, to configure the Citizenserve application, to convert their data, and to integrate with Permits Plus and their GIS. Citizenserve has turned out to be an ideal solution for the City of Sacramento and they have realized significant returns in the form of case load efficiency and increased customer satisfaction. Contact information for the City of Sacramento: Judy Tapia, jtapia@cityofsacramento.org , 916-808-8670.

Citizenserve has very diverse experience in the Community Development arena and we have in depth experience with many legacy technologies. For example, when the State of Florida Fire Marshal needed to migrate off of four retiring legacy systems that included a Focus 4GL mainframe application and a PowerBuilder/Oracle based application we were able to setup Citizenserve to improve the processes in four functional areas and migrate all their legacy data. Details of this contract and project can be reviewed at the following link:

https://facts.fldfs.com/Search/ContractDetail.aspx?AgencyId=430000&ContractId=D0147&Tab=0

Contact information for the State of Florida: Mike Burns, mike.burns@myfloridacfo.com , 850-413-3614.

Project Management is a critical component of all implementations performed by Citizenserve. Our projects are successful because of our attention to detail and execution of all areas related to the project. With all of our projects you will see a consistent methodology including the following elements, initial planning, creation of a project work plan, institution of project management procedures, management of scope and management of risks. We use web conferencing during implementation, training and for support. This allows us to provide significantly more qualified resources on projects and to provide for resource continuity that would be impossible otherwise. In other words, the people working on your implementation and training will be the people you work with for support. This is critical in complex permitting, licensing and inspection processes.

Citizenserve is a private company and is debt and investor free. The company has been profitable for the last 8 years and has never had a litigation or dispute. We keep things simple so we can focus on our customers.

The following Citizenserve staff will be assigned to the project:

Daniel Burt – Citizenserve Engagement Manager

Dan has a degree from Arizona State University in Public Policy. Dan has recently led implementations with St. Charles County Missouri, Hot Springs Village Arkansas and Prattville Alabama. Dan will be responsible for implementation and will also be the lead on training and support.

Syama Pisapati – Citizenserve Engineer

Mr. Pisapati is a software architect with 15 years of experience architecting, developing and implementing software solutions for online retailers and municipalities. Mr. Pisapati has a Master of Science in Information Systems from Arizona State University.

Ray Barker – Project Manager

Ray Barker is an experienced IT executive and has acted as the central resource for sales, marketing, product development, and product support in the education and government industry. Ray certified as a Project Management Professional (PMP #1647672) in July of 2013 and is working toward his Project Management Professional (PMP) certification. Ray is currently an Account Manager with Citizenserve. He serves as the interface between customer service and existing Citizenserve customers. He manages relationships with Citizenserve customers in order to ensure their continued success in using Citizenserve for their community development needs. Before coming to Citizenserve, Ray was the Vice President of Academic Technology at Education Management Corporation (EDMC). At EDMC, Ray manages the Student Success Portfolio of Services for the 140,000 students represented with Argosy University, South University, The Art Institutes, and Brown Mackie Colleges. In addition, Ray has held the Chief Executive Officer role for two software companies serving the higher education industry. At

rSmart, Ray executed the strategic and tactical growth plans for this early stage, open source, application software provider. He executed fundraising efforts to ensure the company's continuing success by presenting the company's ongoing strategic product/market vision and operating business plan to venture funds. In this role, he closed a $1.8M investment round of funding. For UNICON, a leading provider of enterprise portal and learning management systems, Ray executed the company's turnaround strategy encompassing the transformation from a service provider to a product company and the acquisition of an established competitor. UNICON supported over 450,000 students in 10,000 higher education institutions.

REFERENCES

Somerville, Massachusetts
Goran Smiljic
Superintendent of Inspectional Services
617-625-6600 x 5610
gsmiljic@somervillema.gov

St. Charles County, Missouri
Patty Steevens
Business Applications Manager
Information Systems
636-949-7900 x4488
psteevens@sccmo.org

Spanish Fork City, Utah
Dave Anderson
Director of Community Development
801-804-4586
danderson@spanishfork.org

Gulf Shores, Alabama
Shana Edmond
IT Systems Administrator
251-968-1130
sedmond@gulfshoresal.gov

Redmond, Washington*
Kelley Wood
Treasury & Revenue Manager
425-556-2161
kwood@redmond.gov
***Redmond recently selected Citizenserve for Business Licensing through a competitive RFP process and is in the initial implementation phase.**

COST PROPOSAL

The following quote has been prepared for you based on the requirements outlined in the RFP. Citizenserve pricing is based on the number of named user subscriptions needed for City staff. Users can be added or removed at any time. Each of your Citizenserve user subscriptions will have access all Citizenserve components and features including unlimited support.

Annual Subscription Fees	
User Subscriptions (40 users at $100 per user per month)	$48,000
One-Time Initial Fees	
Training	$8,000
Setup and Configuration	$12,000
Project Management	$4,000
Data Migration	$40,000
Systems Integration (HTE/NaviLine Financial, Active Directory, Payment Processor, two-way GIS, State Contractor Database)*	$30,000
Total First Year Fees	$142,000
Each Additional Year Fees	$48,000

*Integration points are a one-time fixed price of $5,000. After the integration is developed and tested, support for the integration is included at no additional charge with the subscription. The Payment Processor integration may not involve additional costs. If the City uses an existing integration or if the selected payment processor supports an existing gateway that is already setup. The State Contractor Database may not involve any costs as it may just be a simple HTTP link to the State web site.

ADDITIONAL INFORMATION

Signed Addendum No. 1
Citizenserve Brochure
Requirements Matrix

CITY OF BRYAN

PURCHASING DEPARTMENT

February 22, 2016

ADDENDUM NO. 1

Addendum to City of Bryan Request for Propasal No. 16-022

"Cloud based "Civic Platform" solution supporting the administration of municipal land-use, permitting, and code enforcement functions."

Please be advised of the following clarifications, additions, deletions and/or changes to RFP No. 16-022 are hereby made a part of the bid documents for the above referenced project as full and as completely as though the same were included therein.

Receipt of the following information, to be included in your response of request for proposal:

- Civic Platform Requirements, Excel format and PDF format
- Record Types, Excel format

END OF ADDENDUM

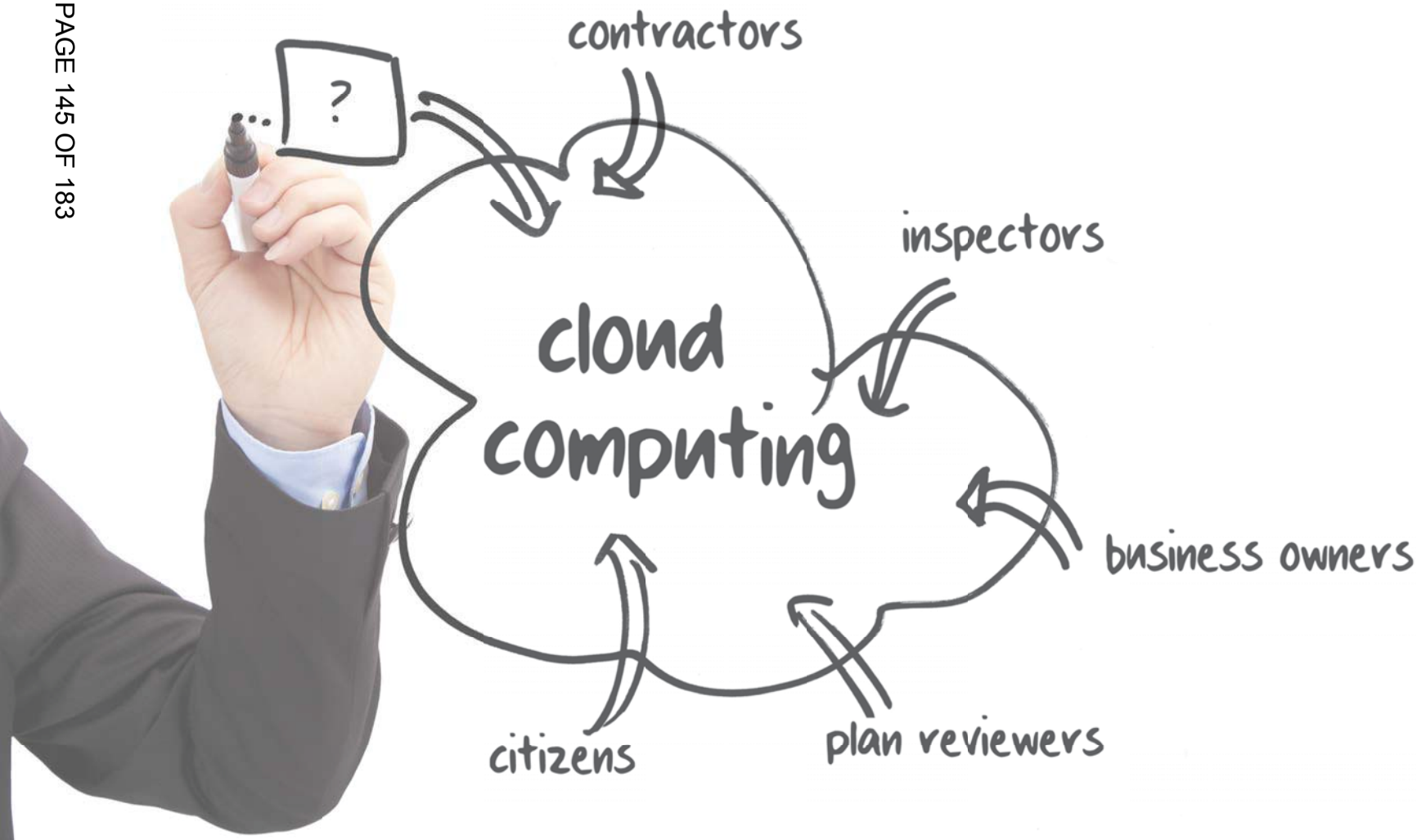
This addendum shall be signed and included with your response package as acknowledgement of the addendum. Failure to acknowledge and submit any addenda may be cause for the bid to be rejected. The City's decision to accept or reject a bid due to a failure to acknowledge and submit addenda shall be final.

Vendor Acknowledgement Signature

Melanie Tigerina

Melanie Tigerina, Buyer
City of Bryan – Purchasing

1309 E. Martin Luther King St. • Bryan, TX 77803
(979) 209-5500 • Fax: (979) 209-5507
http://www.bryantx.gov/departments/?name=purchasing



Join the cloud computing revolution.

citizenserve®

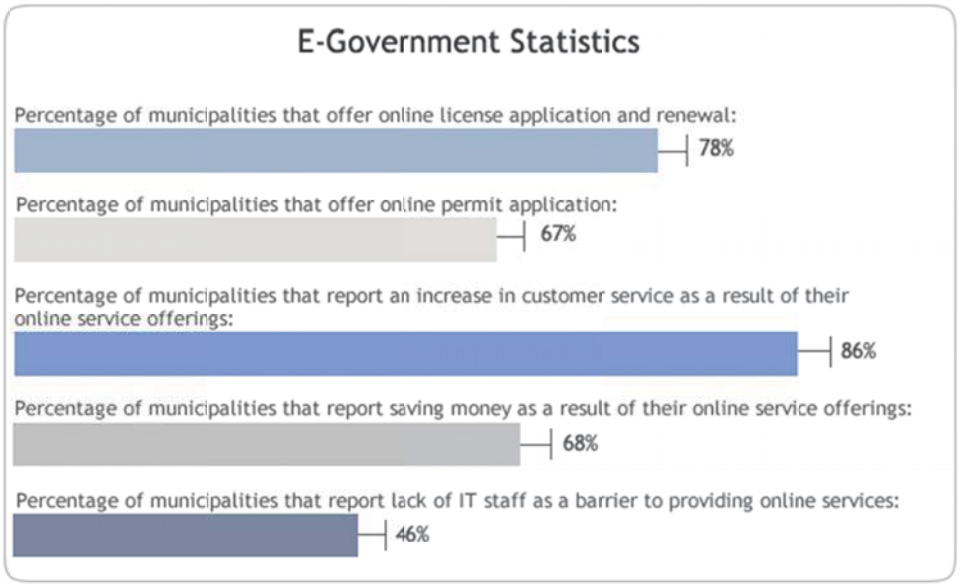
Cloud Computing

With citizenserve® cloud computing you have access to fast, secure, leading edge technologies at a low cost. The citizenserve cloud was initially launched in 2002, and currently has processed over a billion transactions.

As citizens' expectations for online services continue to grow, state and local agencies are pressured to provide online services without a significant increase to their budget or IT staff.

With the citizenserve cloud, get your constituents' online services up and running quickly while providing and easy-to-use solution for your staff.

Over the last 13 years the citizenserve cloud has had no data loss, no security breaches, and has maintained 99.9% system uptime.



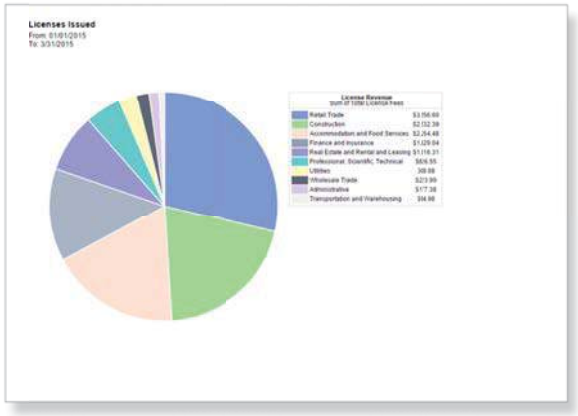
Source: Norris, D., & Reddick, C. (2011). *The Electronic Government Survey*. Washington, DC: International City/County Management Association.

easy to learn & use
fully mobile.
features
mapping
online portal
flexible reporting
easily configurable

General Features

Citizenserve offers robust solutions filled with rich features in a user-friendly interface. All of our components, features, and services are included with every user subscription with no hidden fees. Through our Concierge Program you'll have all the help you need configuring, implementing, and using citizenserve.

Give your citizens, contractors, and business owners access to your services 24-7 through the citizenserve device and browser independent online portal.



A fully mobile solution provides your inspectors with the ability to access all system features and functions from the field using a tablet or laptop.

Load your GIS layers such as zoning districts and parcel lines. View or look up your files or inspections due on a map.

Create your own custom reports with the report writer or let our support engineers create reports for you at no additional costs. You can easily add pie-charts, bar-charts, and line graphs to your reports.

"We began using citizenserve in 2010, the internet based feature and customization were the initial selling points for our town; however, the service response and continuing improvements to the software has been the real key to the software."

-Town of Duck

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code enforcement
business licensing
permitting
services
request tracking
planning & zoning

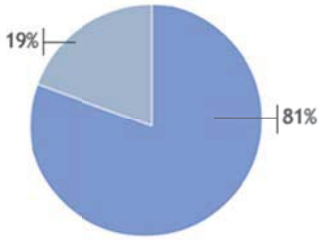
Permitting

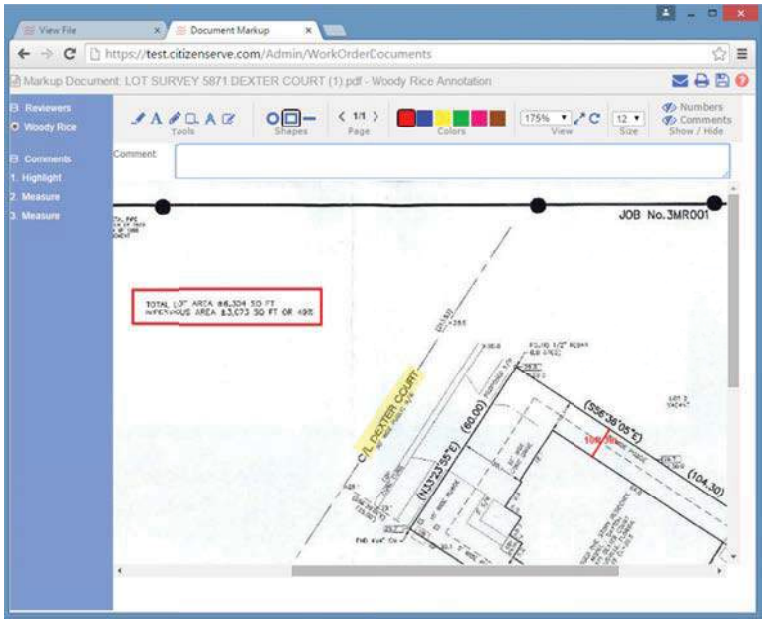
With citizenserve permitting software your contractors, architects, engineers, and property owners can apply for a permit, upload digital plans, and pay application fees online. Municipalities have reported online applications through the citizenserve portal making up more than 80% of total permit applications.

