

4/14/2023

iMS

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iMS

*Vance Brademan*



# REQUEST FOR PROPOSAL

RFP # 2023-03



for an

## Land Management Community Development System and Implementation Services

City of Richmond, California

Partnering with

Intuitive Municipal Solutions (iMS)



## C.1.1. Proposal Section 1.0 - Introduction

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Please find the completed **Intuitive Municipal Solutions (iMS)** Section 1.0 details as required in the RFP.

Our introductory material contains a title page (see previous page) with the RFP name, name of the proposer, address, contact information, the date, a Letter of Transmittal. In addition, the following sections are also included:

- 1) Attachment 1 (RFP Submittal Checklist)
- 2) Attachment 2 (Signature Page)
- 3) Attachment 3 (Proposer Statement)



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## iMS Letter of Transmittal

Friday, April 14<sup>th</sup>, 2023

Patrick McKenzie  
Purchasing Division / Finance Department  
450 Civic Center Plaza  
Richmond, CA 94804

Mr. Patrick McKenzie and RFP Committee Stakeholders,

Greetings and a good day! My entire **Intuitive Municipal Solutions (iMS)** team is pleased to submit the following RFP response and proposal to the City of Richmond, CA's Request for Proposal (RFP) for a new **Land Management Community Development System and Implementation Services** software solution. Your proposed iMS Suite will provide world-class Permitting, Licensing, Code Enforcement, and Planning Project applications to replace your existing TRAKiT system. Our responses are being presented after carefully reviewing the needs of your City's different departments and stakeholders. At iMS, my team's only focus is on Community Development and Land Management software for government agencies. We are committed to partnering with and providing solutions specifically configured for each of our clients. In addition to our software, what we believe truly sets us apart from our direct competition is our dedication to customer service. We sincerely want our clients to experience a collaborative and mutually beneficial environment and relationship with iMS. We greatly appreciate your organization considering joining us and becoming a member of the iMS family.

We also recognize that the City's teams involved in this RFP process have a tremendous amount of work ahead to analyze all responding vendors submissions. To that end, we at iMS will attempt to keep our responses succinct, but clear and meaningful, as it relates to the RFP. However, please be aware that should your team require any clarification or additional information, we stand ready to assist immediately. Also, you may notice that my company's motto is **Dependable. Diligent. Driven.** As such, I believe this simple and direct slogan sums up who we are, what we represent, and what we hope to achieve for each of our customers. Again, we greatly appreciate The City of Richmond's thoughtful consideration of iMS to be your trusted partner in this major project.

Finally, should you, or anyone at the City have questions, concerns, additional needs, or comments about our RFP response that you believe I personally can assist with, please do not hesitate to contact me directly at either (747) 222-8822 or via email at [vance@ims16.com](mailto:vance@ims16.com).

Sincerely,

**Vance Bradshaw**  
**President and CEO of Intuitive Municipal Solutions (iMS)**



## Executive Summary

**Intuitive Municipal Solutions, LLC** was founded in 2016 to address the software needs of local and state government community development departments with current/modern “adaptable” technology and innovative, easy-to-use solutions. We are family-owned, and are focused on creating and fostering long-term, mutually beneficial relationships with our valued customers. To date, every customer of the iMS Suite has had an on-time conversion and successful go-live implementation. We strive for 100% customer satisfaction in everything we do. Each day, we endeavor to be **Dependable. Diligent. Driven.**

Simply stated, the overall objective behind iMS is to always provide customers with both progressive and leading-edge software, as well as a personalized business partner relationship. iMS is committed to be attentive, responsive, and devoted in our pursuit of impeccable service.

***Our Mission** - To re-establish an honest and coherent business model whose primary focus is to care for the customer and their needs.*

***Our Vision** - To provide local and state agencies with both a progressive and leading-edge software program, as well as a personalized business partner relationship.*

At the time of iMS’s creation, our CEO and Founder, Vance Bradshaw, worked for “corporate” America. After the company he helped become extremely successful, **CRW** (the original developer/owner of **TRAKiT**), was purchased and merged with another ERP Solution Provider, and then purchased again multiple times by Private Equity firms, he decided to leave and start his own company. Vance knew there had to be more than watching long-term customers suffer at the expense of margin and profitability. Contributing to his decision to walk away from this job and create iMS were other factors as well, primarily among them, was his long-time customers advising him that their previous experiences with vendor responsiveness, support of the product(s), and technological upgrades that they were accustomed to, had rapidly declined, as had, of course, their customer satisfaction.

Vance saw this need to get back to the basics and taking care of customers was going to be instrumental in whatever venture he decided to join or start. As such, iMS was born. Vance’s intimate knowledge of the good and bad of other products in the marketplace afforded him an opportunity to create a new solution using the positives and re-inventing those areas that could use some improvement. As such, your proposed iMS Suite of products is a single system comprised of various applications that will support the City of Richmond in the areas of approvals (plan review), permitting, code enforcement, and licensing. iMS offers a fully integrated enterprise application that enables your staff, customers, and even administrators to share the same code base. Of course, one great benefit to using our innovative software is that it utilizes HTML5 and modern technology, with no plugins needed. Additionally, because of the software’s responsive and



browser-based design, it can successfully run on any of the City’s, Staff’s, or other User’s hardware (i.e., PCs, tablets, and smartphones).

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 greatly benefit your citizens, users, and administrators. In addition, and perhaps more importantly, we believe without a doubt, that our team is uniquely qualified to replace your existing TRAKiT system from CentralSquare. This should become clear as you read our response, review our team’s resumes, qualifications, and references being provided with this submission. As already mentioned, but to stress it, iMS is exceptionally qualified to convert the TRAKiT data, train administrators and staff, successfully implement, configure your new system, and supply world-class support to the City.

A great benefit to using our innovative software is that it utilizes HTML5 and modern technology, with no plugins required. Additionally, because of the software’s responsive and browser-based design, it can successfully be run on PCs, tablets, and phones without a user having to worry about additional software. The user experience and software being utilized are the “same” for all applicable devices. Producing tens of thousands of applications per year with different project types and multiple fee schedules will be easy with your iMS solution. Our products are highly configurable by your agency. In addition, your dedicated iMS project team will be ready and prepared to assist in customizing fee tables, reports, project, and permit types, etc. during your personalized implementation. We gather all the business process details and current processes that you wish to maintain and ensure we educate staff on how to replicate those in iMS. For those additional processes you wish to change, or new ones you do not have today, we collaborate and together review best practices, recommendations, and scenarios on how they may best work within your new solution. Our proposed solution will be for your iMS Solution to be a Software-As-A-Service (SaaS) and hosted by iMS deployment leaving you with less to worry about.

## **Your iMS Suite of Proposed Products include.....**

The iMS software suite is a single system comprised of various applications that will support your Agency in the areas of land development, permitting, plan review, inspections, code enforcement and licensing. Additional departments or stakeholders, such as Fire, Utility Billing, Public Works, and others may be able to take advantage of the highly configurable solution the City would own and incorporate either business-specific workflows or add-on functionality as part of the overall project, or in later phases. Intuitive Municipal Solutions offers an integrated enterprise application that enables your staff, customers, and even administrators to share the same code base. As mentioned previously, we feel a tremendous benefit of using our innovative software is that it utilizes HTML5 and modern technology, with no plugins required. Your iMS Software is sure to grow with the needs of your agency without any fear of becoming outdated or that you are “stuck” with a technology that cannot adapt when, and if, it becomes necessary.



The **iMS Suite** we are proposing for your agency includes the following “core” applications / modules:

- I. **iMSApprovals**
- II. **iMSPermits**
- III. **iMSEnforce**
- IV. **iMSLicenses and Renewals**

As your team and stakeholders will find, throughout this entire RFP we make a point to bring up our background and experiences with your current solution; TRAKiT. We believe we possess a unique group of individuals with many years of knowledge and success migrating this and other legacy community development outdated products to the iMS Suite. As your iMS Project Team kicks off your unique and very individual implementation, we will provide an overall Business Process Review (BPR) for the City. During this phase, we gather information from each department that requires access, configuration, workflow design, reporting requirements, and begin making our best practices recommendations before mutually agreeing on the proper configuration for the City of Richmond. We then proceed to build this individual configuration for you and with you, with iMS staff taking the “heavy” load and your team responsible for input, verification, testing, and acceptance.

Without a doubt, iMS will be able to assist the City in all your project’s objectives listed in your RFP. As with many modern Land Management/Community Development solutions, there are usually multiple ways to accomplish tasks, processes, workflow, and outcomes. We specialize in finding out what the overall objective means, what you are trying to accomplish, as well as thinking about future conditions when making recommendations. We certainly want to ensure the City of Richmond, CA that meeting and exceeding your needs is our primary goal.

If we can provide additional information pertaining to our references, character, or company’s overall qualifications, please let us know how we can further assist.





## Attachment 1 (RFP Submittal Checklist)

Submittal Checklist		
Section	Item	Submitted
<b>B1</b>	<b>Scope of Project</b>	
B.5	Complete Attachment 13 (Interface)	✓
B.6	Complete Attachment 14 (Anticipated Conversion)	✓
Error! Reference source not found.	<b>Summary and Overall Scope</b>	
Error! Reference source not found.	<b>Introduction</b>	✓
	Error! Reference source not found.	✓
	Error! Reference source not found.	✓
	Error! Reference source not found.	✓
Error! Reference source not found.	<b>Proposer Team</b>	✓
Error! Reference source not found.	<b>Functional Requirements</b>	✓
	Error! Reference source not found.	✓
Error! Reference	<b>Software Proposal</b>	



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	<b>Error! Reference source not found.</b>	✓
	<b>Error! Reference source not found.</b>	✓
<b>Error! Reference source not found.</b>	<b>Professional Service Proposal</b>	
	Complete Attachment 5 (Professional Services Background) for each firm involved with the project	✓
	Complete Attachment 6 (Reference Form) for each firm involved in the project	✓
	Complete Error! Reference source not found. - When completing Error! Reference source not found., please refer to definitions found in section Error! Reference source not found. of this RFP.	✓
<b>Error! Reference source not found.</b>	<b>Price Proposal</b>	
	Complete and submit Error! Reference source not found.	✓



## Attachment 2 (Signature Page)

The undersigned proposer having examined this RFP and having full knowledge of the condition under which the work described herein must be performed, hereby proposes that the proposer will fulfill the obligations contained herein in accordance with all instructions, terms, conditions, and specifications set forth; and that the proposer will furnish all required products/services and pay all incidental costs in strict conformity with these documents, for the stated prices as proposed.

Submitting Firm: Intuitive Municipal Solutions, (iMS)

Address: 600 La Terraza Blvd.

City: Escondido State: CA Zip: 92025

Authorized Representative (print): Scott Christensen Title: Sr. Account Executive

Authorized Signature: Scott A Christensen Date: April 14<sup>th</sup>, 2023

### Contact Information:

Name: Scott Christensen

Title: Sr. Account Executive

Address: 600 La Terraza Blvd

City: Escondido State: CA Zip: 92025

Email: scott@ims16.com

Phone: Work Direct: 747-222-8822, x 707

Cell Phone: 407-314-3398

Fax: N/A

**City of Richmond, CA**

**RFP 2023-03 Land Mgmt Community Development & Implementation Services**



## Attachment 3 (Proposer Statement)

By submitting a response, the respondent acknowledges that he/she has acquainted themselves with the terms, scope, and requirements of the project based on the information contained in this RFP and any addendums. Any failure by the proposer to acquaint themselves with available information will not relieve them from the responsibility for estimating properly the difficulty or cost of successfully performing the work available. The City is not responsible for any conclusions or interpretations made by the proposer on the basis of the information made available by the City.

The following addendums have been acknowledged and are included in our response. Proposals that do not acknowledge addendums may be rejected.

Addendum#	Initials
Q & A Set 1 issued by the City on March 29 <sup>th</sup> , 2023	SAC

Scott Christensen (Sr. Account Executive)

PRINTED NAME OF AUTHORIZED AGENT (TITLE)

Scott A Christensen

April 14<sup>th</sup>, 2023

SIGNATURE OF AUTHORIZED AGENT

DATE



## C.1.2. Proposal Section 2.0 - Proposer Team

Please find the completed **Intuitive Municipal Solutions (iMS)** Section 2.0 - Proposer Team details as required in the RFP.

In our RFP Submission, Intuitive Municipal Solutions (iMS) is the only sole provider of products and services being offered in our submission. No additional vendors are required for the items contained, unless otherwise stated, in any of the deliverables associated with our response. iMS does partner with vendors included in the City’s RFP interface section(s) and we are happy to also discuss any additional potential integration points with shareholders during either pre-contract and/or implementation strategy sessions.

From an iMS Standpoint, the only general contract documents in addition to what the City of Richmond requires would be the following highly recommended agreed upon documents. Sample or agency-specific ones can be provided upon request or when appropriate in the City’s procurement process.

Contract Documents from iMS required and/or highly recommended if iMS is a finalist in Richmond’s RFP process:

1. SaaS / Hosting Agreement between agency and iMS - Please see a sample exhibit provided as part of our RFP submission at the end of this document.
2. Software Implementation Agreement - please see a sample Exhibit provided as part of our RFP submission at the end of this document.
3. Statement of Work (SOW)
4. Project Plan

## Corporate Overview

Metric	Response
Name of Proposer:	<b>Intuitive Municipal Solutions (iMS)</b>
Type and number of employees committed to the product and support being proposed	7
Office locations (City and State)	Escondido, CA (Corporate Headquarters) Casselberry, FL (Field Office)



Additional information for iMS in this section is that since our inception, iMS has been a very stable privately owned entity. The company is entirely owned and operated by Vance Bradshaw. Staff turnover is rare, and we have had no significant changes in our organizational structure since 2016. We are not owned by Private Equity or a public-traded company that has revenue responsibilities like many of our competition, where the profit margin is key to their business model. All services will be performed by iMS Staff. The iMS Project Manager(s) would coordinate and oversee all aspects of the business partner(s) objectives directly with the City of Richmond and the respective business partner(s).

iMS specializes ONLY in Land Management / Community Development solutions. This is not an after-thought after the ERP or another more important business unit and where the technology and solution suffer because attention is paid to other areas within a company. For the past six years we have been hyper-focused on getting our solution 100% completed and we are there! While many RFP's we have responded to consider our size, or number of years in business a negative or a red flag, we totally disagree. Being relatively new in a state will surely offer a City like Richmond many extra opportunities and much more direct access to each of our employees. Most importantly, all our clients are collaborative partners, and we would be thrilled to have the City of Richmond as our next customer in the State of California. In addition, we believe no other responding software vendor will have the breadth and experience of your existing TRAKiT products, especially conversion of the data.



### C.1.3. Proposal Section 3.0 - Functional Requirements

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iMS has completed and submitted Attachment 11 in an .xlsx format with our overall RFP submission. Our responses within the City's Attachment 11 attempt to address the software and implementation scope of the overall project and the requirements for each functional area. If City stakeholders require any clarifications or have additional questions, please reach out to Scott Christensen directly.



## C.2 Software Proposal

### Proposal Section 4.0 Software Products

This section contains details and information on the proposed software scope, and functional description of the software.

### Attachment 9 (Software Products)

Include all software licenses proposed on the form below providing the following information:

- **Software Product Name.** Provide the name of the software product as it is expected to appear on any license agreements or official product listings.
- **Function.** Describe the function of the software product. If multiple software products share a similar function, be specific on role of the software and what is and is not allowed with each license
- **License Metric.** Define how the software product is licensed. If license is based on quantify, or if the cost of an enterprise license is based on metric, proposers must provide definition for the metric as it appears in contract documentation.
- **Quantity /Access Limitations.** Define any licensed quantities or access limitations to the proposed software.
- **Dependencies.** Define any proposed or third-party products that are required to utilize the software product.

Software Product Name	Function	License Metric	Quantity/ Access Limitations	Dependencies
The iMS Suite – this includes the following software products/modules/tools, etc. <ul style="list-style-type: none"> <li>■ iMS Approvals</li> <li>■ iMSPermits</li> <li>■ iMSEnforce</li> <li>■ iMSPros</li> <li>■ iMSLocations</li> <li>■ iMSLicensing</li> <li>■ iMSRenewals</li> </ul>	Community Development / Land Management solutions	Unlimited License for contracting departments	None	





For each major software product, please answer the following questions:

Requirement	Response	Comment
<b>System Features</b>		
System accessible on mobile device	YES	Any device, any time, anywhere. We are a true browser-based solution and any hardware you or your user or customers wish to use will work with iMS.
System provides app for use on mobile device	N/A	No APP is required. The software usage is the same for staff, citizens, contractors, guests, etc. No middleware to use and none to worry about not working when you upgrade.
System requires download of any software on device		No. Browser-based
<b>Security Information</b>		
System provides role-based security	YES	Security is role-based and can be easily transferred to users as necessary.
System provides role-based security connection to position file (assigning employee to position allows employee to inherit roles of the position)	YES	
<b>Data Entry</b>		
System allows for user-defined fields	YES	System is highly configurable and allows for not only user-defined fields, but the labels transfer forward to reports, inquiry, etc.
System provides audit trail for entered and modified information	YES	With appropriate security, a user or admin can access 100% audit capability on any field or process.
System allows masking data upon entry (sensitive fields)	YES	This will be determined during Business Process Review and can be configured by iMS staff for the agency.
System allows designating mandatory fields	YES	System can be configured to require mandatory fields as well as other key aspects of your business processes.
System allows data to be encrypted	YES	



## Attachment 4 (Software Background)

Complete one form for each firm included in the proposal.

<b>Software Background</b>	
Software Product Name:	<b>The iMS Suite</b>
Firm Providing Software:	<b>Intuitive Municipal Solutions (iMS)</b>
<b>Software History:</b>	
Current Version of the Software:	April, 2023
Date of Release for Current Version:	April 2023 (released v.04/05/2023)
Date of First Release of Software:	July 2016
Identify any Precursor Software Products or Alternate Names for Software	N/A
<b>Current Version</b>	
<p>What Were Top Five Enhancements in Current Version of the Software</p>	<p>1 – Multiple Payment Integrations completed including PayTrace, BridgePay, Paymentus, now giving iMS and partners five total interfaces completed for (also US Bank and CardKnox)</p> <p>2 – Ability for clients to disable the file request exchange.</p> <p>3 – Added the capability for iMS records to have not only Parent-Parent or Parent-Child type relationships or links but increased this capability to allow for Parent-Child-Sibling linking capability.</p> <p>4 – ePermitHub and iMS vendor agreement to allow a unique interface between two software to allow for much tighter electronic plan review integration points.</p> <p>5 – Within iMS, the iMS People (Shared Contacts) capability was created and enhanced.</p>



**Software Background**

<p>How as Software Changed Over Previous Three (3) Years</p>	<p>Over the previous three years, the iMS suite has targeted departments with workflows not previously supported. This has allowed our customers, new and existing, to review departments not currently using iMS to determine if iMS is now a good fit. This has meant listening to our customers and expanding the iMS feature set to support the requirements of an expanding user base. The evolution and changes over the past three years have always been customer focused and providing expanded capabilities for the future. Many other client enhancements have been completed during this time as well.</p>
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<p>Biggest Limitation of Current Software</p>	<p>Due to the highly configurability of the software, iMS implementations for the entire iMS Suite of products tend to range between 40-50 weeks on average.</p>
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**Third Party Products:**

<p>List any Third-Party Products embedded in the Software</p>	<ul style="list-style-type: none"> <li>• Electronic Plan Review (i.e., Bluebeam Software or other similar vendor(s)) Link</li> <li>• Links for ESRI GIS, or Maps</li> <li>• Links for End-User “Favorites”</li> <li>• Microsoft Outlook (Office 365)</li> <li>• California State Licensing Board (CSLB)</li> <li>• Active Directory (Office 365)</li> <li>• Twilio for text messaging</li> <li>• Payment Processor integrations (i.e., US Bank, PayTrace, BridgePay, Paymentus, and CardKnox)             <ul style="list-style-type: none"> <li>• SendGrid for email(s)</li> <li>• Works with documents creating PDF’s or Excel during report generation.</li> <li>• SSRS – Report Writing</li> <li>• SQL</li> </ul> </li> </ul>
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## Software Background

<p>List any Third-Party Products Recommended for Use along with the Software</p>	<p>An Electronic Plan Review (Bluebeam, ProjectDox, ePermitHub, or Other)</p> <p>Interactive Voice Response (IVR) and/or SelecTXT by Selectron</p> <p>VueSpex if your agency is interested in virtual inspections.</p> <p>SolarAPP+</p>
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## Solution Overview

Intuitive Municipal Solutions is proposing our iMS Suite of products to the City of Richmond, CA. Based on your RFP, we are recommending the Software-As-A-Service (SaaS) deployment for you and that iMS will host this in our data center(s) as well. The City of Richmond, CA will own its own data once live and fully converted with your iMS software. In addition, the City will have ongoing access to download for both backup requirements, if necessary, and for the City's own analysis desires or needs using data warehousing products. As part of our proposal, iMS takes no exceptions to these requirements of the City of Richmond.

The iMS software 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. Intuitive Municipal Solutions offers an integrated enterprise application that enables your staff, customers, and even administrators to share the same code base. These integrated enterprise applications will allow your staff, customers, and even administrators to share the same database, all configurable and secured by your administrators and community development management team.

A great benefit to using our cutting-edge software is that it utilizes HTML5 and modern technology, with no plugins required. Additionally, because of the software's responsive and browser-based design, it can successfully perform on PCs, tablets, and phones. In addition, we do not charge extra for additional licensing for staff users, external users, mobile users, etc. Our solution is being licensed with unlimited licensing for all departments that are contracted under this agreement.

The origins of the iMS Suite are that it is a product created from "scratch" by Vance and his technical team after more than 100 years combined in the local government software space working for other companies that had community development expertise and software. Taking the best from what they learned existed, adding to this what potential customers were saying they wanted, and thinking about a clear roadmap with client input being instrumental to drive the product forward for the foreseeable future, your proposed solution is continually updated, and we will be rolling out our latest software for your production and test environments.

