



CITY OF RICHMOND

Standard Contract Approval and Execution Routing Slip

Contractor Name: iMS Contract# 6855 BL# 40065428 Exp. Date: 12/06/2024
 Description of Services Enterprise Community Development Land Management System Vendor # 16320
 Department: IT Project Manager: Sandi Wong Phone: 510-620-6745
 Initial Contract Amount: \$ 1,157,120.82 Term of Contract: 5 Years
 Total Contract: \$ 1,758,596
 Initial Contract: Amendment: 1 2 3 4 Amendment \$ _____

Step 1: Staff Preparation

- | | <u>Check One</u> | <u>Attach</u> |
|---------------------------|---|-------------------------------------|
| 1. Check One | <input type="checkbox"/> Emergency Justification | (Please Attach) |
| | <input type="checkbox"/> Sole Source Approval Signed | (Please Attach) |
| | <input checked="" type="checkbox"/> Evidence of Competitive Bidding | (Please Attach) |
| | 2. Prepare Scope of Work | <input checked="" type="checkbox"/> |
| | 3. Add Insurance Provisions | <input checked="" type="checkbox"/> |
| | 4. Obtain Tentative Contractor Approval (Scope of Work, General Conditions, Insurance Provisions) | <input checked="" type="checkbox"/> |
| | 5. Prepare Contract | <input checked="" type="checkbox"/> |
| 8. Check Applicable boxes | <input checked="" type="checkbox"/> Council Approval (over \$10,000) (Council Meeting Date) _____ | <input checked="" type="checkbox"/> |
| | <input type="checkbox"/> Finance Committee Approval (over \$100,000) (Committee Meeting Date) _____ | <input checked="" type="checkbox"/> |
| | <input type="checkbox"/> This contract is grant funded by _____ | <input checked="" type="checkbox"/> |

Step 2: Council Approval Process (Contracts above \$10,000)

Using Agenda Plus System to Place Items on the City Council Agenda for Action

Step 3: After City Council Approval, Project Manager Executes Contract by

Obtaining contractor signature on 3 original contracts and attaching Insurance Certificate and additional Insurance Endorsement

Step 4: Submit Contractor Signed Documents to City Clerk

City Clerk ensures that contract received City Council approval that took place at the _____ Council meeting. _____ City Clerk Signature

	<u>Delivered Date</u>	<u>Return Date</u>
City Attorney	_____	_____
Mayor	_____	_____
City Clerk	_____	_____

City Clerk will return two original documents to Project Manager for the contractor and department and place a copy on the Intranet

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Software License, Implementation, Hosting, Technical Support, and Maintenance Agreement

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

BETWEEN:

Intuitive Municipal Solutions, LLC of 541 N Mt Juliet Rd, Suite 2201B, Mount Juliet, TN 37122
(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 grant a license and implement IMS Software and Partner Subscription Services (collectively "the Software") for the Licensee and the Licensee desires to purchase the software license and implementation services 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

1. 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 "IMS Software").
2. "IMS Software" includes the executable computer programs and any related printed, electronic and online documentation and any other files that may accompany the product.
3. Title, copyright, intellectual property rights and distribution rights of the IMS Software remain exclusively with the Vendor. Intellectual property rights include the look and feel of the IMS Software. This Agreement constitutes a license for use only and is not in any way a transfer of ownership rights to the Software.
4. 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.
5. The IMS Software may not be modified, reverse-engineered, or de-compiled in any manner through current or future available technologies.
6. Failure to comply with any of the terms under the Software License section will be considered a material breach of this Agreement.

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Permit Rocket Subscription Services

Section 7-11 apply only to the Licensee's use of the software from Permit Rocket Software LLC.

7. **Subscription Services.** Subject to the terms and conditions of this Agreement, Vendor will make the Digital Plan Room software-as-service technologies from Permit Rocket Software LLC dba ePermitHub ("Partner"), together with related Software and documentation (collectively "Partner Subscription Services") available to Licensee by means of Vendor resell agreement with Partner.
8. **Hosting.** The Partner Subscription Services (including Software, as applicable) will be hosted by Partner at a physically secure, commercial third-party hosting facility. Partner will be responsible for maintaining standards at such facility and for implementing suitable network security measures to minimize the likelihood of unanticipated interruptions to the Partner Subscription Services. With respect to any Software that is provided to Licensee for use "on premise": (a) Partner through resell agreement with Vendor hereby grants Licensee non-exclusive, non-transferable, non-sublicensable, royalty-free license to use such Software during the Term only in connection with Licensee's use of the Partner Subscription Services; (b) Licensee may download the Software onto its systems or devices; and (c) Licensee will be responsible for obtaining and maintaining any equipment and ancillary services needed to connect to, access or otherwise use the Software and Partner Subscription Services, including modems, hardware, servers, software, operating systems, networking, and web servers.
9. **Prohibited Use.** Licensee will not, and will ensure that its Users do not, directly or indirectly, (i) modify, rent, sublease, sublicense, assign, use as a service bureau, copy, lend, adapt, translate, sell, distribute, create derive works from, decompile, disassemble, reverse engineer or otherwise attempt to discover the source code, object code or underlying structure, ideas, know-how, processes or algorithms relevant to the Software or Partner Subscription Services or remove any proprietary notices or labels affixed on or delivered with the Software or Services. Although Partner has no obligation to monitor Licensee's use of the Software or Partner Subscription Services, Partner may do so and may prohibit any use of the Software or Partner Subscription Services it believes are or may be in violation of this Agreement, with notice to Partner that includes a description of the actual or suspected violation.
10. **Licensee's Commitments.** Licensee represents and warrants that Licensee and its Users will use the Software and Partner Subscription Services, including any Customer Data associated with such use, only as permitted by this Agreement and in compliance with all applicable laws and regulations. If Licensee becomes aware of any threats to the confidentiality or security of the Software or Partner Subscription Services that is or is likely to be caused by Licensee, its Users or the systems, technologies or software used by them, Licensee will promptly notify Vendor. As used herein, "**Customer Data**" means all non-public data, information, materials and content provided by Licensee to Vendor or Partner or used by Licensee in connection with the Partner Subscription Services, excluding Usage Data (as defined below).
11. **Reserved Rights.** As between the parties, (a) Licensee owns and retains all right, title and interest in and to the Customer Data; and (b) Vendor and Partner respectively own and retain all right, title and interest in and to (i) the Software and Partner Subscription Services, and all improvements, enhancements or modifications thereto, (ii) any software, applications, inventions or other technology developed in connection with Professional Services or Support, and (iii) all intellectual property rights related to any of the foregoing. No rights or licenses are granted by either Party except as expressly set forth in this Agreement.