Create customized workflow routes that mimic your plan review process and digitally track plan review status and comments. With the document markup tool measure distances, add comments, shapes and highlights to plans and documents.

Move to the citizenserve cloud

Municipalities have reported online applications through the citizenserve portal making up more than 80% of total permit applications.



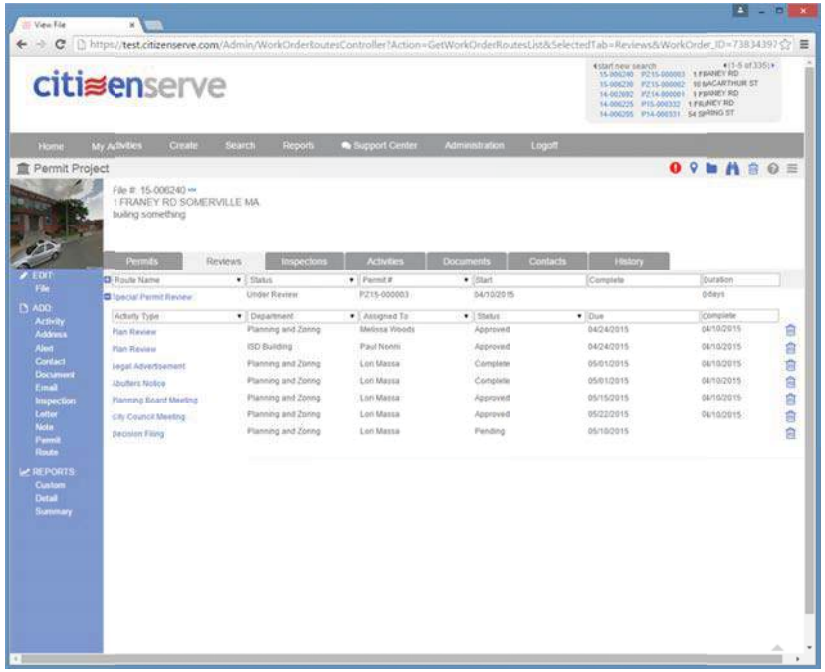


Custom rules will ensure permits are not issued without the required approvals. After construction begins inspections can be requested through the online portal, inspectors can enter inspection results directly from the field using a tablet or laptop. After the final inspection has been completed easily generate a certificate of occupancy that can be printed, emailed or downloaded by the applicant, contractor or property owner.

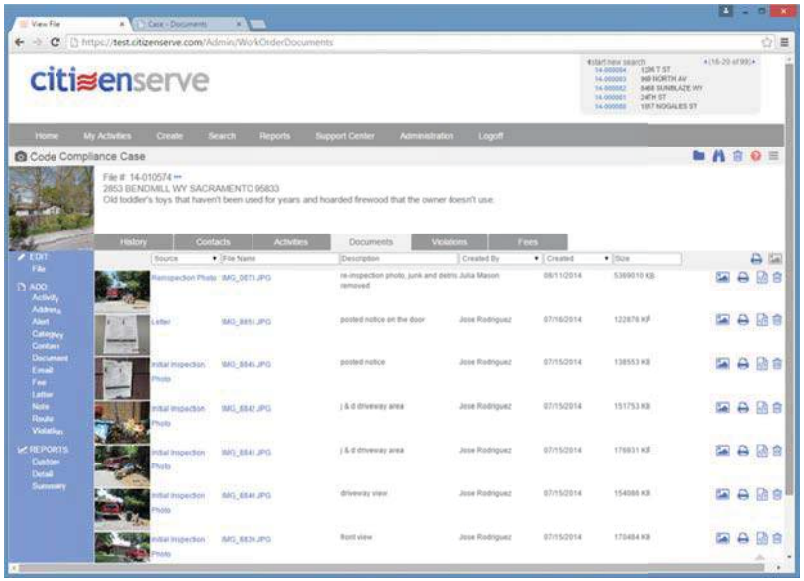
Planning and Zoning

Citizenserve planning and zoning software completely automates the process of application, review, routing, resubmittals, and public notification.

Applicants can submit applications, attach plan documents, and pay application fees through the online portal. Applications are automatically routed to the appropriate reviewers based on your workflow routes. Track due dates for public notice and legal advertisements based on the hearing dates you select. Build your plan review report by selecting comments from a custom library of review comments. Electronically comment on plans with the document markup tool by adding notes, highlights, and other annotations. Through a flexible and user-friendly interface, citizenserve helps keep your projects organized and on schedule.



> “The online portal has really helped cut down on the daily phone calls asking for a status on projects, with the reporting functions we can accurately track our review timelines.”
>
> -City of Lewiston



Code Enforcement

Citizenserve code enforcement software completely automates the process of opening cases, scheduling inspections, recording violations, and coordinating resolutions. Property ownership, inspection results, photos, notices, violations, and notes become an electronic record of each case.

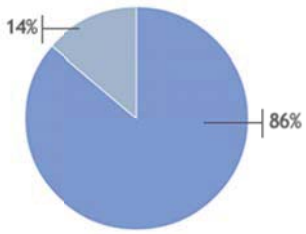
As a fully mobile solution, inspectors are notified of inspections due, can lookup property ownership information, add violations, take and attach photos, generate tickets or notices of violation, and schedule re-inspections all in the field from a tablet or laptop.

“Citizenserve has made it possible for our officers to have access to records and the ability to enter case data in the field. This allows the officer to be accurate to the minute with code enforcement, keeping the officer in the field and not at a desk.”

-City of Boulder

Business Licensing

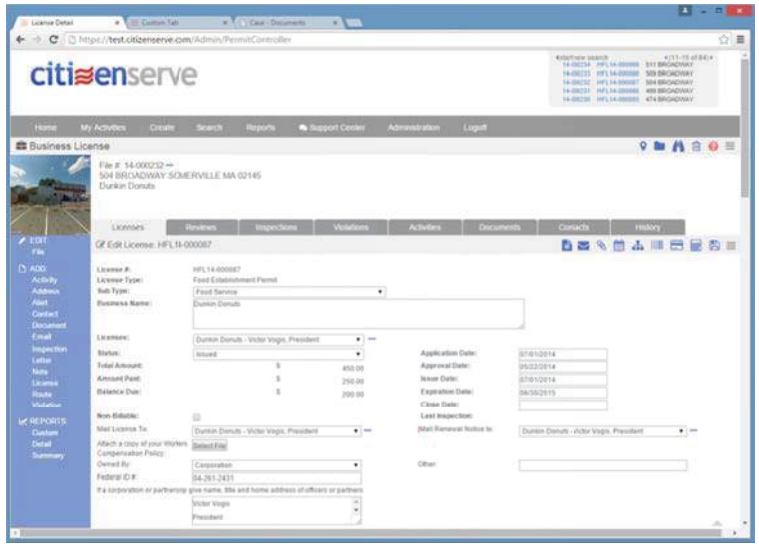
Citizenserve business licensing software automates the application, payment, review, and renewal of business licenses.



Move to the citizenserve cloud

Municipalities have reported online applications through the citizenserve portal make up more than 85% total business license applications.

Businesses can submit applications, upload copies of required documents and pay application fees through the citizenserve online portal. Create customizable deficiency checklists based on application types and quickly generate and email of Deficiency Notices. If an inspection is required before issuance, citizenserve can automatically notify your inspectors of pending applications and required inspections. Upon final approval, generate License Certificates and ID cards that can be mailed, emailed or downloaded from the online portal.

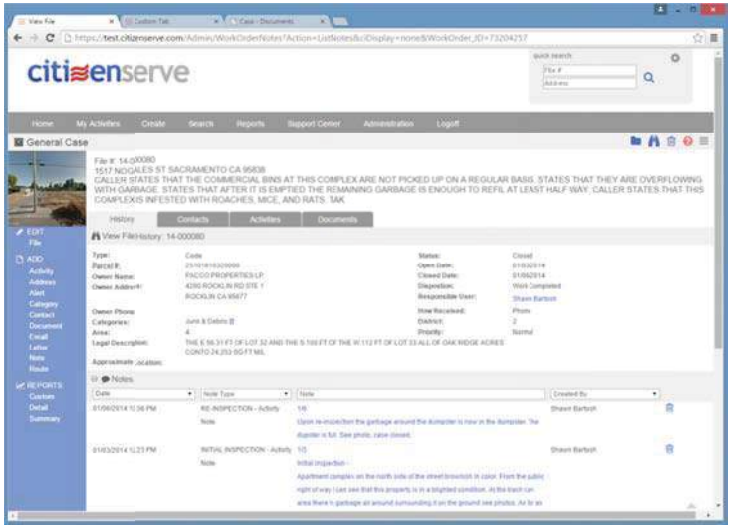


When it comes time for renewal, create batch email or mail renewal notices quickly. Citizenserve can be configured to automatically calculate penalties and interest for late renewals. License holders can submit required documentation such as proof of identity and insurance verification through the online portal as part of their license renewal.

Request Tracking

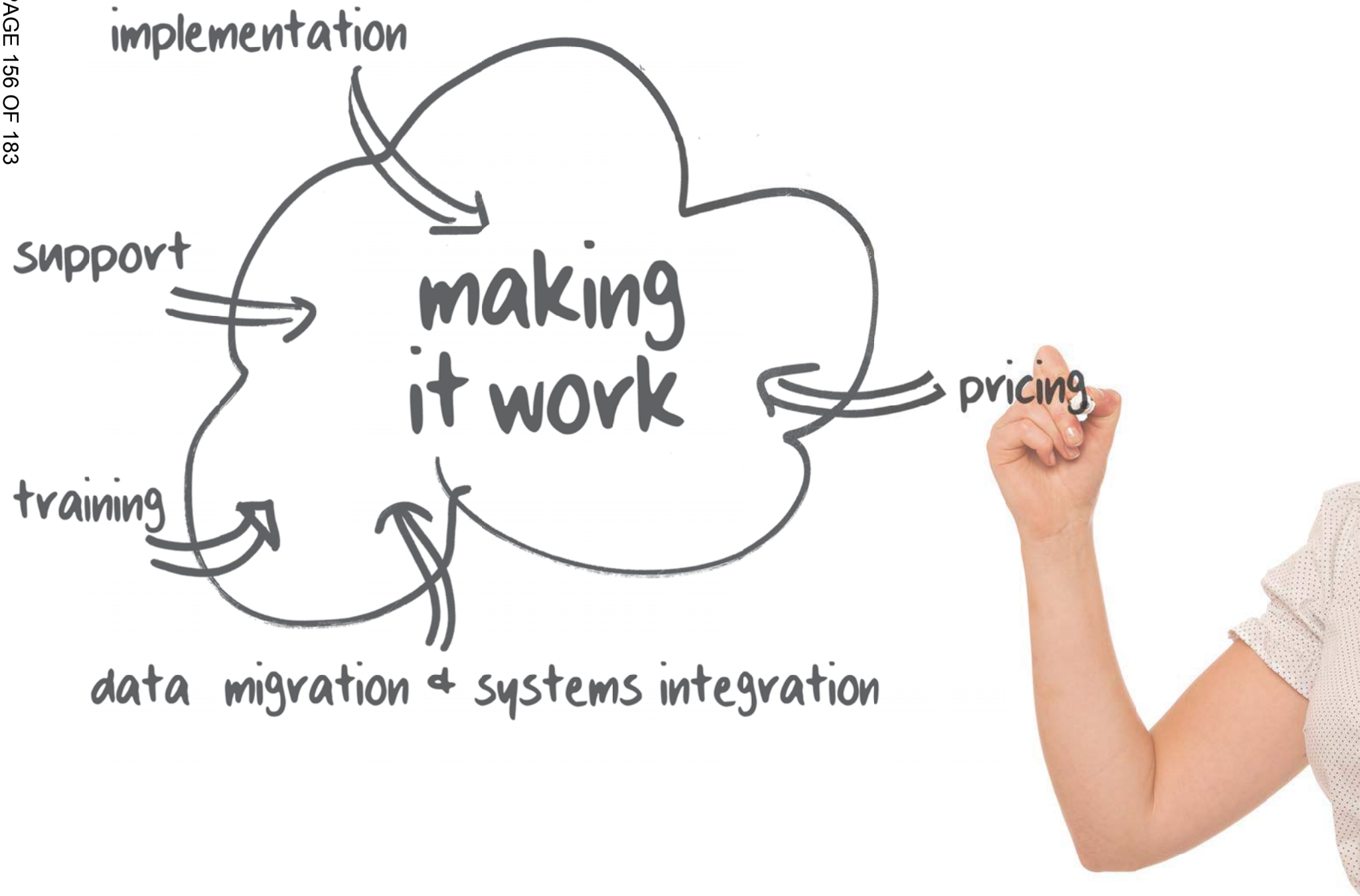
Citizenserve request tracking software automates the assignment, routing, and fulfillment of your citizens' requests.

Your citizens can submit requests on your municipal website through the citizenserve online portal. With configurable automatic routing based on request type, appropriate staff will be notified and can respond to your citizens' requests immediately. Communicate with your citizens effectively and efficiently by using citizenserve's automatic notifications, automated letters, and email templates.



"After years of research and studying various case management programs, we have found citizenserve to be the most comprehensive and user friendly solution on the market."

-City of Sacramento


implementation
support
making it work
pricing
training
data migration & systems integration

“ When it comes to customer service and tech support the staff at citizenserve is at the top of my list ranking #1. I know they have many other users but when I contact them they make me feel like I am the only user with their personal, undivided attention. ”

-Wood County

“ We have been with citizenserve for a few years now and are very impressed with the level of service we receive and the speed of response. We would highly recommend them. ”

-City of Athens

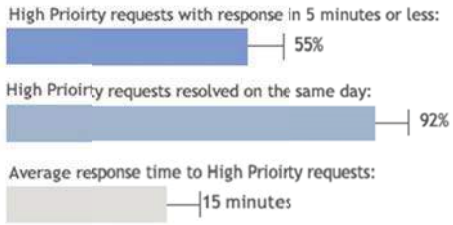
“ My staff and I couldn’t be happier. Citizenserve has been fantastic in getting us up to speed and helping us with changes to our new procedures. It’s like dealing with good friends. ”

-City of Oviedo

Concierge Program

Through our Concierge Program every user subscription comes with unlimited training and support at no additional cost. Your dedicated, certified support engineer and project manager will work with you to configure citizenserve to meet your needs. They will coordinate any other setup tasks such as data migration or system integration to ensure your success. When you need help our staff is available. Our certified support staff members are trained on all areas of citizenserve, and they will assist you with whatever you need. We guarantee response time of one hour or less on your high priority items; our average response time is fifteen minutes. For your standard requests, we will respond on the same business day, and our average response time is less than four hours.