The following is an itemization of our proposed solution for you. Please note that these iMS products are highly configurable by your agency. However, unlike many of our direct competitors, where they expect you the client, to do much of your implementation, our team works in conjunction with your stakeholders and performs much of the initial configurations for you after extensive interviews and collaborative sessions with stakeholders in all departments. In addition, your dedicated iMS project team will be ready and prepared to assist in customizing fee tables, reports, project, and permit types, etc. during your personalized implementation. We gather all the business process details and current processes that you wish to maintain and ensure we educate staff on how to replicate those in iMS. For those additional processes you wish to change, or new ones you do not have today, we collaborate and together review best practices, recommendations, and scenarios on how they may best work within your new solution.



As such, iMS proposes the iMS Suite of products to the City of Richmond, CA in response to your RFP and the needs of your agency. Details about our solution’s core modules and key features are outlined below for your RFP team’s assessment, review, and thoughtful consideration.

## Your iMS Suite of Products include.....

The iMS software suite is a single system comprised of various applications that will support your agency in the areas of land development, permitting, plan review, inspections, code enforcement and licensing. Intuitive Municipal Solutions offers an integrated enterprise application that enables your staff, customers, and even administrators to share the same code base. As mentioned previously, we feel a tremendous benefit of using our cutting-edge software is that it utilizes HTML5 and modern technology, with no plugins required. Your iMS Software is sure to grow with the city without any fear of becoming outdated or that you are “stuck” with a technology that cannot adapt as necessary.

The **iMS Suite** we are proposing to the city includes the following “core” applications / modules:

### iMSApprovals

Yes, it can usually start here. With iMSApprovals, your customers are just a few keystrokes away from submitting that next big project. This application allows developers to submit that next big project whenever and wherever they are ready, even if that means your planners and engineers are out of the office. The entire electronic submission process can be done from both the location and device of your choosing. iMSApprovals also supports the collaborative effort between an applicant and their planner or engineer by providing an enhanced notification and communication system that will send automated text messages and/or emails when appropriate, ensuring the lines of conversation are always open.

### iMSPermits

Imagine a streamlined interface that allows a tailored user experience for citizens, contractors, and Agency employees alike. Citizens and Contractors will benefit from iMSPermits because not only can they apply for a permit on our web-based application, but they can also pay fees, check the status of reviews and inspections, and schedule inspections. How does this help you? iMSPermits allows you to spend less time doing data entry and frees up more time to continue saving the world, one permit at a time!



## iMSEnforce

When there's a problem in your jurisdiction, citizens expect immediate resolution. With iMSEnforce, you put problem reporting into the hands of the citizens, allowing them to play a vital role in actively processing violations as soon as they are observed. For Code Enforcement staff, our application offers the ability to quickly capture and document violations on the spot. Instead of making Officers wait until they return to the office to document any confirmed issues, iMSEnforce allows them to complete all necessary reporting from the field. Officers can easily access their task list, view their daily schedule, and create a time-efficient route that maps them to each of their inspections. By leveraging the current technology available on mobile devices, Officers can create a case where they are, and effortlessly attach photos and notes on any device in the field as well as in the office.

## iMSLicenses

Need a Business License or Home Occupation Permit but have no time to drive down to City Hall? No problem! iMSLicenses is our complete cloud-based business licensing solution. Just by launching this application, Citizens can apply, pay for, or renew a license in seconds. Out of area contractors doing business in your jurisdiction will benefit from the ease at which they can apply for a business license. Your Agency staff will relish the fact that the need to re-enter copious amounts of data will be minimized and more valuable time can be spent on higher priority tasks.

### iMS Key Software Features

iMS built several noteworthy universal features or business logic into its software applications to create a better user experience. The below detailed application features present your team with many of these key items and hopefully help differentiate us from the competition.

#### **Creating Records**

The record/case creation feature is built upon our “rules-based” system. City users (back office, field, management), contractors you do business with, or your customers/citizens are guided effortlessly through the process of collecting the required information for any type of land development or permit applications. This also means that new record components can easily be added as the application gives Administrators the freedom to define their own process specific workflow.

- Do you ever find that a record wasn't entered into any electronic system? With iMS you can manually enter historical records on an as needed basis while retaining the original number, providing a more complete view of property activities.



## ✓ Rules

The backbone of the iMS Workflow engine is our Rule based system. Rules are comprised of two components, Conditions and Triggers. Rules allow you to create the business logic behind both internal and external processes from the start of application intake. This includes the review, approval, inspection, and finalization process. Rules are defined, created, and managed by your designated local iMS administrator(s).

- Conditions are the logical operators that determine when a Trigger is activated.
- Triggers are the actions performed when all the Rule's unique Conditions are met. Triggers include the ability to require items, insert tasks, define application information requirements, generate correspondence (merge documents, SSRS reports, email, and SMS Text messages), lock/unlock record components, execute a stored procedure, define process navigation, and automatically create and link additional records. The power of iMS is your ability to link together the trigger actions as needed to support your unique business processes.

## ✓ Record and Content Management

All iMS records support the following information and functional areas:

- Location Information
- Process specific milestones and dates
- Descriptions and client unique data elements
- Linked records.
- Financial transactions to include receipts.
- Contact Information (single or multiple)
- Reviews (Plan, Project, or Licensing modules)
- Inspections
- Conditions
- Violations
- Tasks

## ✓ Correspondence Management

The iMS software solution automatically logs all electronic correspondence generated by our applications. iMS will keep a comprehensive log of all emails, text messages (text message support provided via third party vendor Twilio) and files generated by any iMS software application. These logs also link back to the rule that generated the message or email. Each user can configure and define their preferred method of communication via their user account settings. Communication is built directly into our Rule based system and provides the greatest flexibility for generating template-based communications. Text and emails both support data element merge fields and emails support both HTML encoding and the automatic attachment of system generated documents.





✓ **File Request and/or Uploading Files**

Each iMS application supports electronic file requests and uploads via all devices. As an agency, you control both the maximum size and type that your Users, Contractors, and Citizens can upload. Processes can be defined to ensure required documents are uploaded prior to submission or at any point during the life cycle of the process.

✓ **Requiring Specific Information**

Never receive an incomplete application or task again! iMS provides complete control over which data elements are required for each unique process, whether it be before, during or after record creation.

✓ **Assessing and Calculating Fees**

Whether you're computing a single fee or business license renewal process, the iMS software has the flexibility to assess the required fees at the point in the process in which they are required. Fee assessments can be triggered by any task or Action within each of the software applications.

✓ **Collecting Payments**

iMS software provides a robust fee and fine system to calculate fees/fines based on industry standard practices. These practices can be regarding collecting deposits, applying credits,

defining appropriate GL account numbers and autogenerating/emailing transaction receipts. Receipts are also available at the record level for reprint and can be located using the search feature by receipt number, payor name, check number or credit card authorization code. The credit card integration is through Cardknox (or equivalent), which seamlessly transfers users to their actual payment site(s) while the sale is taking place, and then automatically transitions them back to the iMS software after the transaction is completed. iMS also supports applying multiple payment types to a single transaction.



*Please note that iMS has created several payment processors interfaces to work with our solution (including CardKnox, US Bank, BridgePay, and PayTrace).*

✓ **Reviews, Project Signoffs, and Approvals**

Supported throughout the iMS applications is the ability to automatically assign process specific reviews to appropriate internal and external reviewers. Automate your entire review process by combining individual/departmental review requirements with our flexible Rule architecture, which provides a seamless communication experience between internal and external customers. Template based emails can ensure that all individuals are notified



at the appropriate times within the review process and the ability to upload electronic files completes the entirely digital review experience.

✓ **Robust Inspection Capabilities**

Inspection scheduling is available to all applicable users (internal, contractors, and citizens) via the iMS Suite. Your Agency defines the inspector’s availability. Inspectors then have access to their schedules from all locations and on all devices. iMS software has built in routing capabilities based on current location, optimized routing that incorporates current traffic and local conditions, inspector preferred order, or ad hoc routing. Inspectors also have complete access to all iMS information while in the field. If no cell or Wi-Fi signal is available, iMS supports an off-line mode. Inspectors can keep working and the results will be uploaded automatically when service is restored. The Inspection feature supports both image and movie capture via tablet and phones.

✓ **Checklists to Manage Your Processes**

Configurable checklists can be added to a Record, Condition, Review, Inspection, Violation or Activity. With checklists, you can ensure that every element is evaluated in accordance with established requirements. Checklists include the ability to pass, fail, mark as not applicable, and include default fail notes. Users also can create ad hoc checklist items in the field. Combine this with our automated notification system to guarantee that your customers always know the status of any activity or event.

✓ **Sketching Made Easy**

Especially helpful while in the field, users are given the ability to render a sketch on any device onto either a blank canvas or over previously attached photos to help attract attention to an element, violation, or point of reference on a PDF or image file.

✓ **Conditions For Any Needs**

The iMS software provides direct support for the inclusion of record required conditions that must be met prior to or after the project’s completion. Conditions can be scheduled and are visible via the user or user roles task list.

✓ **Violations**

When building or zoning codes are not met, iMS is there to ensure you can capture pertinent information. Just as in real life, violations can occur at any time during any process. Because of this, all our applications support the inclusion of violations.

✓ **Assigning and Completing Tasks**

Define, assign, and schedule required tasks associated with a process. Checklists and custom fields can also be associated with any task to create a robust task management system.



✓ **Record Locks**

Safeguard your data by ensuring that records are protected through a combination of user rights and record specific locks.

✓ **Flags**

Alert users of all types regarding need-to-know information. Flags can be added either manually or with an iMS Rule.

✓ **Actions**

Tired of all this automation yet? Actions are the ability to define user triggered Rules. Select one or more Actions and let the software take care of the rest.

✓ **Document Generation**

The system supports on-demand document generation. If another copy of a permit, violation letter, business license, etc. is needed, the document can easily be initiated and quickly printed or emailed.

✓ **User Experience**

At iMS we understand that each user group (internal user, contractor, or citizen) has unique needs, requirements, and levels of business process knowledge. The iMS Suite provides you with the ability to configure the wording on the screen headings, directions, field specific subtext, help, default field data and required items. These configurable items can be unique for each class of user (user, contractor, citizen).

✓ **Integration with Google Translate**

This allows every end user to be able to successfully utilize the iMS software using their preferred language.

✓ **Duplication Abilities**

Users can quickly duplicate existing records.

✓ **Standard Notes/Comments**

Users can define personalized standard notes or comments, reducing the amount of time spent on writing up common responses. Standard Notes/Comments includes a search by title or text feature that aids in locating a specific note or comment.



In addition, we have incorporated into the foundation of our system supplemental features/functionality that should allow us to simplify existing processes, and build-in added efficiencies to your end-user and staff experience. In addition to the items discussed above, all the iMS applications being proposed also include the following capabilities:

✓ **Secure Logins**

User, Contractor, and Citizen registration includes password encryption and an email verified registration process.

✓ **Search**

A universal and robust search function allows users to locate records within iMS using the most common industry data elements. The search functionality includes activity type (i.e., reviews, inspections, violations, conditions, etc.) and milestone (approved, disapproved, pass, fail, etc.). Users can also save a search and re-create it from their saved search listing, thus, acting as an easy-to-use ad-hoc report writing solution.

✓ **Tasks**

Provides users with a tasks list based on an individual's user account or responsibilities assigned to a specific iMS Role ensuring that important activities don't get missed.

✓ **Alerts**

Provide the user with the ability to notify or remind themselves of important activities or events. The system can generate process specific alerts to either an individual or user group.

✓ **A Shopping Cart for Payments**

Provides a centralized location for collecting payments on any transaction created in the iMS software. We currently support Cardknox for online Credit Card Payments. Internally, payments can be made by cash, check, or credit (using Cardknox). iMS also supports multiple payment methods on a single receipt when cash or check transactions are processed by employees.

✓ **History**

Allows quick access to the last ten most recently created or viewed records. Also, provides access to applications that were started but not completed.

✓ **Favorites**

Users can identify their most used areas of the application and save them for immediate access. Relieves the need to drill down into the application to perform repetitive tasks.



✓ **Reporting/Document Creation**

By utilizing SQL Server Reporting Services (SSRS) and merging fields via Word documents, iMS provides tailored reports and documents that would support the City’s unique processes. iMS will work with your agency to identify and develop the required reports during the implementation phase. iMS includes a standard library of application specific reports and by leveraging SSRS, either your employees or our team can create customized reports to meet your Agencies specific reporting requirements. Existing MS Word documents can also be easily converted for use in iMS by simply including the appropriate merge field, uploading to the iMS server, and attaching to the applicable iMS Workflow. iMS supports the auto-generation and emailing of documents created with either MS Word or SSRS and documents/reports are output to your customers in PDF format.

✓ **ESRI GIS or Google Maps Integration**

The city can choose to employ either ESRI GIS, Google Maps, or both applications to utilize valuable mapping services. The software uses these programs to execute routing capabilities, address verification, and location-based address selections.

✓ **Role Assignments**

As a jurisdiction, we realize that your Agency wants to be able to control who has access to all aspects of your Community Development software. iMS allows you to establish standardized roles and rights for employees with various clearance levels. This feature will allow City administrators to quickly assign staff to a specific role and any additional rights that you would like them to have. If an existing role needs to be modified, an administrator within your organization can easily add or remove rights as needed.

✓ **User Dashboard**

The iMS Dashboard is a user-specific feature that presents a series of graphics and summary fields. This offers easy access to helpful information regarding your Agency’s operation.

Dashboards are completely configurable and can display insightful information that is specifically targeted for both your Agency’s internal and external users. The Dashboard also includes a list of pending and active records for internal users and the ability for external customers to view and schedule inspections and access to pending, in-progress, and completed records.

✓ **Calendar**

iMS provides the ability to manage operational and non-operational days for both the jurisdiction, iMS Roles, and the user through our Calendar interface.



## Security and Administrator Specific Functionalities

We believe these “modes” are unique to our software solutions. Please be advised that the modes itemized below are available to the City’s Administrator(s) for the iMS Suite. Staff with appropriate rights can quickly switch from their individual configuration into one of these modes to perform appropriate administration management of the iMS Suite for users they support.

### ✓ **Configuration Mode**

Administrators can easily enable Configuration Mode to create, modify or remove configuration items directly from within the application. A separate application or account is not required.

### ✓ **Audit Mode**

Instead of making users search through the back end of their program to find changes made in the software, we wanted to make a straightforward way for administrators to track these changes. Audit Mode provides an inline identification of changes made to either a specific data element or configuration item. The audit displays the date, time, user, previous and current values of the data element.

### ✓ **Emulation Mode**

Without having to log out and log into a different user account to see what other use roles are experiencing, administrators can simply transition into Emulation Mode and have their screen instantly change into what a Guest, Citizen or Pro would experience.



## SaaS / Hosted Software Solution

As a true SaaS / Cloud solution, we generally manage your agency’s optimization and performance areas, including storage monitoring. Also from a cost perspective, there are no additional costs for clients to increase storage capacity. 1 Production and 1 Test environment are also included in our proposal.

# Proposal Section 5.0 Technical Requirements

## Attachment 7 (SaaS)

\*Attach additional pages if necessary

<b>SaaS</b>	
<b>Data Center</b>	
Where are data centers located?	Typically, we have our data centers on the US West Coast. However, Microsoft Azure allows for the selection from several data centers across the US for both the primary and backup server. For our RFP submission we are proposing both your primary and backup servers being located on the West Coast.
Are any third party providers used to deliver PaaS or IaaS services? If so, please list.	No
How many environments are proposed?	Typically, and that is what we are currently proposing in our submission, there are two (2) environments included in our proposal. 1 Production (PROD) and 1 Test (TEST) environment. We are certainly willing and able to provide additional environments should your agency request or require them. Additional scope and/or pricing may be required if more than the two environments are necessary.
<b>Availability</b>	



Provide historical availability for data center for past six months.

Month	Total Minutes/Hours in Month	Downtime	Scheduled Maintenance	Other Downtime	Total Downtime	% Availability
October 2022	44,640	0 Minutes	20 Minutes	0 Minutes	20 Minutes	99.9%
November 2022	43,200	0 Minutes	20 Minutes	0 Minutes	20 Minutes	99.9%
December 2022	44,640	0 Minutes	20 Minutes	0 Minutes	20 Minutes	99.9%
January 2023	44,640	0 Minutes	20 Minutes	0 Minutes	20 Minutes	99.9%
February 2023	40320	0 Minutes	20 Minutes	0 Minutes	20 Minutes	99.9%
March 2023	44,640	0 Minutes	20 Minutes	0 Minutes	20 Minutes	99.9%

**Updates**

How often is solution updated?	iMS can be updated as often as 1-2 times a week. These updates/upgrades are generally NOT major updates, patches, or fixes and normally clients do not have to do anything for the update. Major updates or product releases are 3-6 times a year. All updates are cumulative. .
How much advance notice are customers provided for new updates?	Customers are typically notified of the update(s) a few days to 1 week in advance.
How long do customers have to test new update?	The client and iMS can determine what timeframe reasonably work best for them to test items that have been modified in major revisions. We also produce documentation both per update and monthly (consolidated) to give your agency a very brief overview of the modifications/changes/bug-fixes, etc.

**Authentication**

Does the system support SSO or LDAP?	Yes
--------------------------------------	-----

**Information Security**





<p>Protections provided for data breach? Please include information on notification process, remedy, and indemnification provided.</p>	<p>We provide information concerning our Dedicated Hosting and Security components. Please see the following PDF documents for more details on each section:</p> <ul style="list-style-type: none"> <li>✓ <a href="#">Detectify Full Report PDF (20 Pages)</a></li> <li>✓ <a href="#">iMS Security Policy PDF (17 Pages)</a></li> <li>✓ <a href="#">Azure SOC 2 Report PDF (330 Pages)</a></li> <li>✓ <a href="#">iMS Security Exhibits PDF (1 Page)</a></li> </ul> <p>Also, as iMS hosted software solution uses Microsoft Azure, we are providing an additional link for MS Azure security information.</p> <p><a href="https://docs.microsoft.com/en-us/azure/security/">https://docs.microsoft.com/en-us/azure/security/</a></p>
<b>Disentanglement</b>	
<p>Can customer data be exported in non-proprietary format?</p>	<p>Yes, a standard SQL Server backup can be provided for your agency.</p>

## Cloud-Based Software Installation

Based on the RFP and your responses to vendors questions on whether there was a preference or not, iMS is proposing a cloud-based option for your organization. Please be aware, and as previously mentioned, iMS also has an on-premises option. If more information is necessary or if this becomes your new desired route, we are happy to provide additional details, costs, specifications, etc.

### An iMS Production System For You Includes

- ✓ SQL Server database:
  - Created
  - Initialized



- ✓ SSRS 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

## An iMS Test System Includes

- ✓ Same items configured in your test environment that have been configured in your Production Environment.

## System Back-Up, Redundancy, Disaster Recovery Services

iMS hosts cloud-based implementations on a dedicated virtual Microsoft Azure server for each client. Local disk redundancy is provided by Microsoft. Regular backups of the SQL Server database can be stored on iMS servers or FTPed to Richmond's network. Disaster Recovery in a different time zone is available at an additional cost if desired.



*NOTE: All the data storage you need for iMS is currently included in your proposed solution. iMS does not charge clients when space needs to be increased. As part of standard maintenance and support, iMS monitors your environment daily to ensure space allocation will not be of a concern for your teams.*

## System Software Specifics

Proposed system software specifics are:

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

Application requirements are that the software is hosted either in the cloud, or on a Richmond, FL provided web server capable of handling the desired load. The ideal and minimum system requirements are that your agency has this availability:



- ✓ Windows Server 2016 or later
- ✓ 4+ core processor
- ✓ 500 GB+ SSD
- ✓ 16 GB+ RAM
- ✓ Microsoft SQL Server 2019 or later



*NOTE: Your agency will have the ability to configure maximum upload file requirements as to what you allow users to be able to send to you.*

## Technical Support and Maintenance

Technical Support and Maintenance is available from iMS on an annually renewed basis. This service and all that accompanies it is included in your annual maintenance/hosting cost(s). This generally includes unlimited technical support during iMS business hours (7:30 AM - 5:30 PM PST Monday-Friday). A cell phone number will be provided for critical issues outside of business hours. Support is provided via email or phone. Phone support includes screen sharing when required.

The Support and Maintenance Agreement includes regular software updates at no additional cost. It also covers licensing costs for major upgrades that require services. In these cases, covered clients only incur the cost of the services required. At iMS we believe that communication is a key to success. As new features, versions, or upgrades are released, your organization's primary contacts will be notified by email and have access via our web portal. Your organization controls the timing for the upgrade, regardless of whether your installation is in the cloud or on premise. Your iMS installation includes both a production site and test site so that you are free to download the newest version and test. Once you are comfortable with the release, it can then be applied to your production environment. Each iMS client determines when updates are applied on their specific system and may elect to skip updates if desired.

## System Documentation and Manuals

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

## Third- Party Products and Services as Part of the Overall iMS Proposal

iMS is proposing our solution to the City of Richmond, CA. As previously stated, we intend to perform 100% of all the professional services required to successfully implement our products. In addition to the iMS products we intend to be able to integrate with both business partners and



those city applications that have web services or an open API structure. We understand these integration points the City wishes to include as part of the overall project include the following and barring any technical issues with these vendor's products, we anticipate that basic integration should be accomplishable. For vendors where web services or open API's do not exist, we may need to perform more scope to ensure compatibility.

## Technology Summary

### Technology Overview

iMS is proposing a cloud-based software solution. Our hosting facility is currently located on the West Coast. We can also provide a redundant different location for back-up services if required. However, please note that currently this is outside the scope of our proposal. iMS can be implemented in an on premise, SaaS, and Hosted manner. We are proposing SaaS / Hosted by iMS as part of our proposal, but should the City prefer a different flavor we are open to discussing and providing details necessary for your preference. In this Section we outline our security parameters and have access documented to either additional documentation we can provide, if necessary. As with many other areas of the RFP Requirements, we find nothing in your Security and Technology section that gives us concern or alarm. Rest assured, security for iMS is equally as important as it sounds to the City of Richmond.

