
Exhibit A

Statement of Work and Payment Schedule



City of Richmond, CA

RFP# 2023-03

**Land Management Community Development
System and Implementation Services**

Statement of Work & Payment Schedule

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Section 1: Overview of the Project

Intuitive Municipal Solutions (iMS) along with PermitRocket and Selectron is excited to partner with the City of Richmond, CA on this Land Management Community Development System, and Implementation Services project. Section 1 - An Overview of the Project includes acquisition, configuration, and implementation of the iMS Suite of products, iMS Professional Services including historical TRAKiT data conversion, integrations, iMS Project Management, coordination of the (list the other products) and other ongoing services including software support and maintenance.

This iMS solution being provided will be designed as a Software-As-A-Service (SaaS) configuration and hosted by iMS. In general, the iMS suite is a single system comprised of various applications that will support the City in the areas of approvals (plan review), permitting, code enforcement, and licensing.

The integrated ePermitHub Digital Plan Room solution being provided is hosted by PermitRocket. In general, the ePermitHub Digital Plan Room is a solution designed specifically for government agencies to streamline their plan review workflows and enhance collaboration with applicants. The integrated Selectron Interactive Voice Response (IVR) and SelecTXT solution being provided is hosted by Selectron. In general, the IVR solution provides callers with an IVR system for accessing and posting permit information. The SelecTXT solution allows contractors to schedule, reschedule, and cancel inspection dates via an interactive text message conversation, and view inspection results.

The iMS Project Team will constantly collaborate and partner with the City of Richmond's core stakeholders and project team throughout the entire software implementation process. It will be pivotal that project teams have open communication and an effective project plan that is consistently being reviewed, updated, and mutually accepted by both partners throughout the project's lifecycle. iMS will provide all services required to deploy the software solutions identified subject to the functionality in the software solutions identified.

Section 1.1: Project Criteria for Success

Project criteria for success will include collaboration and two-way open and honest, as well as effective communication.

1. The City's Project overall success will be measured by a successful "go-live" and transition to internal agency and iMS Support. Additionally, the City has identified several goals and functional requirements that will set the standard for project acceptance and "Final Acceptance." Other tangible metrics of this project's success will include staff, customers, and community members being able to easily utilize this new modern system, while optimizing re-imagined agency-wide business processes, and allowing for cross-departmental efficiencies gained through our upfront business process review analysis and best practices recommendations. City objectives include improved data accuracy & integrity, user satisfaction, processing time, workflow automation, efficiency & process improvement, data analytics adoption, quality of reports, data privacy compliance, community feedback, compliance rates, enforcement effectiveness, timeliness, budget adherence, documentation, responsiveness, communication effectiveness, training quality, Allowing the City to effectively handle rent control and the City's Measure U ordinance,

where their customers can report gross tax receipts, will also be a key metric. Additional areas of measured success will be in the City staff and stakeholders being able to generate demand, ad-hoc (search), and custom reports that meet their needs, both today and moving forward. Overcoming challenges of accounting for exemptions, deductions, and credits within the current system will also be a measure of success for many city stakeholders. The parties shall meet within one week of full execution of the agreement and develop a matrix of metrics to measure the success of the project and its milestones.

Section 1.2: Project Scope

The overall project scope has been defined in Sections B2-B4 in City's RFP and documented in the City's Functional Requirements attached to the Agreement as Exhibit C. iMS's responses to these sections ensure we both understand and can deliver products and services that the city requires for this project. Overall project scope includes SaaS / Hosted environment(s) creation, software installation, software configuration, process review and recommendations, implementation of product, project management, training and acceptance, administrator knowledge transfer, and transitioning to ongoing support services. The iMS Solution was purposefully designed to bring a streamlined, adaptable, and straightforward interface to users. We believe you will find that the intuitive flow, plus the ease of configuration and automation, will benefit your community members, users, and administrators.

The Scope of this project is also governed by the City of Richmond RFP 2023-03, and the response to that RFP by iMS.

Section 1.2.1: Functional / Module Scope

Richmond, CA Functional Areas included in this implementation of the iMS Software includes the following:

- Permitting
- Licensing
- Plan reviews, including zoning reviews
- Inspections
- Building/property code enforcement / complaint tracking
- Land management
- Business License Tax
- Customer Relationship Management
- GIS integration
- Public Works - as it relates to Traffic Calming
- Mobility
- Workflow and Automated (system-configured) Workflows
- Work Orders
- Document Management (Folders and tags for attachments)
- Applicant Online Portal
- Conversion of all data from TRAKiT
- Rent Program
- User friendly internal reports and queries generation
- Accepting online and mobile payments
- Tamper-proof database with multifactor authentication for editing.
- Wildlife Urban Interface Program (WUI)
- Electronic plan review ()

- Online payments (credit/ACH)

To address these functional areas, and to meet the City's functional requirements listed in this SOW as Appendix 11 (the Functional Requirements), the following software/applications/modules will be installed, configured, and implemented:

- iMSPermits
- iMSApprovals
- iMSEnforce
- iMSLicenses / iMSRenewals
- iMSPros
- iMSLocations
- Resident Login
- Pro Login
- Anonymous Login
- Offline Inspection Results
- Selectron Relay IVR and SelectTXT (Selectron)
- Electronic Plan review (Permit Rocket)
- Payment Gateway (CoreBT)

Section 1.2.2: Organizational Scope

iMS is a small but agile company. Organizationally, the entire iMS Team may participate and/or assist with this project. A primary and secondary Project Manager will be assigned. A dedicated technical resource for database conversion, interfaces, software and environment set up, and other technical matters will work directly on your project. In addition, iMS will have executive oversight for any matters that arise that need to be addressed by President & CEO, Vance Bradshaw.

From the City's perspective, the following service departments will be participating in the project:

- Administration /IT
- Building
- Code Enforcement
- Community Development
- Engineering
- Finance Business License Tax Division
- Fire
- Planning
- Public Works
- Rent Control
- Water Resource Recovery
- External Agencies / Consultants

In addition, other City departments may need to participate in the project.

Section 1.2.3: Data Conversion Scope

iMS has extensive knowledge about your current system's database structure, limitations, and capabilities. As experts in converting this information we have a good deal of understanding of what is required to have a successful conversion of TRAKiT.

Data Migration of ALL Historical Records
(see Attachment 13, Conversion from iMS Proposal)

Community Development (CentralSquare's TRAKiT System)

Migration of Permits, Land Development Records, Code Cases, Business License Tax, and Rental Records, Contractors, Architects, Engineers, and Parcels from existing TRAKiT system.

Data to be migrated from these areas: WorkSpace, LandTRAK, PermitTRAK, ProjectTRAK, CodeTRAK, AEC TRAK, License TRAK, CRM TRAK

Contra Costa County, CA Assessor (Parcel and Ownership)

Initial Migration and ongoing update routine for refreshing iMSLocations

Data Migration Summary Process Flow

- City provides iMS either access to TRAKiT environment(s) or provides a file in standard format (SQL Server Database Backup File)
- iMS will convert TRAKiT history (typically 3-4 passes) and other records, if necessary
- City stakeholders will confirm all source records are migrated to iMS, and that all data elements on each record are accurately imported into the correct section of iMS based on best practices, configuration, and both project teams recommendations.
- Records have been successfully converted and data conversion has been signed off on by both project teams.

Data Conversion Summary or Anticipated Milestones:

Proposed data conversion services are:

City of Richmond, CA Existing Data Conversion (TRAKiT)

- Initial conversion into iMS for testing
- Second conversion into iMS after correcting any issues
- Final conversion into for Go-Live

City of Richmond, CA GIS Tabular Data Conversion from Assessor System

- Initial conversion into iMSLocations for testing
- Second conversion into iMSLocations after correcting any issues
- Final conversion into for Go-Live

City of Richmond, CA GIS Tabular Data Update Routine (ONGOING) from Assessor System

- Initial installation for testing
- Second installation after correcting any issues
- Final installation for Go-Live

Section 1.2.4: Interface Scope

Integrations or Interfaces are identified here:

- Finance Integration - Includes nightly batch integration to City's current General Ledger (GL) software (Tyler Munis) and reconciliation reports.
- Document Management Solutions - Document Management integration via URL (system passes permit number, etc.). This could also include a nightly export of documents for FTP retrieval if desired.
- GIS Integration (ESRI). Integration includes:
 - Address matching to current location
 - Display locations using Map Services
 - Address auto-complete using Location Services
 - Radius notifications based on one or more properties and supported via SSRS generated documents or mailing labels
 - Create permits, project, code enforcement cases directly from the map
 - Viewing property history
- Electronic Plan Review - integration with ePermitHub
 - ePermitHub provides a cutting-edge web-based electronic plan review solution in partnership with Intuitive Municipal Solutions. This solution, the ePermitHub Digital Plan Room, is designed to meet the requirements of government permitting agencies around the United States and specifically meet the requirements of agencies using the iMS Suite of products.
- Links for End-User "Favorites"
- Microsoft Outlook (Office 365)
- California State Licensing Board (CSLB)
- Active Directory (Office 365)
- Twilio for text messaging
- SendGrid for email(s)
- PDF and MSExcel for report and/or MSWord Template document creation
- SSRS - Report Writing
- SQL database
- Selectron IVR and SelectTXT System
- Credit Card Payments - online payment integration with Core BT

Additional Integrations

The following integrations were either part of the iMS RFP submission (see Attachment 13) or were discussed during subsequent shortlist process qualifying questions and/or demonstration phases:

		8
Main Application	Interface Description	Comments
Munis	ERP financial system	This interface will be via a nightly General Ledger batch iMS creates with the Tyler MUNIS general ledger account numbers transmitted in summary nightly for accounting staff to review, edit if necessary, and then update in to MUNIS.
ESRI GIS	Geospatial/Land/Tax Data	
MicroSoft Outlook (Office 365)	Workflow, email communication and scheduling	
California State Licensing Board (CSLB)	The City desires to leverage the CSLB web service interface to validate the State of California contractor's information such as expiration date, license type, bond information, etc.	
Active Directory (Office 365)	The City leverages Active Directory as the Single-Sign-On system to provide security access to network resources and enterprise systems.	
Tyler Data and Insights	Tyler Reporting	
State of California - Franchise Tax Board	Revenue and Taxation Code 19551.1 authorizes the reciprocal exchange of limited confidential data between FTB and participating cities/counties.	
Socrata	Transparent Richmond	
TLO	GIS, land information, owner	
Parcel Quest	GIS, land information, owner	
Data Tree	GIS, land information, owner	
Zoll Fire RMS	Incident Reporting (Fire Investigations)	
The Compliance Engine (Brycer)	Tracks fire protection systems' service/inspection dates, GIS, owner information	

NOTE: iMS supports integration with many third-party systems. Where these vendors provide open API's and usually access to technical resources, this normally poses little to few issues. However, if any integrations are outside the Scope of the RFP and/or agreement(s) than more analysis by iMS Technical staff may be required to ensure we all know level of effort, availability of files and API's or web services, etc. to deliver appropriate scope and if necessary, additional project costs to complete these integrations.



These items are **NOT INCLUDED** in the Statement of Work for this project:

- i. Hardware or peripheral devices (i.e. POS workstations, mobile devices, etc.) other than the Card Readers from CORE Business Technologies.
- ii. Any additional interfaces not itemized in RFP or in our proposal’s response or follow up discussions, agreements, etc.
- iii. Any third-party products or services required to implement other vendor’s software / solutions or their integrations with iMS.

Section 1.2.5: Modification / Enhancement Scope

The City of Richmond will receive all standard modifications and enhancements for the iMS solution during their project. Project teams can agree on a modification/enhancement process that meets the project team’s requirements, if necessary or desired. Also, please note that if the City is under an iMS support agreement, they are provided with details about all enhancements for upcoming versions and may coordinate with iMS on when these should be delivered to your TEST and/or PROD Environments. Documentation and communication pertaining to these modifications are provided by the iMS Support staff on a regular basis.

Due to the highly configurable capabilities of your new iMS products, we find that clients do NOT need to have custom modifications done to the system. Should the City of Richmond decide this is necessary, the following process for “one-off” custom modifications or enhancements is as follows:

- Agency communicates to iMS staff (usually through your dedicated Project Manager) that a custom modification is required
- iMS Technical team member(s) will have discussion(s) around the need for this customization
- If in fact, customization is required, iMS will provide a scope and if necessary, cost for this modification
- Once both parties agree on deliverables, cost (if necessary), etc. than a proposal is put forth and can be included as part of initial release or any point in the future

Section 1.2.6: Reporting Scope

Within the iMS products, you have access to canned/on-demand reports. Pre-defined reports come standard with the solution. Users may also author their own Ad-Hoc reports by creating “Searches” within iMS using a variety of search criteria and save these searches for future use. In addition, we have proposed and agreed to author customized departmental reports (as determined by your project team) during the project.

Custom Documents and Reports Included:

Output Document Format:	Number Included:
MS Word Merge Templates:	Up to 30
SSRS Custom Docs/Reports:	Up to 45

NOTE: These MS Word Templates and SSRS Custom Reports / Documents are in addition to your “demand” or canned system reports and documents. These are custom reports your iMS Project Managers build for/with you as part of the project



and train your administrators on how to create additional ones, if necessary, as well.

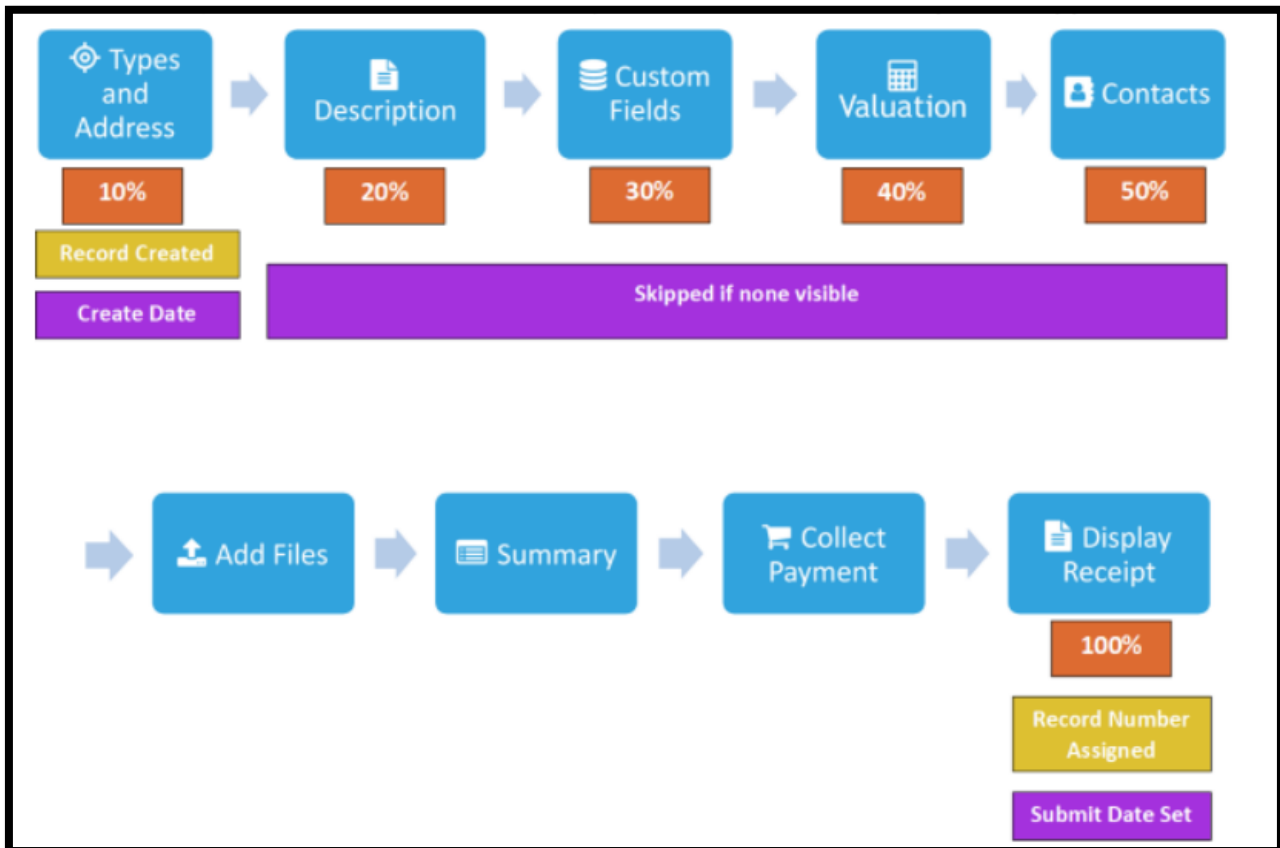
Section 1.2.7: REMOVED

Section 1.2.8: Workflow Scope

As part of your agency's Business Process Review and Project Management meetings, anticipated workflow design(s) and process recommendations will be made, documented, and agreed upon, including the Functional Requirements. Following these decisions, your iMS Project Manager(s) will configure workflows for your iMS products or other applicable third party products. Agency personnel will test during training and UAT phases accordingly so that if workflows need to be reconfigured, iMS PM's will have adequate time to do so to allow for more testing and eventual acceptance.

STANDARD IMS WORKFLOW

The following chart illustrates the standard workflow for all applications. This workflow structure is automatically assigned until a unique configuration is desired based on Richmond’s business processes and requirements. This structure enables a consistent and convenient user experience, but also allows for flexibility when it comes to achieving desired results from a specific application.



The standard workflow is automatically created and associated with each Record Type, Subtype and Variant. The standard workflow includes screens, fields, progress, and dates. Each standard workflow can be configured/adjusted to comply with specific process requirements.