Concierge Program Statistics

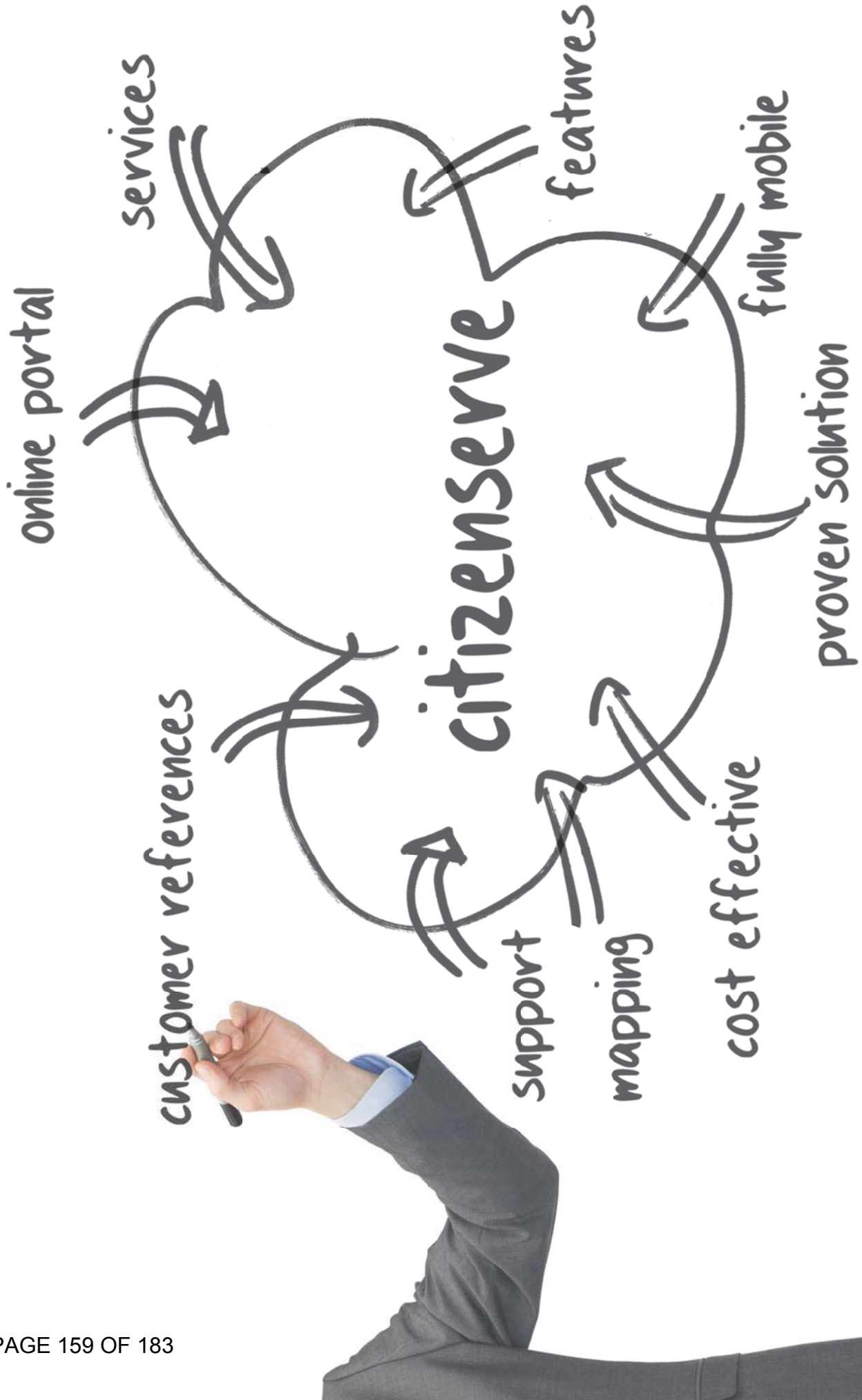


Pricing

Citizenserve pricing is based on the number of dedicated user subscriptions you need. Each of your citizenserve user subscriptions will have access all citizenserve components and features.

User Subscription Fees	
Number of Users	Annual Fee per User
1 – 10	$1,800
11 – 25	$1,500
26 – 50	$1,200
50 or more	$900
One-Time Initial Fees	
Service	Fee per User
Training	$200
Setup and Configuration	$300
Project Management	$100
Data Migration*	varies
Systems Integration*	varies

**Pricing for data migration and systems integrations will vary based on your requirements; our team will work with you to determine requirements and pricing.*


online portal
services
features
fully mobile
citizenserve
proven solution
customer references
support
mapping
cost effective

Contact Us

1.800.325.9818
contactus@citizenserve.com
www.citizenserve.com

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Please input the corresponding letter of the available response codes for each requirement. Where indicated by all response codes other than "Y", the Vendor should insert text statements into the corresponding requirement column. Unanswered requirements or requirements with multiple response codes will be scored as "N" (Not Available).

All items marked with response codes of "C", "I" and "T" also require pricing to be indicated on the pricing forms. Comments provided to requirements herein shall not indicate any pricing.

Response Code	Definitions
Y	**This requirement currently exists in the proposed system and is either satisfied out-of-the-box or through configuration of the system performed during the implementation.**
C	**This requirement mandates customization of the source code of the system. Customization involves additional pricing to satisfy the requirement. Please insert corresponding details in the Comment column and applicable pricing in the Cost Proposal.**
I	**This requirement requires an interface to the proposed system at an additional cost. Please insert corresponding details in the Comment column and applicable pricing in the Cost Proposal.**
T	**This requirement or portions thereof are satisfied through third party systems including reporting software. Please insert corresponding details in the Comment column and applicable pricing in the Cost Proposal.**
R	**This requirement is met by the proposed system's reporting tools or by fully integrated third party report writers.**
N	**This requirement cannot be met by the system or is not applicable. Comments optional.**

General Specifications

#	Requirement	Response Code	Comment
GEN-1	System generates date/time stamping of transactions.	Y	
GEN-2	System generates letters, reports and notifications automatically and email to recipients.	Y	
GEN-3	System has built-in spell check for all comment boxes.	Y	spell check is supported by the browser
GEN-4	System allows an administrator to configure the dictionary within the system that drives the spell check functionality.	Y	to the extent the browser spell check supports this
GEN-5	System employs customized fields and/or pull down lists to facilitate data entry.	Y	
GEN-6	System has its own set of tools to allow agency staff to modify the system as needed without having to call upon the vendor or outside technical resources.	Y	
GEN-7	System seamlessly integrates with similar data in other vendor modules.	Y	citizenserve is one integrated system
GEN-8	System displays only those modules and pull-down menus that the user is authorized to access.	Y	
GEN-9	System allows a system administrator to inactivate or reactivate a user's permissions at any time.	Y	
GEN-10	System logs off an inactive user after a specified period of time, determined and controlled by the system administrator.	Y	
GEN-11	Staff overrides designated workflow tasks at any time providing they have the necessary capabilities based on user control tables.	Y	
GEN-12	System has available security that can be applied to end users for checking and marking documents related to electronic document review.	Y	
GEN-13	System provides easy access to documents by supporting hyperlinks to these documents.	Y	
GEN-14	System makes status information available 24/7 via the Internet to interested parties within government agencies and the public.	Y	
GEN-15	System selects standard information from pull down lists to simplify data entry and provides the ability to input standard comments, such as inspection results.	Y	
GEN-16	System allows the initiation and potential completion of an application or case when a specific address is not available or required.	Y	
GEN-17	System allows the user to define case types with a user-defined sequence of tasks and case data for each type.	Y	
GEN-18	System allows for the creation of a system-generated and unique project number and project name for each permit, license or other case type under which other activities may be associated.	Y	
GEN-19	System displays historical information about each case, project or other record type and viewable by authorized staff.	Y	
GEN-20	System maintains, sorts, searches, retrieves, and reports on key information about property, including Parcel ID.	Y	
GEN-21	System provides convenient service and accurate information retrieval to the public via remote on-line access. Specify how this is accomplished.	Y	Any report templates created can be made available to the public on the citizen portal.
GEN-22	System allows multiple cases, projects and other records to be associated with a property or address.	Y	
GEN-23	System relates all pertinent information to a particular property - permits, liens, licenses, permits, enforcement actions, etc.	Y	
GEN-24	System re-assigns queued tasks from one staff member to another.	Y	
GEN-25	System issues permits and licenses to businesses, facilities, activities and individuals.	Y	
GEN-26	System assigns multiple locations to one permit/license.	Y	

GEN-27	System tracks and accommodates approvals from various departments including date of approval, person approving, and comments.	Y	
GEN-28	System reprints licensees, permits and other case-outputs on demand.	Y	
GEN-29	System workflow electronically routes and automatically notifies, via email, each reviewer on a queue that an approval for an application or renewal or other task is pending	Y	
GEN-30	System tracks the amount of time individuals or departments spend on each application and/or renewal in total and by appropriate subsets of activity.	Y	
GEN-31	System flags applications and renewals that have outstanding pre-defined issues.	Y	
GEN-32	System allows for internal and external notes associated with each customer file.	Y	
GEN-33	System emails renewal reminders to all applicants, licensees and others citizens who have upcoming expiration deadlines.	Y	
GEN-34	System complies with ADA Section 508 standards for end users with disabilities. Please describe your compliance.	Y	Citizenserve is a browser based application, support for accessibility standards is offered through the browser and devices used by the end user.
GEN-35	System displays content in multiple languages. State language availability.	Y	Applications can be created in alternate language formats and html on citizen portal can be configured with alternate language.
GEN-36	System offers agency hosted or vendor hosted applications.	N	Citizenserve is only offerred as a cloud based solution.
GEN-37	System includes functional online help documentation for system users.	Y	
GEN-38	System includes context sensitive help that is displayed based on the location of the mouse or cursor.	Y	
GEN-39	System provides users with an integrated, consistent “look and feel” user interface to minimize training and administration.	Y	
GEN-40	System provides detailed and comprehensive user and administrative manuals and documentation.	N	Documentation is built into the software, not offered in a printed manual. Unlimited technical and administrative training is included in the subscription.
GEN-41	System provides the ability for configuration of workflow by use of a drag and drop graphical tool.	N	Workflows are easy to create and modify in the administrative configuration. Drag and drop is not used.
GEN-42	The graphical workflow tool provides for previewing the workflow as a diagram and for employing fonts and colors to make the workflows more apparent and easy to read.	N	Workflows are not displayed in a graphical format. Workflows are easy to configure and easy to read in the system.
GEN-43	System has user configurable menus and screens (by role or individual).	Y	
GEN-44	System allows for custom home page definition per individual user preferences. Various components of the system can be viewed/accessed through the home page (based on user security privileges).	Y	
GEN-45	System allows for home pages to view and manage all assigned activities to that individual user (i.e. pending applications for review, pending inspections, permits requiring plan checks, etc.).	Y	
GEN-46	System has GUI appointment calendaring with multi-inspector schedule viewing, or seamlessly links to same	Y	
GEN-47	System allows managers to view all of their staffs work schedules and assigned activities.	Y	
GEN-48	System allows each department the ability to configure custom fields for each of the permit/license applications (min. of 20 custom fields per permit type).	Y	
GEN-49	System allows owning departments to view status on all of their applications throughout the review process including but not limited to staff assigned, status of service level agreements, etc	Y	
GEN-50	Applicants can view pending applications for the status, additional step in the process and comments from reviewing departments.	Y	

GEN-51	System attaches documents and photos on any case, action level, or parcel. System time stamps all such attachments. System also attaches address and parcel identifier to photos.	Y	
GEN-52	System allows non-system documents and photos to be “attached” to addresses and other system records for easy viewing, including but not limited to MS Office application documents and files, .jpgs, .gifs, .pdf.,.txt,. rtf.,.bmp .	Y	
GEN-53	System allows users to attach photos to applications and letters.	Y	
GEN-54	System allows records and applications to be partially created and completed at a later time by initial creator or other authorized users. Incomplete records are not viewable by unauthorized users.	Y	
GEN-55	System provides for email or letter follow-up or status notifications to be made in batch for records and applications These batch processes can also automatically update records with new statuses, compliance dates, etc.	Y	
GEN-56	System allows the user to define escalation workflow rules based on definable work criteria.	Y	
GEN-57	System allows authorized user to assign one or more roles to a user and the geographic area(s) they work in (such as inspectors responsible for a certain district, zone, etc.).	Y	
GEN-58	System allows specific fields to be editable and others to be non-editable.	Y	
GEN-59	System interface requires user confirmation for operations that result in the deletion of any system record, or function that was created by that user. Records should be marked as inactive and an audit trail should exist.	Y	
GEN-60	System provides for easily going back and forth to view, create or modify records from anywhere within system.	Y	
GEN-61	System interface allows the user to preempt activity on the system for another activity, with the ability to return to the original activity	Y	
GEN-62	System allows authorized users to create records on behalf of other users (such as office staff creating violation records for inspectors, office staff abating violation records for inspectors, etc.)	Y	
GEN-63	System provides for spellchecking of text entered by the user when creating or modifying records, letters, etc. Authorized users can create and modify words in spellchecker.	Y	
GEN-64	System can prohibit records from being created without valid Agency addresses.	Y	
GEN-65	System provides a method for easily identifying bottlenecks and problem areas throughout the permit lifecycle (application, construction inspection, close-out, certificate of occupancy), as well as other lifecycles.	Y	
GEN-66	System integrates with a GIS system to validate parcels, addresses, owners and zoning.	Y	
GEN-67	System defines minimum of 20 different geographic areas (minimum of 15 characters) of the Agency that have specific work requirements (i.e. code compliance, conservation districts)	Y	
GEN-68	System allows pending work assignments can easily and quickly display and print on a map. In addition to districts, mapping can be for all open or pending work or a specific record type, districts in division, and/or block or census tract(s) or defined polygon. Records past due (overdue) are plotted in different colors from other pending work.	Y	
GEN-69	System automatically flags properties, and/or sends out advisory notification when ownership change information is received from the Agency's system.	Y	
GEN-70	System provides easy query of property related records by address, also-known-as address, street, taxkey, district(s), record #, owner name, contractor, etc. For those queries that would yield more than one record, user additionally can choose to query by relevant date field ranges, and to sort by address and relevant date fields depending on type of record.	Y	

GEN-71	System searches and displays all historical information recorded on a particular property (prior permits, complaints, periodics, code violations, use, description, etc.) This information shall be broken down by building, unit, etc.	Y	
GEN-72	System provides method for modifying inspector district boundaries and for moving records from one district to another, by criteria such as census tracts and blocks.	Y	
GEN-73	System provides for authorized users to create report templates for inspection forms, contact letters, certificates, bills or any other form templates using any field in system.	Y	
GEN-74	System accesses property ownership history from other data sources	Y	
GEN-75	System prints records (w/ attachments) for board reviews, etc	Y	
GEN-76	System allows renewal dates for Special Use/Variance zoning appeals to be defined manually or calculated from a number of months.	Y	
GEN-77	System tracks all activities concerning violations, permits, complaints and code enforcement. This includes inspections and attempted inspections; contacts with owners, contractors, landlords and tenants; letters; phone calls; emails, court enforcement, billing, etc. performed by inspectors and other employees. Reports can easily be generated which list all such activities in chronological order for any violation, permit, periodic, complaint and code enforcement record in system.	Y	
GEN-78	System supports association of inspection with an individual who may be different then the property owner. System has the ability to track information regarding licenses, inspections, and violation by operator and to review all establishments linked to an operator.	Y	
GEN-79	System tracks changes in operator and requires re-licensing and re-inspection when operations for an establishment change hands.	Y	
GEN-80	System exports all data in a format (access, excel, tab delimited, html, etc.) that can be imported and analyzed using statistical analysis software. System allows a user based on defined roles to specify fields and date ranges of data for export.	Y	
GEN-81	System creates custom reports and adhoc queries by the user. Please specify how each type is accomplished.	Y	End user reporting tool, custom reports are created using Microsoft TSQL scripts. Report formats can be map, various charts, tabular and merge with template reports.
GEN-82	System displays a minimum of 3 years of inspection history in real time for each type of inspection performed at a property.	Y	
GEN-83	System automatically schedules and re-inspects a property based on routine inspection results where violations were identified.	Y	
GEN-84	System transfers a license/permit to a new location without a change of ownership.	Y	
GEN-85	System edits/modifies out-of-compliance items and codes identified during an inspection.	Y	
GEN-86	System defines/codifies inspection results for each type of inspection.	Y	
GEN-87	System reports multiple violations for each element of an inspection.	Y	
GEN-88	System supports management and tracking of approved variances for inspection elements.	Y	
GEN-89	System simultaneously reviews and displays license/permit, inspection, and complaint data and results for a selected property.	Y	
GEN-90	System provides a public web portal that displays inspection results based on user-provided search criteria.	Y	
GEN-91	System's batch functionality configures on a job-by-job basis to execute at any time during the day.	Y	
GEN-92	System allows users to modify screen layouts to optimize a user's experience.	Y	
GEN-93	System views inspectors' availability, schedules inspections and reschedules/rearranges inspections all within a calendar interface in the back office.	Y	
GEN-94	System is offered in multiple foreign languages.	N	The main software is only in english. Alternative help and applications can be created in other languages.