### Security and Administrator Specific Functionality - Application Level

In addition to overall infrastructure security, as itemized below, our applications also offer unique security components. We believe these "modes" are unique to our software solutions. Please be advised that the modes itemized below are available to the agency's administrator(s) or those you assign security for in the iMS Suite:

- ✓ **Configuration Mode**

Administrators can easily enable Configuration Mode to create, modify or remove configuration items directly from within the application. A separate application or account is not required. Configuration mode allows staff to quickly update how the iMS products will behave and allows you to quickly see real-time the changes you have made without labor-intensive updates.

- ✓ **Audit Mode**

Instead of making users search through the back end of their program to find changes made in the software, we wanted to make a straightforward way for administrators to track these changes. Audit Mode provides an inline identification of changes made to either a specific data element or configuration item. The audit displays the date, time, user, previous and current values of the data element.

- ✓ **Emulation Mode**

Without having to log out and log into a different user account to see what other user roles are experiencing, administrators can simply transition into Emulation Mode and have their



screen instantly change into what a Guest, Citizen or Pro would experience. You quickly “see” what those users are seeing allowing for more rapid support of your customer(s).

## Compliance

Your iMS Suite (portal) complies with the American with Disabilities Act/ Section 508 of the Rehabilitation Act (29 U.S.C. § 794d) and will meet the requirements that Federal agencies' electronic and information technology be accessible to people with disabilities, including employees and members of the public.

## SaaS / Hosted Software Solution

As a true SaaS / Cloud solution, we manage your agency's optimization and performance areas, including storage monitoring. Also from a cost perspective, there are no additional costs for clients to increase storage capacity. 1 Production and 1 Test environment are also included in our proposal. If more environments (i.e., Training, QA, etc.) are required, we are happy to provide more details and/or plan this as part of your software installation.

## Dedicated Hosting

iMS has reviewed your RFP and Addendum(s). As such, we are proposing our Software-As-A-Service (SaaS), hosted by iMS (MS Azure Cloud) solution. We are providing [weblinks to MS Azure](#) for review if necessary as well as information below to ensure IT and other interested stakeholders have information about the overall technology behind our proposed solution.

As a true SaaS / Cloud solution, we manage your agency's optimization and performance areas, including storage monitoring. Currently, there are no additional costs for clients to increase storage capacity. So, your iMS solution grows as you grow with no worries of additional unforeseen costs. As stated, you receive one (1) Production and one (1) Test environment with your deployment of the iMS Suite. Also, for your team's review, we are providing a typical topology diagram in this section - see below. Please note that we are happy to provide, upon request, additional PDF documents for the topic - Dedicated Hosting and Security. The PDF documents referenced are:

- ✓ [Detectify Full Report PDF \(20 Pages\)](#)
- ✓ [iMS Security Policy PDF \(17 Pages\)](#)
- ✓ [Azure SOC 2 Report PDF \(330 Pages\)](#)
- ✓ [iMS Security Exhibits PDF \(1 Page\)](#)

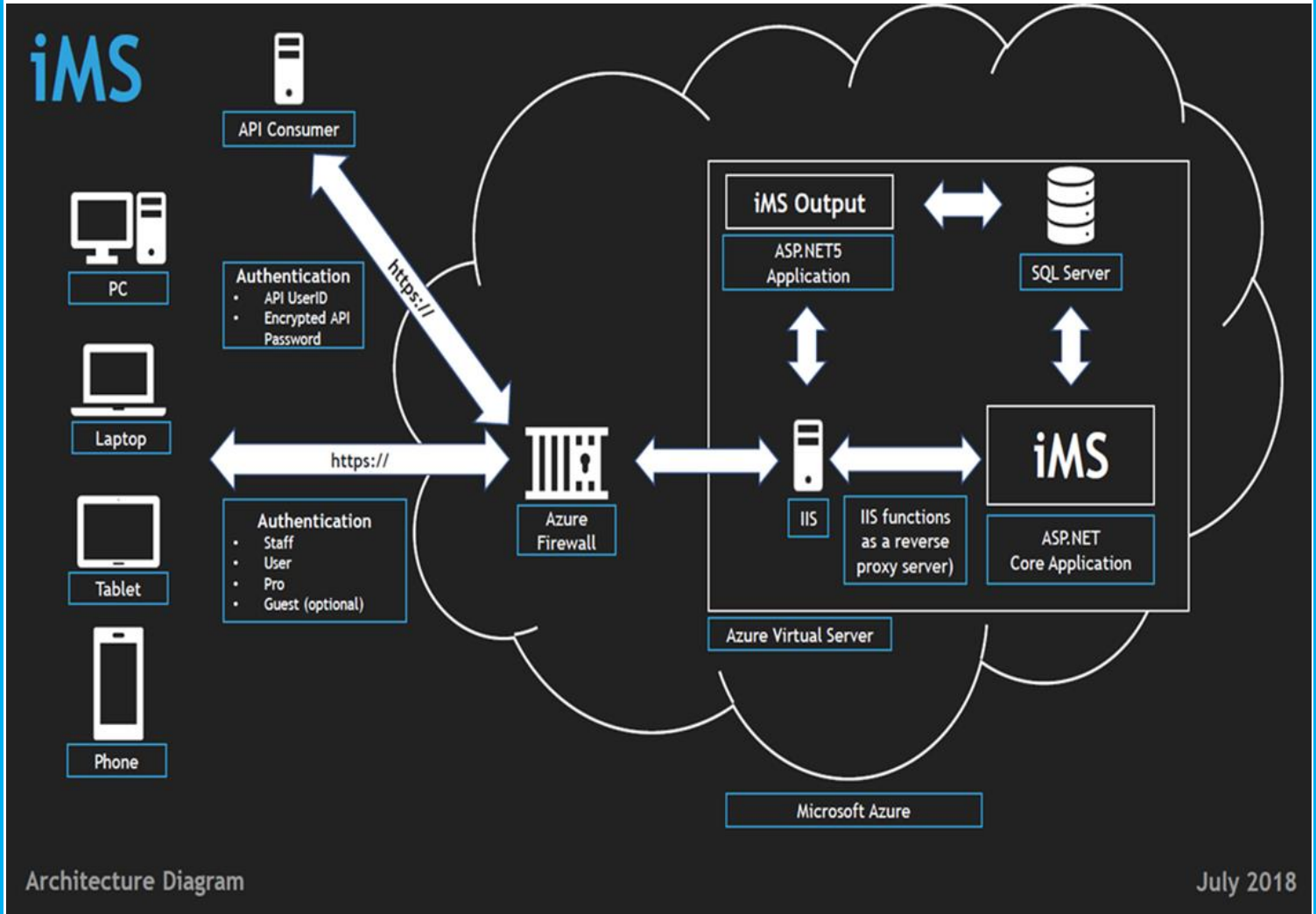
As noted, your iMS hosted software solution uses Microsoft Azure, we wanted to make sure you had easy access to the link for MS Azure security information, which I have also included here for you here:

<https://docs.microsoft.com/en-us/azure/security/>



## Typical iMS SaaS / Hosted Software Solution Topology Diagram

A general technology deployment/topology diagram of how your iMS software will be configured for use at your agency is depicted below.



Your proposed solution includes a Production and a Test System, System Back-Up configuration and tools, built-in agency-specific Redundancy, and Disaster Recovery (DR) Services. Please NOTE that all these items are included as part of the proposed solution and is not an additional cost for your agency.



## Your 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

## Your iMS Test System Includes

- ✓ Same items configured in your test environment that have been configured in your Production Environment.

## System Back-Up, Redundancy, Disaster Recovery Services

- ✓ iMS hosts cloud-based implementations on a dedicated virtual Microsoft Azure server for each individual client. Microsoft provides local disk redundancy. Regular backups of the SQL Server database can be stored on iMS servers or FTPed to City of Richmond, CA's network. Disaster Recovery, usually in a different time zone, is available at an additional cost if desired.

## System Software Specifics

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



Application requirements are that the software is hosted either in the cloud, or on a City of Richmond, FL provided web server capable of managing the desired load. For purposes of our RFP submission, we are proposing the iMS cloud hosted variation. For web server details pertaining to your agency's infrastructure, the ideal minimum system requirements are that you have the following available:

- Windows Server 2016 or later
- 4+ core processor
- 500 GB+ SSD
- 16 GB+ RAM
- Microsoft SQL Server 2019 or later



*NOTE: Your agency will have the ability to configure maximum upload file requirements as to what you allow users to be able to send to you.*





## Attachment 8 (Proposed Service Level Agreement)

If hosting services are proposed, please complete the following table identifying proposed service level guarantees. For each service, please indicate the metric used to measure the service quality, the proposed requirement (target for service), and the proposed remedy/penalty if guarantee is not met.

Proposed Service Level Guarantees			
Service	Metric**	Requirement/ Guarantee***	Remedy if Not Met
System Availability* (Unscheduled Downtime)	%Time	99.9% Uptime	Identify issue, and notify client of resolution and expected timeframe
System Response (Performance)			iMS monitors your system daily in real-time and as your system either needs additional space or resources, we increase these for you as part of the hosting agreement
Issue Response Time	Hours	24 Hours	An iMS standard case or support ticket is submitted via the iMS Support Portal using our software or over the phone
Issue Resolution Time	Days	Depends on Severity of issue – Functional, Technical, Development, etc.	Resolution and expectations for resolution can be provided by iMS Support staff via email and/or telephone call(s) as necessary
Recovery Point Objective (RPO)	Hours	24 Hours	iMS Staff will identify issue(s) and notify client of resolution



Recovery Time Objective (RTO)	Minutes	60 Minutes from first Notification	iMS Staff will identify issue(s) and notify client of resolution
System Data Restore	Minutes	60 Minutes from first Notification	iMS Staff will identify issue(s) and notify client of resolution
Implementation of System Patches	Hours	Within 24 Business Hours of Release of software	Clients are notified of version updates and installed to their TEST Environment. Upon approval and scheduling. Updated version is then applied to client's PROD Environment
Notification of Security Breach	Minutes	Within 30 Minutes from first notification	iMS staff will notify client representative(s) via a telephone call. We will specify and identify the breach and any/all actions we have taken
Please list other proposed service levels			

Proposed Service Level Guarantees	
* Formula used to calculate Availability	
** How is performance against service levels reported to the City	
***Describe process for City reporting issue to the vendor	



## Confirmation and Acceptance

- 1) **Intuitive Municipal Solutions (iMS) confirms and accepts the following contract terms related to any software contracts resulting from this RFP.**
  - **Additional Users and Modules** - The City will require “price protection” for a minimum of two (2) years from the effective date of the agreement for additional City users and modules that are listed in the proposal but are not initially purchased.
  - **Audit/Growth Fees** – Pricing for the software’s initial term will be free from any expansion fees or reconciliations resulting from vendor audit of user counts.
  - **Hold Harmless** – Vendor shall hold harmless, defend and indemnify City and its officers, employees, agents, and volunteers, from and against any and all liability, loss, damage, expense, costs (including without limitation costs and fees of litigation) of every nature arising out of or in connection with Contractor’s performance of work hereunder or its failure to comply with any of its obligations contained in this Agreement, except such loss or damage which was caused by the sole negligence or willful misconduct of City.



## C.3 Professional Service Proposal

### Proposal Section 6.0 Implementation Team

In this section, iMS will describe and itemize the proposed project team that will be part of the partnership with the City of Richmond. In addition, we will include key implementation services and deliverables to provide an overall sense of scope and intent for a successful migration to the iMS Suite by the City and its different departmental stakeholders.

- 18) Identify the proposed project team including the firms responsible for implementation, and any key consulting team members that will be providing services to the City**
- How many staff will the vendor have assigned to the project
    - The entire iMS Team will be responsible for success in this partnership. We are a small company and every participates in client success and satisfaction.
  - Approximate dedication to the project of each resource and approximate time work will be completed **on-site vs. off-site.**
    - Your assigned iMS Project Managers (Trenton Seymour and/or Chuck Badger) will have 75-85% dedication to this project from a management perspective and overall implementation responsibility. The other staff generally are involved 10-25% based on current milestone, deliverable or need. Others assist as necessary.
  - Major roles and responsibilities for each resource – see below
- 19) Complete Attachment 5 (Professional Services Background) for each firm involved with the project**
- 20) Complete Attachment 6 (Reference Form) for each firm involved in the project**
- 21) Complete Error! Reference source not found. - When completing Error! Reference source not found., please refer to definitions found in section Error! Reference source not found. of this RFP.**

**NOTE: Please see appropriate Attachment Section within this area for iMS response(s).**



## Attachment 5 (Professional Services Background)

Complete one form for each firm included in the proposal.

Proposer Background	
Company Name:	<b>Intuitive Municipal Solutions (iMS)</b>
Location of corporate headquarters:	Escondido, CA
Firm History	
Years of Experience Providing Land Management Community Development System Implementation	30+
Previous Names / Successor Firms	N/A
Current/Recent Projects	
List up to five (5) current or recent projects that provided relevant experience	<ol style="list-style-type: none"> <li>1. State of Minnesota (Department of Labor and Industry)</li> <li>2. City of Palm Bay, FL</li> <li>3. City of Blaine, MN</li> <li>4. Kootenai County, ID</li> <li>5. City of Englewood, CO</li> <li>6. Also, City of Daytona Beach is really close to a go-live date, and they were also formerly TRAKiT customer.</li> </ol>
In the past, what has been your firm's target market	<p>Unlike many legacy providers in the Land Management/Community Development "space", iMS does not have a target market for clientele. iMS is a highly configurable Off-The-Shelf (OTS) solution for local and state governments from small, to medium, to large size. Our target(s) are agencies that want better customer and support than is what has recently been in our marketplace with modern software that will grow with your agency.</p>
What is primary lesson learned from recent projects you have adjusted for the City	<p>That every project we assist and partner on is a very different and unique project. Bringing iMS's Implementation Methodology to these projects with our unique approach and ability to do most, if not</p>



**Proposer Background**

	all, of the initial configuration(s) for clients has proven to be a very different approach to implementation in the industry.
--	--

**Size**

Number of current (new) implementation clients	2-3
Number of current upgrade clients	None, software is continually upgraded, and clients do not need to pay for this with iMS
Number of ongoing support clients	8
Number of other clients	0

**Consulting Team**

Size of consulting team	7
Average tenure with firm	5 Years (been around since 2016)
Source of recent hires (Where do you recruit for consultants?)	LinkedIn, Professional Contacts, References from Teammates, Clients (retiring, etc.)

**Consulting Team Experience Matrix**

For all key project team members proposed for the City’s project, prepare a matrix showing past experience with relevant clients. Matrix should be similar to the table below:

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



## Attachment 6 (Reference Form)

Please provide at least five (5) references for past projects that include products and services similar to those proposed for this RFP. Please use the following format in submitting references.

### GENERAL BACKGROUND

Name of Client: **CITY OF PALM BAY, FL**\_\_\_\_\_

Project Manager/Contact: John Pearson or Brian Robinson\_\_\_\_\_

\_\_\_\_\_ Title: deputy building official and IT Director

Phone: (321) 952-3400 = Brian Robinson or (321) 290-4103 = John Pearson\_\_\_\_\_

E-mail: \_\_\_\_\_ [brian.robinson@palmbayflorida.org](mailto:brian.robinson@palmbayflorida.org) or [john.pearson@palmbayflorida.org](mailto:john.pearson@palmbayflorida.org) \_\_\_\_\_

Software Program/Version: \_\_\_\_\_ Current Version of iMS Suite\_\_\_\_\_

Summary of Project: \_\_\_\_\_ The City of Palm Bay was a 20 year+ customer of CentralSquare's NaviLine Community Development software. They were approached by their vendor to upgrade to the CRW / TRAKiT new Community Development solution several years ago to replace and receive a technology upgrade from this vendor. After several years (I am being told nearly three) of this vendor and the City not being able to implement the new solution they began looking for a replacement product. iMS connected with them through a mutual business partner. We agreed to a full iMS replacement of NaviLine's Community Development software in a two-phase implementation. They needed Building Permits to go live as quickly as possible so in Phase I we delivered this module. Phase II immediately followed, and they went live with the entire iMS Suite March 2023, iMS staff and project team provided 100% of their professional services, data conversion, training, etc.

Number of Employees: 125 Size of Operating Budget: OPERATING BUDGET FOR ALL FUNDS TOTALS \$282,803,933

### PROJECT SCOPE

Please indicate (by checking box) functionality installed:

Permitting

Licensing

Inspections

Other (Please indicate) iMS Services, Workflows, Configurations, etc.\_\_\_\_\_

Plan Review

### TECHNOLOGY INFORMATION



Hosted? Yes  No  If yes, hosting provider: iMS w MS Azure

## IMPLEMENTATION INFORMATION

**Project Duration:** 20 weeks for Phase I and 30 weeks for remainder of Phase II \_\_\_\_\_

**Initial Go-Live:** Permits (June 2022), Rest of iMS Suite (March 2023) \_\_\_\_\_

**Describe Role on Project:** iMS and Palm Bay collaborated. iMS Provided all Professional Services as described in our RFP response to the City of Richmond. We performed Business Process Review(s), Departmental Needs Analysis, Onsite and Remote Configurations for the City as well as custom workflows, documents, and SSRS Reports, conversion of historical data, and custom scripting and integrations. In addition, we trained both staff and administrators. Documented business processes, assisted in creating web content and videos. Our Project Managers delivered the bulk of the work necessary for successful go live(s).

**Project Challenges:** This project, the first in the State of Florida for iMS, was very successful and painless for both iMS, and we believe, the City of Palm Bay. The biggest challenge was probably getting full-time staff to devote time to testing and verifying the configurations prior to key dates and the go live visit.

**Major Accomplishments:** Conversion of historical data, built integrations with new Payment Processor (CORE Business Technologies and/or BridgePay) including deploying multiple payment (merchant-funded and customer % fee acknowledgement) varieties, interfacing with Selectron for IVR and SelecTXT options, and bringing a new Electronic Plan Review Partner, ePermitHub, with a unique API for iMS Customers to the agency. Certainly, the single biggest accomplishment was getting them “live” on time and on budget, especially after their prior experiences.





## GENERAL BACKGROUND

Name of Client: **STATE OF MINNESOTA – DEPT. OF LABOR AND INDUSTRY (DLI)** \_\_\_\_\_

Project Manager/Contact: **TODD BOSCH** or **ASHLEY BUCK** \_\_\_\_\_

Title: **Project Manager and Project Administrator/iMS Specialist**

Phone: : 651-284-5005 = Todd Bosch or (651) 284-5844 = Ashley Buck \_\_\_\_\_

E-mail: \_\_\_\_\_ [todd.bosch@state.mn.us](mailto:todd.bosch@state.mn.us) OR [ashley.buck@state.mn.us](mailto:ashley.buck@state.mn.us) \_\_\_\_\_

Software Program/Version: \_\_\_\_\_ Current Version of iMS Suite \_\_\_\_\_

**Summary of Project:** \_\_\_\_\_ The State of Minnesota (DLI) was iMS's first client. The State was previously running CentralSquare's TRAKIT products and had been a long-time customer back before the acquisition of CRW by CentralSquare. DLI was not happy with the direction of the product and/or the support from the vendor. Initially the State contracted with iMS for only the iMSLicensing components and ancillary modules/tools. They are currently working on going live with iMSPermits for DLI later this year.

Number of Employees: 2500 Size of Operating Budget: 500,000,000.00

## PROJECT SCOPE

Please indicate (by checking box) functionality installed:

- |   |   |
|---|---|
| <input checked="" type="checkbox"/> Permitting  | <input checked="" type="checkbox"/> Licensing   |
| <input checked="" type="checkbox"/> Inspections | <input checked="" type="checkbox"/> Other (Please indicate) <u>iMS Services, Workflows, Configurations, etc. Integration with Avolve's ProjectDox</u> |
| <input checked="" type="checkbox"/> Plan Review |   |

## TECHNOLOGY INFORMATION

Hosted? Yes X No \_\_\_\_\_ If yes, hosting provider: iMS w MS Azure

## IMPLEMENTATION INFORMATION

Project Duration: **First Phase was approx. 1 year, Also, currently implementing iMSPermitting** \_\_\_\_\_

*City of Richmond, CA*  
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**Initial Go-Live:**                    **Licensing 2016**\_\_\_\_\_

**Describe Role on Project:** iMS staff provided all Professional Services for our software and services. We performed Business Process Review(s), Departmental Needs Analysis, Onsite and Remote Configurations for the City as well as custom workflows, documents, and SSRS Reports, conversion of historical data, and custom scripting and integrations. In addition, we trained both staff and administrators. Documented business processes, assisted in creating web content and videos. Our Project Managers work very closely with State project team members.

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**Project Challenges:** The State's bureaucracy at times any buy-in by stakeholders at times is a little challenging, maintaining the project schedule can be a challenge if both project teams are not in constant communication and up to date.

**Major Accomplishments:** First iMS customer go live! Confirmation that the iMS Suite of Products is scalable to a State Entity with little to no problems from a technological standpoint. Continue to partner with the State of MN (DLI specifically but other Departments as well) and adding products, services, workflows, etc. where it benefits the agency.