Section 1.2.9: Implementation Deliverables

Included in your iMS implementation are the following deliverables:

- Deliverable 1 - Production and Test Systems Installed
- Deliverable 2 - Digital Plan Room Cloud Provisioning
- Deliverable 3 - Project Plan
- Deliverable 4 - Process Review Meetings for Applications
- Deliverable 5 - Data Conversion Plan
- Deliverable 6 - Interface Plan

- Deliverable 7 - Digital Plan Room Analysis
- Deliverable 8 - Initial Applications Configured
- Deliverable 9 - Initial Data Conversion Delivered
- Deliverable 10 - Initial Digital Plan Room Configuration for Applications
- Deliverable 11 - Initial Delivery Meeting
- Deliverable 12 - Workflow Meeting
- Deliverable 13 - Initial Workflow Delivered
- Deliverable 14 - Initial Reports Delivered
- Deliverable 15 - Selectron IVR Initial Delivery
- Deliverable 16 - Selectron SelecTXT Initial Delivery
- Deliverable 17 - Selectron Relay Portal Training
- Deliverable 18 - Digital Plan Room Full Configuration
- Deliverable 19 - Digital Plan Room Administrative and Technical Training
- Deliverable 20 - Selectron Full Configuration
- Deliverable 21 - iMS System Full Configuration
- Deliverable 22 - iMS Reports Delivered
- Deliverable 23 - Go-Live Migration and Production Planning
- Deliverable 24 - Entire System Delivered for Testing
- Deliverable 25 - Digital Plan Room Staff End-User Training
- Deliverable 26 - End User Training
- Deliverable 27 - System Go-Live

Professional Services Included

- System Installation - Production and Test Environments
- Project Management
- Business Process Review and Analysis
- Current State and Future State Swim Lane Diagrams (partner with City)
- System Configuration by iMS Project Team
- Client Success
- On-Site Meetings
- Remote Meetings
- Additional Software Configuration(s)
- Testing and Acceptance
- Documents and Reports
- Data Migration
- Interfaces
- Training - System Administration, End-User/Departmental, and Report Writing
- Travel Cost (Flights/Lodging/Meals, etc.)
- Coordination of Third Party Products

Software as a Service (SaaS) Items Included:

- Hosting in the Cloud (Microsoft Azure)
- 1 Production and 1 Test Environment of Your iMS Solution
- Unlimited Technical Support

- Functional Support
- Maintenance / Software Updates / Bug Fixes
- Disk Space Allocation and Size, Re-Sizing when necessary
- Backup and Recovery services:
 - Entire system backed up daily for 31 days, then monthly for 6 months
 1. Provided through Microsoft Azure
 - SQL database backed up on server nightly
 1. Kept for 30 days

Included Selectron Deployment Model:

This implementation of Relay will be deployed in Selectron's Relay Managed Services environment.

Relay Managed Services is a hosted application environment, located in Selectron's local hosting facility. Selectron's hosting facility is a co-located data center featuring keyed entry and individual server locks for security. With a Managed Services solution, Selectron owns all hardware and is responsible for security, ongoing maintenance, and proactive support.

Third Party Services Included:

Selectron Products and Services:

Interactive Voice Response (IVR) - 25,000 calls annually:

The IVR Channel for the Permits Pack provides callers with an Interactive Voice Response (IVR) system for accessing and posting permit information. The IVR offers functionality in the form of a Contractor Menu and an Inspector Menu:

- Contractor Menu
 - Access inspection results
 - Permit based messaging
 - Schedule/reschedule inspections
 - Cancel inspections
 - Hear site address for the permit
- Inspector Menu
 - Post inspection results
 - Post correction codes
 - Leave Message for contractor

Using the Contractor Menu, a contractor can enter a permit number to access permit information and functions. Upon entering a valid permit number, the user can schedule, reschedule, and/or cancel inspections. After an inspection has been scheduled/rescheduled/canceled, the caller will receive a confirmation number.

Additionally, contractors can use the IVR to access inspection results, including any associated correction codes and descriptions. Finally, the

contractor can access messages left for them by an inspector or leave a message for an inspector.

Using the Inspector Menu, accessible via a hidden main menu option, an inspector can enter a permit number to post inspection results via the IVR. When posting results, the caller must enter a valid Inspector PIN number (or some other validation number to be determined during implementation). The PIN can be determined by the Customer, but must be validated by the database. When posting results, inspectors can add correction codes and leave a message for the contractor.

If desired, callers can receive the option to transfer to an agent. If a caller requests a transfer, the Relay IVR transfers the caller to a number specified by the Customer.

IVR service requires a local-to-customer phone number. iMS can either use an existing number provided by customer, or obtain and provide a number if needed. For text Selectron will provide 888 number. IVR Services are provided by the Call. A Call is defined as a successful completed connection. A Call can be up to 4 minutes in length, with each additional 4-minute period counted as an additional Call. Actions such as transfer that result in multiple connected circuits are counted on the per circuit basis and are measured for the duration of the connection including the time after a transfer occurs.

SelectTXT - 100,000 text messages annually:

SelectTXT for inspection scheduling allows contractors to manage inspection requests and results from a mobile device. Users can schedule, reschedule, and cancel inspection dates via an interactive text message conversation, and view inspection results.

SelectTXT provides both step-by-step, menu-driven, and “power user” entries. Scheduling, rescheduling, and canceling inspections require a text message conversation back and forth between the application and the mobile user, where the application requests specific permit-related information and the mobile user responds. A conversation consists of multiple text messages for each inspection request process.

Residents and contractors using a permit number can communicate with the department 24/7 & 365 days. Callers will be able to enter a permit number and perform the following actions:

- Access inspection results
- Permit-based messaging
- Schedule/reschedule inspections
- Cancel inspections
- View the site address for the permit

In addition to the above, the following add-on features are included with this implementation of the Relay Permits Pack:

Integration with iMS

Relay Administrative Portal

This section details administrative tasks that can be performed to manage Relay. All system administration for Relay is handled through the Relay Portal web application. The Customer's administrator will be provided with user credentials for the Relay Portal application during the implementation process. Additional users can be created by the administrator as needed.

Permissions can be assigned per-user; permissions govern the functionality available to a given user.

The Relay Portal provides administrators with a single platform for viewing system usage and health, running reports, and configuring various system settings. The Relay Portal is supported on Chrome, Firefox, Microsoft Edge, and Safari.

Activity Widgets

The Customer's solution is equipped with the following dashboard widgets, allowing for the easy tracking of daily activity and statistics:

Activity:

Call Activity - Tracks and reports call activity with line graph

IVR Usage - Display call statistics, including peak (concurrent) call activity

SelectTXT Activity - Tracks and reports SelectTXT activity with line graph

Inspection Widget - Tracks and reports inspection activity with displayed numbers

SelectTXT Inspection Activity Widget - Tracks and reports

SelectTXT inspection activity with bar graph

Support System:

System Status Widget - Tracks status of the system through Ping and Database displays

Today Widget - Displays date, holiday, office hours, and greeting information

Run System Reports

Administrators will be able to run system reports via the Relay Portal.

Reports Center:

Running / Saving Reports - Depending on your permissions, the Reports Center has a large number of system, activity, and usage reports that you can run. Saving a Report - To save a report (including how you have set the filters), click the desired file type you want to download, either PDF or Excel. The Portal will automatically generate the file and allow you to download it.

The solution will also be equipped to provide the following reporting functions:

Activity Reports:

Call Activity Report - This report provides a graph of different activity types performed by callers on the IVR over a relative span of time (hour over hour, day over day, month over month, and more).

Call Activity Detail Report - Use this report to find a specific call or group of calls. Search by date/time, the caller's phone number, or other identifying information to find calls of interest.

Call Statistics Report - This report provides aggregate facts and statistics about calls into the IVR including average call lengths, longest calls, and whether or not actions were completed by callers.

Email Activity Report - This report provides a list of all emails sent on a specified date.

IVR Usage Report - This report provides data on peak (concurrent) calls and average calls, hour by hour, over a selected date range.

Multiple Calls Report - This report provides insight on how many times incoming phone numbers have called the IVR within a specified range of time.

System Status Report - See a log of system events, including reboots and changes in the system's overall status or health.

Relay Permits Reports:

Inspector Posting Activity Report - This report provides a summary of inspector posting activity, per day of the week, within the specified date range. The report lists inspector names and the number of inspections resulted each day.

Inspections Summary Report - This report provides a summary of inspection scheduling activity per day within the specified month and year. The report lists the number of inspections scheduled and canceled on the IVR each day.



SelectTXT Reports:

SelectTXT Activity Report - This report provides a graph of different activity types performed by visitors over a relative span of time (hour over hour, day over day, month over month, and more).

SelectTXT Activity Detail Report - Use this report to find a specific SelectTXT conversation or group of conversations. Search by date/time, phone number, or other identifying information to find text conversations of interest.

ePermitHub Products and Services:

- Digital Plan Room Cloud Provisioning
 - Verify that all iMS Suite prerequisites are in place
 - Cloud Provisioning of the Digital Plan Room components into Customer's DEV environment
 - Cloud Provisioning of the Digital Plan Room database
- Digital Plan Room Configuration Analysis
 - Define configuration for each Plan Review record/permit type.
 - Determine all needed document types, plan review roles, and submittal requirements.
 - Determine Digital Plan Room disciplines configuration.
 - Plan iMS workflow integration configuration points
 - Email communication analysis, including recipients and notification content
 - Identify iMS to Digital Plan Room security/role mappings.
 - Determine approved documentation generation requirements, including stamps/watermarks and approved plan and document types.
- Digital Plan Room Configuration
 - Configuration of design items gathered during Configuration Analysis, including project types, document types, required checklists, digital signature validation business rules, review disciplines, notifications, comment library, stamps/watermarks, and print sets
 - Configure Digital Plan Room business rule triggers per Configuration Analysis.
- User Acceptance Testing (UAT)
 - Assist Customer in the UAT effort and validation of system configuration
 - Resolve issues resulting from Customer User Testing
 - Provide recommendation on testing strategy and best practices
 - Agree on UAT completion date and Go-Live date
- Administrative and Technical training
 - Digital Plan Room Administration and technical training, walking through each step of the configuration and how it is configured.
- Staff End-User Training
 - Digital Plan Room Staff training for Intake Specialists and Plan Reviewers
 - Provide End User training documentation.
- Agency Customer Enablement
 - Produce contextually relevant public-facing training and help web-based videos for licensed professionals, contractors, owners, and the general public submitting plans
 - Produce a public-facing User Guide for licensed professionals, contractors, owners, and the general public submitting plans
 - Assist in the delivery of the Agency's customer training in the form of live webinars.