Web Portal Specifications

#	Requirement	Response Code	Comment
WEB-1	System provides a seamlessly integrated web portal for citizens, applicants and others.	Y	
WEB-2	System provides administration of the web portal from consoles within the back office product and does not require access to or editing of technical files on the web server (i.e. no requirement for CSS, HTML, ASPX, etc. skills)	Y	
WEB-3	System receives payments online by credit cards and e-checks.	Y	
WEB-4	System accepts forms filled online.	Y	
WEB-5	System accepts documents of any file type.)List any limitations or exclusions.)	Y	
WEB-6	System must not require a redirect of the online user to a third party merchant's site for payment processing.	Y	Citizenserve uses Payment Processor and Gateway API integration for payment processing. Whereas we do not store or forward payment information, the payment page is integrated in the web page.
WEB-7	System provides online ability to complete permits and other types of applications 24/7.	Y	Portal configuration as well as back office configuration is on-the-fly and support 100% uptime. In other words, configuration changes are made without any back office or citizen portal down-time.
WEB-8	System displays key permit information online.	Y	
WEB-9	System schedules and reschedules inspections.	Y	
WEB-10	System accesses permit information and status updates online.	Y	
WEB-11	System allows public users to lodge complaints and to access code enforcement information online, both named and anonymously.	Y	
WEB-12	System accepts contractor license information online.	Y	
WEB-13	System obtains minor trade and sub permits online.	Y	
WEB-14	System allows customers to initiate applications online for further processing and validation by staff without re-entry of information.	Y	
WEB-15	System provides field-level help, watermarks, and directions for all data entry sections on the web portal to assist end users.	Y	
WEB-16	System allows public users to attach electronic documentation to complete application requirements.	Y	
WEB-17	System web application is PCI-DSS certified.	Y	
WEB-18	System allows applicants to view building violation comments.	Y	
WEB-19	System allows applicants to electronically view all related activities of a project, permit, license, enforcement, complaint or other record type.	Y	
WEB-20	System displays Holds, Conditions, and Notices that may exist on a project, permit, etc.	Y	
WEB-21	System allows applicants to request all required inspections that have been made available for them to schedule.	Y	
WEB-22	System provides residents and business owners to report, review and research application and licensing information, including history, from inception to conclusion.	Y	
WEB-23	System requires users to register before making portal information available to them. (Except in the case of anonymous code enforcement requests.)	Y	
WEB-24	System web portal accepts and links all supporting electronic documents associated with the application.	Y	
WEB-25	System calculates fees on the web portal so that applicants and others can estimate fees prior to the submission of an application.	Y	
WEB-26	System schedules, reschedules and cancels inspections on the web portal.	Y	
WEB-27	System allows for access to view inspection results and inspection comments on the web portal.	Y	

WEB-28	System allows access to renew business licenses and permits on the web portal.	Y	
WEB-29	System web portal has a “shopping cart” feature allowing citizens to make a single payment to include all fees due. This feature allows multiple transactions to be paid with a single payment.	C	Currently each license or permit is paid separately. This feature can be added. There will be no additional charge for this feature if the City requires it.
WEB-30	System web portal allows users to access reference contacts of designated contact types when making applications for permits, licenses and other record types.	Y	
WEB-31	System web portal announcements can be posted to members of the public.	Y	
WEB-32	System allows applicants to save, resume and make changes to the application before submission.	Y	
WEB-33	Once the permit application, registration, or recording form has been submitted, the system calculates fees associated with information entered on the application, verifies a contractor is currently licensed, verifies the address is valid, accepts on-line payment, records payment in cash system, accepts electronic signature of customer, approve, deny or hold for staff review, and if approved, assigns permit number.	Y	
WEB-34	System provides on-line internet access to all public records, including permit, complaint, violation, recording, etc.	Y	Additionally, any reports created in the back office can be posted in the citizen portal for public consumption
WEB-35	System web portal provides global search capabilities.	Y	There is a search for permit or license feature. Additionally reports can be put on the portal for the public to search on specific information.
WEB-36	System web portal allows users to search for a property and see all related records to that property (permits, plans, inspections, code cases, etc.) without having to go to individual search screens to access each of those records.	Y	This can be setup as a report on the citizen portal and can be created in many forms for consumption by the public.

Permitting, Planning, and Zoning Specifications

#	Requirement	Response Code	Comment
PPZ-1	System issues and tracks multiple permits and cases associated with one location.	Y	
PPZ-2	System captures addresses and an unlimited amount of information regarding buildings, parcels, zoning and other land management data.	Y	
PPZ-3	System captures Legal Descriptions.	Y	
PPZ-4	System captures proposed project descriptions.	Y	
PPZ-5	System links or relates one or more developments together.	Y	
PPZ-6	System accepts applications and related documents in unlimited electronic formats as attachments to records.	Y	
PPZ-7	System allows the agency to determine the size and format of any document submitted through the web portal.	Y	
PPZ-8	System users can attach documents to applications by applicants and others through the web portal.	Y	
PPZ-9	System tracks an application's life cycle status (pending, accepted, revised, response letter, etc.).	Y	
PPZ-10	System automatically assigns a application prefix and number (case number) based on the type of request (e.g., unique prefix for each type of case).	Y	
PPZ-11	System checks and validates the property address and ownership against an internal or external database (including GIS if applicable).	Y	
PPZ-12	System provides logical and easily viewable association between master and any subsidiary permits or other unrelated case types.	Y	
PPZ-13	System attaches multiple documents to the permit application or other case or record type.	Y	
PPZ-14	System clones a permit or other case type containing information to create subsequent and similar permits/cases.	Y	
PPZ-15	System provides connectivity to the Texas Department of Licensing and Regulation database to ensure accurate and timely updates on contractors' licensure.	Y	This can be accomplished through a HTTP link if available through the state system. If a web service or integration is required this can be be done for a fixed fee of $5,000.
PPZ-16	System allows staff to conduct the electronic review of submitted documents (plans, etc.) with redline capabilities and employing side-by-side viewing of documents.	Y	There is a built-in browser and device independent markup tool for redlining and commenting on plan documents. Bluebeam or Adobe can also be used.
PPZ-17	For the electronic document review functionality, the system assigns documents outside of the workflow, to filter and categorize documents and to view the history of all reviews and comments.	Y	
PPZ-18	The functionality of electronic document review provides for side-by-side and overlay comparison capabilities.	C	Currently Bluebeam or Adobe can be used for overlay comparison. We are planning on adding this to the built-in device and browser independent tool.
PPZ-19	The electronic document review ability extends to allowing documents to be directed to reviewers that exist outside of the configured workflow.	Y	
PPZ-20	System determines and tracks plan review steps and department comments based on permits or other application types.	Y	
PPZ-21	System electronically routes permits and cases for review, approval and inspection management.	Y	
PPZ-22	Partial address information may be employed to locate an address from the land management repository (either internal or external).	Y	
PPZ-23	System allows concurrent plan review by multiple departments and outside agencies and to allows them to input plan review results and comments.	Y	Outside agencies will require a subscription to participate in the plan review workflow.

PPZ-24	System allows selected standard plan review comments to be modified. Modifications will only be applicable for that particular occurrence.	Y	
PPZ-25	System allows the user to add non-standard plan review comments or copy/paste from other external outside sources (i.e., Word, SharePoint, Internet, etc.).	Y	
PPZ-26	System tracks the location of plans in the review pipeline.	Y	
PPZ-27	System allows administrative rights to edit, move, delete and add any file or folder to the electronic plan review system.	Y	
PPZ-28	System's electronic plan review electronically compares any two sheets of plans and notate the differences between the two sheets.	C	Currently Bluebeam or Adobe can be used for overlay comparison. We are planning on adding this to the built-in device and browser independent tool.
PPZ-29	System records and retains parcel parentage and genealogy data. Allows information from parent parcel to be carried forward to parcels created from parent.	Y	
PPZ-30	System links or unlinks or relates individual records together to create parent/child and/or master/subordinate relationships.	Y	
PPZ-31	System attaches sets of conditions to a record based on record type.	Y	
PPZ-32	System supports resubmissions of documents by parent/child relationships.	Y	
PPZ-33	System uploads multiple documents simultaneously.	Y	
PPZ-34	System can alert applicants and others that a document is available for review.	Y	
PPZ-35	System tracks changes made to conditions of approval in its audit log.	Y	
PPZ-36	System provides for permit corrections to trigger approvals or distribution re-routing to applicable departments.	Y	
PPZ-37	System logs revised submissions and notifies reviewers that changes have been	Y	
PPZ-38	System allows for the reviewer to manually place holds or notes into the record that are not visible to the customer.	Y	
PPZ-39	System creates the permit and calculates fees when plan review is complete and can include selected comments and conditions from reviewers.	Y	
PPZ-40	System allows for online credit card payment and as payment is received, permit number and transaction information (time and date of payment, amount of payment, permit type and transaction number) is recorded on the permit copy. Permit is made available to the system in real time.	Y	
PPZ-41	Cashier system records all payment transactions, and allow records to be exported in common format (.CLS, .XLS, etc.)	Y	
PPZ-42	Authorized staff can add permanent annotations to the permit record. Examples of this include address changes or revised occupancy application information.	Y	
PPZ-43	System allows for corrections to final records, such as change of address.	Y	
PPZ-44	System generates real-time information that allows applicants and customers and staff to check the status of a plan review via a web portal using a unique user ID.	Y	
PPZ-45	System manages electronic plans submitted.	Y	
PPZ-46	System allows viewing and printing of the attached documents/plans on an application.	Y	
PPZ-47	System allows reviewers to make changes to attached documents/plans supporting the corresponding application and track such changes.	Y	
PPZ-48	System allows modification of format, conditions, and notes on applications and records.	Y	
PPZ-49	System deals with multiple contractors and application types for each trade on each project.	Y	
PPZ-50	System separately tracks multiple projects or programs and their associated permits, inspection activity, orders, etc. that exist at the same property address or other identifier.	Y	
PPZ-51	System allows the owning department to assign inspectors to specific records or applications.	Y	

PPZ-52	System allows for certain applications to be issued without a valid street address (ex. permits in the right of way).	Y	
PPZ-53	System allows the applicant to identify their preferred medium of communication throughout the process (e-mail, fax, hard copy via mail).	Y	
PPZ-54	System issues and tracks partial, temporary and provisional certificates of occupancy.	Y	
PPZ-55	Owning departments can modify the default routing list for an individual permit as conditions require.	Y	
PPZ-56	System allows the real time routing list to be defined to include outside agencies not affiliated with the Agency.	Y	
PPZ-57	System automatically routes the assigned application to all identified departments once the application has been authorized by the owning department.	Y	
PPZ-58	System allows specific activities to commence simultaneously without hindering the permitting process.	Y	
PPZ-59	Once a permit application is complete all users can view the permit application and supporting documents according to their assigned roles and privileges.	Y	
PPZ-60	Owning departments can define what information is required for each of their corresponding permit applications.	Y	
PPZ-61	Owning department can define the business rules/workflow to be followed for their permit/license workflows (time constraints, sign-offs, reviewers, required documentation, fees, forms, etc.).	Y	
PPZ-62	System manages an electronic submission of drawings and review of such electronic files.	Y	
PPZ-63	System utilizes the criteria defined during creation of a record to determine approval process/requirements in its workflow element. This will include department and agency approval responsibilities.	Y	
PPZ-64	System notifies the owning department by automatically posting to the specified user's To Do List when a time sensitive event occurs (i.e. state statute mandated requirement to record a document is approaching).	Y	
PPZ-65	System tracks and processes application fees.	Y	
PPZ-66	System views and prints the attached documents/plans supporting the corresponding application.	Y	
PPZ-67	System allows reviewers to make changes to attached documents/plans supporting the corresponding application and track such changes.	Y	
PPZ-68	Owning department can create their own unique workflow process for the review and approval of their specific record types.	Y	
PPZ-69	System links companion files to one another. For example, a project requires a zoning change, vacation, and land division. All three records should be linked together.	Y	

Inspections Specifications

#	Requirement	Response Code	Comment
INS-1	System schedules online inspections through the web portal and through the back end system.	Y	
INS-2	System displays inspection route to staff personnel in the office and in the field and offer inspectors the ability to change their planned routes during the day.	Y	
INS-3	System provides a calendar for scheduling daily inspections that can be queried and included in reports.	Y	
INS-4	System defines inspection checklists by specific permit type and inspection item.	Y	
INS-5	System allows inspectors to enter inspection results in the field and reference applicable codes to append comments and specific details or documents (e.g., photographs).	Y	
INS-6	System provides daily schedules for inspections and supports schedule modifications by authorized parties.	Y	
INS-7	System allows applicants to request all required inspections through the web portal that have been made available for them to schedule.	Y	
INS-8	System tracks inspection data and ensure accountability of staff. Specify how this is accomplished.	Y	We need more details on the requirement to specify the best way to implement this. From an accountability standpoint Citizenserve has a security setting to prevent editing of completed activities, such as inspections or review activities. This ensures inspection results are not modified after an inspection has been completed. We have also implemented applications and inspections that support federal non-repudiation requirements.
INS-9	System obtains signatures while on inspection (signature pad).	Y	
INS-10	System configures inspection Checklists for each type of inspection.	Y	
INS-11	System Checklists (e.g. Punch List) track agency-definable status such as Partial Pass, N/A, Pass, Fail, etc.	Y	
INS-12	System allows for the standard inspection comments/violation codes to be modified and all such modifications will only be applicable for that specific occurrence.	Y	
INS-13	System allows the authorized user to add non-standard inspection comments/violation codes.	Y	
INS-14	System schedules, reschedules and cancels inspections on the web portal.	Y	
INS-15	System allows for access to view inspection results and inspection comments on the web portal.	Y	
INS-16	System generates historical views of previous Checklists allowing for the comparison of current results and scores.	Y	
INS-17	System displays selected inspection comments to the field and/or to the public through the web portal.	Y	
INS-18	System defines required inspections by type of permit and complexity.	Y	
INS-19	System schedules re-inspections based on a designated due date.	Y	
INS-20	System schedules a temporary certificate of occupancy re-inspection based on an expiration date.	Y	
INS-21	System allows for manual override or rescheduling of automated inspection requests, with provisions of automated notification to the inspector, permittee, owner, and electronic record.	Y	
INS-22	System allows field personnel to schedule an inspection from the field.	Y	
INS-23	System notifies the owner, permittee and supervisor if a field inspector cancels a scheduled inspection.	Y	
INS-24	System provides access to the agency codes/ordinances in electronic format.	Y	

INS-25	System tracks all permit status changes and record them in an audit log.	Y	
INS-26	System generates a reminder list of upcoming inspections based on due dates.	Y	
INS-27	System supports periodic fire inspections of all commercial and multifamily structures.	Y	
INS-28	System accommodates different field and workflow requirements for each type of periodic inspection.	Y	
INS-29	System fees are calculated based on prescribed tables and formulas.	Y	
INS-30	System allow inspection requests to be auto-forwarded to outside partner agencies. (Electric, water, natural gas, etc.)	Y	

Code Enforcement Specifications

#	Requirement	Response Code	Comment
CE-1	System tracks inspections and violation data with its user audit trail.	Y	
CE-2	System tracks code complaints from complaint inception to conclusion, including liens and the ability to generate ad hoc reports necessary to identify trends, report on objectives, and monitor workload measures.	Y	
CE-3	System provides residents and business owners with the ability to report, review and research property information, including complaints and complaint history, from inception to conclusion, including a record of any code compliance liens and cases by property.	Y	
CE-4	System creates, alerts and maintains the need for annual fire inspections.	Y	
CE-5	System creates and maintain unique code cases specific to distinct types of violations and infractions.	Y	
CE-6	System tracks all enforcement remediation related activities, such as lot clearing, graffiti, etc. in the case that such efforts will be invoiced to property owners.	Y	
CE-7	System supports issuance of violations in the field by inspection staff.	Y	
CE-8	System allows inspectors in the field to record, enter inspection, and research data into a case with minimal manual input.	Y	
CE-9	System researches property and owner information to complete inspections and issue violations.	Y	
CE-10	System identifies violations by parcel and address if applicable.	Y	
CE-11	System automatically tracks each case, calendar each step in the process and alerting officers, when needed, for key steps until case is closed/resolved.	Y	
CE-12	System automatically engages a lien process if a fine is not paid within a specific timeframe.	Y	
CE-13	System creates and maintains unique code cases specific to distinct types of violations and infractions.	Y	
CE-14	System tracks all aspects of liens including collections, tasks, hearings, court cases, outcomes, etc.	Y	
CE-15	System allows inspectors and other field users to search prior premised history on property with code violations and to use GIS mapping for display of such violations if desired.	Y	
CE-16	System restricts access to the complainant information based on user login and security settings.	Y	
CE-17	System automatically routes all web portal registered complaints/possible code violations to the appropriate department or individual based on the type of complaint.	Y	
CE-18	System provides for online complaint submissions to be system-assigned a complaint number, auto-acknowledgement, and ticklers for follow-up.	Y	
CE-19	System allows a pre-identified list of users to request inspections on specific properties (i.e. customer service, city council members, etc.). List can have 'hidden' pre-defined priority codes assigned to their requests.	Y	
CE-20	System enables authorized supervisors to reassign work to other staff and to track those assignments under an audit trail.	Y	
CE-21	Security provides management team access to all complaints for review, updates and (re)assignment.	Y	
CE-22	System generates inspection requests by type of buildings (such as vacant buildings) on a predefined schedule.	Y	
CE-23	System tracks and assigns actions to external agency vendors for example grass cutting, trash removal, inoperative vehicle removal, building boarding, building demolition. System tracks task assignment, completion, invoicing and lien assignment.	Y	