**GENERAL BACKGROUND**

Name of Client: **KOOTENAI COUNTY, IDAHO** \_\_\_\_\_

Project Manager/Contact: Nicholas Torres OR Craig Davidson

Title: application systems manager and/or code compliance officer

Phone: (208) 446-1379 = Nicholas and (208) 446-1075 = craig

E-mail: ntorres@kcgov.us or cdavidson@kcgov.us

Software Program/Version: Current iMS Version

Summary of Project: Kootenai County was another early adopter of the iMS Suite of products. They were the first County we implemented. Kootenai County has the entire iMS Suite licensed and implemented in a Production and Test environment. Kootenai County Goes Live with iMS in 2021

Number of Employees: 500-1000 Size of Operating Budget: 110 MILLION

**PROJECT SCOPE**

Please indicate (by checking box) functionality installed:

Permitting

Licensing

Inspections

Other (Please indicate) \_\_\_\_\_

Plan Review

**TECHNOLOGY INFORMATION**

Hosted? Yes X No \_\_\_\_\_ If yes, hosting provider iMS (MS AZURE)

**IMPLEMENTATION INFORMATION**

Project Duration: Approximately 40 weeks

Initial Go-Live: August 2021

Describe Role on Project: iMS and the County collaborated on the entire project. iMS Project Team (Trenton Seymour) provided all Professional Services as described in our RFP response to the City of Richmond. We performed Business City of Richmond, CA RFP 2023-03 Land Mgmt Community Development & Implementation Services



Process Review(s), Departmental Needs Analysis, Onsite and Remote Configurations for the City as well as custom workflows, documents, and SSRS Reports, conversion of historical data, and custom scripting and integrations. In addition, we trained both staff and administrators. Documented business processes, assisted in creating web content and videos. Our Project Managers delivered the bulk of the work necessary for successful go live(s).

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**Project Challenges:** As the first County to implement iMS, there were some challenges with terminology and departmental acknowledgement and some participation by staff. Project went very smoothly. A big challenge was assisting the County with trying to update standard operating procedures (SOP's) for their daily users in order to best utilize iMS's software efficiencies. Another major challenge was helping the client understand and move their previous TRAKiT Chronology items, which contained everything they did to using our Specified Applications (Tiles) and learning that Workflow was available to automate much of their manual practices.

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**Major Accomplishments:** First client in State of Idaho. First County entity.



## GENERAL BACKGROUND

Name of Client: **CITY OF ENGLEWOOD, CO** \_\_\_\_\_

Project Manager/Contact: Karen Montanez, CBO Title: chief building official

Phone: (303) 762-2355 E-mail: [kmontanez@englewoodco.gov](mailto:kmontanez@englewoodco.gov)

Software Program/Version: \_\_\_\_\_ CURRENT VERSION OF iMS

Summary of Project: The City of Englewood, CO was our first client in the State of Colorado. Although a smaller agency than most of our clients (showing iMS can again scale "down") the City is affluent and progressive. Chuck Badger was their iMS Project Manager and the agency also preferred the On-Premises install of iMS as opposed to the Hosted / SaaS variety. Agency was another CentralSquare TRAKiT Customer.

Number of Employees: 150-250 Size of Operating Budget: 180-250 MILLION \_\_\_\_\_

## PROJECT SCOPE

Please indicate (by checking box) functionality installed:

- |   |  |
|---|--|
| <input checked="" type="checkbox"/> Permitting  | <input checked="" type="checkbox"/> Licensing          |
| <input checked="" type="checkbox"/> Inspections | <input type="checkbox"/> Other (Please indicate) _____ |
| <input checked="" type="checkbox"/> Plan Review |  |

## TECHNOLOGY INFORMATION

Hosted? Yes \_\_\_\_\_ No X \_\_\_\_\_ If yes, hosting provider \_\_\_\_\_

## IMPLEMENTATION INFORMATION

Project Duration: Approximately 40 Weeks from beginning to end

Initial Go-Live: August 2021 \_\_\_\_\_

Describe Role on Project: iMS performed all services as responded to in Englewood's RFP. Chuck Badger was the iMS Project Manager.



**Project Challenges:** This was only our 2<sup>nd</sup> On-Premises customer. Most of the services were performed remotely due to COVID. City came from not being a very progressive user of their TRAKiT solution and not a lot of staff were involved initially in the implementation. \_\_\_\_

**Major Accomplishments:** Another successful go live on time and on budget. Agency was very satisfied with the overall conversion and implementation and is finding additional uses for iMS and perhaps additional projects to partner with us on. Getting our first live Colorado partner.



## GENERAL BACKGROUND

Name of Client: **CITY OF BLAINE, MINNESOTA**

Project Manager/Contact: DAN HAUCK, CBO Title: CHIEF BUILDING OFFICIAL

Phone: (763) 785-6176 E-mail: [DHauck@blainemn.gov](mailto:DHauck@blainemn.gov)

Software Program/Version: CURRENT VERSION OF iMS

Summary of Project: Blaine, MN has licensed the iMS software suite for the following departments: Planning, Building and Fire Inspections; Housing and Neighborhood Services; Engineering; Public Works, Business Licensing, and Public Complaint/Inquiries. Former CRW/TRAKiT Customer.

Number of Employees: \_\_\_\_\_ Size of Operating Budget: \_\_\_\_\_

## PROJECT SCOPE

Please indicate (by checking box) functionality installed:

- |   |  |
|---|--|
| <input checked="" type="checkbox"/> Permitting  | <input checked="" type="checkbox"/> Licensing          |
| <input checked="" type="checkbox"/> Inspections | <input type="checkbox"/> Other (Please indicate) _____ |
| <input checked="" type="checkbox"/> Plan Review |  |

## TECHNOLOGY INFORMATION

Hosted? Yes X No \_\_\_\_\_ If yes, hosting provider iMS Hosted (MS Azure)

## IMPLEMENTATION INFORMATION

Project Duration: Approximately 40 Weeks

Initial Go-Live: Mid 2021 (started late 2020)

Describe Role on Project: As with all our project, iMS Professional Services team members were heavily involved in this agency's project. Our Project Managers actively participated in all aspects of implementation. No outside resources or agencies were used to implement our products and services.



**Project Challenges:** In the Winter, it gets cold. Other than that, a fairly smooth integration. Maybe terminology differences and getting used to the products capabilities not knowing upfront how it could be taken the best advantage of by staff.

**Major Accomplishments:** On time, on budget go live. Another Happy Customer. Continuing to work with them to ensure they can now maximize their solution and gain interdepartmental and outside agency efficiencies they didn't realize early on in their project.

## Attachment 10 (Level of Effort)

Please see Intuitive Municipal Solutions separate inclusion of Attachment 10 in the required .xlsx format. We have completed this and are attaching to our overall submission.

## Additional Implementation Team Details

### iMS Key Project Staff:

For your project, the following iMS Staff members will be assigned.

- i. Vance Bradshaw - Executive Oversight and iMS Software enhancement programming as necessary
- ii. Chuck Badger or Trenton Seymour - Your dedicated iMS Project Manager(s). Assignment of either or both will depend on their availability as your project “kicks off.”
- iii. Mike Epstein - Your historical data conversion specialist and Programmer
- iv. Jim Williamson - Your Customer Support Liaison and Manager

All team members are available to the extent proposed for the duration of the required services and your successful project timeline. Normally, staff designated as “key” project team members are not removed or replaced without the acknowledge and consent of the involved project teams.

Key Project Team members relevant work experience includes:

- Intuitive Municipal Solutions' Founder and President, Vance Bradshaw, possesses over 20+ years of industry experience. He holds extensive knowledge in Community Development Software project management, data conversion, programming, report writing, and system enhancements. Prior to founding iMS, Vance was the Project Manager for 25 successful Community Development Software projects and was the key liaison for the states of Minnesota and Idaho. Not only was he instrumental in designing several core and complex components of a previous system, but he was also a key contact for achieving customer satisfaction, ensuring accurate projections and the timely delivery of results.
- Another key member of our team is Jim Williamson, our Sr. Client Success Manager. He brings with him 15+ years of industry experience as a Senior Technical Trainer and Implementation Specialist and has a considerable grasp on Community Development practices and procedures.





Jim has successfully worked with City, County and State clients and always strives to exceed customer expectations.

Four other members of your Implementation team would include Mike Epstein, Trenton Seymour, Chuck Badger, and Alan Lopez. Below are some highlights of the team's background.

- Mike, our SQL Server Developer, has 16+ years of database management and developer experience along with specializing in data conversions. He has been instrumental in several TRAKiT conversion projects.
- Trenton Seymour specializes in system implementations. He has managed Community Development Software projects for the past 7+ years and is always focused on the growth of our customers.
- Chuck Badger is a certified PMP. He brings project management expertise to ensure every project progresses smoothly and efficiently.
- Alan Lopez is iMS's Sr. Support Manager. Alan brings with him 20+ years of software industry experience as a Senior Technical Support Engineer and Business Analyst.



## **iMS Team Resumes - Detailed:**

### **Vance Bradshaw, Founder & President**

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#### **Objective**

Utilize proven operational, organizational, and client relationship skills to provide significant value to Community Development Agencies in need of software support.

#### **Qualifications**

1. Highly experienced in designing and maintaining municipal software systems.
2. Proficient in programming and troubleshooting.
3. Innovative thinker
4. Keen business sense
5. Extremely self-motivated
6. Highly efficient
7. Very dedicated
8. Excellent organizational and leadership skills
9. Solid communication skills
10. Computer and technology savvy → report writing, data conversion, exports, and integrations to other systems.
11. Adept at fostering and maintaining customer relationships.
12. Creative problem solver

#### **Experience**

##### **Intuitive Municipal Solutions, LLC | October 2016- Current Founder/President**

Designed and developed the iMS Software suite, a next-generation Community Development software suite, created to simplify and improve daily interaction between Municipal Agencies and the Citizens they serve.

##### **CRW Systems, Inc. | June 2000- September 2016**

##### **Project Manager/Vice President of Operations and General Manager/ Vice President of Product Development/ Director, Client Services**

Instrumental in changing a languishing technology company with 10 employees and 35 clients to a respected, professional industry leader with 35 employees, and 130 clients in 22 states, including two state agencies.

Participated in all aspects of the business, with strongest contribution in the following areas:

- **Operations Management**
  - Assigned and prioritized tasks to maximize resource utilization while ensuring customer commitments and company objectives are met.
  - Resolved technical and procedural issues that project manager, support staff, or technical staff member could not address
  - Screened resumes, interviewed, and delivered ad-hoc and regular performance reviews
- **Project Management**
  - Successfully managed 25 projects from contract signing to productive use
  - Sole ownership of first \$350,000 contract
  - Oversaw and added significant contribution to first \$500,000 and \$1M contracts.
  - Designed checklists and documentation to minimize risk and ensure delivery of quality products at each stage of implementation
- **Product Development**

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- Produced detailed specifications for technical interfaces and system enhancements that provided maximum value to the client while increasing the value and marketability of the base system
- Critical in two major upgrades to the system and the roll-out of those upgrades to existing clients
- Managed development team, including on-site and offshore teams.

## **Selectron Technologies | May 1998- June 2000 | Portland, OR**

### **Project Manager/Account Executive**

- **Project Manager**
  - Responsible for multiple simultaneous Interactive Voice Response (Computer Telephony) projects across the United States
- **Account Executive**
  - Major account sales and marketing, primarily to City and County governments

## **Education**

### **1997 | Portland State University | Portland, OR**

BS Business Administration: Management Emphasis



## Jim Williamson, Client Success Manager

### Client Success Manager

*Area of Expertise: Software-As-A-Service (SAAS)*

Client-centric senior implementation and training professional specializing in defining and implementing Software-as-a-Service (SaaS) applications and trainings. Demonstrates expertise in managing all aspects of the implementation, configuration, and training. Proven track record managing, scheduling, and deploying Enterprise Application Software (EAS).

### Core Competencies

Business Unit Management & Leadership | Team Building & Development | Client Relationship Management | Scheduling  
User & System Administer Technical Training | Train-the-Trainer Training | Technical Training Assessment & Evaluation  
Curriculum Development & Execution | Packaging & Delivery of Product Training | Technical Training Roadmap Development  
Talent Recruitment | Technical Certification Program Management | Quality Control & Assurance | Software-as-a-Service (SaaS)

### Experience

#### Intuitive Municipal Solutions, LLC | August 2017 - Current

##### Client Success Manager

Ownership over all phases of the project. Works directly with client subject matter experts and teams to ensure a thorough analysis and understanding of current business processes. Develops project schedules and status reports, ensuring stakeholders are aware of project progress and possible risks. Provides application-based configuration recommendations to integrate, optimize, and automate business requirements. Responsible for ensuring end-users and local system administrators are knowledgeable in the use and maintenance of the Intuitive Municipal Solutions Suite.

#### SunGard, An FIS Company (Formerly CRW Systems) | July 2005- October 2016

##### Director of Training/ Manager Professional Services/Senior Trainer (2010-2016)

Responsible for all aspects of classroom and technology-based training and support documentation. Spearheaded talent recruitment, training and development, and management of all training teams. Presided over all training and documentation development and implementation, and developed and facilitated client training including System Acceptance, User, Administrator, and Report Writing training. Continuously evaluated instructor quality and effectiveness utilizing client and Project Manager feedback to improve and strengthen user trainings. Performed operational and resource usability analysis to provide review and evaluations of programs to executive management and support teams to achieve business objectives.

##### Training Coordinator- CRW Systems (2008 - 2010)

Provided support to ongoing operation, maintenance, usage, analysis, and administration of the learning management system. Managed data reporting to generate detailed course level reports and assess training needs. Assisted clients with change management preparations and communications, training plans, and documentation for end-user and train-the-trainer training. Worked with clients, support engineers, and sales team to identify training requirements. Participated in the design, development, and/or updating of training programs, certifications, and materials. Conducted training sessions, utilizing in-person classroom, on-line and other alternative training methods.

##### Software Trainer- CRW Systems (2005 - 2008)

Facilitated application training in support of software solutions, executing a blended learning solution that integrated proven training methodologies. Ownership over all aspects of client-based application training including Power User, End User, System Administration, and Report Writing training, and introduced to the solution's newest features and functionality to help users and system administrators learn how features could help improve their agencies business processes. Delivered classroom training, comprehensive user guides, application-specific context sensitive help, and Internet based training.

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**The Centech Group | 2001 - 2004 | Falls Church, VA**  
Instructor/ Instructional Designer

**United States Air Force | 1981 - 2001**  
Instructor/ Personnel Manager

### **Technical Skills**

Languages: JavaScript, HTML, CSS, and ASP

Platforms: Window 7 and Mac OS X

Software: Microsoft Windows Suite (Word, Excel, Outlook, and PowerPoint)

### **Education**

**University of Maryland University College**

Master of Science in Software Development Management

Bachelor of Science in Computer and Information Science



## Alan Lopez, Client Success Manager

20 years of application and technical support experience in the software industry. I have accumulated effective communication, written, analytical, and verbal skills to effectively communicate business processes, technical issues and client resolutions to senior management and customers. My technical experience includes Windows and Linux operating systems, SQL databases, IIS, remote access tools, SAAS environments and software/hardware troubleshooting. Along with a positive and team-oriented attitude I can work independently with minimal supervision and flexible to the rapidly changing needs of the department and company.

### PROFESSIONAL EXPERIENCE

#### Client Success Manager

Intuitive Municipal Solutions, LLC

04/2019 to Present

San Diego, CA

- Perform software application configuration of the Intuitive Municipal Solutions Suite based on customer business process
- Application configurations include rule configuration to automate the business process flow
- Work directly with customers to resolve any end user application questions and concerns
- Work directly with stakeholders during on-site Business Process Review meetings

#### Senior Technical Support Engineer

Tableau Software

11/2017 to 03/2019

Austin, TX

- Assist customer base with post-sales software installation, configuration and reported software issues of Tableau Server and Desktop software
- Owning and resolving complex technical and application related issues
- Performed in-depth analysis of Tableau Server and Desktop log files using tools such as Sublime, AstroGrep, UltraEdit and Notepad++
- Performed Root Cause Analysis for customer reported software issues (e.g., high CPU and memory consumption, slow page loads)
- Created test environments in OpenStack VM and AWS to reproduce potential software defects
- Software defects submitted via Chameleon and tracked through Microsoft TFS
- Case tracking and customer email communication performed via Salesforce.com
- Collaborate and consult with customers to help optimize the use of Tableau Software
- Internal software products used for daily job routine, WebEx, Workday, Office365, AWS and Slack
- Responsible for mentoring Technical Support Engineers in researching, resolving and documenting Tableau software issues
- Act as the primary technical liaison between customers and other Tableau departments as issues are resolved
- Worked closely with internal teams such as Technical Leads, Technical Account Managers, Sustaining Engineering and Development
- Contributed to Tableau knowledge base and internal Wikki

#### Technical Support Advisor

09/2019 to 10/2017

#### Team Lead - Technical Support

09/2015 to 09/2016

#### Technical Support Specialist II

01/2015 to 09/2015

Superion (Formerly CRW - SunGard PS - FIS)

Carlsbad, CA

- Significantly reduced the amount of non-defect related cases escalated to the development team
- Implemented case escalation processes for level 1 support team to level 2 support team
- Created daily, weekly, and monthly support case stats dashboards using Microsoft Dynamics CRM
- Implemented a weekly knowledge sharing meeting with level 1 and level 2 support teams
- Provide level 2 application and technical support for internal and external client base with over 300 external clients and a small sub-set of 20 clients in our SAAS hosted environment.
- Responsible for managing day-to-day escalated technical support issues and mentoring level 1 support team members
- Implement and configure company's TRAKiT software suite of applications for our client base in a Windows Server 2008 and 2012 environments

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- Apply software updates and fixes to clients test and production software environments
- Conduct a weekly software defect meeting with development, QA, and service manager staff to review and promote weekly reported software defects
- Work closely with the software development team to prioritize promoted defects during bi-weekly sprint planning meetings
- Supervise and manage the technical support team comprising of four level one technicians and one senior technician
- Responsible for bi-weekly team meetings, weekly knowledge sharing meetings and monthly one-on-one staff meetings
- Review/Modify/Create departmental business processes
- Review weekly and monthly case submission statistics for trend analysis
- Conducted employee performance reviews using TRAKSTAR (Employee evaluation software)
- Review support case surveys and responded to negative surveys via email and phone
- Review technician case backlog and provided technical guidance
- Approve/Adjust weekly employee electronic timecards
- Responsible for conducting Performance Improvement Plan (PIP) with direct reports
- Adhere to SLAs for urgent and critical reported technical issues
- Experienced with IIS 7 Manager, application pool and virtual directory configuration, etc.
- Experienced with Microsoft SQL Server Management Studio 2008 R2, 2012 and 2014, Microsoft Server Manager, Add Roles, and Features, etc.
- Create technical reference and troubleshooting documentation
- Maintain test environments with software updates and new enhancement configurations
- Experienced with various remote access tools such as VPN, RDP, VMWare Horizon Client
- Experienced with Microsoft Dynamics CRM software, Dashboards, view, and chart creation

## **EDUCATION**

**ITIL V3 Foundation Certificate** - IT Services Management  
**Project Management Fundamentals** - Certificate of Completion  
**Cisco CCNA Network Fundamentals Course** - Certificate of Completion  
**Network Administration** - Certificate of Completion

Bridgepoint Education  
Palomar College  
San Diego Continuing Education  
Learning Center, Alexandria, VA



## Mike Epstein, SQL Server Developer

Leveraging Advanced SQL development with strong T-SQL experience to analyze and determine conversion requirements and specifications. Demonstrates expertise in designing, testing, and executing one-off and regularly run data conversion routines to migrate data from legacy databases into the SQL server database. Adept to ensure as part of the data migration that data quality, integrity and completeness is maintained or improved and that duplicate entities are identified and removed. Proven track record and success in identifying and resolving any data conversion issues/risks, and escalating issues/risks as needed to ensure on time delivery of projects. Trusted advisor to communicate with clients to obtain guidance for the conversion process.

### Qualifications

Data Conversion | Data Migration | Database Development | Data Modeling | Data Integration | SSRS Report Development | ETL Process Design | SQL Server Database Development & Management | SQL Server Data Modeling & Schema Enhancement | Database Server Configuration & Maintenance | Stored Procedure Development, Maintenance & Enhancement | Quality Assurance | Database Performance, Integrity & Security | Client Relationship Management | Query/Data Analytics & Performance Tuning

### TECHNICAL SKILLS

**Frameworks:** HTML5, AJAX, PHP, XML, XSLT, XSD, C#, VB.NET, ASP, and ASP.Net

**Languages:** JSON, XML, XSLT, XSD, CSS3, JavaScript, and JQuery.

**Servers/Tools:** Microsoft SQL Server (7.0, 2000, 2005, 2008R2, 2012, 2014, 2016), Microsoft Access (97, 2000, 2003, 2010, 2013, 2016), SSIS (2005, 2008, 2012), SSRS (2005, 2008, 2012), and Crystal Reports (8, 9, 11).

**Operating Systems:** Windows Operating Systems (NT, 2000, XP, Vista, 7, 8, 8.1, 10), and Microsoft Office Suite (2000, 2003, 2007, 2010, 2013, 2016, Office 365).

### PROFESSIONAL EXPERIENCE

#### **CENTRAL SQUARE TECHNOLOGIES (Formerly SunGard Public Sector/CRW Systems), San Diego, CA 2015 - 2020**

##### **Data Conversion Specialist**

Initially joined CRW Systems (now CentralSquare Technologies), a leading developer of solutions that help local government agencies manage community development as a Data Conversion Specialist. As a Data Conversion Specialist, migrated data from legacy databases into the core application database (MS SQL). Partnered with the Project Manager to ensure that all migration issues were resolved on time. Worked with data owners to verify and obtain approval that any transformed data retained its accuracy.

- Designed ETL processes to migrate data from legacy systems into to TRAKiT utilizing T-SQL scripting and SQL server SSIS.
- Supported the Development team by building, optimizing, and troubleshooting SQL stored procedures, views, and triggers.
- Designed, developed, and tested all data transformation, extraction, and migration activities.

#### **INTUIT, San Diego, CA**

**2010 - 2015**

##### **Content Image Developer**

Initially joined as Intuit, an American business and financial software company that develops and sells financial, accounting, and tax preparation software and related services for small businesses, accountants, and individuals as a Government Forms Specialist. As a Government Forms Specialist, developed web-based applications. Promoted to Content Image Developer to provide a deep understanding of query language (SQL) and relational databases with strong understanding of web technologies (i.e., XML, JSON).

- Helped design a web application that could submit applications to various agencies via fax on behalf of Turbo Tax customers.
- Transformed extracted tax data with JSON to XML and mapped extracted data to PDF application to be used by print engine.
- Developed and updated TurboTax User forms using Adobe Live Cycle and XML as the Government Forms Specialist.