Selectron Subscription Services

Section 12-20 apply only to the Licensee's use of the subscription services from Selectron.

12. **Access to Selectron Services.** Subject to the terms and conditions of this Agreement, including the Selectron End User License Agreement ("EULA"), attached hereto as Exhibit B which is incorporated into and made a part hereof, and the timely payment of all fees hereunder, Vendor will make available to Licensee, on a non-exclusive, nontransferable, nonsublicensable, limited, and revocable basis, during the Term, the Selectron Technologies Inc. ("Selectron") proprietary subscription services described in the Statement of Work attached hereto as Exhibit A ("Selectron Services"), solely in accordance with the standard documentation for the Selectron Services, as generally provided by Selectron to its other customers (the "Documentation") and the EULA and solely for Licensee's own internal business use. Except as set forth in

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this Section 12 or the EULA, Licensee will have no other right or license to the Selectron Services. At the termination or expiration of this Agreement, for any reason, the limit right to access the Selectron Services under this Section 12 will immediately terminate.

13. Selectron Services Restrictions. Licensee hereby acknowledges and agrees that it shall not use the Selectron Services for any purpose other than the purpose for which Selectron has developed the Selectron Services, and that it shall use the Selectron Services in accordance with the EULA and all applicable laws, rules, and regulations. Licensee shall not, and shall ensure that Authorized Users do not, directly or indirectly: (a) modify, rent, sublease, sublicense, assign, use as a service bureau, copy, lend, adapt, translate, sell, distribute, create derive works from, decompile, disassemble, reverse engineer or otherwise attempt to discover the source code, object code or underlying structure, ideas, know-how, processes or algorithms relevant to the Selectron Services or remove any proprietary notices or labels affixed on or delivered with the Selectron Services. Selectron may monitor use of the Selectron Services. In the event of any violation of this Section 13 or the terms of the EULA by Licensee or any person Licensee provides with access to the Licensed Software (whether or not such person is an employee that Licensee provides with access to the Selectron Services (“Authorized User(s)”), Selectron may require that Vendor terminate the provision of the Selectron Services under this Agreement.
14. Authorized Users; Licensee Identification and Passwords. Licensee shall not permit any person to access the Selectron Services other than employees whom Licensee has designated as Authorized Users. Each individual natural person shall be a separate Authorized User for purposes of this Agreement. Licensee shall create or request that Selectron create unique log-in credentials, consisting of a “User Identification” and “User Password”, for each individual Authorized User who shall be accessing the Selectron Services. Licensee hereby acknowledges that Licensee and its Authorized Users bear sole responsibility for protecting the confidentiality of all User Passwords and shall remain fully responsible and liable for (and Selectron shall not be responsible or liable for) any unauthorized use of any User Identifications or User Passwords. Licensee shall not share or disclose, and shall not permit any Authorized User to share or disclose, such Authorized User’s log-in credentials with or to any other individual or entity, even if such other individual is also an Authorized User. A User Identification may not be transferred from one Authorized User to another Authorized User. Licensee shall promptly terminate (or cause to be terminated by requesting that Selectron terminate) the User Identification for any individual who ceases to be an Authorized User for any reason, including without limitation due to termination of such individual’s employment with Licensee. Licensee shall promptly notify Selectron if it discovers or suspects that any log-in credentials have been accessed or used by any person other than the Authorized User to which such log-in credentials were granted, in which case Selectron shall promptly reset or provide Licensee with a means of resetting the password associated with such log-in credentials.
15. Customer Tools. Licensee may permit its customers to access and use the Customer Tools solely through Licensee’s website and/or an application that is set up and maintained as part of the Selectron Services, and solely for the purpose of enabling such customers to (a) receive notifications sent by or on behalf of Licensee, (b) make payments to Licensee, (c) view their invoices from Licensee and history of payments to Licensee, and (d) update their contact information with Licensee. “Customer Tools” mean the Selectron Services components and interfaces that, as described in the Documentation, are designed and intended to be accessed by customers of Licensee through an application that is set up and maintained as part of the Selectron Services and/or Licensee’s website.
16. Updates, Maintenance, and Technical Support. Licensee understands and agrees that Selectron may make modifications and updates to the Selectron Services from time to time. Modifications or updates to current features and functions built into the current version of Subscription Services shall be provided at no additional charge to Licensee. In the event Selectron makes new features or functions available and does not remove any existing features or functionality, Selectron may determine in its sole discretion whether to provide such modifications and updates to Licensee and its other customers as an update to the Selectron Services provided hereunder, or whether such modifications and updates will be issued as a separate or new product or premium version of the Selectron Services that is available only at an additional charge.
17. Internet Security. Selectron Services are made available through the internet and may be used to access and transfer information over the internet. Licensee is solely responsible for the security and integrity of information it transfers from the Selectron Services, if any. No representations or warranties to Licensee are made regarding (a) the security or privacy of Licensee’s network environment, or (b) any third-party technologies or services not included in the Software ability to meet Licensee’s security and privacy needs. These third-party technologies and services may include, but are not limited to, operating systems, database management systems, web servers, and payment processing services. Licensee is solely responsible for ensuring a secure environment for information it transfers from the Selectron Services, if any.