CE-24	System tracks all activities associated with Agency demolition of structures on private property. Activities include raze files and orders, utility cutoffs, contracting bid process, contract award, monitoring of the demolition, and the verification and signoff of the work performed by the contractors to demolish the building and reseed the property.	Y	
CE-25	System allows for code complaints to be submitted by residents anonymously via the internet.	Y	
CE-26	System allows for code enforcement officers to attach photos and other documents to a case ticket.	Y	
CE-27	System provides calendar reminders to support the re-inspection of open tickets.	Y	
CE-28	System allows for unlimited updates to current and past enforcement tickets.	Y	

Mobile Specifications

#	Requirement	Response Code	Comment
MA-1	System provides a seamlessly integrated application specifically designed for inspections and other field-related duties.	Y	
MA-2	Mobile app supported by wireless connectivity to the Internet and those where system data can be saved to the field device for downloading upon return to the office.	C	Citizenserve is fully functional in the field and is the same application whether on a workstation, tablet or smart phone. We recommend a data plan on mobile devices using LTE or 4G. We are adding a feature for scheduled inspections to be completed if an internet connection is lost or bad in a certain area.
MA-3	Mobile app is compatible with iOS, Android and Windows platforms for mobile devices (e.g., smartphones, tablets)	Y	Citizenserve is browser and device independent.
MA-4	Mobile app is easily accessible from the mobile's corresponding app store and a link from the agency's website.	N	No application is required, citizenserve is a html5 and javascript based browser application that uses a device responsive design.
MA-5	Mobile app provide a method of attaching to the record, electronic image(s) from the mobile device's camera or from an existing library of images.	Y	
MA-6	Mobile app are map-based and utilize location-aware technology. Requestor must be able to make more precise adjustments or enter a street address for more accurate location reporting.	Y	
MA-7	Mobile app enters the inspection disposition in the field and update system data in real time.	Y	
MA-8	Mobile app prints documentation in the field.	Y	
MA-9	Mobile app researches information such as prior inspections from field devices.	Y	
MA-10	Mobile app displays all the inspections related to a permit or other case type in the field.	Y	
MA-11	Mobile app interfaces with handheld devices and laptop computers to upload and download information for daily inspections. Specify all supported platforms.	C	See MA-2
MA-12	Mobile app provides GIS in the field for assisting in accomplishing field research and inspections.	Y	Citizenserve is fully functional in the field and support device features such as GPS.
MA-13	Mobile app provides access to maps and related property information through a map service while in the field.	Y	
MA-14	Mobile app captures time and mileage to be associated to a department or budget.	Y	Activities can be configured to track mileage and time associated. The user needs to input this information.
MA-15	Mobile app allows users full access to all relevant information for their assigned permits or applications.	Y	
MA-16	Mobile app allows users to enter notes and report any code violations that may be identified during an inspection.	Y	
MA-17	Mobile app electronically links external sources of information, including passing a parcel identifier, x-y coordinate or other information needed to lookup and supply information relative to the location or characteristics of the suspected violation.	Y	Additionally, most contemporary mobile devices store GIS coordinates in picture metadata.
MA-18	Mobile app allows users to schedule follow-up appointments.	Y	
MA-19	Mobile app synchronizes with the core system through wireless connectivity.	Y	Citizenserve requires a internet connection and updates are all real-time.
MA-20	Mobile app stores entered data when connections are lost and seamlessly connect and reconnect wireless network coverage is available automatically.	C	See MA-2
MA-21	Mobile app supports seamless roaming between broadband networks; agency owned wireless hot spots, and other agency network facilities.	Y	This is dependent on how the device is setup. For example, an iPad will switch to a configured wifi network if it is available rather than using the LTE network.
MA-22	Mobile app has predefined and modifiable Checklists based on the inspection and/or complaint type.	Y	

MA-23	Mobile app starts a record (permit, complaint, etc.) in the field in the online or offline mode.	**C**	See MA-2
MA-24	Mobile solution stores both photos and videos.	**Y**	

GIS Specifications

#	Requirement	Response Code	Comment
GIS-1	System supports ESRI ArcGIS platforms	Y	
GIS-2	System connects to the ArcGIS Server to get GIS information and verifies this information using the GIS addressing system.	I	Two way integration to ESRI can be created so GIS layers and objects can be show in Citizenserve and file information in Citizenserve can be used with ESRI tools. The one-time cost to set this up is $10,000. Custom integration is developed based on requirements that are determined by the City.
GIS-3	System displays GIS and select property in lieu of entering an address.	Y	
GIS-4	System queries using ESRI GIS tools.	I	Citizenserve uses Google Maps for built-in mapping features. Layers and map objects can be layered onto a map in real-time using a web service connection to an ESRI server. More information is needed regarding the requirement and whether this can be setup in the integration mentioned in GIS-2.
GIS-5	System uses GIS browsing that will pinpoint location of permits, cases, etc. by number, address, owner name, and/or parcel number.	Y	
GIS-6	System can display GIS information on an embedded web map (e.g. Agency's map services, ArcGIS Online basemaps, etc.)	I	See GIS-2.
GIS-7	System initiates an activity in the system from GIS Base Map (e.g., permit application, planning application, open a code case, schedule inspection, etc.)	Y	
GIS-8	System turns GIS layers on and off. System allows user control of layers.	Y	
GIS-9	System launches the GIS tool within the application.	Y	
GIS-10	System launches the GIS tool standalone.	N	Google Maps is built into Citizenserve. There is no standalone GIS tool. Links can be made available on the citizen portal or in the citizenserve application that go directly to the City or County GIS server and related features.
GIS-11	System selects and performs actions on properties geospatially, one or many, through a map screen (go from map to property/parcel) using tools for various types of selection, e.g., point and click, multi-select, etc.	Y	
GIS-12	System displays selected properties geospatially on a map (go from property/parcel to the map).	Y	Map reports can be created using the end-user reporting tool or requested as a custom report through support.
GIS-13	System shows all addresses associated with a parcel or multiple parcels.	Y	
GIS-14	System shows permit records organized by individual address within that parcel/parcels.	Y	
GIS-15	System identifies records pertaining to site-related work (property record) separately from building-related work (GIS coordinates), i.e. permits for flagpoles or driveways - not associated with a building address.	Y	
GIS-16	System imports information from the Agency's GIS RDBMS database automatically, e.g., permit setup, and manually, e.g., staff search and import.	I	See GIS-2.
GIS-17	System automatically updates addresses based on updated information in external data sources.	I	See GIS-2.
GIS-18	System has no limit to the number of layers allowed for viewing within the web portal.	I	See GIS-2. This can be accomplished through a map report on the web portal or a link to access the GIS server directly.

Financial Transaction Specifications

#	Requirement	Response Code	Comment
FIN-1	System provides effective dating of all financial transactions completed in the system including an audit trail tracking all financial actions including modifications to financial elements and data.	Y	
FIN-2	System loads, tests, and stores revised fee schedules to be implemented in the future.	Y	
FIN-3	System directly links payments received to the Agency's financial system.	Y	
FIN-4	System provides integration with Sungard HTE/NaviLine so as to update financial records in real-time as transactions take place.	I	This is an integration point, fixed fee to setup is $5,000.
FIN-5	System handles all transactions involving bonds and bond refunds and to relate them to permits and other types of applications.	Y	
FIN-6	System calculates fines and interest.	Y	
FIN-7	System can reverse a transaction and all related allocations and record this action permanently as part of the system audit trail.	Y	
FIN-8	System tracks and automatically calculates all fees related to the permitting, planning, zoning, licensing and enforcement processes at any point dictated by the business rules.	Y	
FIN-9	System calculates fees based on configured fields.	Y	
FIN-10	System generates invoices by any combination of the following criteria: use, square footage, number of seats, number of beds, number of units, number of X, etc.	Y	
FIN-11	System automatically determines fees from codes based on business rules defined by the code ordinances.	Y	
FIN-12	System tracks all transaction history (renewals, bills, payments, penalties, late fees, etc.) associated with a business/individual.	Y	
FIN-13	System provides receipts as part of the payment process in real time.	Y	
FIN-14	System allows authorized users to waive and void permitting and other fees and have all such changes reflected as part of the system audit trail.	Y	
FIN-15	System tracks and accounts for all current and historical financial related transactions collected through the system.	Y	
FIN-16	System is PCI-DSS certified for financial transactions.	Y	Citizenserve does not store or forward any credit card or bank information. Payments made on the citizen portal are made through PCI compliant payment gateways or payment providers. Payment providers are integrated into the portal but payment information is sent through the payment providers secure connection and industry standard APIs.

Reporting

#	Requirement	Response Code	Comment
REP-1	System must have seamless integration with one of three industry-standard report writers (Cognos, Crystal, and SSRS).	Y	A Microsoft SQL Server backup can be made availabe on a regular basis for data reporting with report writers. Unlimited custom reports are included in support and there is a built-in end user reporting tool for end users to create their own reports.
REP-2	System provides an ad hoc reporting tool to enable non-technical users to quickly and easily create, generate, display and print basic reports from the application software with built-in charts/graphs and deep links to the record directly in the system.	Y	
REP-3	System users can save and edit the current query or current report settings once a report has been built.	Y	
REP-4	System saves reports built with the report module for future printing. Access to that repository can be determined by system administrators.	Y	
REP-5	System directs report output to a specific printer or file, or to a screen.	Y	
REP-6	System exports output in formats that can be further manipulated by multiple third party applications such as PDF, Excel, Word, or MS Access.	Y	Excel (CSV) and PDF format are supported
REP-7	Reports can be generated from all system data fields as needed.	Y	Custom fields are supported also.
REP-8	System customizes reports, letters, correspondence and other printed outputs derived from the system database.	Y	
REP-9	System prints letters as well as original or duplicate permits or permit cards.	Y	
REP-10	System provides a library of standard reports (i.e. canned reports).	Y	
REP-11	System allows searches by wild cards, based on security permissions.	Y	
REP-12	System allows end users to create, edit, save and delete their own search criteria or parameters.	Y	
REP-13	System has an internal reporting tool which provides for multiple levels of security to control access to reports and reporting tools.	Y	
REP-14	System allows access for search for cases, permits violations, complaints, licenses and other applications by address, parcel number, record number and owner/ business/contractor name.	Y	
REP-15	System allows for searching records that may include discontinued or disabled record types.	Y	
REP-16	System conducts searches on multiple levels of related records hierarchy.	Y	
REP-17	The ad hoc report writer requires no technical knowledge of MS SQL or Oracle to allow end users to create queries or reports.	Y	
REP-18	Reports created using the report writer provide for interactive linking and drill-down as well as the ability to export data to all popular file formats.	Y	Report data can be exported in CSV format which is the standard for exporting tabular data.
REP-19	System provides searchable notes fields by key word across all records/modules/departments including by date and user.	Y	
REP-20	System sorts/filters all reports by user defined parameters (geographical zoning areas, inspector, inspection territory etc.).	Y	
REP-21	Financial reports can be defined and selected by a date or date range of activity.	Y	
REP-22	System allows users to print notices, etc. in the field from their mobile devices to a field/remote printer.	Y	
REP-23	System allows users to send notices of non-compliances electronically from the field.	Y	
REP-24	System allows users to build their own reports and create templates for recurring reports.	Y	In addition any user can request a custom report at any time as part of the standard subscription.
REP-25	Owning departments can check the status on all of their active/inactive records.	Y	
REP-26	System can report on all communications and comments on a permit application.	Y	

REP-27	System and its mobile version provides work management tools for users to review work status on all assigned permits, work load and schedule of appointments.	Y	
REP-28	System evaluates the optimal route for field staff to travel between appointments for a day's activity prior to scheduling time for appointments while also accommodating appointments set through auto scheduling.	Y	
REP-29	System allows for appropriate records retention schedules and ease of retrieval for open records requests.	Y	In addition any reports can be made available on the citizen portal for public consumption. For example a list of issued building permits or active business licenses.

Technical Specifications

#	Requirement	Response Code	Comment
TECH-1	System is 100% web-based and web-accessed.	Y	
TECH-2	System operates on Windows and OSX.	Y	
TECH-3	System operates on multiple browsers including Explorer, Chrome, Safari, and Firefox.	Y	
TECH-4	System supports the VMWare virtual server environment.	N	No server software is required. Citizenserve is a cloud based solution.
TECH-5	System is supported by a cloud database which is backed-up daily to a physically separate location.	Y	Multiple backups and archiving are maintained in geographically diverse data centers.
TECH-6	System provides a centralized data dictionary that fully describes table structure and appropriate levels of metadata.	Y	
TECH-7	System database can interoperate with MS-SQL Server.	Y	
TECH-8	System utilizes a middle tier web service to access backend database and the Application resides in a multiple N-tier environment.	Y	
TECH-9	The Tier 1 and 2 are capable of running in a virtually hosted server environment.	N	No server software is required. Citizenserve is a cloud based solution.
TECH-10	The Tier 1 and 2 application/system components are capable of running in a load balanced server configuration.	N	No server software is required. Citizenserve is a cloud based solution.
TECH-11	System is installed with a production environment and a separate test environment that can simulate actual operating conditions for all functions and uses.	Y	A full test environment is maintained for testing new versions and a full environment is maintained for testing data migrations.
TECH-12	System is designed for object driven data entry.	Y	
TECH-13	System uses network logon credentials to assign permissions.	Y	
TECH-14	System can receive converted and migrated historical information from the existing and current system.	Y	This is provided through data migration services by Citizenserve staff. Data migrations can be done at any time and a the functional or departmental level at any time.
TECH-15	System leverages Microsoft Word and Microsoft Excel and employs MS Outlook for issuing ad hoc and automated emails.	N	Citizenserve uses a browser and device independent HTML editor for generating document and e-mail templates. The editor is also used for editing generated documents. E-mails are sent through a SMTP server and stored with the related file. This is a design trade-off, you can't have a fully featured device and browser independent application that depends on MS Word, Excel and Outlook.
TECH-16	System in both agency- and vendor-hosted options provides a minimum of 99.9% uptime excluding scheduled maintenance.	Y	Citizenserve has a 13 year history of 99.9+% uptime. Citizenserve data centers have a 100% uptime SLA and certification from the Uptime Institute.
TECH-17	The vendor provides a Software Development Kit (SDK) to allow staff and others to customize and configure new applications based on the vendor's system.	N	Web services are developed as needed as integration points for interoperability requirements. Integration points are a flat fixed fee of $5,000.
TECH-18	System SDK is designed to allow citizens and other interested parties to develop new iOS, Android and Microsoft apps.	N	Web services are developed as needed as integration points for interoperability requirements. Integration points are a flat fixed fee of $5,000.
TECH-19	System provides for an Application Programming Interface (API) or Web Services interface for processing third party electronic payments.	Y	Citizenserve supports several payment processors and gateways. Additional payment processors can be integrated as a integration point for a fixed fee of $5,000.
TECH-20	System provides the ability to support extraction and publishing of single record types or an entire environment.	Y	Web services are developed as needed as integration points for interoperability requirements. Integration points are a flat fixed fee of $5,000.

TECH-21	System supports and is compliant with Service Oriented Architecture (SOA).	**Y**	
TECH-22	System supports and is compliant with Section 508 EIT standards.	**Y**	Citizenserve is browser based and all contempary browsers support access standards.