#### **City of Richmond, CA**

**RFP 2023-03 Land Mgmt Community Development & Implementation Services**





**GLOBUS WEB TECHNOLOGIES, Oceanside, CA**

**2008 - 2010**

**ETL Developer / Database Developer**

Joined Globus Web Technologies, a web design company that specializes in creating affordable, professional web designs and other online marketing as a ETL Developer and Database Developer. As an Extract, Transformation & Load (ETL) Developer, managed the Extract, Transform, and Load processes, implementing technical solutions. As the Database Developer, designed, developed, tested, debugged, implemented, and maintained data storage systems for companies.

- Worked closely with the President of SVM Real Estate to design and implement a complete data management solution.
- Using SQL Server 2005 and C#.NET implemented CLR functions and stored procedures for client (DCSE, Inc.).
- Designed Ambient Water Quality Statistics Calculating tool for client (DCSE, Inc.) to calculate statistics (i.e., minerals tests, etc.).

**GREATCALL, Del Mar, CA**

**2007 - 2008**

**Database Developer / Database Manager**

Joined GreatCall (Jitterbug), a startup cellular provider that offers health and safety products and services for older adults, including mobile devices, cellular service, and a wearable device as a Database Developer and Manager. As a Database Developer and Manager, designed, built, and maintained a best-in-class data warehouse to serve as a centralized repository for all operational data. Responsible for the development, support, and optimization of complex T-SQL DDL and DML database objects and SSIS packages.

- Designed custom reports, tables, and charts to meet reporting requirements using Crystal Reports 11, Visual Studio and SSRS.
- Wrote complex queries and stored procedures using T-SQL. Created ETL processes using SSIS.
- Developed SSIS packages (i.e., data flow tasks, transformations, precedence constraints, expressions, etc.).

**WILDERMUTH ENVIRONMENTAL, Lake Forest, CA**

**2004 - 2007**

**Database Developer / Database Manager**

Joined Wildermuth Environmental, a specialized water resources consulting firm, dedicated to creating visionary yet practical solutions to the complex water problems facing California municipalities, governmental agencies, and private companies as a Database Developer and Manager. As a Database Developer and Manager led the development of T-SQL (i.e., stored procedures, functions, triggers, etc.). Participated in non-development tasks such as data analysis, data modeling, user training and documentation.

- Designed custom reports, tables, and charts to meet reporting requirements using MS Access 2003 and/or Crystal Reports 11.
- Provided support to 20 engineers and scientists. Created new applications and integrated existing systems to create efficiencies.
- Wrote complex queries and stored procedures using T-SQL. Designed DTS packages for all SQL server 2000 databases.

**EDUCATION & CERTIFICATIONS**

Server-Side Programming & Advanced Web Design Coursework, EAST TENNESSEE STATE UNIVERSITY, Online

MS SQL Server 2005 Certificate, UNIVERSITY OF CALIFORNIA - IRVINE, Irvine, CA

Microsoft Certified Technology Specialist (MCTS), UNIVERSITY OF CALIFORNIA - IRVINE, Irvine, CA

Computer Information Systems Certificate, COLEMAN COLLEGE, San Diego CA

Computer Information Systems Coursework, HARPER COLLEGE, Palatine IL



# Chuck Badger, Client Success Manager

Operations Manager • Project Manager • Marketing • Customer Service  
Critical Problem Solving • Training & Coaching • Public Speaking • Communication Skills  
Increased Productivity • Expanded Businesses • Developed SOP • Self Starter

## EXPERIENCE

### **Intuitive Municipal Solutions, LLC - Escondido, CA | August 2020 - Current** **Client Success Manager**

1. Brings years of project management, sales, and marketing experience to the team
2. Configures rules-based client workflows in iMS applications

### **R. E. Badger & Son, Inc. - Rancho Santa Fe, CA | Jan 2018 - August 2020** **Operations Manager**

Account Acquisition & Project Management, Harvest Coordination, U-Haul Management

3. Expanded coffee farm management operations from a 500-tree test plot to over 20,000 planted.
4. Produced over \$200,000 of revenue from new coffee farm accounts which now provide over \$70,000 ongoing annual revenue.
5. Added three new organic fertilizer products now used for all clients.
6. Expanded U-Haul dealer from start-up to over \$5,000 commission per month in 4 months and over \$9,000 per month by 8 months.
7. Doubled the efficiency of fertilization by designing and building a custom injection system.
8. Logged backflow tests, school-site notifications, wastewater and hazardous waste management forms via county and irrigation district web portals.

### **Topsoil Ag Solutions - Kingsburg, CA | Feb 2018 - Mar 2020** **Marketing Consultant**

- Generated over 100 warm leads at World Ag Expo two years in a row.
- Collaborated with owner to design a marketing strategy for two company divisions.

### **The Father's House Church - San Marcos, CA | June 2016 - Dec 2017** **Director of Children's Ministry**

- Expanded the volunteer team from 45 to 85 trained teachers, recruiting solo.
- Improved teacher training protocol from a handbook to a three-session training seminar.
- Managed Buildout Project of seven A/V capable classrooms while remaining under budget.
- Increased consistency and quality of events by empowering volunteer leaders and researching newest and most effective teaching material.

### **Vintage Grace Church - El Dorado Hills, CA | Sept 2015 - June 2016** **Children's Ministry Resident**

- Increased children's engagement and comprehension by adding superior curriculum material and writing my own.
- Expanded the elementary ministry into two classrooms and trained new volunteers to staff them.

## EDUCATION

PMP Prep Course (Enrolled) - PMTraining	2020
Digital Marketing Coursework - Click Funnels; Traffic & Funnels	2019
BA in Biblical Studies - Colorado Christian University	2016
STEM Coursework - Biola University	2012-2014
<i>Calculus I, II &amp; III, Physics, Biology, Chemistry, Organic Chem., Analytical Chem.</i>	
Immersion Internship Program - The Father's House Church	2011-2012



## Trenton Seymour, Client Success Manager

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### EDUCATION

**Bachelor of Science in Business Administration: Major in Finance**  
*California State University San Marcos*

May 2015

### EXPERIENCE

**Project Manager**  
*Intuitive Municipal Software*

December 2020 - Current  
Escondido, CA

- ✓ Responsible for end-to-end project completion; including project initiation, onboarding, data conversion, web portal development, training, and project closure. Fully responsible for client satisfaction throughout the implementation process.
- ✓ Negotiate with internal and external groups to set priorities and obtain required resources to ensure successful fixed duration project completions.
- ✓ Provide support maintenance using a prominent level of software and hardware expertise to resolve issues.
- ✓ Successfully managed Kootenai County, ID (CentralSquare TRAKiT customer) to go live and playing pivotal PM role with Palm Bay, FL in working with Chuck Badger.

### Trenton's three professional contacts, as requested, are:

Susie Calkins - Union County NC Building Official - 704-507-0995  
Melissa Hopkins - Dorchester County SC Chief Building Official - 843-514-9408  
Melissa Monroe - Former Co-project manager/co-worker - 360-383-6794



## Proposal Section 7.0 Implementation Approach

In this section, iMS will describe aspects of our overall implementation approach.

### Configuration, Customization, and Interfaces

As your selected vendor, iMS understands our responsibility to continually strive for complete customer satisfaction. Our team has the experience to understand and recommend the optimal implementation and configuration strategy. And, as a part of your implementation, our Client Success Manager partners, along with your agency's Subject Matter Experts (SME's), ensure there is open communication throughout this entire process. We believe, and experience has shown, that an educated and involved client ensures project success. Our proposed project plan and milestones outline the tasks and responsibilities for your team and ours. If necessary, we are happy to ultimately provide a Project Plan that outlines key users and project responsibilities, as a percentage of overall project.

At iMS, our projects strive to ensure collaboration with each customer. As such, our overall approach to provide the City a successful project based on your needs and this RFP and fulfill all project requirements is itemized and detailed further below. Although we certainly recognize that collaboration and communication are pivotal for the entire project, we also want to stress that our unique approach will be that iMS performs the "heavy lifting" as it pertains to your project. As such, we recognize that your assigned iMS Client Success Managers / Project Managers will be very instrumental in both the City's project's success, but also our ongoing success as a viable Community Development software vendor. Your iMS Project Managers will generally not wait for things to happen, they will make sure that things are taking place as needed, as agreed upon, and as necessary for overall project success and completion.

Simply put, we at iMS believe very similarly to the City of Richmond that, when possible, configuration should always come before customization. We would nearly take it a step further and say totally unique "one-off" agency-specific customization should rarely, if ever, be required. The good news here is that with iMS, we rarely see a business use case where true customization is warranted. Along with that good news, comes more good news..... Your iMS Software is so highly configurable that we can almost always configure the software to work specifically the way each agency desires. Our process and method also include 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, generally by iMS team members.

Unlike your current product, iMS has a great deal of opportunities for your agency to take many advantages of true workflow. We are purpose-built to help you gain efficiencies throughout all business processes, inter-departmental checklists or participation, and interaction with your citizens or business owners. Our team after successfully completing an initial overall project Business Process Review will configure nearly your entire system. We do the heavy lifting. Staff involvement across the board during your iMS implementation generally is no more than 10% overall participation. Certainly, the biggest areas your teams and participants will need to collaborate will be during User Acceptance, Data Conversion Verification, and Training. System configuration is our specialty. Even though this is an area we ensure we manage and provide as part of our projects, the end goal is to ensure your intended System Administrator(s) - usually, 1-3 individuals, are comfortable and involved during each facet of the project so that after go-live you



have self-sufficient administrators who generally only need to call and ask us for guidance or address questions to make changes. Please NOTE that the same holds true for those that will be responsible post go-live for authoring internal custom reports. We will customize (X) number of reports and MS Word Templates together with your administrators so that they can take the ball and run with it after implementation.

The City will be assigned a primary iMS Project Manager. They will function as your main liaison for everything pertaining to the implementation of your iMS products. They will communicate with all members of your 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 our project team is to provide services that ensure 100% on time delivery and overall acceptance of iMS at your targeted go-live date. Also, as normally the case with relatively large and lengthy implementations, should any issues or conflict arise during the project that require joint decision(s) by both project teams, we will coordinate and have joint meetings to ensure mutually agreed upon decisions are reached by both teams. an honest and open partnership between the City's staff and our team. Right from the start, a primary goal of our team will be sure we 100% understand the City's project objectives, and then to supply the City a proposed configuration plan that meets or exceeds these goals. Generally, 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.

Your SME's or key project users, provided they have the correct permissions, correct knowledge (technical or function) should be able to easily modify whatever system configurations need to be modified on the City's side. Whether that is modifying an existing configuration or setting up/creating new ones. Your System Administrators, having sat through project meetings and training sessions specifically designed for them, should have no problems modifying existing workflows. We are still here to support the City post go-live. We will be responsive and customer attentive and aid when necessary. When configuring your new solution, we attempt to take on the 90-10 rule. If we can automate 90% of your current processes for most of your processes (issuing permits, code violations, establishing projects, business tax review(s),etc.) then certainly at any juncture can staff that have the appropriate rights institute a manual process, such as adding a manual fee, creating an invoice, adding an additional inspection not originally included in the workflow, etc.

As previously mentioned in our RFP response your new iMS software is used by all users. There is no longer a need to have an "App" or a Mobile interface, or an eGovernment Website, etc. The same experience with securitization and user-rights as defined by the City means that there is only ONE product. This of course cuts down on the potential for breakdowns when you upgrade, train inexperienced staff members, work with citizens or business owners, and more. Output documents are generated either via MS Word merge or SSRS and generated as a PDF to ensure cross-platform compatibility (i.e., computer, phone, tablet).

If / when a customization should ever truly be necessary, we simply would have a meeting with the City and those that require the customization. A client can also request a customization through your normal iMS Support Channels (calling or creating a case). Once the agency relays and iMS acknowledges your desire to customize the software a conference call / MS Teams Meeting, etc. would be scheduled. We would further discuss what you are trying to accomplish. Ensure there is no configuration in the base product that we can think of that would provide this functionality.



Once we both agree that customization is required. We would itemize what you need, the level of effort iMS is expected to deliver, then provide a professional services engagement proposal to accomplish this customization. If there is a business case for iMS to have this as part of all customer's solution, then we would want to program into the base software.

### **Integration Items:**

Based on your RFP and vendor responses, the integration with third parties is identified and explained here.

#### ✓ **Credit Card Payments**

iMS supports direct integration with several online payment providers. Scope and pricing being proposed by iMS includes integration with your existing provider or one of our previously built integrations (BridgePay, US Bank, Cardknox, PayTrace, etc.) at no additional cost. Credit Card reader integration for counter staff is not included but can be discussed if desired. This integration allows for the City not to be worried about PCI compliance for the Community Development products as our software never "touches" credit card or PCI data.

#### ✓ **Finance Integration**

Includes nightly batch integration to City's current General Ledger (GL) software and reconciliation reports. Please NOTE that if the City wanted instead, a real-time interface, as opposed to a nightly batch update, cost and additional Scope of Services specification(s) may need to be developed together with the City.

#### ✓ **Document Management Solutions**

Document Management integration via URL (system passes permit number, etc.) Includes 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 form the map
- View property history

#### ✓ **Electronic Plan Review/Bluebeam**

iMS support integration with the industry-leading Bluebeam Revu (requires Studio Prime licenses). All desired electronic plan review management tools will be supported through



this integration. Although we are not currently proposing integration with Bluebeam, iMS understands that this is something that your agency may consider later. Rest assured, if you move forward with an electronic plan review solution, iMS will be prepared to assist, integrate, and support this interface at that time.

✓ **Other Interfaces (i.e., IVR, Texting for Land Management, Assessor database(s) for Property Owners, etc.)**

iMS supports integration with many third-party systems. Where these vendors provide open API's and usually access to technical resources, this normally poses no issues. More analysis of what is available and what access we will have for programming, testing, and vendor-specific assistance may be necessary. Our interface cost proposal line item(s) represent this exposure or need to verify availability of required components. Please NOTE we previously documented Selectron and iMS's relationship and project collaboration(s).

## Reports

We understand the City will require world-class reporting. Your new iMS Suite comes with 100+ pre-configured "demand reports". These reports have been created by iMS and come "out of the box" delivered to you on Day 1. Usually, these demand reports can be selected to be run multiple ways (i.e., drop down, date ranges, picklists, users, etc.) and then published in either a PDF or an MS Excel file format. In addition to your Demand Reports, we also, as part of our proposed project, and understanding of your overall project, will build both custom SSRS Reports and MS Word Templates during a client's implementation (please see our proposal for total number we are proposing for you here). During this report creation period, the expectation is that our team(s) will be training your report writing administrators, and by the end of the project will be self-sufficient in building custom reports - although, we are still available to assist through normal support channels. We do want to also mention that in addition to the pre-built reports and the custom-designed reports specific for departments / users, we also have an extended search functionality that allows users to find "anything" in the database and then save this search for either themselves or other users/roles so in fact this is an on-the-fly ad-hoc report writing solution as well.

### Reporting/Document Creation

As mentioned above, we utilize SQL Server Reporting Services (SSRS) and merge fields via Word documents, iMS provides tailored reports and documents that would support your agency's unique processes. iMS will work with your agency to identify and develop the required reports during the implementation phase. iMS includes a standard library of application specific reports and by leveraging SSRS, either your employees or our team can create customized reports to meet your Agencies specific reporting requirements. Existing MS Word documents can also be easily converted for use in iMS by simply including the appropriate merge field, uploading to the iMS server, and attaching to the applicable iMS Workflow. iMS supports the auto-generation and emailing of documents created with either MS Word or SSRS and documents/reports are output to your customers in PDF format.



## Implementation

Project Implementations are so pivotal in judging whether a project is/was successful. We understand the importance of the implementation aspect of your new software. Please see our RFP responses below on each topic you have outlined in your document. Should you for any reason need clarification or more information, please do not hesitate to let us know how we can assist. Rest assured, your project will have Executive Oversight within iMS. Vance Bradshaw will personally oversee the project as well as function as your next escalation point immediately following, if ever necessary, your assigned Project Managers. There will be little or no need to worry about having direct access to immediate decision-making obstacles. Vance will be accessible to your Project Team executives.

### Implementation Overview:

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

- Installation, Integration, Data Conversion, and Training-specific details about these services are covered in their respective sections.
- Configuration of Software Specific configurations provided to you by iMS project team members for each module you are implementing using best practices - Custom Word Merge Templates We will configure and customize up to ten (20) custom letters for the different departments
- Custom SSRS Documents Up to forty (40) custom SSRS documents, including SSRS Custom Reports

**Please NOTE:**

- o *The SSRS Documents and SSRS Reports (total of 40) based on our understanding of Appendix B requirements and can be split up multiple ways up to the total number of custom SSRS items.*
- o *All configuration to be included in the main project must be clearly identified in the first on-site meetings.*
- o *If any of these estimates seem insufficient, or if the City wishes to have more custom SSRS Reports or MS Word Templates, we are happy to discuss further on how this impacts our initial proposal.*
- o *City administrators are also trained on how to perform these tasks for future changes.*

Our estimated project timeline provides a high-level overview of the work plan. The iMS Client Success Management team will manage software demonstrations, on-site training, and all the County's specific system configuration that needs to occur. The iMS team will work closely with the County and Public Works Department to directly manage the project and its timeline and complete data conversion. Should schedule variance arise for any reason, iMS is well prepared to fast-track any phase of the project. The nature of this type of software implementation lends itself well to fast-tracking, as many activities with non-dependent relationships are scheduled at separate times. The following estimated schedule is provided to demonstrate a typical timeline for a successful project of this scope.



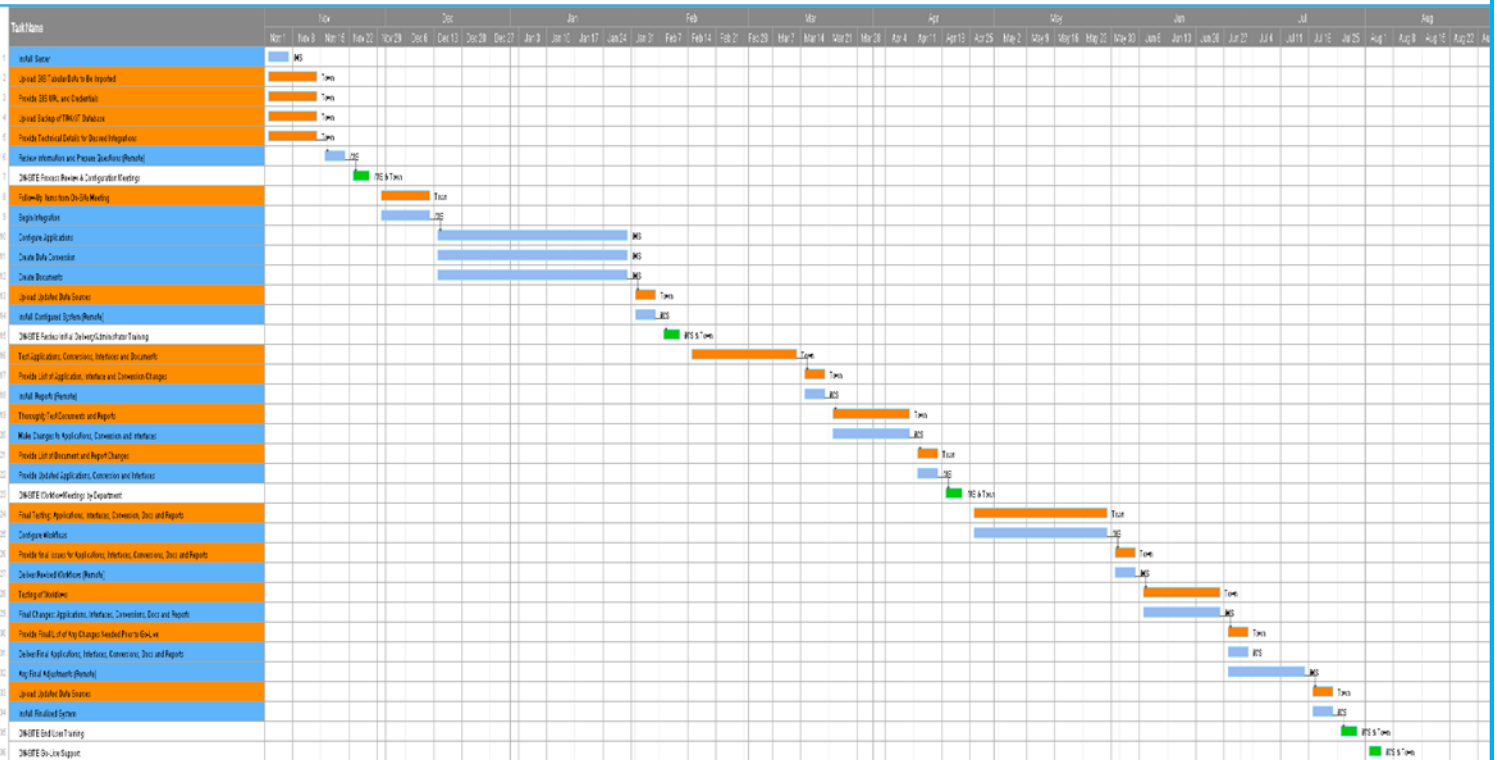


We have provided a standard Gantt Chart - **see below**, for you and your team(s) to “see” from an extremely prominent level the project breakdown in summary. Also, we understand this attached diagram is small to read and can provide, upon request or if necessary, a larger view of the project for you. Hopefully this will provide stakeholders with a basic “visual” timeline of what we might expect for your overall implementation of the iMS Suite.

## Gantt Chart



*Please note that the colors on the chart are meant to reflect overall project “responsibilities” by party. The orange-colored items on the chart represent tasks that are primarily assigned and completed by your agency and its stakeholders. Items in blue represent tasks that are primarily the responsibility of iMS. And finally, those items in green are going to be joint tasks by both our teams.*





As your selected vendor, iMS understands our responsibility and we will promise to continually strive for complete customer satisfaction. Our team has the experience to understand and recommend the optimal implementation and configuration strategy. As a part of the implementation, our Client Success Manager partners with the City's Subject Matter Experts to ensure there is open communication throughout the process. We believe, and experience has shown, that an educated and involved client ensures project success. Our proposed project plan and milestones outline the tasks and responsibilities for your team and ours.