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18. Outbound Services Disclaimer. Outbound services are intended to create additional methods of communication for Licensee's employees who use the Selectron Services in support of existing processes. These services are not intended to replace all interaction with Licensee's end users or employees. While the outbound services have been created with the best available tools and practices, they are dependent on infrastructure that is inherently not fail-proof including, but not limited to, infrastructure such as software, computer hardware, network services, telephone services, and e-mail. Examples of situations that could cause failure include but are not limited to: down phone lines, all lines busy, equipment failure, email address changes, and Internet service disruptions. For this reason, while outbound services are valuable in providing enhanced communication, they are specifically not designed to be used as the sole method to deliver critical messages. Licensee acknowledges that it is aware of the potential hazards associated with relying on an automated outbound service feature, when using the Selectron Services, and Licensee acknowledges and agrees that it is giving up in advance any right to sue or make any claim against Selectron, and that Licensee forever releases Selectron from any and all liability caused by (a) any failed call attempts (including excess of calls over and above network or system capacity), incomplete calls, or any busy-outs; (b) any failure to transmit, obtain or collect data from callers or for human and machine errors, faulty or erroneous input, inarticulate caller communication, caller delays or call lengths exceeding estimated call lengths or omissions, delays and losses in connection with the Selectron Services provided hereunder; or (c) if Licensee, Licensee's employees, or Licensee's end user suffer injury or damage due to the failure of outbound services to operate, even though Licensee does not know what or how extensive those injuries or damages might be, unless such losses were directly attributable to Selectron's gross negligence or willful misconduct.
19. Data Transfers Between Licensee and Selectron. The parties acknowledge that, to facilitate providing the Selectron Services, Selectron and Licensee shall regularly transfer Licensee data to each other. Licensee, not Selectron, is responsible for providing and maintaining a secure file transfer protocol for such transfer of Licensee data, and shall be responsible for maintaining the security of the system components, environment, and procedures of such file transfer protocol.
20. Licensee's Privacy Practices. Licensee acknowledges that the Licensee data includes information about individuals with whom Licensee, rather than Selectron, has direct relationships. Therefore, it is Licensee's obligation, and not Selectron's obligation, to provide any privacy notices or disclosures to, and obtain any consent from, such individuals as may be required by applicable law with respect to processing of the Licensee data by Selectron on Licensee's behalf. Licensee represents, warrants, and covenants to Selectron that (a) Licensee has the authority to transmit the Licensee data to Selectron; and (b) Selectron's collection, storage, transmittal, and other processing of the Licensee data on behalf of Licensee, as described in the Documentation and this Agreement, does not and will not violate any applicable laws, regulations, ordinances, contracts, policies, orders, or decrees to which Licensee is subject.

Confidentiality

21. General. The parties agree to hold each other's Confidential Information in strict confidence, not to use it in any way, commercially or otherwise, other than for the legitimate purposes of this Agreement, and not to disclose it to others. For purposes of this Agreement, "**Confidential Information**" means and will include any information, materials or knowledge that is disclosed by one party or its Affiliates ("**Discloser**") to the other party or its Affiliates ("**Recipient**") during the relationship contemplated by this Agreement and concerns Discloser and its business, including business plans, roadmaps, financial condition, products, programming techniques, suppliers, technology or research and development. Recipient agrees to take all actions reasonably necessary to protect the confidentiality of all Confidential Information, including implementing and enforcing procedures to minimize the possibility of unauthorized use or disclosure of Confidential Information and not using or disclosing the Confidential Information to any third party (except as necessary to perform the Services or where required by law or court order). All Confidential Information, if any, is provided "AS IS" and without any warranty, express, implied or otherwise, regarding its accuracy or performance.
22. Exceptions. Confidential Information will not include any information that: (a) is or becomes publicly known through no fault of Recipient; (b) was rightfully in Recipient's possession at the time of disclosure, without restriction as to use or disclosure; (c) has been rightfully received by Recipient from a third party without restriction as to use or disclosure; or (d) was developed by employees or agents of Recipient independently of and without access or reference to any information communicated to Recipient by Discloser. The Disclosing Party agrees that these obligations of confidentiality will cease to apply to any information after five (5) years following the Disclosing Party's first disclosure thereof (excluding in respect of any trade secrets of Vendor or Partner, which will remain Vendor's or Partner's Confidential Information in perpetuity).
23. Usage Data. Notwithstanding anything to the contrary in this Agreement or otherwise, Vendor, Partner, and Selectron may collect and analyze Usage Data and will be free, during and after the Term, to (i) use such information and data to improve and enhance the Services and Selectron Services and for other development, diagnostic and corrective purposes in

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connection with the Services and Selectron Services and other offerings, and (ii) use and disclose Usage Data pertaining to Licensee in aggregate or other de-identified forms in connection with business. As used herein, “*Usage Data*” means data and other information, including derivatives thereof, relating to the provision, use and performance of the Services and Selectron Services.