- Go-Live Migration & Production Planning
 - Develop the Go-Live Project Migration Plan, steps, and timing to be used to go-live.
 - Provision of the Digital Plan Room for the Production environment
 - Cutover to the Digital Plan Room in the Production environment
- Post-Go-Live Support
 - Post-Go-Live support provided
 - Resolution of all Critical and High defects as defined above in User Acceptance Testing
 - Transfer meeting regarding ongoing support of the Customer to the Company Customer Success program conducted

CORE Business Technologies Products and Services (See Exhibit CA):

- Payment Processing Services
- Implementation Services
- Integration with iMS

Expected ON-SITE Project Meetings / Training:

<u>Typical Project Meetings</u>	<u>Estimated Number of Days (TBD)</u>
Business Process Review	up to 4 days on site
Delivery/SME Training:	up to 4 days on site
Revised Delivery:	up to 2 days on site
User Training:	up to 3 days on site
Admin Training:	up to 2 days on site
Go-Live Support	up to 3 days on site

NOTES:

Above referenced Project Meetings may be held remotely or onsite at the request of project team leaders from both the City and iMS. Travel and living costs are already included in our overall cost proposal. Actual number of onsite visits and number of onsite days TBD during contract phase and/or project kick-off meetings.

No on-site meetings are proposed for Selectron or ePermitHub. All work by these sub-contractors will be provided remotely.

Section 2: Project Governance

Intuitive Municipal Solutions (iMS) genuinely believes in Project Governance. Project governance is typically an oversight function that is aligned with the City of Richmond, CA's governance model and will encompass the entire iMS implementation project life cycle. Project Governance will entail all the key elements that make a project successful. When necessary, these elements will be tailored to Richmond's specific needs. In general, the following eight components are part of the overall project governance methodology:

1. Project governance framework
2. Roles and responsibilities
3. Stakeholder engagement and communication
4. Meetings
5. Reporting
6. Risk and issue management
7. Assurance
8. Project management control processes.

Effective project governance requires the right project manager. This means that senior management must fully support the project manager in their role. The organization's senior management must also outline roles, responsibility, and relationships among project stakeholders. Finally, information dissemination and transparent communication are also important.

This project will have a primary iMS Project Manager assigned to it. This Project Manager will function as the City's main liaison for everything pertaining to the implementation of your iMS products. They will communicate with all members of the project, coordinate key milestones, perform City configurations based on input and internal best practices or business rules, draft custom reports, and MSWord Templates, and otherwise be intimately familiar with the City's specific project needs. Overall, the goal of the iMS project team is to provide services that ensure 100% on time delivery and overall acceptance of iMS at the City's targeted go-live date. Also, as normally the case with large and lengthy implementations, should any issues or conflict arise during the project that require joint decision(s) by both project teams, iMS will coordinate and have joint meetings to ensure mutually agreed upon decisions are reached by both teams, and an honest and open partnership between the City's staff and the iMS team. Right from the start, the primary goal of the iMS team will be to make sure we 100% understand the City's project objectives, and then to supply the City with a proposed configuration plan that meets or exceeds these goals. iMS projects follow a milestone approach to managing a project which includes weekly and monthly deliveries of completed work along with progress status reports conducted via conference calls, emails, and webinars, as well as upcoming "punch-lists," to-dos, and expectations.

Section 2.1: City of Richmond Project Structure

The City will make every effort to staff the project appropriately and understands that staffing a project is important to its success. The City has staffed the project with small teams of five (5) to seven (7) individuals that represent key stakeholder groups for each functional area. These process improvement teams have been working to establish project goals, discuss improvement opportunities, and ready the City for implementation. It is expected that all will be involved as the "core" team moving forward with the project. Each core team will have a lead individual

identified, but all are expected to participate in the project. The City has identified the following teams for the project:

- Permits
- Inspections
- Code Enforcement
- Rental Program
- Plan Reviews
- Finance
- Public Safety
- Technical
- Business Licensing
- Public Works

Section 2.2: City of Richmond Project Roles and Responsibilities

City Role	# of Staff		
Executive Sponsors / Executive Committee	7	Responsible for being a champion of the project within the organization, managing stakeholder engagement, and ensuring appropriate resources are aligned with the project Key attendee in Steering Committee meetings and project governance meetings Continuously keeps organizational goals in mind while monitoring project success and timeframes	Community Development Director Deputy City Manager Finance Director Fire Chief IT Director Public Works Director Rent Program Director
Project Manager	1	Primary individual responsible for managing the project to completion with iMS Project Manager With iMS Project Manager, develops, manages, and maintains the Project Plan Manages milestone completion and deadlines in conjunction with the project plan Maintains and mitigates issue log Presents project status and issues impacting timeline to the Steering Committee	IT Manager of Business Systems



		Responsible for signing off on key deliverables outlined in SOW with approval of the Functional Lead(s) and the business owners for the Land Management Community Development System	
Training Lead	1	Training Coordinator for the organization Knowledge of Departments and their participation requirements	IT Manager of Business Systems
Trainers	5-7	Complete the train-the-trainer classes and deliver end user training to all Richmond end users	Department SME
Change Management Lead	1	Support execution of the change management plan for Richmond	IT Manager of Business Systems
Functional Leads	1 per major area	Plays a key role during the design workshops Leads the functional team for a specific functional area(s), e.g., Measure U Attends workshops to identify opportunities for improvement, areas for standardization, unique variances, and potential differences in functionality Communicates business requirements Gathers reports and defines reporting requirements Conduct system testing during Unit, End to End and Production Dress Rehearsal Testing Key resource during end user training activities Expected iMS subject matter expert after deployment	Accounting Manager Code Enforcement Manager Rent Program Deputy Director Finance Manager Fire Marshall Planning Manager Senior Environmental Compliance Inspector
Functional SMEs		Providing specialized knowledge of business processes and department procedures	Accountant Business License Specialist

		<p>Providing support to the functional lead in building test scenarios, executing test scenarios, and reporting of test outcomes and related defects</p> <p>Creation of job aids and other training documentation unless otherwise assigned</p> <p>Assisting with data conversion validation and integration requirements</p> <p>Providing end user guidance</p>	<p>Code Enforcement Officer</p> <p>Permit Tech</p> <p>Senior Planner</p> <p>Administrative Aide</p>
Integration Lead	2	<p>Technical Resource</p> <p>Creates or maintains integrations between iMS and other systems</p>	<p>IT Manager of Business Systems</p> <p>Senior Programmer/Analyst</p>
Data Conversion Lead	2	<p>Leads data validation activities</p> <p>Participates in all phases of the project</p>	<p>IT Manager of Business Systems</p> <p>Senior Programmer/Analyst</p>
Reporting Lead	2	<p>Creates and maintains simple to complex reports and dashboards within iMS</p> <p>Participates in all phases of the project</p>	<p>IT Manager of Business Systems</p> <p>Senior Programmer/Analyst</p>
Test Lead	2	<p>All testing activities including assisting with the creation of test scenarios and scripts</p> <p>Contributor to the Test Strategy and Test Plan</p>	<p>IT Manager of Business Systems</p> <p>Senior Programmer/Analyst</p>
Security Lead	2	<p>Responsible for configuring and administering iMS configurable security after go-live</p>	<p>IT Manager of Business Systems</p> <p>Senior Programmer/Analyst</p>

Section 2.3: iMS Project Structure

As a small Community Development software and services provider, each project is a team effort. The entire iMS Team will be dedicated to the City’s success and potentially could be involved in the project. The iMS Project Manager(s) will be the daily conduit for the project. When additional iMS resources are needed, they will act to ensure proper personnel are brought into the project at the appropriate times.

Section 2.4: iMS Project Roles and Responsibilities

Ultimately, the entire iMS Team will be responsible for success in this partnership. IMS is a small company and everyone participates in client success and satisfaction. IMS anticipates the assigned iMS Project Manager(s) to be as follows:

- Primary Project Manager - Trenton Seymour
- Secondary Project Manager - Either Chuck Badger or Jim Williamson TBD
- Primary Technical SME - Mike Epstein
- Additional Resources include:
 - Jim Williamson
 - Alan Lopez
 - Vance Bradshaw
 - Scott Christensen

Project	Executive Oversight	Project Manager	Consultant	Technical Resource(s)	Testing/Training	Support
State of MN	Vance	Vance/Jim	Vance/Jim	Vance/Jim/Mike	Name	Alan/Jim/Vance
Palm Bay	Vance	Chuck/Trenton	Chuck/Trenton	Mike/Vance	Chuck/Trenton/Alan	Alan/Chuck/Trenton
Daytona	Vance	Trenton/Chuck	Trenton	Mike/Vance	Trenton/Chuck	Alan/Trenton
Kootenai	Vance	Trenton	Trenton	Mike/Vance	Trenton	Alan/Trenton
Englewood	Vance	Chuck	Chuck	Mike/Vance	Chuck	Alan/Chuck

Section 2.4.1: iMS Executive Oversight

Executive Oversight within iMS will be handled, managed, and facilitated directly with:

CEO & President of iMS - Vance Bradshaw

Section 2.4.2: iMS Steering Committee

- Primary Project Manager - Trenton Seymour
- Secondary Project Manager - Either Chuck Badger or Jim Williamson TBD
- Primary Technical SME - Mike Epstein
- Vance Bradshaw

Section 2.4.3: iMS Project Manager(s)

- Primary Project Manager - Trenton Seymour
- Secondary Project Manager - Either Chuck Badger or Jim Williamson TBD

Section 2.5: Third Party Vendors

Section 2.5.1: Third Party Role(s)

- Selectron: iMS will serve as the prime contractor for this engagement and will coordinate with Selectron to ensure deliverables are met in a professional and timely manner.
- ePermitHub: iMS will serve as the prime contractor for this engagement and will coordinate with ePermitHub to ensure deliverables are met in a professional and timely manner.
 - ePermitHub Implementation Team
 1. Project Manager - Melissa Chiong
 2. Primary Technical SME - Seth Axthelm
 3. Additional Resources include:
 - a. Cristina Pitelli
 - b. Tony Hernández
 - c. Maykel Martin
- CORE Business Technologies: iMS will serve as the prime contractor for this engagement and will coordinate with CORE Business Technologies to ensure deliverables are met in a professional and timely manner.