Finally, and perhaps most valuably, as an active and on-going project, the City of Richmond will have dedicated Project Manager(s) available during all business hours. Additionally, this includes unlimited technical support during iMS business hours (7:30 AM - 5:30 PM Pacific, Monday through Friday). In addition, mobile/cell phone number(s) will be provided for critical issues outside of business hours so that you can always potentially get a hold of your iMS Project Team. iMS Support can also provide service during this initial implementation and is normally available via email or telephone. Please note that telephone support may occasionally require screen sharing functionality.

## Implementation Methodology

With the implementation of the iMS Suite, our expectation is a partnership between the City's staff and our team. Our goal is to understand the City's needs, desires, and to provide your agency with a proposed configuration plan. We 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.

Our project managers are "hands-on" and our available to start as working on your project as soon as the contract is signed. From our initial consultations (onsite preferred) we evaluate how you currently do business, how you wish to do business, and how we can help blend those two together with our products and services. We collaborate with your team every step of the way and feel that overcommunicating during this project is better than not. Our Project Managers are certified and have 100% successful implementations thus far with similar projects to yours. Your dedicated iMS Project Managers will be **Trenton Seymour** and **Chuck Badger**.

iMS has no outside third-party employees that would participate in the project implementation. The proposal includes several onsite days as we feel on-site meetings are important to a successful project. Should the city feel uncomfortable due to Covid-19 or any other reason, the proposal can be adjusted to remote only after agreement by both project teams.



## Project Management Methodology

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. Our 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.

## Project Timeline

Our estimated project timeline provides a high-level overview of the anticipated work plan. Your iMS Client Success Management team will oversee software demonstrations, on-site training, and all your agency’s specific system configuration that are required. The iMS team will work closely with the Town and all departments/stakeholders to directly manage the project and timeline. Should schedule variances arise for any reason, iMS is well prepared to fast-track, or re-schedule, if necessary, any phase(s) of the project after confirming with your project team. Also, the very nature of the IMS software implementation lends itself well to fast-tracking, as many activities with non-dependent relationships are scheduled at separate times.

The following schedule (sample) is provided to demonstrate a typical timeline for a successful project of this scope. 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.



## 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 (TBD after Project Kick Off) Process Review and Configuration Meetings
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)
14	(City) Upload updated data sources (iMS) REMOTE install configured system
15	(Team) ON-SITE (TBD after Project Kick Off) Review Initial Delivery/Administrator Training
16-19	(City) Begin thoroughly testing <u>Applications</u> , <u>Conversion</u> , <u>Interfaces</u> and <u>Documents</u>
20	(City) Provide list of any <u>Application</u> , <u>Interfaces</u> and <u>Conversion</u> changes (iMS) REMOTE install <u>Reports</u>
21-23	(iMS) REMOTE Update <u>Applications</u> , <u>Conversion</u> , and <u>Interfaces</u> (City) Thoroughly evaluate <u>Documents</u> and <u>Reports</u>

- iMS Tasks
- City of Richmond
- Team Tasks (Both)



24	(iMS) REMOTE Updated <u>Applications</u> , <u>Conversion</u> , and <u>Interfaces</u> provided  (City) Provide list of any <u>Document</u> and <u>Report</u> changes
25	(Team) ON-SITE (TBD after Project Kick Off) Workflow meetings by department
27-30	(iMS) REMOTE configure <u>Workflows</u> (City) Final testing for <u>Applications</u> , <u>Interfaces</u> , <u>Conversion</u> , <u>Documents</u> and <u>Reports</u>
31	(iMS) REMOTE deliver revised <u>Workflows</u> (City) Provide final issues for <u>Applications</u> , <u>Interfaces</u> , <u>Conversion</u> , <u>Documents</u> , & <u>Reports</u>
32-34	(City) Testing of <u>Workflows</u> (iMS) REMOTE make final changes to <u>Applications</u> , <u>Interfaces</u> , <u>Conversion</u> , <u>Documents</u> and <u>Reports</u>
35	(iMS) REMOTE deliver final <u>Applications</u> , <u>Interfaces</u> , <u>Conversion</u> , <u>Documents</u> and <u>Reports</u> (City) Provide final list of <u>any</u> 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 (TBD after Project Kick Off) End User Training
40	(Team) ON-SITE (TBD after Project Kick Off) <b>Go Live and Transition to iMS Support</b>

## Operational Redesign

As stated above in our Implementation strategy ,our project managers are “hands-on” and from our initial consultations (onsite preferred) we evaluate how you currently do business, how you wish to do business, and how we can help blend those two together with our products and services. We collaborate with your team every step of the way and feel that overcommunicating during this project is better than not. Our Project Managers take pride in viewing every project as a successful partnership to streamline and improve processes everywhere possible for the city. We are happy to drive this process for the City.

Collaborating with different agency departments, completing Business Process Review (BPR) meetings in person and remotely, documenting current business practices, defining existing or non-



existing workflow, integration points, approval agencies, IT requirements, staff availability, testing capacity, and other items all are part of our project team's area of expertise and responsibility.

## Change 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 citizen 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, Citizen, and Customer Involvement or Methodologies



## Data Conversion

We agree that this portion of the project will be one of the most important aspects of the overall project for the City of Richmond. We believe we are uniquely qualified and have proven success on this front with multiple customers that are now live on the iMS Suite. Please ensure to confirm our capability to deliver on this front. Not all the responding vendors to this RFP will have nearly the technical assets and background, specifically related to TRAKiT, that we have on our team and that will be assigned to your project. 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 greatly benefit your citizens, users, and administrators. In addition, and perhaps more importantly, we believe without a doubt, that our team is uniquely qualified to replace your existing TRAKiT system from CentralSquare. This should become clear as you read our response, review our team's resumes, qualifications, and references being provided with this submission. As already mentioned, but to stress it, iMS is exceptionally qualified to convert the TRAKiT data, train administrators and staff, successfully implement, configure your new system, and supply world-class support to the city.

As an aside, and to the City's point concerning additional data elements potentially on the conversion. We have encountered several legacy TRAKiT customers that have presented prior versions and customizations they have paid for that were unable to "bring those forward" with their current vendor or replacement vendor. We have successfully had in depth discussions about what can be modified from a former customization into workflow and/or configuration many times. Data migration as part of the scope of the RFP are part of overall cost proposal. At this point we do not envision anything changing that. Should the City add to the scope or require additional data conversion elements not published in the RFP, we are happy to have a technical discussion to determine the overall impact. Based on the findings of these conversations and scoping meetings, we would quickly determine the level of effort, and whether additional services (either fixed fee, hourly, or milestone-base) would be required.

As previously mentioned, but worth re-stating, Intuitive Municipal Solutions' Founder and President, Vance Bradshaw, has over 20+ years of industry experience and supporting local and state government entities. He has extensive knowledge in Community Development Software project management, data conversion, programming, report writing, and system enhancements. Prior to founding iMS, Vance was the TRAKiT Project Manager for 25+ successful Community Development Software projects and was the key liaison for the States of Minnesota and Idaho. Not only was he instrumental in designing core and complex components of your current TRAKiT product(s), but he was also a key contact for achieving customer satisfaction, ensuring correct projections and the timely delivery of results to his clients.

Another key member of our team is Jim Williamson. Jim is iMS's Sr. Client Success Manager. He brings with him 18+ years of industry experience as a Senior Technical Trainer and Implementation Specialist and has a considerable grasp on Community Development practices and procedures. Jim has successfully worked with City, County and State clients and always strives to exceed customer expectations. Jim also spent much of his career working with TRAKiT customers

**City of Richmond, CA**

**RFP 2023-03 Land Mgmt Community Development & Implementation Services**



## Training

Essentially, 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 ultimately 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 on the configuration and system features. We will also be training your local SME on how their unique applications and workflows 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 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





## Testing

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 on the configuration and system features. We will also be training your local SME on how their unique applications and workflows 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 generally 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.

### Sample Testing Procedure

- i. **Applications** (i.e., Permit, Code Violation, Projects, etc.)
  - o Start a new application
  - o Enter mock information
  - o View record to ensure all appropriate elements are present (reviews, inspections, fees, notes, etc.)
  - o Repeat for each application type, subtype, and variant



*Note any changes that need to be made and email them to iMS Project Manager*

- ii. **Database Conversion of TRAKiT** (typically 3-4 passes) and other records, if necessary
  - 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.
- iii. **Interfaces** as defined in Agreement Testing and Acceptance
  - Confirm transactions are accurately transferred between the source and target systems for each delivered interface.
- iv. **Documents** - MS Word Template(s) Custom Built for You
  - For each document type, enter necessary information and download
  - View documents to ensure all appropriate elements are present (notes, contact information, etc.)
  - Note any changes that need to be made and email them to iMS Project Manager
- v. **Reports** - Demand, Ad-Hoc (Searches), and Custom Built for You
  1. Launch Report
  2. Enter parameters if necessary
  3. View Report to ensure all appropriate line items are displayed and all items are grouped in the City's preferred way.

Note any changes that need to be made and email them to iMS Project Manager
- vi. Begin **Report Administrator** Training Path and Acknowledgement
- vii. **Workflows** - Unique for Your Agency
  - For each workflow, create a test application, inspection, code violation, or permit
  - Walk through each step as it was configured by iMS
  - Schedule and mark as complete all reviews and inspections, uploading test files where appropriate
  - Mark each review and inspection as Pass and then again as Fail to ensure proper triggers fire for each

## Acceptance

iMS generally 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.



## Custom Reporting

iMS makes reporting easy. We have both canned/on-demand reports that can be filtered and run by staff with multiple selection criteria. Our pre-defined reports come standard with the solution. Agencies can also author their own Ad-Hoc reports easily - all you need is a team member that knows a little about SSRS. In addition, during your project, we are proposing several customized reports. We write these for you, but your Administrators participate in the classes so that when we leave, your team can draft additional custom reports whenever necessary. Custom reports will be defined by both the city staff and the iMS team member if a standard report cannot pull the desired information.

## Documentation

iMS will provide both a System Administrator Manual and a User Manual in MS Word and PDF format for your Agency use during the training portion of your implementation. iMS also provides a complete architectural document of the database structure. In addition, we can assist and provide the agency with best practices for updating your own internal Statement of Work (SOW) and can leverage existing client experiences for additional insight.

## 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 trainings and onsite during the go live week to ensure a smooth transition. Along with project manager(s) being on site, our support manager will also be on site to familiarize himself with your installation to best be able to help you in future support. Go live will be a cut over approach where legacy software is turned off and iMS will be used going forward.



## Proposal Section 8.0 Implementation Considerations

In this section, iMS addresses the following.

### 1. Onsite Work

- o The City has returned to work in the office for the vast majority of City staff and operations. The City will react on a case-by-case basis with regard to Covid-19 protocols (e.g. masks, remote only). The City does not want this implementation to be a remote project, and expects the vendor's resources to be onsite. The City will be flexible, but having onsite implementation activity is strongly desired.
  - 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 times 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.

### 2. Use of Dashboards / Management Reporting

- 1. One of the City's success factors for this project is the extent that City staff are able to utilize the land management and community development system for reporting purposes. The City is optimistic about modern reporting features and the ability to leverage management dashboards, real-time data, and role-specific views of data to provide decisions support for key processes. Please indicate how you will use this project to ensure the City is able to leverage system tools for dashboard reporting and deliver the City a system that can be used by users throughout all departments.
  - a. Our Project Team(s) will ensure that departments, users, management, etc. have the tools for successful reporting. In addition to the On Demand, Out-Of-The-Box reporting capabilities that initially come with your software solution, our project team will create site-specific reports and documents, all while training iMS Administrators so that moving forward they are self-sufficient. We employ industry tools (SSRS reports, SQL) that are readily available, easy to use, and then provide support both during and after your project. Without a partner being able to extract information from their database, we recognize there is little need to have that database. We aim to ensure you can manipulate, view, and provide access to staff and customers once you use our software.



## Proposal Section 9.0 Implementation / Terms and Conditions Acknowledgements

In this section, iMS confirms key terms and conditions requested by The City of Richmond for this project. Please see below and for additional information, clarification, or needs pertaining to this section, please contact Scott Christensen directly.

**27) Confirm your acceptance with the following contract terms related to any software contracts resulting from this RFP. If the following terms are not accepted, please provide an alternative proposal.**

- **Key Personnel** - The City requires assurances as to the consistency and quality of vendor staffing for its project. Key points of the City's key personnel provision include: The City shall have the ability to interview and approve key personnel proposed by the vendor and the vendor key personnel may not be removed from the project without the City's approval.
  - ✓ iMS acknowledges this item
- **Warranty** – The Proposer will expressly warrant that all work will be performed by an adequate number of qualified individuals with suitable training, education, and experience and that all work performed and all deliverables, including the system itself will conform to the scope and specifications as stated in the RFP including the functional requirements for a period extending no less than 12 months after final acceptance.
  - ✓ iMS acknowledges this item
- **Ownership of Deliverables** – The proposer shall grant to the City ownership of any deliverable or provide an irrevocable license for the City to use the deliverable for its business purposes, including making copies, derivative works, or sharing with representatives from other peer governments.
  - ✓ iMS acknowledges this item
- **Hold Harmless** – Vendor shall hold harmless, defend and indemnify City and its officers, employees, agents, and volunteers, from and against any and all liability, loss, damage, expense, costs (including without limitation costs and fees of litigation) of every nature arising out of or in connection with Contractor's performance of work hereunder or its failure to comply with any of its obligations contained in this Agreement, except such loss or damage which was caused by the sole negligence or willful misconduct of City.
  - ✓ iMS acknowledges this item
- **Vendor's Insurance.** Vendor shall not commence work under the agreement until all insurance required has been provided and approved by City. Such insurance shall be maintained throughout the duration of the contract and evidenced by insurer's certificates filed with the City. Each such certificate shall name the City as an additional insured.



- a. Workers' Compensation Insurance. The Vendor shall take out and maintain during the life of this agreement Workmen's Compensation Insurance for all of its employees employed at the site of the project, and in case of any work is sublet the Vendor shall require the subcontractor similarly to provide "Workmen's Compensation Insurance" for all of the latter's employees unless such employees are covered by the protection afforded by the Vendor. In case any class of employee engaged in hazardous work under this agreement at the site of the project is not protected under the Workmen's Compensation Insurance Statute, the Vendor shall provide, and shall cause each subcontractor to provide adequate insurance coverage for the protection of his employees not otherwise protected.
  - b. Commercial General Liability Insurance (CGL). The Vendor shall take out and maintain during the duration of this agreement Commercial General Liability Insurance in an amount not less than \$2 Million combined single limit or equivalent. The limits of coverage may be provided by coverage of \$1 Million combined single limit together with excess or "umbrella" coverage of \$ 1 Million combined single limit.
  - c. Automobile Insurance. Vendor shall take out and maintain during the duration of the agreement automobile public liability insurance including hired and non-owned auto in an amount not less than \$2 Million combined single limit or equivalent. The limits of coverage may be provided by coverage of \$1 Million combined single limit together with excess or "umbrella" coverage of \$ 1 Million combined single limit.
  - d. Technology Errors and Omissions (Tech E&O) Insurance. The Vendor is required to maintain Technology Errors and Omissions (Tech E&O) Insurance which shall be sufficiently broad to respond to the duties and obligations undertaken by the Vendor in the agreement and shall include, but not be limited to, claims involving infringement of intellectual property, including but not limited to infringement of copyright, trademark, trade dress, invasion of privacy violations, information theft, damage to or destruction of electronic information, release of private information, alteration of electronic information, cloud computing, extortion and network security. The coverage shall provide for breach response costs as well as regulatory fines and penalties and credit monitoring expenses. Insurance minimum limits are as follows: \$2,000,000 – per occurrence and \$2,000,000 – per aggregate.
- ✓ iMS acknowledges this item and our Insurance provider has confirmed that we meet these insurance requirements should we be selected for this project as your partner.



## C.4 Price Proposal

Please find iMS's Error! Reference source not found. submission in the required .xlsx format submitted as part of our overall RFP response.

- 1) **Complete and submit** Error! Reference source not found.
  - ✓ iMS has submitted Attachment 12 (Cost) submission as part of this RFP.

### Additional Price Proposal Details

iMS software and professional services are competitively priced. Based on your specific RFP requirements, the expected pricing proposal details are being provided below, as requested. In addition to the anticipated costs for your project, iMS wishes to assure the City that we recognize as a fiduciary to your citizens, City council, customers, and other entities in your community, we welcome any opportunity to ensure we are offering you the best product(s) and services at the best price. For our projects, we also can extend multiple payment options, such as, milestone billing, or due as incurred invoicing for the one-time professional service fees. In addition, we have many customers that have successfully leveraged procurement vehicles (i.e., SHI, OMNIA, Sourcewell, etc.) and can provide information or details if that is preferred contract method. Just know that if the iMS software meets your needs, and we are the right vendor for you to partner with, then we welcome open and honest discussions about our pricing and the value we feel both our software and team represent for long-term stability.

As stated, iMS has carefully considered everything in the City of Richmond' RFP. Our cost proposal is based on your requirements and is all encompassing what we are proposing. We will generally never have costly "Change Orders" and intend to implement you fully and successfully for the costs we have provided. Another important note to make about our proposed costs for this project is that travel costs for any onsite meetings or visits is already part of our proposal and you do not need to add anything for those components, including Travel and Living items. We will not invoice for anything pertaining to our onsite visits. Based on the RFP, the assumption made in our current cost proposal is that the City of Richmond, CA would choose to pay for the licensing fee upfront (one-time). Should this not be your preferred method of paying for the iMS Software License, or you wish to consider alternatives, we are happy to provide you other options to what works best for the City's current budget needs.

Also, please be aware that your iMS Suite Software License is for an **unlimited** number of users for the departments that are contracting for the iMS Software or that are in scope for services, workflows, configurations, etc. we are proposing. Furthermore, all pricing provided is related to either your iMS Software, or iMS Professional Services. We do NOT use any third-party software / services or implementers for your project. Where third-party business partners may add value or represent optional overall efficiencies for your agency, we have noted these as well and welcome a chance to elaborate, when appropriate. We have attempted to provide anticipated pricing from those business partners (i.e., Selectron) where possible and included all the information received from them in the Attachment Section of our response - following the City's last attachment, Attachment G.



Again, please **NOTE** that your Software License for the proposed iMS Suite is an **Unlimited User** License. We do not charge for concurrent or additional users for any licensed agency departments. This means no future surprises as the City continues to grow with what you currently have licensed from us.







## Cost Proposal Details for City of Richmond, CA

### Software Licensing

#### iMS Products Licensing (one-time cost):

\$ 236,250.00

Software Licensing costs. One-time costs for the purchase of your iMS Suite of products for departments listed and those business units that are in scope for this project. Please note that if the City prefers, iMS can also “roll” this licensing fee into your annual ongoing Hosted/SaaS amount and spread that out over several years. If selected, or when appropriate, we are of course willing to discuss multiple payment scenarios for you.

#### iMS Applications Licensed:

- I. iMS Approvals
- II. iMSPermits
- III. iMSEnforce
- IV. iMSPros
- V. iMSLocations
- VI. iMSLicensing
- VII. iMSRenewals

#### Departments Licensed:

- I. City’s Community Development / Developmental Services areas in scope as part of this RFP.

#### User Classes Being Licensed:

#### Description (NOTE: Unlimited License):

- |   |   |
|---|---|
| <ul style="list-style-type: none"> <li>i. Observers</li> <li>ii. Users</li> <li>iii. Pros</li> <li>iv. Staff</li> </ul> | <ul style="list-style-type: none"> <li>Limited Guest Access (with no login, if desired)</li> <li>Public Access for Residents</li> <li>Public Access for Contractors</li> <li>Access for City of Richmond, CA Staff Members</li> </ul> |
|---|---|



**Implementation/Professional Services Total:**

**\$ 366,188.00**

**Services Included in this Amount:**

- i. System Installation
- ii. Project Management
- iii. On-Site Meetings (Actual # TBD)
- iv. Software Configuration
- v. Documents and Reports - Custom Document and Reports (Actual # TBD)
- vi. Data Migration - TRAKiT. Land and/or GIS
- vii. Interfaces Included (See below)
- viii. Training (Remote and Onsite TBD)
- ix. Travel Costs Included (Mileage/Lodging - Onsite Government Travel and Living Expenses. Costs for the onsite visits as agreed upon will be included. Additional onsite may be requested by agency and T & E would be needed for anything additional and/or outside scope).