Limitation of Liability

24. 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.
25. With the exception of warranties outlined in this Agreement, the Vendor makes no warranty expressed or implied regarding the fitness of the Software, Partner Subscription Services, or Selectron Services for a particular purpose or that the Software, Partner Subscription Services, or Selectron Services will be suitable or appropriate for the specific requirements of the Licensee.
26. The Vendor does not warrant that use of the Software, Partner Subscription Services, or Selectron Services 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

27. Vendor warrants that:
 - a. Software will perform without Defects during the term of this Agreement. If the Software does not perform as warranted, Vendor will use all reasonable efforts, consistent with industry standards, to cure the Defect.
 - b. “Defect” means any failure of the Software or Services or component thereof to conform in any material respect with applicable Functional Requirements as defined and included in this Agreement as Exhibit C or any specifications mutually agreed to as part of any accepted Deliverable as define by an applicable Statement of Work.
 - c. Vendor will (a) perform the services in a professional, workmanlike manner, consistent with industry standards; (b) perform the services in a manner that complies with all applicable laws and regulations; (c) staff the project with a sufficient number of resources with skills and experience sufficient to perform services in accordance with the requirements of this Agreement; and (d) comply with applicable functional requirements in Exhibit A and Exhibit C or other plans or specifications approved by Vendor and the City in any approved deliverables or work products. In the event Vendor provides services that do not conform to this warranty, Vendor will timely re-perform such services at no additional cost to City.
28. Vendor warrants that (a) it will perform the Services in a manner that complies with all applicable laws and regulations, and (b) when City requirements are included in an SOW, the City shall provide all Services and Work Products to comply with identified functional requirements or other expectations listed in the applicable SOW.
29. In the event that any Service or Work Product fails to conform to the foregoing warranty in any material respect, Vendor will, at its expense, promptly use commercially reasonable efforts to cure or correct such failure.

Indemnification

30. By Licensee. Licensee will defend, indemnify and hold Vendor, Partner, Selectron and their officers, directors, employees and agents harmless from and against any liabilities, losses, damages and expenses, including court costs and reasonable attorneys’ fees (collectively, “**Losses**”), arising out of or in connection with any third-party claims; (i) arising from Licensee’s (or any User’s or Authorized User’s) use of the Services or Selectron Services in violation of this Agreement or applicable law; or (ii) alleging that Customer Data or the use thereof in accordance with this Agreement infringes or misappropriates a party’s intellectual property or other rights therein.
31. By Vendor, Partner, and Selectron. To the fullest extent permitted by law, Vendor will defend, indemnity and hold Licensee and its officers, directors, employees and agents harmless from and against any Losses arising out of a third-party claim (i) that the Software or Services infringe any United States patent or any copyright or misappropriate of any trade secret or (ii) arising from Vendor, Partner, or Selectron’s gross negligence or willful misconduct in performance of the Services. The foregoing obligations do not apply (i) with respect to portions or components of the Software or Services not supplied by Vendor, Partner, or Selectron, made in whole or in part in accordance with Licensee’s direction or specifications, modified after delivery by Licensee, or combined with other processes or materials where the alleged infringement relates to such supply, use, modification or combination; (ii) where Licensee continues allegedly infringing activity after being notified

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thereof or after being informed of modifications that would have avoided the alleged infringement; or (iii) with respect to any use of the Software or Services in violation of this Agreement or applicable law.

- a. Notwithstanding the foregoing, in the event a particular design, process or product of a particular manufacturer is specified by City in writing, City shall defend, indemnify and hold Vendor, Partner, or Selectron harmless from any suits or claims of patent or copyright infringement arising out of Vendor, Partner, or Selectron 's use of those specified designs, processes or products. City does not, however, consent to or authorize the unauthorized, unlicensed or otherwise impermissible use of any patented or copyrighted designs, processes, or products by Vendor, Partner, or Selectron. Therefore, if Vendor, Partner, or Selectron has any reason to believe the use of a specified design, process or product would result in the infringement of any patents or copyrights, Vendor, Partner, or Selectron shall promptly provide written notice thereof to City.
- b. If Vendor, Partner, or Selectron is subject to a claim of patent or copyright infringement, then Vendor, Partner, or Selectron hereby agrees to provide City prompt notice of any such claim, and to permit City to assume and control the defense of such action, with counsel selected by City. Vendor, Partner, or Selectron shall not enter into any settlement of any such claim without City's prior written consent, which shall not be unreasonably withheld.

This indemnification obligation shall survive this Agreement and shall not be limited by any term of any insurance policy required under this Agreement.

32. Infringement Claims. If, due to a claim of infringement, the Software or Partner Subscription Services are held by a court of competent jurisdiction to be or are reasonably believed by Vendor, Partner, or Selectron to be infringing, Vendor, Partner, or Selectron may, at its option and expense (a) replace or modify the Software or Services to be non-infringing provided that such modification or replacement contains substantially similar features and functionality, (b) obtain for Licensee a license to continue using the Software or Services, or (c) if neither of the foregoing is commercially practicable, terminate this Agreement and provide Licensee a refund for any prepaid, unused fees for the Services. The foregoing is Licensee's sole and exclusive remedy with respect to infringement claims.
33. Procedure. To be entitled to the benefit of a Party's ("**Indemnitor**") obligations under this Section, (i) the other Party ("**Indemnitee**") must advise the Indemnitor in writing of the existence of the claim promptly upon learning of its assertion; (ii) the Indemnitee must cooperate with the Indemnitor in all reasonable aspects connected with the defense of the claim; and (iii) the Indemnitor must have the sole right to control the defense and/or settlement of all such claims, including selection of counsel. Notwithstanding the foregoing, if any settlement admits wrongdoing by Indemnitee, Indemnitee will have the right to pre-approve any such settlement in writing, such approval not to be unreasonably withheld. Further, Indemnitee will have the right to participate in the defense of any claim with separate counsel of its own choice at its own expense.