Section 2.5.2: Third Party Oversight Responsibilities

- Selectron: iMS will serve as the prime contractor for this engagement and will coordinate with Selectron to ensure deliverables are met in a professional and timely manner.
- ePermitHub: iMS will serve as the prime contractor for this engagement and will coordinate with ePermitHub to ensure deliverables are met in a professional and timely manner.
- CORE Business Technologies: iMS will serve as the prime contractor for this engagement and will coordinate with CORE Business Technologies to ensure deliverables are met in a professional and timely manner.

Section 2.5.3: Third Party Software and Services that ARE NOT INCLUDED

Twilio
<ul style="list-style-type: none"> • \$.007 charge per text message sent

Section 2.6: Project Plan

The iMS Project Management Methodology includes a workflow definition phase where all concerned parties collaborate and agree on the proposed process specific workflows. From these workflow plans, an initial configuration is completed. The next phase includes training the City’s subject matter experts on best practices for testing the configuration and how the configuration was created. During this phase, subject matter experts will provide feedback on the configuration and converted data. iMS implementation team will make corrections/adjustments as needed and provide an updated implementation. IMS’ goal during this phase is to ensure client understanding and satisfaction with the implementation. A proposed implementation plan with milestones and responsibilities has been included in this proposal.

Based on our team’s experience, iMS believes that each of the proposed applications be implemented simultaneously. This recommendation is outlined in our proposed project schedule. Unless the City has reasons to implement the iMS applications in a phased/staggered manner, we will approach the implementation process in this way.

We estimate your total project from beginning to successful “go-live” will be around 40 weeks, again as mutually agreed upon by both project teams. Below is a breakdown of project services by phases, task, or key milestones.

Section 2.6.1: Project Plan

Deliverables and Project Sample

Based on your agency’s RFP, we expect that the entire iMS Suite Project will take approximately 40 weeks to successfully complete. A sample project is outlined below. The deliverables and weekly items are also color-coded to quickly help you and stakeholders find which tasks/milestones will be primarily responsible by iMS, the City of Richmond, or jointly.

Week(s) Task(s) / Milestones for Entire Project by Responsible Party

0 (Team) REMOTE Agreement executed and project begins

1 (iMS) Install Server

2 (City) Upload GIS tabular data to be imported
 (City) Provide GIS URLs and credentials
 (City) Upload backup of TRAKiT database
 (City) Provide technical details of desired integrations

3 (iMS) REMOTE Review supplied information and prepare questions

4 (Team) ON-SITE Process Review and Configuration Meetings

■	<u>iMS Tasks</u>
■	<u>City of Richmond</u>
■	<u>Team Tasks (Both)</u>

- 5 (City) Prepare follow-up items from Process Review and Configuration Meetings
(iMS) Begin Integration
- 6 (City) Provide all follow-up items
- 7-13 (iMS) Configure Applications, Create Data Conversion(s), Create Documents (SSRS and Word)
(ePermitHub) Configure Digital Plan Room for identified processes
- 14 (City) Upload updated data sources
(iMS) REMOTE install configured system
- 15 (Team) ON-SITE Review Initial Delivery/Administrator Training
PAYMENT MILESTONE 1
- 16-19 (City) Begin thoroughly testing Applications, Conversion, Interfaces and Documents
- 20 (City) Provide list of any Application, Interfaces and Conversion changes
(iMS) REMOTE install Reports
- 21-23 (iMS) REMOTE Update Applications, Conversion, and Interfaces
(City) Thoroughly evaluate Documents and Reports
- 24 (iMS) REMOTE Updated Applications, Conversion, and Interfaces provided

(City) Provide list of any Document and Report changes
- 25 (Team) ON-SITE Workflow meetings by department
- 27-30 (iMS) REMOTE configure Workflows
(City) Final testing for Applications, Interfaces, Conversion, Documents and Reports
- 31 (iMS) REMOTE deliver revised Workflows
(City) Provide final issues for Applications, Interfaces, Conversion, Documents, & Reports
- 32-34 (City) Testing of Workflows
(iMS) REMOTE make final changes to Applications, Interfaces, Conversion, Documents and Reports
- 35 (iMS) REMOTE deliver final Applications, Interfaces, Conversion, Documents and Reports
(City) Provide final list of any changes needed prior to go-live

- | | |
|-------|---|
| 36-37 | (iMS) REMOTE any final adjustments |
| 38 | (City) Upload updated data sources
(iMS) REMOTE install completed system |
| 39 | (Team) ON-SITE End User Training |
| 40 | (Team) ON-SITE Go Live and Transition to iMS Support
PAYMENT MILESTONE 2 |
| 44 | System Acceptance (30 days from Go-Live)
PAYMENT MILESTONE 3 |

Section 2.6.2: Project Documentation

iMS will provide both a **System Administrator Manual** and a **User Manual** in MS Word and PDF format for City use during the training portion of implementation. In addition, iMS can assist and provide the agency with best practices for updating the City's own internal Statement of Work (SOW) or departmental process documents and can leverage existing client experiences for additional insight.

Section 2.6.3: Project Status Reports

iMS will provide project status reports bi-weekly or as mutually agreed to during the project to City project teams.

Section 2.6.4: Steering Committee Meetings

iMS staff and project team members are happy to participate and update on the overall project status for steering committee meetings.

Section 2.6.5: Requirements Traceability Matrix

iMS Project Manager(s) will assist and provide a requirements tracing matrix for Functional Requirements (Exhibit C to the Agreement)

Section 2.6.6: Issues Log

iMS Project Team members will provide updates to the City project team members and keep track of "issues" during the project.

Section 2.6.7: Decision(s) Matrix

As a smaller organization, the iMS decision matrix and process is pretty simplistic. Initial decision-making point will almost always be your assigned and dedicated Project Manager, Trenton Seymour. Following that, any decisions that either need to be escalated will go directly to Vance Bradshaw.

Section 2.7: Acceptance

iMS uses an Agile approach for acceptance or User Acceptance Testing (UAT). Each project milestone, as defined by both project teams, and agreed upon, must be signed off before moving to the next step of the process. The acceptance criteria for milestone testing and acceptance will generally be action items from project team meetings where core stakeholders ensure the testing is complete, acknowledged, and confirmed there are no deficiencies. The parties involved agree that each milestone's acceptance shall be contingent upon the successful completion of predefined criteria including, but not limited to, functionality, performance, and quality standards. The City shall have the responsibility of conducting UAT with a specified timeframe, during which any identified issues or defects must be addressed by the vendor. Upon successful UAT completion and City approval, the milestone shall be considered accepted, triggering the subsequent payment or project progression as specified in the project schedule.

Section 2.7.1: REMOVED

Section 2.7.2: REMOVED

Section 2.8: Issue Resolution

iMS rarely has implementation issues. Issue resolution, if necessary, should be simple and expeditious. Both parties agree to promptly report any issues, defects or concerns related to the system to the designated iMS project manager. iMS commits to investigate and address reported issues within mutually agreed-upon timeframes, prioritizing critical matters affecting system functionality or security. The City agrees to provide necessary cooperation and access to facilitate issue resolution. If a dispute arises regarding the nature of or resolution of an issue, a designated dispute resolution process will be followed to ensure a fair and expedient resolution.

Section 2.8.1: Issue(s) Resolution Process

Project Managers from both partners will agree that there is a resolution that cannot be solved by standard processes already described. When an issue cannot be dealt with by either or both project managers, then the executive sponsors for both partners should be engaged and provide guidance as to the mutually agreed upon resolution for this matter.