*Please NOTE: Meetings may be held remotely or onsite at the request of project team leaders. For standard number of onsite visits associated for this type of project (up to 4), the travel and living costs are already included in this amount.*

**Expected Project Meetings / Training:**

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



*Please NOTE: Above referenced Project Meetings may be held remotely or onsite at the request of project team leaders from both your agency and iMS. At this juncture, we envision at least 4-5- onsite visits for this successful project. Again, 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.*



**Custom Documents and Reports:**

<u>Output Document Format:</u>	<u>Number Included:</u>
MS Word Merge Templates:	up to 30
SSRS Custom Docs/Reports:	up to 40



*Please note that 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.*

**Interfaces Included in Your Cost Proposal:**

- GIS Integration (ArcGIS by ESRI)  
*ESRI Integration to <https:// Map Service Base map and Parcel Layer>*
- Finance Integration  
*Existing Finance General Ledger Software  
Our proposal includes accomplishing this Integration of via a nightly batch update.  
Payment transactions processed in iMS will be via a batch to your G/L*
- Electronic Payment Integration  
*(for Cardknox, AMS, US Bank, PayTrace, or Equivalent)*
- Document Management Integration (City’s existing Document Management System)
- Bluebeam Integration  
*iMS support integration with Bluebeam Revu (requires Studio Prime licenses). All desired electronic plan review management tools will be supported through this integration. Although we are not currently proposing integration with Bluebeam, iMS understands that this is something the city is considering later in the project and we will be prepared to assist, integrate, and support this interface at that time.*

**Software Hosted by iMS (SaaS/Hosting Fee)**

**City’s Ongoing Annual Fee**

**\$ 78,750.00 Yearly**



*Please NOTE: In addition, please note that for future budgeting purposes, iMS generally has a 5 % increase annually on your annual SaaS / Hosting Fee. Please budget accordingly for future years.*



**Software as a Service (SaaS) Items Included:**

- i. Hosting in the Cloud (Microsoft Azure)
- ii. 1 Production and 1 Test Environment of Your iMS Solution
- iii. Unlimited Technical Support
- iv. Functional Support
- v. Maintenance / Software Updates / Bug Fixes
- vi. Disk Space Allocation and Size, Re-Sizing when necessary

<b>Your Total Anticipated Project Costs for 1<sup>st</sup> Year:</b>	<b>\$ 681,188.00</b>
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*For your convenience, here is a summarized breakdown by category of your agency’s anticipated 1<sup>st</sup> Year Costs for the iMS Solution. We have also listed this as part of our response in Attachment A.*

\$ 236,250.00	Licensing of Software ( <b>one-time fee</b> )
\$ 366,188.00	Professional Services ( <b>one-time fee</b> )
\$ 78,750.00	Annual SaaS/Hosting Fee ( <b>annual recurring fee</b> )
\$ 681,188.00	Your Total First Year Project Costs

**iMS Standard Payment Terms:**



We outline iMS standard payment terms here but certainly recognize the City may have alternative requirements. We welcome an opportunity to discuss and agree on what works best for your project.

**iMS License Fees:**

- i. 100% due at Contract Execution/Signing

**Implementation/Professional Services Cost(s):**

- ii. 25% due at Contract Execution/Signing
- iii. 50% due upon Initial Delivery
- iv. 25% due End-User Training (Go-Live timeframe)

**Additional Items Concerning Hosting and/or SaaS Cost(s) / Annual Fees:**

- i. Paid annually, in advance
- ii. First period starts upon installation of Implementation server in the Cloud

**These Items are not Included in our Cost Proposal:**



- i. Hardware or peripheral devices (i.e., credit card readers, POS workstations, mobile devices, etc.)
- ii. Any additional interfaces not itemized in RFP or in our proposal response
- iii. Any third-party products or services required to implement integrations (i.e., upgrading if necessary to Bluebeam Studio Prime, Selectron’s upgrade costs, etc.).

iMS Optional Project Components:

**Selectron (Certified Business Partner):**

- i. Interactive Voice Response (IVR)
- ii. SelecTXT - fully integrated interactive text messaging service to schedule, re-schedule and cancel inspections Schedule, reschedule, and cancel inspections. Include comments/instructions for inspectors. Request follow up on results or view inspection results



*Please NOTE: We partner with Selectron, and we are including a PDF of these complimentary products. More pricing or information can be provided at your request.*

**Electronic Plan Review Solution Providers - Bluebeam**

- i. Electronic Plan Review - currently today, iMS can interface to either of our business partners. We also believe integrating to other providers in this solution space can easily be done but more research will need to be done if your agency selects or already has one of these licensed. For all customers

**Annual SaaS/Hosting Cost:**

This cost is your annual maintenance/hosting/SaaS fee. It represents your ongoing budgetary dollar amount for continued service. 5% per year budgetary increase for CPI is expected and included in our calculations as requested for 5 Year totals below.

**Total Anticipated Five-Year (5) iMS Investment Cost:**

\$ 681,188.00	Your Total <b>First Year</b> Project Costs
\$ 82,688.00	Your Total <b>Second Year</b> Project Costs
\$ 86,822.00	Your Total <b>Third Year</b> Project Costs
\$ 91,163.00	Your Total <b>Fourth Year</b> Project Costs
\$ 95,720.00	Your Total <b>Fifth Year</b> Project Costs

**City’s Five-Year Investment: \$ 1,037,582.00**



Verified and acknowledged by:

**Vance Bradshaw**  
**President and CEO of Intuitive Municipal Solutions**



## Additional Attachments and Notes

We have attempted to include all attachments that were not required to be in an Excel (either .xls or .xlsx) format in this RFP PDF submission by iMS. The other four (4) required attachments are included in our .zip file or as attachments to our submission. Should the City require any clarifications or additional needs on this matter, please reach out to Scott Christensen and he will be happy to assist.

Proposers must upload electronic copies of all files to the city website: [www.ci.richmond.ca.us/bids](http://www.ci.richmond.ca.us/bids) . Attachments not listed in the table below do not have a required file format and may be supplied in either the original file format or PDF.

RFP Section	Attachment/Document	Required File Format
<b>Error! Reference source not found.</b>	Attachment 10 (Level of Effort)	Microsoft Excel (.xls or .xlsx)
<b>Error! Reference source not found.</b>	<b>Error! Reference source not found.</b>	Microsoft Excel (.xls or .xlsx)
<b>Error! Reference source not found.</b>	<b>Error! Reference source not found.</b>	Microsoft Excel (.xls or .xlsx)
D.13	Attachment 13 (Interface List)	Microsoft Excel (.xls or .xlsx)
D.14	Attachment 14 (Anticipated Conversions)	Microsoft Excel (.xls or .xlsx)



# Procurement Disclosure Statement for LLC for iMS

## Disclosure Statement for Limited Liability Companies

This Statement Shall be included with all Bid and Proposal Submissions

Is your Business a Limited Liability Company (LLC)?  YES  NO

If you answered YES, please provide the City with the names and business addresses of any and all shareholders, directors, officers, members, managers, other authorized persons, partners, and "Beneficial Owners" of the applying LLC. A Beneficial Owner is any person or entity who: (1) exercises substantial control over the applying LLC; (2) owns 25% or more of the interest in the applying LLC; or (3) receives substantial economic benefits from the assets of the applying LLC. If any LLC shareholder, director, officer, member, manager, other authorized person, partner, or Beneficial Owner is itself an LLC or other business entity, the names and business addresses must also be provided for any and all shareholders, directors, officers, members, managers, other authorized persons, partners, and Beneficial Owners of that LLC or other business entity all the way up through each entity in the organizational chart until ultimate ownership by individual people is disclosed.

Name: Vance Bradshaw

Title: President

Address: 600 La Terraza Blvd. Escondido, CA 92025

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Address: \_\_\_\_\_

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Address: \_\_\_\_\_

Check this box if additional ownership information is attached to this Disclosure Statement.

In signing this Disclosure Statement, I represent that the information submitted in this Disclosure Statement, and any attachments, is true and correct.

Signature: Vance Bradshaw

Printed Name: Vance Bradshaw

Title: President

Date: 04/14/23





## Vendor Sanctuary City Compliance Certification for iMS

### CITY OF RICHMOND Sanctuary City Compliance Statement

The undersigned, an authorized agent of **Intuitive Municipal Solutions (iMS)** (hereafter "Contractor"), has had an opportunity to review the requirements of City of Richmond Ordinance 12-18 (hereafter "Sanctuary City Contracting Ordinance" or "SCCO"). Contractor understands and agrees that the City may choose with whom it will maintain business relations and may refrain from contracting with any person or entity that provides Data Broker or Extreme Vetting services to the U.S. Immigration and Customs Enforcement Division of the United States Department of Homeland Security ("ICE"). Contractor understands the meaning of the following terms used in the SCCO:

- a. "Data Broker" means either of the following:
  - i. The collection of information, including personal information about consumers, from a wide variety of sources for the purposes of reselling such information to their customers, which include both private-sector business and government agencies;
  - ii. The aggregation of data that was collected for another purpose from that for which it is ultimately used.
- b. "Extreme Vetting" means data mining, threat modeling, predictive risk analysis, or other similar services."

Contractor understands that it is not eligible to receive or retain a City contract if at the time the Contract is executed, or at any time during the term of the Contract, it provides Data Broker or Extreme Vetting services to ICE.

Contractor further understands and agrees that Contractor's failure to comply with the SCCO shall constitute a material default of the Contract and the City Manager may terminate the Contract and bar Contractor from bidding on future contracts with the City for five (5) years from the effective date of the contract termination.

By executing this Statement, Contractor certifies that it complies with the requirements of the SCCO and that if at any time during the term of the Contract it ceases to comply, Contractor will promptly notify the City Manager in writing. Any person or entity who knowingly or willingly supplies false information in violation of the SCCO shall be guilty of a misdemeanor and subject to a \$1,000 fine.

Based on the foregoing, the undersigned declares under penalty of perjury under the laws of the State of California that the foregoing is true and correct. Executed this 14th day of April, 2023, at Escondido, California.

Printed Name: Vance Bradshaw Title: President

Signed:  Date: April 14, 2023

Business Entity: Intuitive Municipal Solutions, LLC

Vendor SCCO Compliance Statement (Augt2020)



## Exhibit 1 - Sample Contract / Hosting Agreement

### **Sample iMS Software License and Implementation Agreement:**

#### **Software License and Implementation Agreement**

**THIS SOFTWARE LICENSE AND IMPLEMENTATION AGREEMENT** (the "Agreement")

**BETWEEN:**

Intuitive Municipal Solutions, LLC of 600 La Terraza Blvd, Escondido, CA 92025  
(the "Vendor")

**OF THE FIRST PART**

- AND -

The City of Richmond, California of 450 Civic Center Plaza, Richmond, CA 94804  
(the "Licensee")

**OF THE SECOND PART**

**BACKGROUND:**

The Vendor wishes to license and implement the Vendor's computer software for the Licensee and the Licensee desires to purchase the software license and implementation under the terms and conditions stated below.

**IN CONSIDERATION OF** the provisions contained in this Agreement and for other good and valuable consideration, the receipt and sufficiency of which is acknowledged, the parties agree as follows:

**Software License**

9. Under this Agreement the Vendor grants to the Licensee a perpetual, non-exclusive and non-transferable license (the "License") to use the Intuitive Municipal Solutions Software Suite (the "Software").
  
10. "Software" includes the executable computer programs and any related printed, electronic, and online documentation and any other files that may accompany the product.



11. Title, copyright, intellectual property rights and distribution rights of the Software remain exclusively with the Vendor. Intellectual property rights include the look and feel of the Software. This Agreement constitutes a license for use only and is not in any way a transfer of ownership rights to the Software.
12. The rights and obligations of this Agreement are personal rights granted to the Licensee only. The Licensee may not transfer or assign any of the rights or obligations granted under this Agreement to any other person or legal entity.
13. The Software may not be modified, reverse-engineered, or de-compiled in any manner through current or future available technologies.
14. Failure to comply with any of the terms under the Software License section will be considered a material breach of this Agreement.

#### **Limitation of Liability**

15. The Software is provided by the Vendor and accepted by the Licensee "as is". Liability of the Vendor will be limited to a maximum of the original purchase price of the Software. The Vendor will not be liable for any general, special, incidental, or consequential damages including, but not limited to, loss of production, loss of profits, loss of revenue, loss of data, or any other business or economic disadvantage suffered by the Licensee arising out of the use or failure to use the Software.
16. The Vendor makes no warranty expressed or implied regarding the fitness of the Software for a particular purpose or that the Software will be suitable or appropriate for the specific requirements of the Licensee.
17. The Vendor does not warrant that use of the Software will be uninterrupted or error-free. The Licensee accepts that software in general is prone to bugs and flaws within an acceptable level as determined in the industry.

#### **Warrants and Representations**

18. The Vendor warrants and represents that it is the copyright holder of the Software. The Vendor warrants and represents that granting the license to use this Software is not in violation of any other agreement, copyright, or applicable statute.

#### **Implementation Services**

19. Under this Agreement the Vendor shall perform the services identified in Exhibit A ("Scope of Work and Payment Schedule").



20. Implementation of the Software is limited to the following functional areas of the Licensee:

- a. Building
- b. Land Development
- c. Code Compliance
- d. Business License (BTR)

21. Implementation of the Software is limited to the following features and/or applications:

- a. iMSPermits
- b. iMSApprovals
- c. iMSEnforce
- d. iMSLicenses / iMSRenewals
- e. iMSPros
- f. iMSLocations
- g. Citizen Login
- h. Pro Login
- i. Anonymous Login
- j. Offline Inspection Results

#### **Payment Schedule**

22. The payment schedule will be as described in in Exhibit A ("Scope of Work and Payment Schedule").

#### **Acceptance**

23. All terms, conditions and obligations of this Agreement will be deemed to be accepted by the Licensee ("Acceptance") upon the execution and delivery hereof by each of the parties hereto of this agreement and an accepted purchase order, but in no event later than **June 30<sup>th</sup>, 2022**.

#### **Termination**

24. This Agreement will be terminated, the License forfeited, and all benefits will cease where the Licensee has failed to comply with any of the terms of this Agreement or is in breach of this Agreement.



### **Payment on Termination**

25. If this Agreement is terminated, the Licensee shall pay the Vendor for all services rendered up to the date of termination.

### **Force Majeure**

26. The Vendor will be free of liability to the Licensee where the Vendor is prevented from executing its obligations under this Agreement in whole or in part due to Force Majeure, such as earthquake, typhoon, flood, fire, and war or any other unforeseen and uncontrollable event where the Vendor has taken any and all appropriate action to mitigate such an event.

### **Governing Law**

27. The Parties to this Agreement submit to the jurisdiction of the courts of the State of Texas for the enforcement of this Agreement or any arbitration award or decision arising from this Agreement. This Agreement will be enforced or construed according to the laws of the State of Texas and venue is agreed to be in **Central Costa County, California.**

### **Miscellaneous**

28. This Agreement can only be modified in writing signed by both the Vendor and the Licensee.
29. This Agreement does not create or imply any relationship in agency or partnership between the Vendor and the Licensee.
30. Headings are inserted for the convenience of the parties only and are not to be considered when interpreting this Agreement. Words in the singular mean and include the plural and vice versa. Words in the masculine gender include the feminine gender and vice versa. Words in the neuter gender include the masculine gender and the feminine gender and vice versa.
31. If any term, covenant, condition or provision of this Agreement is held by a court of competent jurisdiction to be invalid, void or unenforceable, it is the parties' intent that such provision be reduced in scope by the court only to the extent deemed necessary by that court to render the provision reasonable and enforceable and the remainder of the provisions of this Agreement will in no way be affected, impaired or invalidated as a result.
32. This Agreement contains the entire agreement between the parties. All understandings have been included in this Agreement. Representations which may have been made by any party to this Agreement may in some way be inconsistent with this final written Agreement. All such statements are declared to be of no value in this Agreement. Only the written terms of this Agreement will bind the parties.



33. This Agreement and the terms and conditions contained in this Agreement apply to and are binding upon the Vendor's successors and assigns.

**Notices**

34. All notices to the parties under this Agreement are to be provided at the following addresses, or at such addresses as may be later provided in writing:

**Intuitive Municipal Solutions, LLC: 600 La Terraza Blvd, Escondido, CA 92025**  
**The City of Richmond, California of 450 Civic Center Plaza Richmond, CA 94804**

**Signatures**

The individuals signing below represent that they have the authority to sign this Agreement.

**City of Richmond, CA**

\_\_\_\_\_  
*Printed Name*

\_\_\_\_\_  
*Title*

\_\_\_\_\_  
*Signature*

\_\_\_\_\_  
*Date*

**Intuitive Municipal Solutions, LLC**

\_\_\_\_\_  
Vance Bradshaw, President

\_\_\_\_\_  
*Signature*

\_\_\_\_\_  
*Date*

**Software License and Implementation Agreement**



**EXHIBIT A**  
**SCOPE OF WORK AND PAYMENT SCHEDULE**

<u>On Site Meetings/Milestones</u>	<u>Total</u>
Process Review and Application Meetings	TBD
Initial Delivery of Application Workflows	TBD
Post-Submittal Workflow Meetings	TBD
End User Training	TBD
Go-Live Support	TBD

**NOTE: Meetings held remotely if on-site not possible due to health concerns (i.e., Covid, etc.)**

<u>Administrator Training</u>	<u>Total</u>
Held Remotely	TBD

<u>Output Document Format</u>	<u>Number Included</u>
Word Templates:	TBD
SSRS Documents/Reports:	TBD

**NOTE: The expected number of documents recommended here specifically for your project is specifically anticipated based on the scope of your project. The number of both types of documents is a Not To Exceed number and does not carry forward after go-live. Please leverage and use all these prior to final acceptance as there are no carry-forward balances from this portion of the project. There is also flexibility during the project implementation to combine, replace, switch document types as necessary to ensure 100% satisfaction based on both project team's needs. The expectation for this number of Output Documents (MS Word Templates and/or SSRS Documents/Reports) is that they will initially (first ½ of your project) be primarily created by the iMS project team with agency personnel training, observing, validating data, etc. In the second ½ of the implementation and to ensure agency personnel receive training on these important aspects, the roles will normally switch, and your team will take the lead, while iMS staff validate and assist as necessary.**

**Interfaces**

Only iMS software and services are included.

No software, licenses, or services from integration partners are included.

**Electronic Payment Integration**

Electronic Payment Integration (for Cardknox, AMS, US Bank, or Equivalent)



### **GIS Integration**

ESRI Integration to <https://> Map Service Base map and Parcel Layer

### **Finance Integration**

Automated export of transactions received previous day to Financial Software (via Nightly Batch Update)

### **Electronic Plan Review Software Integration**

iMS integration to Bluebeam Studio Prime

Please note that use of this integration requires licensing that the City may not otherwise have. If not available, PDF documents can be exchanged via standard iMS methods.

### **Document Imaging Integration**

Document Management integration via URL (system passes permit number, etc.)

Includes nightly export of documents for FTP retrieval if desired

### **Data Migration**

#### **Community Development (CentralSquare's TRAKIT System)**

Migration of Permits, Land Development Records, Code Cases, BTR Records, Contractors, and Parcels from existing TRAKIT system.

#### **Assessor (Parcel and Ownership)**

Initial Migration and ongoing update routine for refreshing iMSLocations, if necessary

### **Services Included**

- System Installation
- Project Management
- On-Site Meetings
- Software Configuration
- Documents and Reports
- Data Migration
- Interfaces
- Training
- Travel Cost (Flights/Lodging/Meals, etc.)

### **License and Implementation Payment Schedule**

- 25% Contract Signing
- 50% Initial Delivery
- 25% End User Training/Go Live/Acceptance

### **NOT INCLUDED IN PROPOSAL**





Any Licensing, Integration, Enhancements or Services not explicitly identified above

**Estimated Project Timeline**

Our estimated project timeline provides a high-level overview of the work plan. The iMS Client Success Management (Project Management) team will manage software demonstrations, on-site training, and all the City’s specific system configuration that needs to occur. The iMS team will work closely with the City of Richmond, CA to directly manage the project and its timeline and complete data migration.

The following estimated schedule is provided to demonstrate a typical timeline for a successful project of this scope. A final SOW and schedule will be provided upon contract execution.

Below represents a breakdown of project services by phases, task, or key milestones:

**Deliverables and Project Sample**

*Based on your agency’s RFP, we anticipate that the entire iMS Suite Project will most likely 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 identify which tasks/milestones will be primarily responsible by iMS, the City of Richmond, CA, 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 provided information and prepare questions
4	(Team) ON-SITE - Process Review and Configuration Meetings
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 (iMS) Create Data Conversion (iMS) Create Documents
14	(City) Upload updated data sources (iMS) REMOTE install configured system

- iMS Tasks
- City of Richmond, FL
- Team Tasks



Week(s)	Task(s) / Milestones for Entire Project by Responsible Party
15	(Team) ON-SITE - Review Initial Delivery/Administrator Training
16-19	(City) Begin thoroughly testing <u>Applications</u> , <u>Conversion</u> , <u>Interfaces</u> and <u>Documents</u>
20	(City) Provide list of any <u>Application</u> , <u>Interfaces</u> and <u>Conversion</u> changes (iMS) REMOTE install <u>Reports</u>
21-23	(iMS) REMOTE Make Changes to <u>Applications</u> , <u>Conversion</u> , and <u>Interfaces</u> (City) Thoroughly test and evaluate <u>Documents</u> and <u>Reports</u>
24	(iMS) REMOTE Updated <u>Applications</u> , <u>Conversion</u> , and <u>Interfaces</u> provided (City) Provide list of any <u>Document</u> and <u>Report</u> changes
25	(Team) ON-SITE - Workflow meetings by department
27-30	(iMS) REMOTE configure <u>Workflows</u> (City) Final testing for <u>Applications</u> , <u>Interfaces</u> , <u>Conversion</u> , <u>Documents</u> and <u>Reports</u>
31	(iMS) REMOTE deliver revised <u>Workflows</u> (City) Provide final issues for <u>Applications</u> , <u>Interfaces</u> , <u>Conversion</u> , <u>Documents</u> and <u>Reports</u>
32-34	(City) Testing of <u>Workflows</u>  (iMS) REMOTE make final changes to <u>Applications</u> , <u>Interfaces</u> , <u>Conversion</u> , <u>Documents</u> and <u>Reports</u>
35	(iMS) REMOTE deliver final <u>Applications</u> , <u>Interfaces</u> , <u>Conversion</u> , <u>Documents</u> and <u>Reports</u> (City) Provide final list of <u>any</u> changes needed prior to go-live
36-37	(iMS) REMOTE any final adjustments
38	(City) Upload updated data sources (iMS) REMOTE install finalized system
39	(Team) ON-SITE - End User Training
40	(Team) ON-SITE - Go Live Support

Scheduling Note(s):



1. *Any City Task items that are not completed on time may result in the remainder of the schedule being moved. In addition, potential cost increase(s) may be incurred by having changes. All changes will be discussed between both project teams and mutually agreed upon.*
2. *Any changes to on-site days/visits within two weeks of scheduled trip may incur additional travel cost(s).*
3. *The distribution of your anticipated onsite number of days, **twenty-five (25)** will best be determined within your individual project scope following the initial kick-off call(s) and or Business Process Review (BPR) meetings and agreed upon by both project teams.*



## Exhibit 2 - Sample Hosting Agreement

### **Sample iMS Hosting, Technical Support and Maintenance:**

#### **Hosting, Technical Support, and Maintenance Agreement**

**THIS HOSTING, TECHNICAL SUPPORT, AND MAINTENANCE AGREEMENT** (the "Agreement")

**BETWEEN:**

**Intuitive Municipal Solutions, LLC of 600 La Terraza Blvd, Escondido, CA 92025**  
(the "Vendor")

**OF THE FIRST PART**

- AND -

**The City of Richmond, CA**  
(the "Client")

**OF THE SECOND PART**

#### **BACKGROUND:**

The Vendor wishes to host, support, and maintain computer software to the Client and the Client wishes to purchase the hosting, technical support, and maintenance under the terms and conditions stated below.