Professional Services

34. Under this Agreement the Vendor shall perform the services identified Exhibit A.
35. Vendor shall, at its own cost and expense, furnish all facilities and equipment necessary for Vendor to complete the project or perform the services required herein, unless otherwise provided in Exhibit A.
36. City shall have the ability to interview Vendor staff filling roles defined by the SOW as "key personnel." Once assigned, Vendor may not remove, except for reasons outside the control of Vendor, personnel listed in an applicable SOW as "key personnel" without the approval of the City. Both parties acknowledge that removal of "key personnel" would have detrimental impacts on the project. In the event that "key personnel" are removed for any reason, Vendor and City shall mutually agree upon process and period for onboarding new staff, which shall be provided at no cost to the City.
37. During the term of this Agreement, and for a period of one (1) year following the expiration or termination of this Agreement, City and Vendor agree, not take action to disrupt or interfere, or attempt to disrupt or attempt to interfere, with the business of the other party by directly or indirectly soliciting, recruiting, or attempting to recruit any of the other party's employees, contactors or consultants or otherwise inducing or attempting to induce the termination of any employee, contractor, or consultant of the other party. For the purposes of this provision, "take action" shall not be deemed to include broad based recruiting efforts, including, but not limited to, help wanted advertising and City posting of open positions.
38. Vendor will abide by any applicable City security or human resource policies in effect and communicated to Vendor when accessing City systems or facilities.
39. Vendor will comply with any instructions, restrictions, or conditions related to use of any City systems.
40. Professional Ability. Vendor acknowledges, represents and warrants that Vendor and its employees are skilled and able to competently provide the services hereunder, and possess all professional licenses, certifications, and approvals necessary to engage in their occupations. City has relied upon the professional ability and training of Vendor as a material inducement to enter into this Agreement. Vendor shall perform in accordance with generally accepted professional practices and standards of Vendor's profession. In the event that City, in its sole discretion, desires the removal of any person employed or retained by Vendor to perform services hereunder, such person shall be removed immediately upon receiving notice from City.

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41. Implementation Software is limited to the functional areas identified in Exhibit A.
42. Implementation of the Software is limited to the features and/or applications identified in Exhibit A.

Support Services

43. The Vendor shall support and maintain computer software to the City including the following. Services shall be provided consistent with the service level agreements identified in Exhibit A.
 - a. The City will be entitled to hosting services in Microsoft Azure at no additional cost. The Vendor will provide both a Production and Test environment that include necessary software licenses and capacity to accommodate the City's needs under this Agreement.
 - b. The City will be entitled to maintenance, upgrades, and backups of the hosted environments.
 - c. The City will be entitled to unlimited technical support during Vendor 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 City will be entitled to regular software updates.
 - e. The City will be notified via email when an update becomes available. If the City elects not to upgrade they will not be able to take advantage of features and fixes added in that update.
 - f. The City will be entitled to a reasonable number of refreshes upon request per year of their test environment from production.
 - g. The City is also entitled to licensing costs for major upgrades that require services at no additional cost. In these cases, the City will 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.
44. The annual fee for Hosting, Technical Support, and Maintenance is identified in Exhibit A, due within 30 days of agreement execution.
45. The annual fee for Hosting, Technical Support, and Maintenance in subsequent years will receive a 5% increase from the preceding year, and is due within 30 days of the Acceptance date anniversary:
46. City data will be used only to provide City with the defined services and for purposes compatible with providing those services. Vendor will not use City data or derived information for any commercial purposes. City retains all rights, titles, and interests in and to their data, and Vendor acquires no rights to City data other than the rights granted to provide the service. Vendor will not disclose City data except as directed by the City or as required by law.
47. City will have the ability to request access to City database backup and copy of City files at any time during the term of service upon request. In the event of expiration or termination of service, Vendor will make City 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 City data. City is solely responsible for the retention or extraction of software provided by City. Vendor has no liability for the deletion of data as described in this section.

Third-Party Software/Services

48. Under this Agreement Vendor shall ensure the performance of the Selectron services identified in Exhibit A under the coordination and oversight of Vendor.
49. Under this Agreement Vendor shall ensure the performance of the PermitRocket services identified in Exhibit A under the coordination and oversight of Vendor.
50. Under this Agreement CORE Business Technologies shall perform the services identified in Exhibit CA ("Payment Processing Agreement Application and Fee Schedule") under coordination and oversight of Vendor.

Third-Party Software/Services Additional Terms

51. Additional terms relative to the agreement with CORE Business Technologies are detailed in Exhibit CA.

Implementation Cost

52. The cost for implementation will be as described in Exhibit A.

Payment Schedule

53. The payment schedule will be as described in Exhibit A.

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Acceptance

54. 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 January 31, 2024.