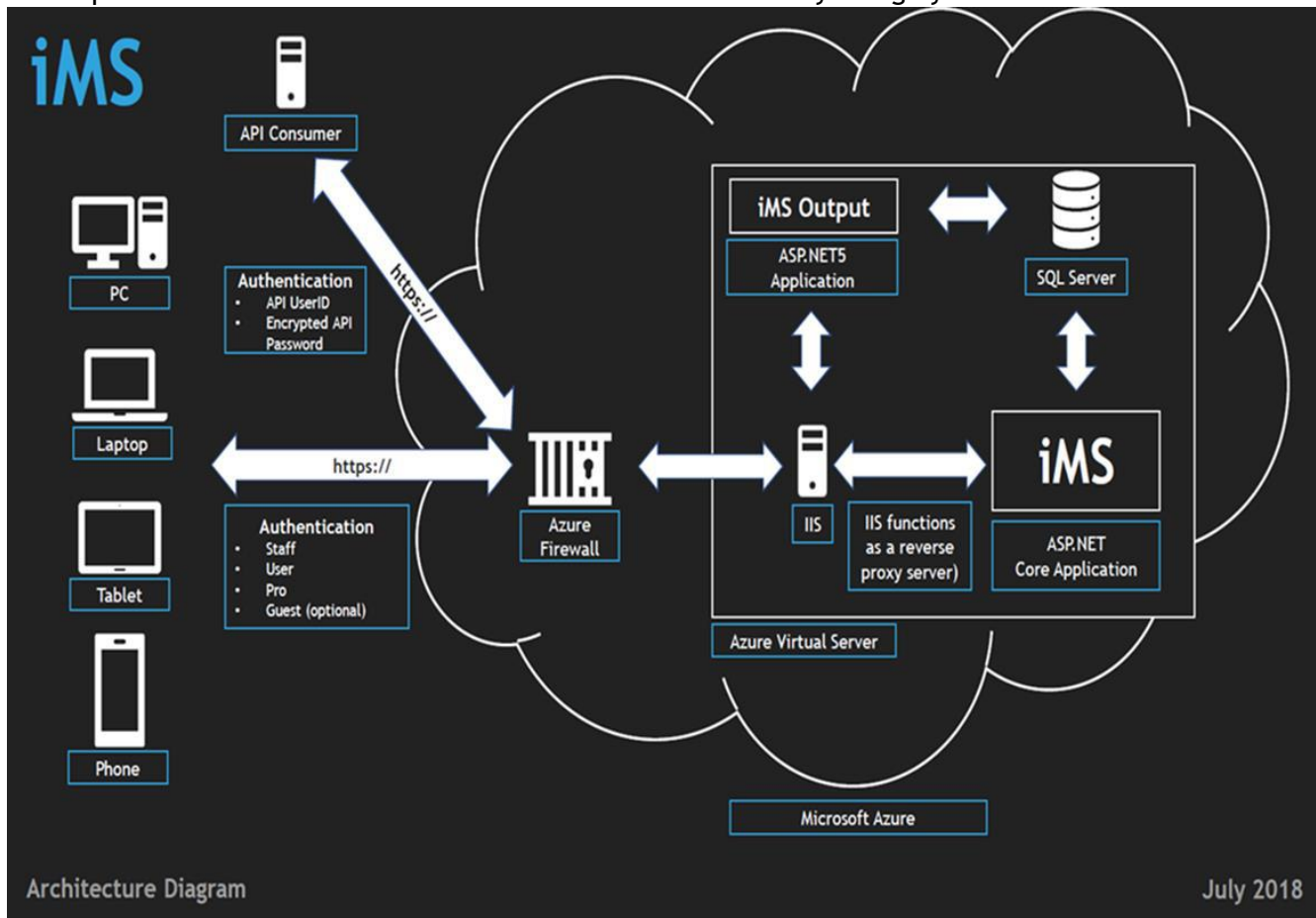
Section 3: Technology Requirements

Please find the technology requirements below necessary for a successful implementation of the Intuitive Municipal Solutions (iMS) solution.

Section 3.1: Technology Architecture

Typical iMS SaaS / Hosted Software Solution Topology Diagram

A general technology deployment/topology diagram of how your iMS software will be configured and deployed for use at your agency is depicted below for reference. Certain modifications may be accomplished but a technical call with iMS to ensure feasibility is highly desired.



Section 3.2: System Requirements

iMS Production System Includes

SQL Server database:

- Created
- Initialized

SSRS (Reporting) instance configured

Core iMS website installed and configured
ASP.NET Core application

iMSOutput website installed and configured
ASP.NET 4.6 application
Used for SSRS and .docx Mail Merge integration

Fileshare configured:

- Folder for attached documents
- Update Program
- Folder for Word Merge Templates
- Password Encryption Tool

iMS Test System Includes

Same items configured in City test environment that have been configured in City Production Environment.

System Software Specifics

- ✓ ASP.NET Core (C#)
- ✓ ASP. NET (C#)
- ✓ SQL Server

For the iMS hosted / SaaS offering, application requirements are that the software is hosted in the cloud. iMS will provide a cloud-based web server capable of managing the desired load.

Section 3.3: Required Environments

iMS will provide one (1) Production and one (1) Test Environment as part of this project.

Section 3.4: Hardware Availability

Section 3.4.1: Requirements for Project Start

Following a successfully signed agreement by the City of Richmond, CA and Intuitive Municipal Solutions, a project kick-off call will be scheduled, usually within 1-2 weeks - an internal iMS call will also be had beforehand to provide adequate knowledge transfer of the RFP details and process from our Sales/Marketing area to the Professional Services

organization (Project Management and others). Verification of hardware and the ability for users to enroll in iMS PROD and TEST Environments may also be confirmed before the project starts.

Section 4: Implementation

The key areas of the successful implementation will be the following:

Project Management - iMS will be responsible for providing overall coordination and management to the project including governance support, schedule management, risk mitigation, project communications, contract management, and quality assurance. Specific deliverables expected during this stage include:

- Project charter / guidelines
- Project plan
- Status reports
- Requirements traceability
- WBS with summary, milestones, Gantt Chart

Knowledge Transfer - iMS will be responsible for ensuring that the City's core team has sufficient knowledge and understanding of the software to properly participate in the project and subsequent system and business process design discussions. The knowledge transfer stage will include all core team training. Specific deliverables expected during this stage include:

- Project team training plan
- Generic system documentation
- System Administration materials

System Design - iMS will be responsible for facilitating process to define how the system will be used to meet the City's business process requirements and project goals. As part of the design, the City expects to engage in discussions around how to use the system most effectively, what changes in business processes are required and to document configurations, interfaces, reports, workflows, and security roles. Specific deliverables expected during this stage include:

- System design document
- Entity Relationship Diagram (ERD)

Build - After completing design and after the City has made decisions on both business process and system configurations, the City expects that iMS and City staff will work collaboratively on building the system. City requirements here center around any clarification or additional documentation required from the initial discussions. All activities related to system configuration, interface development, report creation, or other build tasks are included in this stage. Specific deliverables expected during this stage include:

- As-built documentation
- Test scripts

Testing - Throughout the process, the City expects to engage in the execution of a formal test plan. The test plan will be developed during the project and include testing approach, roles and

responsibilities for testing, and clear deadlines and expectations around testing effort. The City expects to engage in detailed conference room pilot testing, unit testing, regression testing, integration testing, and user acceptance testing. Specific deliverables expected during this stage include:

- Testing plan
- Testing results

Go Live / Support - At time for go-live, the City expects that the iMS will assist with end-user training, work to prepare a cutover plan, and assist with the transition to the new software. Included with go-live could also be assistance for after go-live with management of help-desk type functions. Specific deliverables expected during this stage include:

- Training plan
- Knowledgebase
- End-user training materials

Include creating reports

- List of pre-built reports with descriptions
- Cutover plan
- Final acceptance documentation
- Type of Support provided (hours of support, business processes, administration, etc.)

Section 4.1: Schedule

See Section 2.6.1

Section 4.1.1: Project Phases

See Above and Section 2.6.1

Section 4.2: Implementation Methodology / High Level Plan

With the implementation of the iMS Suite, our expectation is a partnership between the City's staff and the iMS team. iMS' goal is to understand the City's needs, desires, and to provide the City with a proposed configuration plan. A milestone approach to managing the project includes weekly and monthly deliveries of completed work along with progress status reports conducted via conference calls, emails, and webinars.

iMS project managers are "hands-on" and are available to start working on the project immediately after the contract is agreed upon and signed. From the initial consultations (onsite preferred) iMS evaluates how the City currently do business, how the City wish to do business, and how iMS can help blend those two together with the products and services. iMS collaborates with the City team every step of the way and feel that overcommunicating during this project is better than not. iMS Project Managers are certified and have 100% successful implementations thus far with similar projects to yours. The dedicated iMS Project Managers will be Trenton Seymour (**Primary**) and/or Chuck Badger or Jim Williamson (**Secondary/Back-Up TBD**).



Included in the iMS Suite are the following professional services that will be accomplished during the overall implementation process, and as part of the Scope of Services and SOW:

- Installation, Integration, Data Conversion, and Training-specific details about these services are covered in their respective sections.
- All configuration to be included in the main project must be clearly identified in the first on-site meetings.
- City administrators (for iMS moving forward) are also trained in how to perform these tasks for future changes.

Our estimated project timeline provides a high-level overview of the work plan.

Project Start Date: January 2024
Target Project End Date: January 2026

Section 5: Change Management / Project Management

According to Challenge Advisory (<https://www.challenge.org/change-management>), “More than 76% of all change management initiatives fail to achieve their intended outcomes. The drivers of change in the public sector are not due to competitive pressures but a need to do more, better, with less. Budgetary uncertainty, talent shortages, retirement, technology and changing resident expectations are forcing governments to rethink and reorganize.”

In summation, to do more with less. During your iMS project, we hope to assist the City of Richmond with its Change Management goals by offering some of the following best practices and incorporating these into the successful plan through discussion and collaboration with your team(s):

- Operational Project Plan
- Stakeholder Engagement(s)
- Executive to Executive Peer Discussions and Milestone Acknowledgement Meetings
- Employee / Stakeholder Engagement
- Software Implementation / Monitoring / KPI's
- Business, Resident, and Customer Involvement or Methodologies

Section 5.1: Onsite Activity

During the iMS implementation, we anticipate several opportunities for our staff to be onsite. This will be determined and agreed upon early in the project by both project teams. For a project this size, we might anticipate 4-5 onsite engagements where appropriate in the implementation process.

iMS Response - Our iMS collaboration is a mutually-agreed upon project with scope, deliverables, and methodology being agreed upon. iMS has a proven record of successful vendor implementations. Our clients love that we do what we say we are going to do, often cutting through the “noise” of major projects like this. We have local resources that can and will do a combination of remote and onsite for your project to be successful. We are flexible and want to provide the implementation services you desire and require in meeting these needs. Overall, we enjoy communicating and acknowledging we understand components and can adapt to change, if necessary, as well

Section 5.2: Requirements Mapping

iMS Project Manager(s) can assist and provide requirements mapping details when requested and applicable. iMS and City will update and monitor the Requirements Traceability Matrix throughout major phases, including build, test, and acceptance. In addition, the City expects requirements to be mapped to configured business processes.