Security Specifications

#	Requirement	Response Code	Comment
SEC-1	System has role-based security where users can be assigned multiple roles – modify, view, or to restrict access control.	Y	
SEC-2	System provides adequate security functions to handle web-based transactions without compromising the integrity of the system.	Y	
SEC-3	System Administrator must be able to add, change, and cancel permissions for the system access.	Y	
SEC-4	Multiple sessions are supported on a single machine.	Y	
SEC-5	Multiple sessions with a single login credential is supported.	Y	
SEC-6	Audit trail contains a date/time stamp to the nearest second.	Y	
SEC-7	Audit trail records are not modifiable.	Y	
SEC-8	System provides access to audit trails for authorized users based upon the user's security profile.	Y	
SEC-9	Authorized users have the ability to print audit trail information.	Y	
SEC-10	System administrators have the ability to grant specific users with certain administration rights such as granting access rights/permissions to other users.	Y	
SEC-11	System allows access/security configuration settings by department (including giving access rights to specific permits, records and functions of the system.	Y	
SEC-12	System tracks all transaction history associated with a business/ individual.	Y	

GRANICUS

ORIGINAL PROPOSAL FOR REQUEST FOR PROPOSAL:

CITY OF BRYAN FOR A CIVIC PLATFORM

Presented On: Wednesday, March 24, 2016
Proposal Valid for: 120 days

Prepared For:
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civica

A GRANICUS COMPANY

More than the launch of a new website, Civica is about giving residents a way to easily and powerfully interact with local government.

Civica is one of the most experienced and innovative Government website development companies in the U.S. We work exclusively for Local Government, Special Districts, Special Events and Non-Profits, with installations in over 125 public sector agencies and 300+ projects/ system deployments nationwide. Recently, Civica has become a part of Granicus, Inc. Now governments can use our all-in-one shop for agenda management, web casting and website design.

As the leader in the market and only provider to offer the complete integrated platform to fill the needs of the City of Bryan; Granicus offers the first cloud platform and suite of applications designed specifically for government agencies.

The Center for Digital Government remarked that cities across the United States recognized as “the most innovative and pioneering counties in the nation” turn to Granicus for their software solutions.

We are excited to continue our partnership with the City of Bryan. We consistently go above and beyond for our family of Granicus clients and look forward to exceeding expectations to make this new website a reality for your staff, visitors, and most importantly your community of residents.

CORE SOLUTIONS

Responsive Web Design and Development

Comprehensive Content Management System

Mobile Application Development

Cover Letter

To Whom it May Concern,

We are excited to send you this presentation and cost estimate for a new, fully responsive and hosted website for the City of Bryan. We've had great tremendous success with the recent launch of new sites for Town of West Hartford, CT (**www.westhartfordct.gov**), City of Fullerton, CA (**www.cityoffullerton.com**), City of Carlsbad, CA (**www.carlsbadca.gov**), and City of Santa Barbara, CA (**www.santabarbaraca.com**).

For more than 15 years, Granicus has partnered with local governments and special districts across the country to provide public communications software and tools, and with the recent addition of the CivicaCMS product, Granicus is as well-positioned as any partner to strengthen and support government communications officials in their daily tasks. Through our continued partnership with the City of Bryan, we believe Granicus could provide immense value to the community through a website built on a leading content management system.

Our sites aren't just great to look at; they are functional, easily accessible across all devices, and powered by the CivicaCMS for complete control. The key to our award-winning technologies is our collaborative and partner-focused approach. Behind every great organization are great members, and the city's website should be an accurate and easy-to-use reflection of the pride they take in the organization.

We are available to answer any questions and look forward to demonstrating our capabilities to your team.

Jason Reis
Director of Business Development
(949) 899-8097
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PRINCIPAL

Chief Executive Officer:
JASON FLETCHER

Jason is passionate about instilling a culture of high performance with a team focused on continual improvement, individual ownership and intellectual curiosity. As head of the executive team, Jason believes strongly in building product that is inspired by and provides deep value to the Granicus client base. Jason's primary goal is aggressive and strategic growth, keeping Granicus a celebrated leader in government technology. A Denver native, he graduated from the Leeds School of Business at the University of Colorado Boulder. Over his 17-year career, Jason has successfully guided key teams for major organizations, most recentlyas President of CII, an organization that experienced a fourfold rate of growth under hisstewardship.

Vice President of Marketing & Strategic Partnerships:
MICHAEL ASHFORD

Michael grew up in local government as the son of a Community and Economic Development Director and has relied on those insights to connect public sector employees' needs to technology solutions throughout his career. As the Vice President of Marketing and Strategic Partnerships at Granicus, Michael guides the company's demand generation strategy and thought leadership efforts. He has nearly a decade of experience in the eGovernment software space, having worked previously at MindMixer and CivicPlus, and has been a featured speaker and presenter at conferences across the country on eGovernment trends. Michael graduated from Kansas State University with a B.S. in Mass Communications and Journalism.

OPERATIONS & PROJECT MANAGEMENT
PROJECT MANAGER:
JEANNE GREGG

Jeanne has over 20 years of experience in building, leading & motivating teams, and managing projects & programs in both domestic and international technology arenas. Her experience spans small privately owned corporations, big corporations and business ownership. She holds a Master's degree in Applied Linguistics from the University of Saarland. Jeanne is passionate about streamlining and establishing processes to ensure the highest levels of customer satisfaction. Jeanne manages all phases of a project, acting as a liaison between the client and various Civica staff active at each stage of design and development.

ACCOUNT MANAGEMENT

BUSINESS DEVELOPMENT:
JASON REIS

Jason received a Bachelor of Science degree in Web Design and Interactive Media from the Art Institute of California, Orange County, where he graduated as valedictorian with President's Honors. With over 10 years of experience in various professional service roles spanning entertainment, startup ventures, website design, and software business development, his technical background provides a solid foundation for client solution scoping and delivery. Jason collaborates with clients to keep focus on user interface and experience.

CLIENT SOLUTIONS:
IAN NICHOLLS

Ian has a Bachelor's degree in Web and Interactive Media Design from The Art Institute of California, Orange County. He has worked in both management and production for various media, giving him an insightful perspective on relationships between clients and companies.

Ian works closely with clients to understand and communicate their needs to the Civica Team in order to produce personal and distinctive solutions. A strong advocate for our clients' aspirations, he works alongside designers and programmers to assist in product development.

WEB DESIGN

DESIGN AND INTEGRATION: MARCO SEGURA

Marco received his Bachelor of Science degree in Web Design and Interactive Media from the Art Institute of California, Orange County. He has in-depth experience in website front-end design and integration, corporate branding, graphic design and is highly skilled with graphic design tools such as Adobe Photoshop and Illustrator. Marco maintains expert knowledge in CSS, JavaScript, PHP, MySQL, HTML5 and ASP.NET. He leads the design team in creating and integrating designs for client websites.

DESIGN AND INTEGRATION: RYAN SAPP

Ryan obtained his Bachelor of Science degree in Digital Media and Web Design from The Art Institute of California, Orange County. Before joining Civica, he provided effective web solutions for the Chuck Jones Center for Creativity, Suziki Strings and several other small businesses in Southern California. Ryan has over 7 years of design and integration experience. His designs include dynamic and creative websites which combine his skills at CSS, JQuery, PHP and AJAX, accentuating his experience with digital art and interactive media.

DESIGN AND INTEGRATION: PATRICK EAGAR

Patrick earned his BFA in Communication Art from Otis College of Art and Design in Los Angeles. A California native, he has worked with Tim Burton through Disney, as well as Sony, Square Enix and Legendary Productions. Patrick has 7 years of experience designing and integrating outstanding websites and maintains expert knowledge of CSS, HTML5, UI, and JQuery. He specializes in government website designs that showcase social and new media.

DEVELOPMENT & ENGINEERING

SENIOR ENGINEER: DAVE WELCH

Dave holds a Bachelor's degree from California State University Long Beach. He has 18 years of experience building a variety of software applications in ASP.NET (VB.NET, C#.NET), classic ASP, Cold Fusion, .PHP and SQL frameworks including MS SQL and My SQL. He maintains expert knowledge of Server Side Code, databases and numerous APIs. He created and modified several of the Civica CMS modules. Dave currently leads the ongoing development of the CRM, email applications, specific customized modules, extranet applications and heads the Civica Development Team.

PROGRAMMER ANALYST: SANUJA KANUNGO

Sanuja has a Master's degree in Management Information Systems, from UT Dallas. She interned with the Walt Disney Operations Measurement Department in Florida and worked as a Software Developer with First Communications in Chicago, Illinois. She has 3+ years of experience as a software engineer and maintains expert knowledge of ASP, .NET, JQuery, C# and SQL Server. She is the lead on several Civica CMS modules including the interactive maps.

The Civica CMS – Simple Management with Modules

With over 22 modules and counting, the Civica CMS is a comprehensive and highly capable system right out of the box. Whether you're looking for simple event calendars and job postings, or customizable mapping features on an RFP coordination, our modules are easy to deploy and even easier to manager.

ADMINISTRATION, PERMISSIONS AND WORKFLOW

At the core of CivicaCMS is the Admin Module. The Admin Module allows for simple centralized setup and management of user rights, roles, and permissions across the entire system. Leverage custom workflows and user roles for seamless content revisions and approvals. External authentication is also available against third party systems such as Active Directory, via a dedicated hosting environment.

Restrict access to specific modules and functionalities based upon user roles or departments, on the fly and without the need for IS/IT involvement. As a result, content is self-managed by internal staff for increased efficiencies in a monitored environment. For maximum visibility, an audit trail of changes to the site and its systems are maintained within the Administration MS-SQL database.
A full audit trail of every change to the site and publication of new content is maintained by the Administration MS-SQL database

NAVIGATION, PAGES AND SECTIONS

The Civica CMS makes it simple and quick to edit content in all areas of the website. From our "what you see is what you get (WYSIWYG) editor to our new simplified "Add a Page" feature, we give you full control to sustain your website with new and exciting content for years to come. We include features like Paste From Word, Page Version Time Machine and Spellchecker to give you full control of content management. The center for navigation and page control is NavBuilder, which allows authorized staff to create new pages and folders/sections within the site. With one click, authorized staff can create a new page on the site, using either a simple HTML blank page, a predefined template-based page with integrated module functionality, a branded department page, or more complex "widget" pages. The system automatically populates the associated site indexes and metadata.

The navigation structure and all associated drop down menus are also created from the NavBuilder system. This includes the ordering, layout, colors and styling of the menus.

MODULES, MODULES, MODULES!

The Civica CMS provides an extensive array of modules and tools for proper organization of content. Staff contacts, job postings, press releases, RFPs and bids, e-newsletters - there's a module for that! Best of all, the core CMS package includes all these modules and more, so you don't have to worry about hidden or future costs for service.

DOCUMENT MANAGEMENT

FileBank is a robust and fully integrated document management system which provides high-level organization, tagging and posting of all document materials. Custom features include the ability to set upload size and type restrictions, detailed metadata and search, as well as configurable viewing rights and permissions for documents and file directories.

SEARCH

CivicaCMS comes fully integrated with Google Custom Search Engine (GSE) for a powerful, detailed and familiar search experience. GSE extends search capabilities into documents stored within FileBank (PDF, Word, Excel, PowerPoint, etc.). This single integration enables users to instantly locate documents, as well as perform a complete text search within the documents themselves.

MEDIA MANAGER

CivicaCMS places full design control into the hands of authorized staff with the Media Manager module. Wherever possible, design elements including buttons, icons, and imagery are managed through one central location, and able to be quickly modified or swapped-out on the fly. Government communication needs to be agile and adaptive, CivicaCMS and the Media Manager provide all the tools to keep your new website current, fresh, and serving your community best.

PHOTO MANAGER

Showcasing great imagery of your community has never been easier. Photo Manager brings powerful photo management capabilities to a single interface within CivicaCMS. A variety of Meta Data options are available to allow for easy searchability and organization across multiple photo galleries and groups. Just had an event in your community? Take your event online and publish a new photo gallery for your community to engage with.

CALENDAR

When communities come together over events, they thrive. The CivicaCMS Calendar Module is a catalyst for action, excitement, and enjoyment. Create, edit, and manage event announcements, meetings, or any public activity with the ease. Event posts can be featured on the the homepage or simultaneously

on multiple calendar feeds, tagged with filters such as department, age group or location for easier search. Enhance event posts with pictures, descriptions, website links, attached documents, contacts and map location details.

NEWS & ALERTS

Build awareness and maintain government transparency through a constant feed of news and information. From emergency alerts to simple announcements and social media sharing, CivicaCMS's News Module is powerful and agile. Easily host and manage an unlimited number of departments or project news feeds in addition to the central news feed typically found on the website homepage.

Choose from a variety of display options such as text-only, thumbnail graphics, or even a full-width responsive slideshow for a unique look and feel. Keeping your residents informed and connected has never been easier with APIs and RSS feeds, as well as CivicaCMS's optional user-driven Resident Portal.

SOCIAL MEDIA MANAGER

Engage your community through their favorite social media channels like Facebook and Twitter. Directly connected to the News & Alerts Module, the Social Media Module instantly pulls all socially distributed content into a simple dashboard, keeping a log of all activity for tracking and redistribution. Custom RSS feeds can also be configured through the Social Media Module, making it a dynamic necessity for community engagement.

FORMS

Capturing feedback and information from your community is vital for constant improvement. Deploy a quick and simple visitor survey or a fully dynamic CPR class registration form with complete payment integration in seconds with CivicaCMS's Form Module. Tracking and reporting are all available in a centralized and secure database, and form submissions can be custom tailored per use case.

GIS AND MAPPING

Civica is an ESRI business partner with all of our products that interface with GIS systems being built on ESRI Software. We have created a number of mapping applications, including Crime Mapping, Parcel- and Address-based Information Displays, Capital Improvement Planning, Business Development mapping and a number of client-specific customized displays.

EMAIL MANAGER

CivicaCMS's Email Module is a full-service mass email and text communication distribution solution, digitally connecting your agency with both large groups (20,000+) and individuals. Create newsletters or emails using built-in templates or custom tools, manage distribution lists, and analyze reporting insights for every communication that is sent out.

For full ICANN SPAM compliance users are able to opt-in, as well as manage their subscription directly through an optional Resident Portal. Beyond the Email Module, CivicaCMS supports integration with most popular third party email platforms and solutions, including Constant Contact and GovDelivery.

SOCIAL MEDIA

Civica has made it easy - one click easy - to share information like calendar events and news across popular social media streams including RSS, Facebook and Twitter. Civica can assist with configuration, making sure the Social Media Module provides easy access to any and all social streams across various department. Additionally, it's standard practice to provide website visitors with the ability to share your website content across their own social streams, as well as browse your social feeds in embedded live stream feeds on your new website homepage or social media center.

WEBSITE MAINTENANCE AND HEALTH TOOLS

The Civica CMS has built-in health tools to make sure your website is always running smoothly and free of errors. Among these tools is the ability to produce reports and fix broken link errors, duplicate links, broken pages (404 errors) and image metadata.

SITE MAPPING, A-Z INDEX AND QUICK LINKS

The Civica CMS comes standard with dynamic Site Map features, providing an index of your site that is always current and easily available. A-Z Index automatically links Web pages into the site map, indexing page construction for both Internal and external Web links, significantly improving the website's search capabilities. Adding Quick Links to this toolset provides the ability to create and manage hyperlinks that are short, easy to remember and promotional-material friendly.

APIS

Given the API specifics, Civica can develop the proper interface to allow the CMS to communicate with an external API. Included with the CMS is the ability to communicate with the most common API's – Facebook, Twitter, RSS, Flickr, etc.

We would love to demonstrate for you and your website project team all these features and more.
Please contact us if you have a feature or requirement that you don't see listed above and we can discuss.