Term and Termination

55. Term. This Agreement is effective as of the Effective Date and will continue in effect until terminated in accordance with this Section (the "**Term**"). In respect of the Vendor Hosting, Partner Subscription Services, and Selectron Services, Exhibit A will indicate periods for which City is permitted to use the Subscription Services and Selectron Services (each, a "**Subscription Period**"). Unless otherwise set out in the Order Form, at the end of City's first Subscription Period and each subsequent Subscription Period thereafter, City's commitment to purchase Subscription Services will automatically renew (each, a "**Renewal**"). A Renewal may be cancelled by one Party notifying the other Party of its intent to not renew no less than sixty (60) days prior to the Renewal. In respect of any Professional Services, Vendor will commence work on the date listed in the applicable Order Form or Statement of Work and continue performance for the period designated therein.
56. Removed.
57. Notwithstanding any provision herein to the contrary, City may, in its sole and absolute discretion and without cause, terminate this Agreement at any time, immediately upon written notice to Vendor. In the event of termination Vendor shall be compensated for:
- All authorized work satisfactorily performed prior to the effective date of termination.
 - Any necessary materials or services of others ordered by Vendor for this Agreement, prior to receipt of notice of termination, irrespective of whether such materials or services of others have actually been delivered, provided that Vendor is not able to cancel such orders. Compensation for Vendor in such event shall be determined by City in accordance with the percentage of the project or services completed by Vendor; and all of Vendor's finished or unfinished work product through the time of the City's last payment shall be transferred and assigned to City. Additionally, in the event of such termination, the City may proceed with the work in any reasonable manner it chooses.
58. Termination in the Event of Default. Should Vendor fail to perform any of its obligations hereunder, within the time and in the manner provided or otherwise violate any of the terms of this Agreement, City may immediately terminate this Agreement by giving written notice of such termination, stating the reasons for such termination. Vendor shall be compensated as provided in this section; provided, however, there shall be deducted from such amount the amount of damage, including attorney's fees, expert witness fees and costs, if any, sustained by City by virtue of Vendor's breach of this Agreement. Additionally, in the event of such termination, the City may proceed with the work in any reasonable manner it chooses.
59. Termination. In addition to any other remedies it may have, (a) either Party may terminate this Agreement (i) with thirty (30) days' notice if the other Party materially breaches any of the terms or conditions of this Agreement and fails to cure the breach during the notice period; (ii) with thirty (30) days' notice if the other Party becomes insolvent or (iii) by issuing a notice not to renew (as set out in above) where no other Order Forms or Statements of Work are then in effect; and (b) Vendor may terminate this Agreement (i) immediately if Licensee violates the Subscription Services section (Prohibited Use), or (ii) with ten (10) days' notice if Licensee fails to pay Fees when due and does not rectify non-payment in the notice period.
60. Termination for non-appropriation. In the event the Licensee does not appropriate funding for this agreement, Licensee shall have the option to terminate the Agreement with thirty (30) days notice to Vendor.
61. Effect of Termination; Survival. In the event of any termination of this Agreement under this Section, (i) Vendor's or Partner's obligations to perform and Licensee's rights to use the Services will immediately cease; and (ii) all outstanding Fees, including fees for Hosting and Partner Subscription Services that are reconciled for the period up to the effective date of termination and fees for Professional Services rendered prior to termination, will become immediately due and payable. If Vendor hosts database portions of the Software, Vendor will make Customer Data available to Licensee for electronic retrieval via a database export for a period of thirty (30) days following Agreement termination; thereafter Vendor may, but is not obligated to, delete stored Customer Data. Any termination of this Agreement prior to Vendor's completion of Professional Services may be subject to additional terms and conditions as set out in the applicable Order Form or Statement of Work if designated by Vendor. All sections of this Agreement which should, by their nature, remain applicable after termination will survive, including accrued rights to payment, confidentiality obligations, warranty disclaimers, and limitations of liability.

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Fees and Payment Policy

62. Vendor shall invoice the City for any software, support, or professional service fees based on payment terms identified in Exhibit A.
Unless otherwise identified in a statement of work, professional service and support fees include any expenses incurred by Vendor in performing the services.
63. Provided Vendor is not in default under this Agreement, Vendor shall be compensated as provided as per the payment terms listed in Exhibit A. Any and all payments made pursuant to this Agreement shall be subject to the Agreement Payment Limit. The Payment Limit includes expenses (phones, photocopying, meals and travel etc.). Invoices shall be adequately detailed, based on accurate records, and be in a form reasonably satisfactory to the City. Vendor may be required to provide back-up material upon request.
- Vendor shall submit timely invoices to the following address:
- a) Attention: City of Richmond, Finance Department - Accounts Payable
P.O. Box 4046
Richmond, CA 94804-0046
Email: accounts_payable@ci.richmond.ca.us
64. All invoices that are submitted by Vendor shall be subject to the approval of the City's Project Manager, before payments shall be authorized.
65. The City will pay invoice(s) within 30 days after completion of services to the City's satisfaction. The City shall not pay late fees or interest.
66. All insurance coverage required by this Agreement shall be provided by the Vendor before this Agreement shall be executed by the City. The insurance coverage must be kept current during the term of this Agreement for payments to continue to be authorized.

General Terms and Conditions

67. Force Majeure. Neither party hereto shall be considered in default in the performance of its obligations hereunder to the extent that the performance of such an obligation is prevented or delayed by reason of acts of God, strikes, boycotts, lock-outs, inability to procure materials not related to the price thereof, failure of power, restrictive governmental laws and regulations enacted after the date of this Agreement, riots, civil unrest, acts of terrorism, insurrection, war, declaration of a state or national emergency or other reasons of a like nature not within the reasonable control of such party.
68. If Licensee provides any feedback, comments, suggestions, ideas, requests or recommendations for modifications or improvements to Vendor's or Partner's products, services, websites, documentation or similar materials ("**Feedback**"), Licensee hereby assigns and agrees to assign all right, title and interest in any such Feedback to Vendor or Partner to be used for any purpose.
69. If a dispute arises out of or relates to this contract, or the breach thereof, and if the dispute cannot be settled through negotiation, the parties agree first to try in good faith to settle the dispute by mediation administered by the American Arbitration Association under its Commercial Mediation Procedures before resorting to arbitration, litigation, or some other dispute resolution procedure.
70. The Parties to this Agreement submit to the jurisdiction of the courts of the State of California 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 California.
71. This Agreement can only be modified in writing signed by both the Vendor and the City.
72. This Agreement does not create or imply any relationship in agency or partnership between the Vendor and the City.
73. 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.
74. 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.
75. All notices, demands, statements, or communications provided for by this Agreement shall be in writing and may be delivered by deposit in the United States mail, postage prepaid. Notice shall be deemed delivered:
- a. upon personal delivery
 - b. as of the fifth business day after mailing by United States certified mail, postage prepaid, addressed to the proper party; or

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- c. as of 12:00 p.m. on the second business day immediately after the day it is deposited with and accepted by Federal Express, or a similar overnight courier service, addressed to the proper party and marked for next business day morning delivery.

For the purposes of this Agreement, a "business day" means any day Monday through Friday that is not a holiday recognized by the federal government or the State of California.