Section 6: Training

We train each customer based on their specific needs. We engage, discuss, and determine what you are going to need to be successful. We work with your team and end users to ensure that training is accomplished in a manner that makes the most sense for you overall project timeline and deliverables. It is not simply a cookie-cutter approach but an analysis of what your specific agency requires, and then matching that with your project plan. Overall, our training methodology at iMS is that of a “train the trainer” approach. We bring best practices and recommendations with us, but key decisions are made collaboratively with both project teams.

Overall, iMS’s training approach begins with our iMS Orientation Webinar, approximately two weeks prior to the Business Process Review, where implementation team members and Subject Matter Experts (SMEs) are provided an overview of the core principals of iMS and its functionality. This online seminar provides the base level knowledge so that the team can ask questions and make decisions during the Business Process Review meeting(s). Another key milestone during your implementation will be approximately at week 15 on the project schedule (see pages 7-8). It is during these sessions that local System Admins and IT personnel are trained in the configuration and system features. We will also be training your local SME on how to make their unique applications and workflows that have been designed and how to appropriately test them. During these sessions, an iMS System Administration and User Manual are provided electronically to those attending the sessions. During the testing phase, iMS Client Success Managers will conduct meetings/training sessions to answer questions or discuss configuration issues that are discovered during testing.

- Administrator Training-iMS System Administration training will provide your staff with the hands-on experience needed to support your iMS users and configuration.
- End User Training-This can be a combination of on-site and remote training sessions focusing on functionally (e.g., Permit Technician, Plans Examiner, Inspector, Code Enforcement Officer etc.). Each session can last anywhere from 1 to 3 hours, depending on the content.

The City of Richmond will be responsible for providing an adequate training facility for on-site training. This includes sufficient workstations connected to the Internet, each attendee having their own computer, a projector with screen for the instructor, and a quiet location away from the primary work area.

Section 6.1: Training Coordination

Training - See Above and in addition, iMS Project Manager(s) will facilitate training coordination with City PM’s and/or stakeholders.

Your proposed training services are:

- **Administrator Training**

One (1) two-day class that can hold up to ten (10) staff members. iMS System Administration training will provide your staff with the hands-on experience needed to support your iMS users and configuration. During these two days, iMS Administrators will learn how to manage and create user accounts, create record types, design, develop and/or modify existing iMS



workflows and automation; create and edit MS Word merge documents, and associate SSRS documents with the various applications.

- End User Training

Three (3) days of on-site training that can accommodate up to eight (8) staff members per session. Training sessions are functionally (e.g., Permit Technician, Plans Examiner, Inspector, Code Enforcement Officer etc.) based. Each session can last anywhere from 1 to 3 hours, depending on the content. Sessions will be scheduled based on the City’s staffing needs and requirements. Additional training days can be purchased on an as needed basis.

NOTE: The City of Richmond will need to provide an adequate training facility for your iMS on-site training. This includes sufficient workstations connected to the Internet, each attendee having their own computer, a projector with screen for the instructor, and a quiet location away from the primary work area.

- Selectron Training Services

Selectron will provide remote training for the Relay solution. All installation is handled by Selectron technical staff at our remote hosting facility.

- ePermitHub Training Services:

Intake Specialists/Permit Technician Curriculum

- Two [1] two-hour session for Intake Specialists/Permit Technicians with the same curriculum for each session

	Description
ePermitHub Digital Plan Room embedded into iMS Public Portal	<ul style="list-style-type: none"> ● Plan submittal from the customer perspective <ul style="list-style-type: none"> ○ Understanding the process a customer will follow to submit an application and submit plans and supporting documents ○ Review the types of file validation & digital signature validation occurring during submittal and how to interpret any errors ○ Walkthrough file processing and reviewing the automated sheet numbering.
	<ul style="list-style-type: none"> ● Resubmittal process from the customer perspective



	<ul style="list-style-type: none"> ○ Reviewing & answering issues from a rejected plan set ○ Completing the resubmittal of plan addressing the answered issues.
ePermitHub Digital Plan Room embedded into iMS Staff Portal	<ul style="list-style-type: none"> ● Plan submittal from a staff perspective when done in-house ● High-level review of Plan Reviewer activities <ul style="list-style-type: none"> ○ Learn at a high-level the steps a plan reviewer will perform and how they affect what the customer will see in the iMS Public Portal

Plan Reviewers/Managers Curriculum

- Two [1] four-hour sessions for Plan Reviewers/Managers with the same curriculum for each session

	Description
ePermitHub Digital Plan Room embedded into the iMS Staff Portal	<ul style="list-style-type: none"> ● iMS workflow and the digital plan room <ul style="list-style-type: none"> ○ Learn how the digital platform interacts with the iMS workflow
	<ul style="list-style-type: none"> ● Completing a plan review <ul style="list-style-type: none"> ○ Navigating the digital plan room ○ Overview of the viewer and available tools ○ Creating issues & markup ○ Reviewing issues and filtering tools ○ Sheet versioning ○ Comparison tools ○ Stamping ● Rejecting plans & requesting revisions ● Resubmittals & approving plans ● Create print set
	<ul style="list-style-type: none"> ● Overview of Intake Staff usage of the digital plan room <ul style="list-style-type: none"> ○ Plan submittal from a staff perspective when done in-house

ePermitHub Digital Plan Room embedded into iMS Public Portal	<ul style="list-style-type: none"> ● Overview of customer usage of digital plan room <ul style="list-style-type: none"> ○ Plan submittals and file validation & processing ○ Reviewing and answering issues contextually from the plan markup
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Administrative and Technical Training

- One [1] four-hour session for System Administrators

The following topics will be covered as part of the training session:

- Project type configuration setup
- Document type configuration including role mapping, submittal requirements and digital signature validation setup
- Business rule trigger integration within the iMS Suite
- Digital Plan Room roles and mapping to iMS roles
- Approval Stamps creation and deployment
- Understanding errors

Section 6.2: Training Material Development

See above - in addition, iMS Project Manager(s) can assist with additional training materials or provide best practices guidance on this deliverable if more training material is required or necessary. Training materials will be City specific training documents (i.e. not generic) that reflect the City's configuration and business processes.

Section 6.3: Training Courses

See above - in addition, iMS can coordinate additional training courses for departments on a case-by-case basis, and, as necessary.

Section 6.4: Training Delivery

See above - In addition, the delivery of training can be either remote or onsite (at no additional charge to the City unless on-site days requested exceed limits). Staff being trained should be free from the normal workload and office environment distractions to ensure proper training can be accomplished.

Section 6.5: Training Evaluation and Follow Up

iMS Project Manager(s) can assist in evaluation of City stakeholders that training (and appropriate sign-off(s)) has occurred. Follow-up training during the implementation can be discussed and provided if mutually agreed upon.

Section 7: Quality Assurance

iMS's approach to testing and quality assurance is to have a configured solution ready for staff to get comfortable with, to be accessible to address testing questions, and to help assist those stakeholders with continuing to test and look for quality items throughout the process. We help set up tasks for key project team members to ensure they are not surprised when they "go live." We make this a large part of the effort the city team will contribute to the project while we manage most, if not all, of the other key areas for you. Testing, Staff Training, and Data Conversion User Acceptance Verification and Acceptance are by far the three biggest areas of your agency's stakeholder's responsibility. Experience has shown the more users can test processes, new workflows, configurations, exceptions, reports, etc., the more successful a project. We will ensure your project team is aware of each phase where this is going to be relevant and paramount.

Following initial testing by users that get in early, are involved during the project meetings, BPR, and other aspects, the next major training/testing milestone will be approximately at week 15 on the project schedule - refer to sample Project Plan. It is during these sessions that local System Admins and IT personnel are trained in the configuration and system features. We will also be training your local SME on how to make their unique applications and workflows that have been designed and how to appropriately test them. During these sessions, an iMS System Administration and User Manual are provided electronically to those attending the sessions. During the testing phase, iMS Client Success Managers will conduct meetings/training sessions to answer questions or discuss configuration issues that are discovered during testing.

For end-user training/testing, we are proposing a partnership with your agency, where your staff take the lead in training and the iMS Client Success Manager is onsite to answer any technical questions or ensure a successful training and testing experience. Your agency will be responsible for providing adequate testing time and access to users. As this item is so important to overall success, should the iMS Project Team need to get involved with Richmond's Project Team Leadership Group, we can allocate project tracking during regular recurring meetings.

The acceptance criteria for milestone testing and acceptance will be action items from project team meetings where core stakeholders ensure the testing is complete, acknowledged, and confirmed there are no deficiencies.

Finally, so that project stakeholders might envision what a testing procedure process while implementing iMS might resemble, please look at the below sample testing procedure that is standard for many processes or workflows during entire implementation.

Please see Sample Testing Procedure in iMS RFP submission for recommended process or sample testing recommendation.