Santa Barbara, CA
735 Anacapa St.
Santa Barbara, CA 93101
www.santabarbaraca.gov

Scott Nelson
Webmaster
O: (805) 897-2510
snelson@santabarbaraca.gov

New client website redesign, fully responsive with unique floating panel approach, colorful user portal functionality, video libraries, several 3rd party integrations, interactive maps (parks, construction, downtown parking), and powerful search
DOS: 2013

Fullerton, CA
303 W. Commonwealth
Fullerton, CA 91730
www.ci.fullerton.ca.us

Steven Yee
Webmaster, IT. Dept.
O: (714) 738-6538
steveny@ci.fullerton.ca.us

Current client website redesign, fully responsive with 9 screen interactive scrolling design, each with unique services, icon tray and more. Share and Follow option from the homepage
DOS: 2006

Carlsbad, CA
1200 Carlsbad Village Dr.
Carlsbad, CA 92008
www.carlsbadca.gov

Greg Wallace
Sr. Web Administrator
O: (760) 602-2489
greg.wallace@carlsbad-ca.gov

New client website redesign, fully responsive with completely re-imagined information architecture, humanistic user experience, news center, library subsite, social media integrations, and strong search-ability
DOS: 2014

DISCOVER

Every community is unique. Implementing technologies to best serve your community requires a deeper understanding of usability and audience.

DESIGN

A strong user driven approach toward community branding ensures your website and mobile app seamlessly deliver both style and functionality.

DEVELOP

Stability, security, and accessibility are vital to any site development. We integrate the latest technologies into your solution to provide a flexible foundation for years to come.

DEPLOY

Content migration, quality assurance, training, and the convenience of on-going support come standard. Civica provides everything needed for a successful launch, even hosting.

Appendix:

Assumptions

- Unless otherwise stated, this estimate is good for 120 days from the date first set forth above.
- A full and detailed project schedule will be delivered on commencement of the project.
- All terms and conditions of the foregoing subject to a definitive written agreement to be agreed between the parties, if so desired.
- The client shall be responsible for making additional payments for changes requested by the client's employees or agents in original assignment. However, no additional payment shall be made for changes required conforming to the original assignment description, or to amend any vendor omissions.
- Development and changes are billed are billed at the rates set forth in this proposal and are subject to possible (though unlikely) review year 3 of contract.
- The Client will be solely responsible for securing all licenses, digital certificates, and rights of usage to external links and services.
- Civica Software shall retain all rights to reuse all technologies created and implemented for this assignment.
- The production team and any other authors in the work shall receive a credit line with any editorial usage to the extent such credit lines are in accordance to the customary practice in the industry. And, in keeping with the spirit of the Internet, and because Civica Software is active in the web community, we request credit for development of the website on the bottom of the home page of the developed website. This is handled with a graphic image / hypertext link to the Civica website. Modifications of the agreement must be written, except that the invoice may include, and the client shall be obligated to pay fees or expenses that were orally authorized in order to progress promptly with work, if followed up with written confirmation within five (5) days.
- Any additional design concepts or revisions, content migration or custom development, including retrofitting custom code for responsive design, conversion of existing Flash-based technologies to use industry standard HTML5 display technologies, along with all custom integration items not set forth in the RFP document, will be billed at the rates set forth in this estimate / proposal.
- Any integration with a 3rd party or internally development application (including custom functionality) will first be evaluated by Civica, in order to provide proper cost for integration.
- A Free basic graphic redesign of (1) website after four years of uninterrupted Annual Maintenance Service is will include the following: One (1) Homepage composition based on current theme library, with one (1) revision. One (1) Secondary page composition based on homepage design with one (1) revision. Integration of final design compositions with City website. Migration of current existing content. Free basic graphic Redesign DOES NOT include: Any addition of new content by Civica, any relocation of current content to a new navigation structure by Civica, any changes of Website functionality outside of those necessary with new homepage design. Additional Features and functionality not available on the original website may be subject to addition charge.

COMPANY BACKGROUND

Civica is one of the most experienced and innovative Government website development companies in the U.S. We work exclusively for Local Government, Special Districts, Special Events and Non-Profits, with installations in over 125 public sector agencies and 300+ projects/system deployments nationwide.

Recently, Civica has become a part of Granicus, Inc. Now governments can use our all-in-one shop for agenda management, web casting and website design. As the leader in the market and only provider to offer the complete integrated platform to fill the needs of 3CMA; Granicus offers the first cloud platform and suite of applications designed specifically for government agencies. Cities across the United States recognized as “the most innovative and pioneering counties in the nation” turn to Granicus for their software solutions, as found by the Center for Digital Government.

During the last 17 years, we have created a number of custom online tools to ensure smooth communications and timely project management, with client staff having full and transparent access to our online project management systems and development environments.

We stand out from the competition not just because we have been doing this longer than anyone else, but because we have a personal touch combined with a level of professionalism that few vendors can match. Each client has its unique needs and we respect that. Your new site will be built from your perspective and with your needs in mind, not ours.

COMPANY SIZE

IN BUSINESS SINCE: 1997
TOTAL SIZE OF FIRM: 135
FEDERAL TIN#: 91-2010420
SOFTWARE COMPANY FOR GOVERNMENT.

OFFICE LOCATION

707 17TH STREET
SUITE 4000
DENVER, CO 80202
720-240-9586
WWW.GRANICUS.COM
WWW.CIVICASOFT.COM

OTHER INFORMATION

CIVICA SOFTWARE, INC. (CIVICA), IS OWNED BY GRANICUS INC., A DENVER COLORADO CLOUD SOLUTIONS

AVAILABILITY

CIVICA IS AVAILABLE TO BEGIN THIS PROJECT IMMEDIATELY (UPON NEGOTIATION OF A CONTRACT).

*Civica is the prime and sole contractor for this project. All work will be completed by our in-house team.

Cost and Budget

The following is our initial cost proposal. We have done everything possible to offer our lowest pricepoints, as we highly value our current relationship with the City.

New Website Discovery

Current website review and evaluation, including user and staff goals and requirements
Full discussion of objectives and goals for the new website
Interactive demonstration of wireframes, design themes and Civica technology stack
Introduce and create accounts for collaborative tools for authorized personnel

$ 1134

Website Design Process

Discussion of design examples and desired design direction
Establish homepage design concept based on design meeting feedback
Development of secondary (internal page design)
Additional design concepts can be added to this proccess ($2,250 per concept)

$ 2970

Website Development and Integration

Integration of the approved design on a development CMS installation
Implementation of CivicaCMS and required features
Delivery of fully responsive website framework optimized for mobile

$ 6750

New Website Information Architecture and Navigation

Audit of existing navigation and inventory of content (pages, news, documents) to be migrated
Establish and construct new and improved information architecture for website

$ 1339

Web-Ready Content Migration (discounted block rate)

Migrate up to 100 pages of “ready for web” content to new site according to a content migration matrix
Establish and deploy global styling to all current and future content pages
Final check content for duplication errors, broken links and spelling
Additional content migration available for 50 pages at $350.00

Up to 100 pages - $ 700

Quality Assurance and Technology Transfer

Final checking and stress testing of complete site

At launch, you will take full control of the maintenance of all sections

Full access to the source code (Private Open-Source)

$ 1674

Project Management

Complete hands-on project management for website from Kick-off to Launch

Setup and project task tracking in Collab (project management software solution)

$ 1604

CMS Staff Training - 10 hours of Live Web-Based Training

Training for Basic User and System Administrators (all expenses have been included)

Unlimited user access to Civica Knowledge Base and Online Video Help Center

Live web sessions can be recorded upon request - Onsite Training available for additional cost

Additional day/sessions can be added to this contract ($900 for 4 hour block)

10 Hours Live via Web - $ 2,250

Annual Maintenance, Support and Hosting

Annual Maintenance and upgrade program - security patches, updates, enhancements (responsive)

Private and secure cloud-based hosting with disaster recovery, backups, and 99.5% uptime

Includes full Access to Civica phone support during business hours for staff and administrative users

Includes a FREE website design refresh at the end of year four (with 3 year commitment)

$ 350 per month

Final Cost Summary

New Responsive Website Powered by the CivicaCMS	$ 15,471
Content Migration - Web Pages (100 pages)	$ 700
End User Training (10 Hours Live via Web)	$ 2,250
Migration of all documents and graphic resources	Included
Google Site Search and Google Analytics Integration	Included
3rd-Party Integrations (external link / iframe only)	Included
Total Redesign Project Cost	**$ 22,621**

*We have multi-year pricing options available which can spread the year one cost across multiple years, if desired.

Granicus will provide a no cost design refresh following 4 consequetive years of Maintenance, Hosting and Support*

Annual Recurring Cost (begins at time of Golive)

Maintenance, Hosting and Support — $ 350 per month*

*Subject to a 5% annual increase

AVAILABLE OPTIONS AND SERVICES (NOT INCLUDED IN BASE PRICE)

Branded Section Package (Ex. Police, Fire, Parks, Planning) - $1,450 for each dept.
(includes unique background image, 5 feature buttons, and landing page)

Additional Design Concept with Revisions - $2,250
Additional Responsive Content Migration Beyond Proposal Quote - $940 per 50 page block
Additional Live Web-Based Training (2-hour session) - $450
Onsite Training for CMS Users - $1,750 per day plus expenses
Custom Interactive Map (ex. Parks, Shop & Dine, Construction) - $1,180 each
Password-Protected Member Portal (extranet) - $4,850
Payment Integration for Simple Forms (take payments online) - $1,120 one-time configuration
User Portal (resident accounts for site customization options) - $6,580 one-time design and configuration
Internal Site Section Branding Options - Starting at $300
- Up to 5 Department Feature Buttons - $300
- Unique Department Background Image - $350
- Department Landing Page (homepage) - $800

Unique Look & Feel Subsite - $10,950
CivicaCRM (Service Request Management System) - $4,970 plus $210 per month
CivicaCRM Mobile App (iOS/Android) - $7,790 plus $210 per month

Software Warranty

Civica fully warrants the Content Management Software and website to be free of all bugs and defects for 12 months from the date the website goes live.

Civica remains committed to a long-term partnership with all its government clients and its technicians will be available during regular business hours to assist personnel in all aspects of the website maintenance and also to advise staff on the development of any applications required to interface with other e-government initiatives. These services will be provided free of charge for a three month period post the website go-live date.

Should any additional professional services be required regarding the design, implementation, content conversion or training either beyond that included in the proposal or after the three-month initial period the following rate structure would apply:

Principals:	$210 per hour
Custom programming and integration:	$155 per hour
Project management:	$135 per hour
Web design:	$116 per hour
Web mastering:	$96 per hour
HTML Production:	$93 per hour
Specializing Programming - Scope For Price	

Annual Maintenance Program

An annual maintenance and upgrade program is available that will ensure all website and purchased modules installed contain the latest features developed during the previous year. In addition, it will provide you staff with access to Civica engineers during normal business hours to consult on any proposed website and software integration issues. (Included no-charge for first year following go-live)

Ongoing Training, Web Mastering & Custom Development

Civica has several packages training and web mastering packages available, either via GoToMeeting or onsite with cost of travel and expenses. Custom development packages can be accommodated by pre-approved proposal funding as part of this proposal, and can include graphic design services, department branding and site additions.

Updates

Generally, administrative and general updates are released within 9 to 12 months of the previous release. Changes to specific modules may be provided and integrated with client system upon their approval.

Live Customer Support via Phone, Email or Support Center

Our support team includes dedicated personnel to handle direct phone and email support. Our core development team (the actual programmers who create the technology) is also available to answer and address issues directly. In addition, we have launched Civica Support – a new online Support management system allowing clients to access online Help, a Knowledge base and Forums, submit issues online via our issue tracking system and access all documentation.

Security patches and necessary upgrades are scheduled upon immediate discovery - normally within a few hours of being brought to our team's attention. We assist onsite technology staff with all updates as part of the annual maintenance including all new features added (for other clients and as part of our normal ongoing development cycle) for the modules and systems you have purchased. The impact on your staff is normally no more than a few hours in total.

Issue Categories and Response Times

PRIORITY 1: EMERGENCY

Reserved for anytime there is a severe application problem resulting in complete work stoppage for a large number of your staff, or complete loss of service to either website or intranet (application-related site outage). Access to key points of contact is available 24 hours a day.

Response: 30-60 minutes during prime hours (M-F 8AM - 6PM)
60-120 minutes off-hours, holidays and weekends

Resolution: 4-12 hour resolution time

Notifications: Project Manager is given a detailed report by the Civica on-call technician (for off hours only) and distributes to the IT Manager.

Update: Hourly or as scheduled with Civica

Examples: Web server is up but application non-functional.
SQL-server errors not related to hardware
Patch updates from vendor or Microsoft cause incompatibility resulting in service outage

PRIORITY 2: HIGH

Reserved for when an application or service is available, but in a degraded mode. Work around is feasible or loss of service for short time is acceptable. Impacts a small group or complete work stoppage for an individual.

Response: 2-4 hours during prime hours (M-F 8AM - 6PM)

Resolution: 3-5 business days

Update: Daily or as scheduled with Civica

Examples: Site is operational, but search, calendar or other modular unctionality is non-operational or impaired presentation layer is up but back-end is non-operational

PRIORITY 3: MEDIUM

Moderate business impact; issues have affected customer productivity. Work around may exist or problem is for non-business-critical task.

Response: 8 hours

Resolution: 5 business days

Update: Staff is notified when Civica completes repair

Examples: File attachments won't upload.
Presentation layer is not rendering correctly

PRIORITY 4: LOW

Limited business impact. equest can be scheduled.

Response: 2-3 business days

Resolution: As scheduled by Civica

Update: Staff is notified when Civica completes repair

Examples: Programmatic change to back-end to improve efficiency
Programmatic change to front-end
Distribution of all patches and upgrade

ADA Compliance

Civica Software has used its multiple years of experience in the municipal field to adapt their CMS to make ADA compliance as easy as possible for the content inputting user as well as front end users.

A few examples of the automatic tools are:

- News/Calendar modules: Automatically add an alt attribute to image tags when one is not provided
- Design only images are added via CSS-background so they will not interfere with screen readers
- WYSIWYG Editor provides a table wizard that adds <TH> tags where necessary
- Form Editor adds a label to every input

Other elements that are added to websites are:

- Skip to content link (Santa Barbara)
- Low Graphics (text only) Version is self-generated by the system; this is so administrators don't have to input information twice
- HTML Table Markup is only used for tabular data and not design or layout

Also as part of the Civica workflow, every site goes through a quality assurance process using ADA available tools (http://wave.webaim.org/) and human resources before sites
go-live.

> "I am very pleased with Civica. From the start of the project through content migration and 'go live' the Civica team worked with us to make our Website update a success."
>
> EJ Boranian, IT Manager
> City of Whittier, CA

Average Timeline: 13-24 Weeks

Milestone 1	Milestone 2	Milestone 3	Milestone 4	Milestone 5	Milestone 6
Kick-off	Concept and Design	Development and Integration	Architecture and Content Migration	End-User Training	QA & Technology Transfer

A refined Milestone and Deliverables Timeline and Schedule, which fits the requirements of the Client, will be established at time of contract negotiation and execution. Whenever possible, Civica will work on various project phases concurrently to reduce the overall project timeline.

Milestone 1: Discovery and Kick-Off Meeting
1 week from contract execution

Milestone 2: Concept and Design
4-6 weeks from kick-off meeting

Milestone 3: Development and Integration
3-5 weeks from concept/design

Milestone 4: Information Architecture / Content Migration
6-12 weeks from design integration

Milestone 5: Training
2 weeks during content migration

Milestone 6: Quality Assurance/ Technology Transfer
1-3 weeks from completion of content migration

> The new functionality is wonderfully versatile and flexible. The display of the buttons and banners truly enhances our pages. The flexibility we have with the buttons, both in the homepage and the subpages is truly fantastic! ”

Rick Lynch, IT Application Specialist
City of San Leandro, CA

Milestone 1: Discovery and Kick-Off Meetings

Civica will host kick-off meetings with your website project team to review and evaluate the current site and identify goals, expectations, and your explicit wishes and requirements for the new website. We encourage your team to present design examples to compliment the work and experience our designers bring to the table.

Additionally, we will introduce all of the tools we will use to make this project a collaborative success story (Collab, Content and Branded Page Matrices for Content Migration, etc.), we will also discuss and establish the precise project timeline, milestone goals and expectations.

Estimated Timeline: 1 week from contract execution

Milestone 1	Milestone 2	Milestone 3	Milestone 4	Milestone 5	Milestone 6
Kick-off	Concept and Design	Development and Integration	Architecture and Content Migration	End-User Training	QA & Technology Transfer

Milestone 2: Concept and Design

Upon completion of the design kick-off meeting, our in-house team will have everything they need to drive the design a direction home, establishing what will ultimately become the new website look and feel, layout and content hierarchy.