**IN CONSIDERATION OF** the provisions contained in this Agreement and for other good and valuable consideration, the receipt and sufficiency of which is acknowledged, the parties agree as follows:

#### **Hosting, Technical Support, and Maintenance**

35. Beginning on Acceptance, and for a period of One Year:
- a. The Client will be entitled to hosting services in Microsoft Azure at no additional cost. The Vendor will provide two (2) environments (i.e., a Production, and a Test environment) that include necessary software licenses and capacity to accommodate the Client's needs under this Agreement.
  - b. The Client will be entitled to maintenance, upgrades, and backups of the hosted environments at no additional cost.



- c. The Client will be entitled to unlimited technical support during iMS business hours (7:30 AM to 5:30 PM Pacific, Monday through Friday) at no additional cost. A contact number will be provided for critical issues outside of business hours. Support is provided via email, or phone. Phone support includes screen sharing when required.
- d. The Client will be entitled to regular software updates at no additional cost.
- e. The Client will be notified via email when an update becomes available at no additional cost. If the Client elects not to upgrade, they will not be able to take advantage of features and fixes added in that update.
- f. The Client will be entitled to a reasonable number of refreshes upon request per year of their test environment from production at no additional cost.
- g. The Client is also entitled to licensing costs for major upgrades that require services at no additional cost. In these cases, covered clients only incur the cost of the services required. An example of a major upgrade would be a change in the development platform or re-write of the program based on newly available programming tools. Such upgrades would be very infrequent but could require implementation services and training to successfully migrate.

#### **Hosting, Technical Support, and Maintenance Fee**

- 36. The annual fee for Hosting, Technical Support, and Maintenance is identified in “Licensing, Implementation, Maintenance, and Support Cost Proposal and Estimated Timeline” (the "Scope of Work"), due within 30 days of agreement execution.

#### **Hosting, Technical Support, and Maintenance Automatic Extension**

- 37. The annual fee for Hosting, Technical Support, and Maintenance in subsequent years will receive a 2% increase from the preceding year, and is due within 30 days of the Acceptance date anniversary:

Any gap in payment of the Hosting, Technical Support, and Maintenance fees will terminate this Automatic Extension clause and all Hosting, Technical Support, and Maintenance benefits will immediately cease.

#### **Data Access**

- 38. Client data will be used only to provide Client with the defined services and for purposes compatible with providing those services. Vendor will not use Client data or derived information for any commercial purposes. Client retains all rights, titles, and interests in and to their data, and Vendor acquires no rights to Client data other than the rights granted to provide the service. Vendor will not disclose Client data except as directed by the Client or as required by law.



### **Data Rights Retention**

39. Client will have the ability to request a client database backup and copy of Client files at any time during the term of service. In the event of expiration or termination of service, Vendor will make Client data (database backup and attached files) available to download for a period of 90 days after expiration or termination of service. At the end of the 90-day retention period, Vendor will delete Client data. Client is solely responsible for the retention or extraction of software provided by Client. Vendor has no liability for the deletion of data as described in this section.

### **Acceptance**

40. All terms, conditions and obligations of this Agreement will be deemed to be accepted by the Client ("Acceptance") upon the execution and delivery hereof by each of the parties hereto of this agreement and an accepted purchase order, but in no event later than **June 30<sup>th</sup>, 2022**.

### **Termination**

41. This Agreement will be terminated, the License forfeited, and all benefits will cease where the Client has failed to comply with any of the terms of this Agreement or is in breach of this Agreement.

### **Force Majeure**

42. The Vendor will be free of liability to the Client where the Vendor is prevented from executing its obligations under this Agreement in whole or in part due to Force Majeure, such as earthquake, typhoon, flood, fire, and war or any other unforeseen and uncontrollable event where the Vendor has taken any and all appropriate action to mitigate such an event.

### **Governing Law**

43. The Parties to this Agreement submit to the jurisdiction of the courts of the State of Texas for the enforcement of this Agreement or any arbitration award or decision arising from this Agreement. This Agreement will be enforced or construed according to the laws of the State of Texas and venue is agreed to be in **Central Costa County, California**.

### **Miscellaneous**

44. This Agreement can only be modified in writing signed by both the Vendor and the Client.
45. This Agreement does not create or imply any relationship in agency or partnership between the Vendor and the Client.



46. Headings are inserted for the convenience of the parties only and are not to be considered when interpreting this Agreement. Words in the singular mean and include the plural and vice versa. Words in the masculine gender include the feminine gender and vice versa. Words in the neuter gender include the masculine gender and the feminine gender and vice versa.
47. If any term, covenant, condition or provision of this Agreement is held by a court of competent jurisdiction to be invalid, void or unenforceable, it is the parties' intent that such provision be reduced in scope by the court only to the extent deemed necessary by that court to render the provision reasonable and enforceable and the remainder of the provisions of this Agreement will in no way be affected, impaired or invalidated as a result.
48. This Agreement contains the entire agreement between the parties. All understandings have been included in this Agreement. Representations which may have been made by any party to this Agreement may in some way be inconsistent with this final written Agreement. All such statements are declared to be of no value in this Agreement. Only the written terms of this Agreement will bind the parties.
49. This Agreement and the terms and conditions contained in this Agreement apply to and are binding upon the Vendor's successors and assigns.

#### Notices

50. All notices to the parties under this Agreement are to be provided at the following addresses, or at such addresses as may be later provided in writing:

**Intuitive Municipal Solutions, LLC: 600 La Terraza Blvd, Escondido, CA 92025**

**The City of Richmond, California of 201 Highland Avenue, N, Richmond, FL 33770**



The individuals signing below represent that they have the authority to sign this Agreement.

**City of Richmond, California**

\_\_\_\_\_  
*Printed Name*

\_\_\_\_\_  
*Title*

\_\_\_\_\_  
*Signature*

\_\_\_\_\_  
*Date*

**Intuitive Municipal Solutions, LLC**

\_\_\_\_\_  
Vance Bradshaw, President

\_\_\_\_\_  
*Signature*

\_\_\_\_\_  
*Date*



## iMS Point of Contact for RFP and iMS Non-Disclosure

Sincere thanks for the opportunity to present our responses and proposed software solution to The City of Richmond, CA. We appreciate the time your team will require to review our proposal and iMS. Furthermore, we truly hope that you can envision using our software and collaborating with our team on a day-to-day basis. We are genuinely excited by the prospect of welcoming your agency as a customer.

Please feel free to reach out to any one of our team members if you have any questions. For matters related to this RFP specifically, please reach out to your dedicated Senior Account Executive, Scott Christensen.

Scott's direct contact information is:

**Scott Christensen**  
[scott@ims16.com](mailto:scott@ims16.com)

Office: (747) 222-8822, ext. 707  
Mobile: (407) 314-3398

Intuitive Municipal Solutions (iMS)  
600 La Terraza Blvd  
Escondido, CA 92025

In addition, I personally wish to let you know if I can be of assistance on any matter, please do not hesitate to reach out to me directly.

Thank you again,



Vance Bradshaw  
President and CEO of Intuitive Municipal Solutions



## iMS Non-Disclosure Statement

The terms and conditions contained in this iMS response to your RFP, and our corresponding proposal normally expires **60 days** from the date of this RFP response, unless renewed, extended, or terminated earlier by written notice from Intuitive Municipal Solutions, LLC. Unless otherwise stated, any applicable taxes are not included and are the sole responsibility of the client. Any modification pricing provided in this proposal is an estimate only. Detailed analysis of your specific requirements is needed prior to providing exact pricing. This proposal is protected by copyright law and contains proprietary and confidential trade secrets belonging to Intuitive Municipal Solutions. This proposal is furnished and accepted on the express condition that portions of it shall not be duplicated or disclosed, in whole or in part, except to your staff and agents when necessary for evaluation purposes, without prior written consent of Intuitive Municipal Solutions. Those confidential portions include, but are not limited to, pricing and client lists. All such proprietary information is clearly marked for your convenience. Any portions of this proposal that are not marked proprietary or confidential shall be available for public disclosure.

**CONFIDENTIAL AND PROPRIETARY**  
**© 2023 All Rights Reserved**

## Disclosure Statement for Limited Liability Companies

This Statement Shall be included with all Bid and Proposal Submissions

Is your Business a Limited Liability Company (LLC)?

YES  NO

If you answered YES, please provide the City with the names and business addresses of any and all shareholders, directors, officers, members, managers, other authorized persons, partners, and "Beneficial Owners" of the applying LLC. A Beneficial Owner is any person or entity who: (1) exercises substantial control over the applying LLC; (2) owns 25% or more of the interest in the applying LLC; or (3) receives substantial economic benefits from the assets of the applying LLC. If any LLC shareholder, director, officer, member, manager, other authorized person, partner, or Beneficial Owner is itself an LLC or other business entity, the names and business addresses must also be provided for any and all shareholders, directors, officers, members, managers, other authorized persons, partners, and Beneficial Owners of that LLC or other business entity all the way up through each entity in the organizational chart until ultimate ownership by individual people is disclosed.

Name:   **Vance Bradshaw**  

Title:   **President**  

Address:   **600 La Terraza Blvd. Escondido, CA 92025**  

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Address: \_\_\_\_\_

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Address: \_\_\_\_\_

Check this box if additional ownership information is attached to this Disclosure Statement.

In signing this Disclosure Statement, I represent that the information submitted in this Disclosure Statement, and any attachments, is true and correct.

Signature:   *Vance Bradshaw*  

Printed Name:   Vance Bradshaw  

Title:   President  

Date:   04/14/23





## Schedule 1: Summary

Vendor: **Intuitive Municipal Solutions (iMS)**

Cost Categories	Total Costs	Explanation/Notes (if necessary)
<b>Project Costs</b>		
Software Fees (Schedule 2)		
Initial Costs	\$ 236,250	These are the Licensing Fee(s) for the iMS Suite of Products for the City of Richmond. These are one-time license fees for the purchase of a perpetual license with unlimited users for those departments that are in scope for the RFP.
Maintenance Costs	\$ -	
SaaS/Hosting Costs (5 Years)	\$ 435,143	Total of all five years with an assumed CPI @ 5% per year. Please see totals in the 2-Software Tab under Comments Section for entire breakdown.
Professional Services (Schedules 3):	\$ 366,188	The Professional Services include all items under our scope; Project Management, BPR, Conversion of Data, etc. This number also include up to the number of onsite visits required and no additional Travel and Expenses (T/E) will be added.
Other Fees (Schedule 4)	\$ -	
<b>Total Cost</b>	<b>\$ 1,037,581</b>	<b>Total five (5) year cost for your iMS Investment</b>

**Schedule 2: Software Fees**

Vendor: **Intuitive Municipal Solutions (IMS)**

PRODUCT NAME (Only list software products that would be required in addition to those listed in the IRFP)	FUNCTION	ACCESS LIMITATIONS (CONCURRENT USERS, NAMED USERS, CPU, ENTERPRISE)	QUANTITY PROPOSED **	INITIAL COST	MAINTENACE COSTS (5 YEARS)	HOSTING /SAAS / MANAGED SERVICES (5 YEARS)	
<i>The IMS Suite of Products per our RFP response including the following: IMS Permits, iMSApprovals, iMSEnforce, iMSLicensing and Renewals, iMSPros and iMSLocations</i>	All Land Management System Functionality for Building, Land Development, Code Compliance and Enforcement, Business Licensing and Tax Receipts, State Contractors, Parcel and Ownership data as well as Customer Requests.	Unlimited Licensing with iMS for all Departments that are part of the scope of the RFP / Project.	1	\$236,250.00		\$435,143.00	Annual Hosting/SaaS Fee for Year is \$78,750.00. Assuming a CPI of 5 % per year in years 2-5, the total amount would be \$435,143.00.  Year 1 = \$78,750.00 Year 2 = \$82,688.00 Year 3 = \$86,822.00 Year 4 = \$91,163.00 Year 5 = \$95,721.00
<b>Total</b>			<b>1.00</b>	<b>\$ 236,250</b>	<b>\$ -</b>	<b>\$ 435,143</b>	

NOTE: \*\* Include any transaction based quantity assumptions in this column and provide cost supporting transaction assumption in the Initial Cost column.







## Functional Requirements

### Implementation Response Available Definitions (Column E)

Y	Requirement Met and Proposed (Standard features in the generally available product)
Y-ND	Requirement Met and Proposed (Features that are not offered as a generally available product or require custom development)
N	Requirement Not Met with Proposal
I	Need More Information/Discussion

### Column F: Available Responses (Column F)

S	Requirement and Feature Supported by Software Developer
TPS	Requirement and Feature Supported by Third Party
NS	Requirement and Feature Not Supported

### IF Y-ND Selected (Column J)

F	Feature Schedule for Future Release in Generally Available Software
E	Feature Developed as Enhancement for this Project

Req #	Process	Sub-Process	Requirement	
1	Business Tax / Business License	Application Process	Accepts permit applications online	Y
2	Business Tax / Business License	Fee Collection	Provide for calculation of standard fees with effective dates using user provided formulas or tables.	Y
3	Business Tax / Business License	Fee Collection	Track fee collections and receivables, provide for late penalties as appropriate, and generate payment receipts.	Y
4	Business Tax / Business License	Fee Collection	Provide for the calculation of a fee estimate for printing in a City-defined format.	Y

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Req #	Process	Sub-Process	Requirement	
5	Business Tax / Business License	Fee Collection	Provide report for certain delinquent account types and convert the information into preset documents for mass mailing.	Y
6	Business Tax / Business License	Fee Collection	Provide capability to track an estimate of required fees.	Y

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Req #	Process	Sub-Process	Requirement	
7	Business Tax / Business License	Fee Collection	Schedule and collect fees for consults in instances where a site visit is needed, but no work requiring a permit has been done.	Y
8	Business Tax / Business License	Fee Collection	Set variable rates by business type or category.	Y
9	Business Tax / Business License	Fee Collection	Ability to set flat rates based on specific charge codes.	Y
10	Business Tax / Business License	Fee Collection	Set rates by occupancy type, construction type, square footage and project categories. Allow tiered rates within those parameters.	Y

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Req #	Process	Sub-Process	Requirement	
11	Business Tax / Business License	Fee Collection	Set rates by custom capacity fee based on square footage and usage type.	Y
12	Business Tax / Business License	Fee Collection	Ability to develop custom fee calculations.	Y
13	Business Tax / Business License	Fee Collection	Define project categories that allow for different payment plans (full fees upfront, partial fees at defined stages of the project based on category business rules)	Y
14	Business Tax / Business License	Fee Collection	Ability to assess multiple fees including plan check fee and all permit types	Y

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Req #	Process	Sub-Process	Requirement	
15	Business Tax / Business License	Fee Collection	Allows application/permit fees to be entered in a "temporary" or "pending" manner to allow for the issuance of the application/permit and the collection of the fees to take place on a later day.	Y
16	Business Tax / Business License	Fee Collection	Allows for funds to be posted for a contractor/realtor and "drawn down" as applications/permits are issued.	Y
17	Business Tax / Business License	Fee Collection	Allows for pre-payments on deposit for contractor/realtors.	Y
18	Business Tax / Business License	Fee Collection	Fees are table-based with effective dates, such that fee changes are easily modified by authorized personnel.	Y

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Req #	Process	Sub-Process	Requirement	
19	Business Tax / Business License	Fee Collection	Ability to modify fees.	Y
20	Business Tax / Business License	Fee Collection	Edit and calculate fees by different variables for different permit types (fixed rate, square footage, etc.)	Y
21	Business Tax / Business License	Fee Collection	Integrates with a cashiering system that allows for fee collection and receipt printing.	Y
22	Business Tax / Business License	Fee Collection	Apply fees electronically to the accounts specified.	Y

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Req #	Process	Sub-Process	Requirement	
23	Business Tax / Business License	Fee Collection	Assess fees for applications, permits, licenses, inspections, and penalties.	Y
24	Business Tax / Business License	Fee Collection	Accept fees from the City's central cashiering system.	Y
25	Business Tax / Business License	Fee Collection	Allow for additional fees on a permit including re-inspection fees, administrative fees, and plan review fees.	Y
26	Business Tax / Business License	Fee Collection	Ability to open permits and add and re-issue fees.	Y



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Req #	Process	Sub-Process	Requirement	
27	Business Tax / Business License	Fee Collection	Allow for the collection and tracking of fees for other agencies (state, county)	Y
28	Business Tax / Business License	Fee Collection	Allow for waiver of fees in special condition.	Y
29	Business Tax / Business License	Fee Collection	Allows for the establishment of various fee structures.	Y
30	Business Tax / Business License	Fee Collection	Calculate permit fees based on a fee schedule. System must provide the capability to change the fee schedules and calculation routines.	Y

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Req #	Process	Sub-Process	Requirement	
31	Business Tax / Business License	Fee Collection	Capability to export transactions to finance (revenue) module - General Ledger.	Y
32	Business Tax / Business License	Fee Collection	Capable of calculating estimated fees for permits without creating the permit.	Y
33	Business Tax / Business License	Fee Collection	Record company account information.	Y
34	Business Tax / Business License	Fee Collection	Support future date effective fee structures.	Y

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Req #	Process	Sub-Process	Requirement	
35	Business Tax / Business License	Fee Collection	All fees/permit charge codes are assigned a related GL revenue code	Y
36	Business Tax / Business License	Fee Collection	Ability to run mass Business License renewal letters to collect renewal fees	Y
37	Business Tax / Business License	Fees / Charges	System can calculate standard fees using effective dates and user-provided formulas or tables	Y
38	Business Tax / Business License	Fees / Charges	System allows City to set variable rates by business type or category	Y

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Req #	Process	Sub-Process	Requirement	
39	Business Tax / Business License	Fees / Charges	System allows City to set rates by occupancy type, construction type, square footage and project categories and allows tiered rates within those parameters	Y
40	Business Tax / Business License	Fees / Charges	System has the ability to assess multiple fees including plan review fees and all permit types	Y
41	Business Tax / Business License	Fees / Charges	System allows for pre-payments on deposit for contractor/developers	Y
42	Business Tax / Business License	Fees / Charges	System allows for waiver of fees in special conditions	Y

## Functional Requirements

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Req #	Process	Sub-Process	Requirement	
43	Business Tax / Business License	Fees / Charges	Integrates with a cashiering system that allows for fee collection and receipt printing	Y
44	Business Tax / Business License	Fees / Charges	Allow for the collection and tracking of fees for other agencies (state, county)	Y
45	Business Tax / Business License	General	System supports issuance of various types of licenses, including (Insert license type) (indicate any limitations in the comments column)	Y
46	Business Tax / Business License	General	System can classify businesses and assess/collect licenses due to the City in accordance with the City's Licensing Ordinances and Measure U	Y

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Req #	Process	Sub-Process	Requirement	
47	Business Tax / Business License	General	System utilizes workflow to accommodate the City business rules for each type of license	Y
48	Business Tax / Business License	General	System allows for multiple classification codes on the same business license	Y
49	Business Tax / Business License	General	System can track businesses that may be exempt from a certain license type	Y
50	Business Tax / Business License	General	System allows businesses to apply for and renew licenses online	Y

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Req #	Process	Sub-Process	Requirement	
51	Business Tax / Business License	General	System can create user-defined renewal letters for each type of license	Y
52	Business Tax / Business License	General	System can generate business license certificate and user/customer can print certificate from system	Y
53	Business Tax / Business License	General	System tracks delinquent payments for licenses	Y
54	Business Tax / Business License	General	System defines an expiration date for each business license issued	Y

## Functional Requirements

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Req #	Process	Sub-Process	Requirement	
55	Business Tax / Business License	General	System workflow to notify appropriate staff that a license is approaching the expiration	Y



**ated Interfaces**

**an: Available Responses**

Permanent	System cannot be replaced by ERP. Permanent interface is required
Temporary	System must temporarily exist during implementation
Go-Away	System is replaced

**tion: Available Responses**

C	Configurable Solution
P	Customized developed program

**ort: Available Responses**

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NO.	Main Application	Interface Description	Inbound, Outbound or Both	Vendor Response Section							8
				1	2	3	4	5	6	7	
				Interface Plan	Type of Solution	Consultant Work Effort (in hours)	Client Work Effort (in hours)	In Scope?	Included in Price?	Type of Support	Comments
1	Munis	ERP financial system	Both	Permanent	P	40	0	Yes	Yes	S	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.
2	Bluebeam software	The ePlanSoft system is used to manage electronic documents to support the electronic plan review process. CAD system for architecture, engineering and construction document management software	Inbound	Permanent	P	20	0	Yes	Yes	S	Bluebeam or ePlanSoft? Either we can integrate to. Also, Project Dox by Avolve and ePermit Hub are business partners.
3	ESRI GIS	Geospatial/Land/Tax Data	Both	Permanent	P	40	0	Yes	Yes	S	
4	MicroSoft Outlook (Office 365)	Workflow, email communication and scheduling	Both	Permanent	P	10	0	Yes	Yes	S	
5	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.	Outbound	Permanent	P	40	0	Yes	Yes	S	
6	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.	Both	Permanent	P	15	0	Yes	Yes	S	
7	Tyler Data and Insights	Tyler Reporting	Outbound								
8	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.	Both								
9	Socrata	Transparent Richmond	Outbound								
10	TLO	GIS, land information, owner	Inbound								
11	Parcel Quest	GIS, land information, owner	Inbound								