Section 8: Ongoing Support

Go Live Support

iMS utilizes agile project management methodology where each step of the process is built upon the previous segment having been completed and signed off. At time of go live staff will have tested the system and converted legacy data thoroughly to go live with confidence. iMS Project Manager(s) will be onsite prior to go live for final training(s) and onsite during the go live week to ensure a smooth transition. Along with your dedicated Project manager(s) being on site, our Support Manager, Alan Lopez, typically will also be on site to familiarize himself with your installation to best be able to help you with future support. Go live will be a cut over approach where legacy software is turned off and iMS will be used going forward.

Section 8.1: Post Live Support Scope

See above.

Section 8.2: Post Live Support Duration

See above - Minimum of 30 days before transfer to ongoing support.

Section 9: Facility Requirements

iMS recommends that the City of Richmond provide an adequate training facility for your iMS on-site training events/meetings. This includes sufficient workstations connected to the Internet, each attendee having their own computer, a projector with screen for the instructor, and a quiet location away from the primary work areas or environment, if possible.

Section 9.1: Project Team Equipment

See Above

Section 9.2: Project Team Facilities / Workspace / Security Access

See Above - In addition, if the iMS Team members on site are required to have security access (i.e., badges, parking permits, etc.) that these be coordinated with the Project Managers from both partners.

Section 10: Personnel Requirements

City of Richmond Personnel Staff Participation is expected to be as follows:

City Staff Participation	
Assumed Role	Maximum Participation (FTE)
Project Manager	.5
Team Leads	.5 – 1.0
Team Members	.25 - .5
Technical Resources (Network/DB)	As necessary

Section 11: Acceptance Process

The City will have an opportunity to review and either (i) accept or (ii) object to the Services and Deliverables as set forth in an SOW (“Acceptance Process”). If City objects, City will provide Vendor with a written description of the objection. The Vendor and City will review the objection and agree on a resolution to the objection. The City’s use of the Services shall not be deemed Final Acceptance.

11.1: Deliverable or Service Acceptance

Acceptance by the City is required for all Deliverables identified in this SOW. Vendor shall deliver completed Deliverables for review and approval. Deliverables shall be accepted or rejected within five (5) business days from the time of submittal for acceptance unless mutually agreed to another timeline. The Deliverable Acceptance Process is described below.

1. Submission of Deliverables - The Vendor Project Manager, or designee, will prepare a Deliverable Acceptance Form email and forward with the respective Deliverable to the City Project Manager, or designee, for consideration.
2. Assessment of Deliverables - The City representative will determine whether the Deliverable meets the requirements as defined in this SOW, that the Deliverable is complete, and the Deliverable conforms to City expectations for level or professionalism and clarity.
3. Acceptance / Rejection - After reviewing, the City will either accept the Deliverable (by providing an email reply stating the City approves the deliverable) or will provide a written reason for rejecting it to the Vendor. If feedback from multiple City representatives is received, then the City Project Manager, or City designee, will consolidate that feedback before delivering it to the Vendor.
4. Correction of Service Deliverables – Vendor will submit a schedule for making changes to the service deliverable within two (2) business days of receiving a rejected Deliverable Acceptance Form email. Once Vendor corrects all previously identified in-scope problems, the Deliverable will go through the acceptance process again. The Deliverable will be deemed accepted when City provides an email reply stating the City approves the deliverable.

11.2: System / Phase Acceptance

“Conditional Acceptance” will occur at or prior to go-live. The City will have no less than two (2) Weeks to complete User Acceptance Testing of the system (“pre-live testing”) before going live.

The City will have a 30-day period after the go-live to “live test” the system. Live testing is the City’s opportunity to verify that the system complies with the functional requirements and that all other Services have met the requirements of this SOW.

Any (1) new issues not identified during the first three (3) weeks of the “live test” or (2) not accepted/rejected in the 5 day (unless otherwise agreed) timeline are deemed accepted.

“Final Acceptance” will occur after all after live testing. “Final Acceptance” means the City’s execution of Final Acceptance upon resolution of Defects in City requirements included as Exhibit C to the Agreement, all Deliverables listed in this SOW, as well as any requirements or deliverables added via change orders throughout the project for which VENDOR is responsible.



Section 12: Payment Schedule

Section 12.1: Milestone Listing

The iMS Project Schedule once produced and provided to both project teams will itemize everything on the entire implementation.

Project Milestones Include the following PAYMENT MILESTONES:

PAYMENT MILESTONE 1:	Initial Delivery	Acceptance of Deliverables 1 - 11
PAYMENT MILESTONE 2:	Go-Live	Acceptance of Deliverables 12 - 27
PAYMENT MILESTONE 3:	Final Acceptance	As defined in Section 11

Section 12.2: Payment Amounts

Payment Terms, First Year Cost, and Payment Amounts

PAYMENT TERMS:

Software License and Card Reader:
Due at Contract Execution/Signing

Annual SaaS/Hosting:
Paid annually, in advance
Due at Contract Execution/Signing

FIRST YEAR PAYMENT AMOUNTS:

		CONTRACT	MILESTONE 1	MILESTONE 2	MILESTONE 3	Total
iMS						
	Licensing	\$ 246,250.00				
	Professional Services		\$ 105,922.00	\$ 211,844.00	\$ 105,922.00	
	Annual Hosting Fee	\$ 82,250.00				
		\$ 752,188.00	\$ 105,922.00	\$ 211,844.00	\$ 105,922.00	
Selectron						
	Professional Services		\$ 15,487.50	\$ 30,975.00	\$ 15,487.50	
	Annual SAAS/Hosting Fee	\$ 30,550.00				
		\$ 92,500.00	\$ 15,487.50	\$ 30,975.00	\$ 15,487.50	
ePermitHub						
	Professional Services		\$ 12,250.00	\$ 24,500.00	\$ 12,250.00	
	Annual SAAS/Hosting Fee	\$ 33,000.00				
		\$ 82,000.00	\$ 12,250.00	\$ 24,500.00	\$ 12,250.00	
CORE Business Technologies						
	Card Readers	\$ 1,050.00		\$ -	\$ -	
		\$ 1,050.00	\$ -	\$ -	\$ -	
Invoice Totals		\$ 393,100.00	\$ 133,659.50	\$ 267,319.00	\$ 133,659.50	\$ 927,738.00

FIVE YEAR PAYMENT SUMMARY:

Year 2 = One Year from Contract Execution, etc.

		Year 1	Year 2	Year 3	Year 4	Year 5	5 Year Total
iMS							
	Licensing	\$ 246,250.00					
	Professional Services	\$ 423,688.00					
	Annual Hosting Fee	\$ 82,250.00	\$ 86,362.50	\$ 90,680.63	\$ 95,214.66	\$ 99,975.39	
		\$ 752,188.00	\$ 86,362.50	\$ 90,680.63	\$ 95,214.66	\$ 99,975.39	
Selectron							
	Professional Services	\$ 61,950.00					
	Annual SAAS/Hosting Fee	\$ 30,550.00	\$ 31,015.00	\$ 31,500.00	\$ 12,010.00	\$ 12,545.00	
		\$ 92,500.00	\$ 31,015.00	\$ 31,500.00	\$ 12,010.00	\$ 12,545.00	
ePermitHub							
	Professional Services	\$ 49,000.00					
	Annual SAAS/Hosting Fee	\$ 33,000.00	\$ 33,990.00	\$ 35,000.00	\$ 36,050.00	\$ 37,132.00	
		\$ 82,000.00	\$ 33,990.00	\$ 35,000.00	\$ 36,050.00	\$ 37,132.00	
CORE Business Technologies							
	Card Readers	\$ 1,050.00					
		\$ 1,050.00	\$ -	\$ -	\$ -	\$ -	
Annual Totals		\$ 927,738.00	\$ 151,367.50	\$ 157,180.63	\$ 143,274.66	\$ 149,652.39	\$ 1,529,213.17

Section 13: Service Level Agreement

In the event that three (3) or more Severity Type 1 issues are not responded to within thirty (30) minutes within any one quarter, Customer shall be provided with a credit equal to five percent (5%) of the annual support and maintenance fee, provided the Customer notifies iMS Management in writing of the request for a credit within

twenty (20) business days of a response not in conformity with Severity 1 Customer Service Severity Code as set forth below.

In the event of three (3) or more Severity Type 2 issues that are not responded to within two (2) hours within any one quarter, Customer shall be provided with a credit equal to five (5%) of the annual support and maintenance fee, provided the Customer notifies iMS Management in writing of the request for a credit within twenty (20) business days of a response not in conformity with Severity 1 Customer Service Severity Code as set forth below.

Severity Code	Description	Examples of Issues in This Category	Target Response Time
1	Emergency issue; all users have no access to the iMS production system	All users have no access in the iMS production system.	Within thirty (30) minutes OR Immediate assistance
2	High impact issue; users cannot perform key processes and are unable to continue current operations.	Users are unable to perform critical tasks including processing permits, licenses, input inspection results	Within two (2) business hours OR Immediate assistance
3	Moderate impact issue; users cannot perform key processes.	Users experience functionality issues including data not displaying correctly, issues requiring general assistance on setup and/or configuration, answers to “how to” questions or users being unable to perform basic tasks.	Within four (4) business hours
4	Low impact issue and/or general questions regarding product usage; reporting a behavior which is not an emergency.	General inquiries regarding new or existing product functionality and questions about how to accomplish a certain task or complete a process in iMS.	Within 10 (ten) business hours