Using a variety of proven-effective layouts (themes), our expert team will help you select the best design direction for your users. Civica will work back and forth with your team, branding the selected theme as allowed to ensure all preferred photos, graphics, colors, features and functionality have been considered and included. If a new custom design is desired, we have options available to deliver all new design concepts for review and selections. Throughout the process, your team will be in direct personal communication with the Civica design team, with every opportunity for you to offer comments and feedback on all revisions. Our goal is to deliver a new site that you will be proud to call home.

Estimated Timeline: 4-6 weeks from kick-off meeting

Milestone 1	Milestone 2	Milestone 3	Milestone 4	Milestone 5	Milestone 6
Kick-off	Concept and Design	Development and Integration	Architecture and Content Migration	End-User Training	QA & Technology Transfer

Milestone 3: Development and Integration

Once you approve the homepage and secondary (internal) page designs, Civica will host a development (test) version of what will be your new website. We will integrate the approved designs with the new system and, at this point, the new design will "come to life."

Your staff will have the ability to interact with the new site features, and upon completion of this stage you will have the current version of the CivicaCMS. The new system will have modules, tools and features including:

- News and Announcements
- User Administration System System
- Photo Manager
- Simple Forms
- Phone Directory
- FAQs
- Advanced Media Manager
- Agendas and Minutes
- Press Releases
- Slideshows
- Job Classifications
- RFPs and Bids
- QuickLinks
- e-Notify and Email Manager
- FileBank
- A-Z Index
- Interactive Maps
- Calendar
- Job Postings
- Contacts

Estimated Timeline: 3-5 weeks from concept/design

Milestone 1	Milestone 2	Milestone 3	Milestone 4	Milestone 5	Milestone 6
Kick-off	Concept and Design	Development and Integration	Architecture and Content Migration	End-User Training	QA & Technology Transfer

Milestone 4: Information Architecture and Content Migrations Services

The Civica Content Migration teams primary objective is to relocate all content from the previous navigation structure to the new structure, including the addition and restyling of any new content. We will do a comprehensive analysis of the current content (HTM, HTML and ASPX code), as well as structure an inventory of additional contents, which also require migration. For example:

- News Migration
- FAQ Migration
- Calendar Migration
- FileBank Organization
- Online Forms
- Slide Shows
- A-Z Index
- Staff Directory
- Page Contact Setup
- Image Resizing

Civica will provide a complete content migration plan for successfully migrating content to the new website applying global styles for the new design. Civica considers the budget for this project to be of highest priority, and for that reason, pricing for content migration is best established after a pre-analysis has taken place. Civica will work with your IT administrators to fully understanding the format, storage, structure and styling of the current website content in order to provide a content migration plan that is most efficient and cost effective.

During content migration, the development site will remain available for review on a 24/7 basis. As sections of the site are completed, you will be notified via Civica's internal project management system, and a request for sign-off will be posted.

Civica's content migration services can extend far beyond the simple transfer or relocation of content from a previous navigation structure into a new structure. Our content migration team is highly skilled and experienced at streamlining your website for optimum content delivery and performance. Available content migration services can include, but are not limited to:

- Give existing content a modernized look and feel, complementing the new portal design
- Clean up and removal of extraneous 'junk' code and formatting from previous years, which can slow down site performance
- Employ styled tables and a clear information architecture and content hierarchy
- Use our knowledge and expertise of the CivicaCMS to transform bland HTML pages into visually pleasing, easy to navigate and easy to maintain content.
- Utilize CMS modules and tools for superb content performance, organization and delivery.
- Review of content for grammatical and spelling errors
- Set up CSS style sheets, drop downs and automatic content styling tools
- Optimize all graphics for Web delivery
- Integrate CMS modules to handle content such as news, events, alerts and documents in appropriate and powerful ways
- Setup Popular Links and QuickLinks on homepage and secondary pages
- Organize FileBank structure, files and naming conventions, including the creation of appropriate FileBank display pages
- Establish core News and Calendar feed targets for immediate access by staff

Milestone 4: Information Architecture and Content Migrations Services

- Final check and removal of any broken and/or duplicate links

Throughout the entire development cycle, we maintain a system that replicates your final deployment environment. All functionality testing and development will take place on this system to ensure an accurate representation of the finished product.

Although testing occurs throughout the project, in this stage the site is scrutinized on multiple platforms, browsers, and bandwidth environments. The various systems planned for the site will be tested and all subsections will be refined and tested for proper linkages and content control.

Estimated Timeline: 6-12 weeks from design integration

Milestone 1	Milestone 2	Milestone 3	Milestone 4	Milestone 5	Milestone 6
Kick-off	Concept and Design	Development and Integration	Architecture and Content Migration	End-User Training	QA & Technology Transfer

Dallas-Fort Worth CLEAN CITIES

"Civica staff has been phenomenal to work with. We're really enjoying the site!"

Pamela Burns, Communications Supervisor
Dallas-Fort Worth Clean Cities, TX

Web Marketing Association's WebAward 2014
Congratulations to Dallas-Fort Worth Clean Cities
Winner of Energy Standard of Excellence 2014

Milestone 5: End User Training (Editor/Admin)

Our team will provide end-user training in focused onsite or webinar training sessions. Each session will take your content editors through the tools necessary to maintain and update the content on the website and the procedures for creating and posting new content onto existing pages. These “content editor” training sessions will be held at your offices. Session topics include, but are not limited to:
create and edit page content, best practices for importing and working offline, use of basic modules (News, Calendar, FileBank, etc.)

In addition, we will provide in-depth “system administrator” training for selected users in the full use of the Civica administration system. The session topics include, but are not limited to: setting up all user rights and privileges, configuring Workflow and approver level assignment,
understanding all of the Civica tools necessary to maintain and redesign the website (creating new pages, landing pages, modifications to navigation and graphic changes to the website)

Estimated Timeline: 2 weeks during content migration phase

Milestone 6: Quality Assurance and Technology Transfer

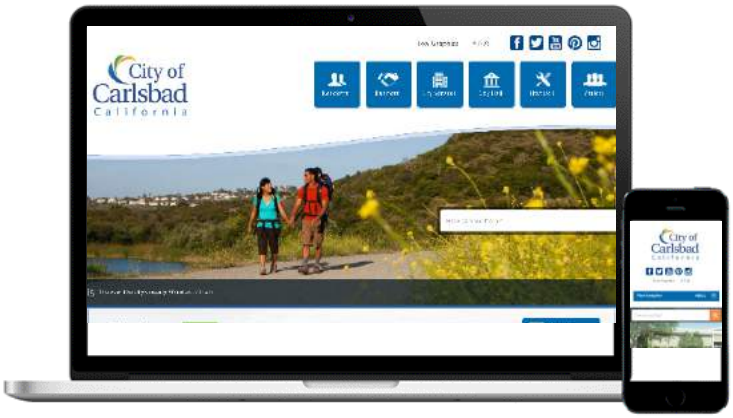
Although the site will be continually tested during the entire duration of development, a final checking and testing will take place at this stage. Civica will deploy the new website on the **Civica Cloud worry-free hosting.**
If a beta (soft-launch) is desired, Civica will assist in configuring the current website so that the public and staff may view the new site via a link from the current website, or alternatively link back to the previous site from the new redesign (if client hosts). A feedback form will be included so that users can submit comments and suggestions.

At the point of soft or hard launch, the site will **go-live**. You will take full control of the maintenance of all sections, including f**ull access to the source code** for possible internal development and/or disaster recovery.

Typical Timeline: 1-3 weeks from completion of content migration

Carlsbad, CA

Launched in September of 2014, the website features a design that truly represents the Carlsbad, CA community and its 115,000 residents. From the surf inspired main navigation, to its custom Library Subsite and City News Room, the redesigned website was designed to reinvigorated the community.



Key features include:

- Completely Responsive Design with Cross Browser Compatibility
- Library Sub-Site for department specific customization and functionality
- City News Room with Social Media Integrations
- Google Search Integration
- "How Do I" navigation for easy access to information our users requested most

Since launch, the site has received tremendous amounts of positive feedback from both staff members, as well as residents. Users are spending less time searching for what they are looking for, and more time engaging with fresh content throughout the site, as well as communicating with us more than ever on digital channels.

FOR REFERENCE, CONTACT:

City of Carlsbad
1200 Carlsbad Village Drive Carlsbad, CA 92008
www.carlsbadca.gov/

Greg Wallace
Sr. Web Administrator O: (760) 602-2489
greg.wallace@carlsbadca.gov

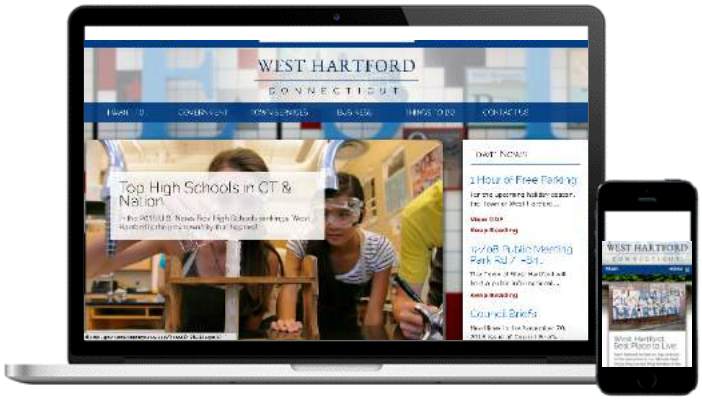
West Hartford, CT

The Town of West Hartford is located just outside of Hartford Connecticut, and is home to over 64,000 residents. A completely reworked and responsive website was launched with a modern look and feel, powered by CivicaCMS to create and distribute new content to its community on a regular basis.

The goal of the site was to provide the residents of West Hartford with a modern digital hub, allowing them to access key information and documents.

Key features include:

- Completely Responsive Design with Cross Browser Compatibility
- Custom Google Search Integration
- Bulky Waste Permit Form with Payment Integration (https://www.westhartfordct.gov/gov/departments/pw/bulkywastepermit.asp)
- Prominent Events Calendar on Homepage to Encourage Community Engagement



IT Specialist, Jeff Roller, led an internal team of key stakeholders and worked closely with Civica Software on the project from concept to launch. Since launch the site has been very well received by internal staff and community members for its robust content and ease of use.

FOR REFERENCE, CONTACT:

Town of West Hartford

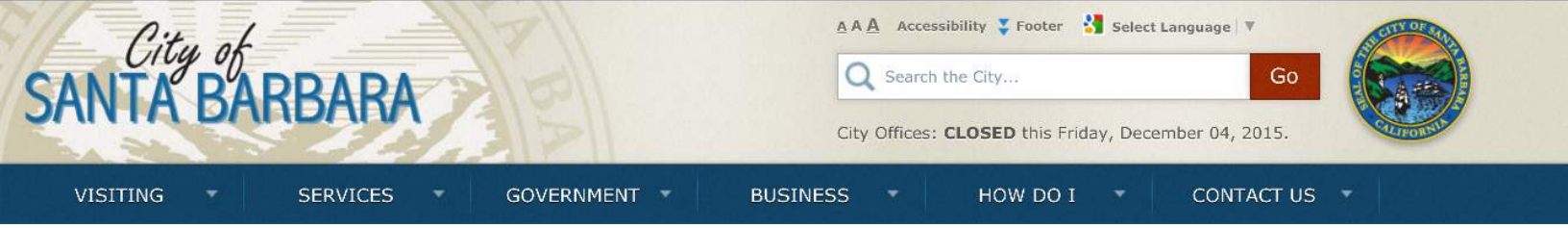
50 S. Main Street - Room 409 West Hartford, CT 06107 www.westhartfordct.gov

2015 Government Standard of Excellence - WebAwards 2015 FINALIST - Best City Portal for “Best of Web”

Jeff Roller

Information Specialist O: (860) 561-7588

jeff.roller@westhartfordct.gov



Santa Barbara, CA

Situated between the Santa Ynez Mountains and the Pacific Ocean on a sunny stretch of Western coastline, the City of Santa Barbara has been aptly nicknamed "The American Riviera" by its visitors and residents. Its picturesque scenery and Mediterranean climate are home to approximately 90,000 people, and draw about 6.1 million more visitors each year. With its ever-changing calendar of programs and events paired with a constant influx of visitors, the city of Santa Barbara required an especially fluid and adaptable web solution to assist future evolution.

The new website functions as a hub, focusing all of the city's initiatives and consolidating its schedule into an easily accessible platform. Robust, detailed drop-down and mega menus such as "How do I" and "Contact Us" are designed to guide site visitors and reduce the need for people to call the city's departments with information inquiries.

Santa Barbara and Civica have continued to cultivate their successful partnership, launching an innovative, real-time parking application. Working in conjunction with Sentry Control Systems, the app serves the more than 4.4 million cars that use the city's Downtown Parking Program per year. The mobile-focused, PCI DSS compliant solution allows users to view parking lot availabilities in real time, as well as to receive GPS directions directly to their desired lot through their native mobile map application.

"We're really using the website to engage in a two-way manner, this is something different from what we used to be, which was just delivering information. [Now] we have a lot of ways for people to contact us and ask a lot of questions; so we can engage more, and really provide more of a conversation than just a tell." -Scott Nelson

FOR REFERENCE, CONTACT:

City of Santa Barbara
735 Anacapa St., Santa Barbara, CA 93101 www.santabarbaraca.gov

Scott Nelson
Webmaster
O: (805) 897-2510
snelson@santabarbaraca.gov

civica

A GRANICUS COMPANY

CHECK OUT OUR MOST RECENT SITE LAUNCHES AND AWARD-WINNERS!

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City of Laguna Beach, CA - www.lagunabeachcity.net
City of Fullerton, CA - www.cityoffullerton.com
Unified Fire Authority, UT - www.unifiedfire.org
City of Tustin, CA - www.tustinca.org
City of Leominster, MA - www.leominster-ma.gov
City of Bakersfield, CA - www.bakersfieldcity.us
City of Norco, CA - www.norco.ca.us
City of Santa Barbara - www.santabarbaraca.gov
Orange County, CA - ocgov.com

AND COMING TO THE INTERWEBS NEAR YOU:

City of Schaumburg, IL - CURRENTLY IN DEVELOPMENT
City of Des Plaines, IL - CURRENTLY IN DEVELOPMENT
City of Asheville, NC - CURRENTLY IN DEVELOPMENT
City of Licking County, OH - CURRENTLY IN DEVELOPMENT

Thank You

You deserve to own more than just a website. Civica Software is home to innovators, thinkers and industry leaders, and by letting us work with you, you are guaranteeing a beautiful and scalable web presence that will meet the needs and expectations of your community and visitors.

Web design, management and hosting is our only business, and we would be proud to be your partner.

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707 17th Street, Suite 4000, Denver, CO 80202

CERTIFICATION AND AUTHORIZATION

CERTIFICATION and AUTHORIZATION:

The undersigned certifies that he has fully read **RFP # 16-022** and understands this "Request for Proposal" and has full knowledge of the scope, quantity, and quality of the services to be furnished *including the Texas Ethics Commission Certificate of Interested Parties Form 1295* and intends to adhere to the provisions described herein. The undersigned also affirms that they are duly authorized to submit this proposal, that this proposal has not been prepared in collusion with any other Vendor, and that the contents of this proposal have not been communicated to any other Vendor prior to the official opening of this proposal. Additionally, the undersigned affirms that the firm is willing to sign the enclosed Exhibit A, Standard Form of Agreement Contract.

By submitting a proposal, the vendor certifies that neither he, nor any co-owner of the organization submitting this proposal, is related to a member of the City Council of the City of Bryan within the first, second, or third degree of consanguinity (blood) or affinity (marriage).

Signed By: _____ Title: CEO

Typed Name: Jason Fletcher Company Name: Granicus

Phone No.: 720-240-9586 Fax No.: 415-872-1636

Email: _____

Bid Address: 707 17th Street Suite 4000 Denver CO 80202
P.O. Box or Street City State Zip

Order Address: Same as above
P.O. Box or Street City State Zip

Remit Address: PO BOx 677898 Dallas TX 75267
P.O. Box or Street City State Zip

Federal Tax ID No.: 91-2010420

Date: 3-24-2016

END OF RFP #16-022