Notices shall be sent to:

Intuitive Municipal Solutions, LLC

541 N Mt Juliet Rd, Suite 2201B

Mount Juliet, TN 37122

City of Richmond, California

450 Civic Center Plaza

Richmond, CA 94804

76. Independent Vendor. Vendor acknowledges, represents and warrants that Vendor is not a regular or temporary employee, joint venturer or partner of the City, but rather an independent Vendor. This Agreement shall not be construed to create an agency, servant, employee, partnership, or joint venture relationship. As an independent Vendor, Vendor shall have no authority to bind City to any obligation or to act as City's agent except as expressly provided herein. Due to the independent Vendor relationship created by this Agreement, City shall not withhold state or federal income taxes, the reporting of which shall be Vendor's sole responsibility.
77. Brokers. Vendor acknowledges, represents and warrants that Vendor has not hired, retained or agreed to pay any entity or person any fee, commission, percentage, gift, or any other consideration, contingent upon or resulting from the award or making of this Agreement.
78. Inspection. Vendor's performance, place of business and records pertaining to this Agreement are subject to monitoring, inspection, review and audit by authorized representatives of the City of Richmond, the State of California, and the United States Government. If the project or services set forth in Exhibit A shall be performed on City or other public property, City shall have the right to inspect such work without notice. If such project or services shall not be performed on City or other public property, City shall have the right to inspect such work upon reasonable notice.
79. Records. Vendor shall keep and make available for inspection and copying by authorized representatives of the City, the State of California, and the United States Government, the Vendor's regular business records and such additional records pertaining to this Agreement as may be required by the City.
80. Vendor shall retain all documents pertaining to this Agreement for a period of five (5) years after this Agreement's termination (or for any further period that is required by law) and until all Federal or State audits are complete and exceptions resolved for this Agreement's funding period. Upon request, Vendor shall make these records available to authorized representatives of the City of Richmond, the State of California, and the United States Government.
81. Vendor shall keep full and detailed accounts, maintain records, and exercise such controls as may be necessary for proper financial management under this Agreement. The Vendor's accounting and control systems shall be satisfactory to City. Vendor's accounting systems shall conform to generally accepted accounting principles and all records shall provide a breakdown of total costs charged under this Agreement, including properly executed payrolls, time records, utility bills, invoices, and vouchers. The City shall be afforded prompt access to Vendor's records, books, and Vendor shall preserve such project records for a period of at least five (5) years after the termination of this Agreement, or for such longer period as may be required by law.
82. Vendor shall permit City and its authorized representatives and accountants to inspect, examine and copy Vendor's books, records, accounts, correspondence, instructions, drawings, receipts, subcontracts, purchase orders, vouchers, memoranda and other data relating to the project or services set forth in Exhibit A, and any and all data relevant to this Agreement at any reasonable time for the purpose of auditing and verifying statements, invoices, or bills submitted by Vendor pursuant to this Agreement and shall provide such assistance as may be reasonably required in the course of such inspection. Vendor shall also allow City access to the record keeping and accounting personnel of Vendor.
83. City further reserves the right to examine and re-examine said books, records, accounts, and data during the five (5) year period following the termination of this Agreement; and Vendor shall in no event dispose of, destroy, alter, or mutilate said books, records, accounts, and data in any manner whatever for five (5) years after the termination of this Agreement.
84. Pursuant to California Government Code § 10527, the parties to this Agreement shall be subject to the examination and audit of representatives of the Auditor General of the State of California for a period of three (3) years after final payment under this Agreement. The examination and audit shall be confined to those matters connected with the performance of this Agreement including, but not limited to, the cost of administering this Agreement.
85. Changes and Extra Work. All changes and/or extra work under this Agreement shall be performed and paid for in accordance with the following:

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- a) Only the City Council or the City Manager may authorize extra and/or changed work. Vendor expressly recognizes that other City personnel are without authorization to either order extra and/or change work or waive Agreement requirements. Failure of Vendor to secure the authorization for such extra and/or changed work shall constitute a waiver of any and all right to adjustment in Agreement price due to such unauthorized work and Vendor thereafter shall be entitled to no compensation whatsoever for performance of such extra and/or changed work.
 - b) If Vendor is of the opinion that any work which Vendor has been directed to perform is beyond the scope of this Agreement and constitutes extra work, Vendor shall promptly notify City of the fact. The City shall make a determination as to whether or not such work is, in fact, beyond the scope of this Agreement and constitutes extra work. In the event that City determines that such work does constitute extra work, City shall provide extra compensation to Vendor on a fair and equitable basis. A change order or Agreement Amendment providing for such compensation for extra work shall be negotiated between City and Vendor and executed by Vendor and the appropriate City official.
 - c) In the event City determines that such work does not constitute extra work, Vendor shall not be paid extra compensation above that provided herein and if such determination is made by City staff, said determination may be appealed to the City Council; provided, however, a written appeal must be submitted to the City Manager within five (5) days after the staff's determination is sent to Vendor. Said written appeal shall include a description of each and every ground upon which Vendor challenges the staff's determination.
86. Business License. Vendor shall obtain a Richmond Business License before performing any services required under this Agreement. The failure to so obtain such license shall be a material breach of this Agreement and grounds for immediate termination by City; provided, however, that City may waive the business license requirement in writing under unusual or extraordinary circumstances without necessitating any modification of this Agreement to reflect such waiver.
 87. Conflict of Interest. Vendor acknowledges, represents, and warrants that Vendor shall avoid all conflicts of interest (as defined under any federal, state, or local statute, rule or regulation, or at common law) with respect to this Agreement. Vendor further acknowledges, represents, and warrants that no City official or employee has any economic interest, as defined in Title 2, California Code of Regulations §§ 18703.1 through 18703.5, with Vendor that would invalidate this Agreement. Vendor acknowledges that in the event that Vendor shall be found by any judicial or administrative body to have any conflict of interest (as defined above) with respect to this Agreement, all consideration received under this Agreement shall be forfeited and returned to City forthwith. This provision shall survive the termination of this Agreement for one (1) year.
 88. Insurance. Insurance requirements are set forth in the City RFP 2023-03. Vendor shall abide by the insurance requirements set forth therein.
 89. Non-Liability of Officials and Employees of the City. No official or employee of the City shall be personally liable for any default or liability under this Agreement.
 90. Compliance with Laws. Vendor shall comply with all federal, state and local laws, statutes, ordinances, rules and regulations, and the orders and decrees of any courts or administrative bodies or tribunals, with respect to this Agreement, including without limitation environmental laws, employment discrimination laws and prevailing wage laws. Compliance under this provision includes compliance with all provisions of the Richmond Municipal Code ("Municipal Code"), including Chapters 2.50, 2.52, 2.56, and 2.60, if applicable.
 91. Vendor agrees to comply with the provisions of the Richmond Sanctuary City Contracting Ordinance (SCCO, Ordinance No. 12-18). Contractor must submit the Sanctuary City Compliance Statement included herein as Exhibit F along with the bid or proposal prior to execution of the contract.
 92. Vendor acknowledges that under § 2.60.070 of the Municipal Code ("Living Wage Ordinance"), Vendor shall promptly provide to City documents and information verifying its compliance with the Living Wage Ordinance. Also as prescribed in § 2.60.070, Vendor shall notify each of its affected employees with regards to the wages that are required to be paid pursuant to the Living Wage Ordinance.
 93. Vendor shall comply with § 2.28.030 of the Municipal Code, obligating every Vendor or subcontractor under an Agreement or subcontract with the City for public work or for goods or for services to refrain from discriminatory employment or subcontracting practices on the basis of race, color, sex, sexual orientation, religious creed, national origin or ancestry of any employee, any applicant for employment or any potential subcontractor.
 94. Vendor acknowledges that the City's Drug Free Workplace Policy, Violence in the Workplace Policy and the Policy Against Workplace Harassment, are available on the City's website at <http://www.ci.richmond.ca.us/workplacepolicies>. Vendor agrees to abide by the terms and conditions of said policies.
 95. Limitations upon Subcontracting and Assignment. This Agreement binds the heirs, successors, assigns and representatives of Vendor. The Vendor shall not enter into subcontracts for any work contemplated under this Agreement, except where expressly indicated, and shall not assign this Agreement, nor any portion hereof or monies due or to become due, without the prior written consent of the City Council or its designee.

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96. With the exception of those third parties included in this Agreement, Vendor shall not assign or sublet to any other party without the prior written approval of City, which approval may be withheld in City's sole and absolute discretion. In the event that City, in writing, approves any assignment or subletting of this Agreement or the retention of subcontractors by Vendor, Vendor shall provide to City upon request copies of each and every subcontract Agreement prior to the execution thereof by Vendor and subcontractor. Any assignment by Vendor of any or all of its rights under this Agreement without first obtaining City's prior written consent shall be a default under this Agreement.
97. The sale, assignment, transfer or other disposition of any of the issued and outstanding capital stock of Vendor (if applicable), or of the interest of any general partner or joint venturer or syndicate member if Vendor is a partnership or joint-venture or syndicate, which shall result in a change of control of Vendor, shall be deemed an assignment. For this purpose, control shall mean fifty percent or more of the voting power or twenty-five percent or more of the assets of the corporation, partnership or joint-venture.
98. Integration. This Agreement constitutes the entire agreement between the parties concerning the subject matter hereof and supersedes any previous oral or written agreement; provided, however, that correspondence or documents exchanged between Vendor and City may be used to assist in the interpretation of the Exhibits to this Agreement.
99. Modifications and Amendments. This Agreement may be modified or amended only by a change order or Agreement Amendment executed by both parties and approved as to form by the City Attorney.
100. Non-exclusivity. Notwithstanding any provision herein to the contrary, the services provided by Vendor hereunder shall be non-exclusive, and City reserves the right to employ other Vendors in connection with the project.
101. Confidentiality. Vendor agrees to comply with, and to require its employees, agents and partners to comply with, all applicable State or Federal statutes or regulations respecting confidentially, including but not limited to, the identity of persons served under this Agreement, their records, or services provided them, and assures that:
- a. All applications and records concerning any individual made or kept by Vendor or any public officer or agency in connection with the administration of or relating to services provided under this Agreement will be confidential, and will not be open to examination for any purposes not directly connected with the administration of such service.
 - b. No person will publish or disclose or permit or cause to be published or disclosed, any list of persons receiving services, except as may be required in the administration of such service.
102. Claims. Any claim by Vendor against City hereunder shall be subject to Government Code §§ 800 et seq. The claims presentation provisions of said Act are hereby modified such that the presentation of all claims hereunder to the City shall be waived if not made within six months after accrual of the cause of action.
103. Interpretation. This Agreement shall be interpreted as if drafted by both parties.
104. Severability. In the event that any of the provisions or portions or applications thereof of this Agreement are held to be unenforceable or invalid by any court of competent jurisdiction, City and Vendor shall negotiate an equitable adjustment in the provisions of the Agreement with a view toward effecting the purpose of this Agreement, and the validity and enforceability of the remaining provisions or portions or applications thereof, shall not be affected thereby.
105. Authority. City warrants and represents that the signatory hereto (the Mayor of the City of Richmond or the City Manager) is duly authorized to enter into and execute this Agreement on behalf of City. The party signing on behalf of Vendor warrants and represents that he or she is duly authorized to enter into and execute this Agreement on behalf of Vendor, and shall be personally liable to City if he or she is not duly authorized to enter into and execute this Agreement on behalf of Vendor.
106. Waiver. The waiver by City of any breach of any term or provision of this Agreement shall not be construed as a waiver of any subsequent breach. Inspections or approvals, or statements by any officer, agent or employee of the City relating to the Vendor's performance, or payments therefore, or any combination of these acts, shall not relieve the Vendor's obligation to fulfill this Agreement as prescribed; nor shall the City be thereby stopped from bringing any action for damages or enforcement arising from any failure to comply with any of the terms and conditions of this Agreement.
107. Precedence. Any inconsistencies in this Agreement shall be resolved in accordance with the following descending order of precedence:
- a. This Agreement
 - b. Exhibit A – Statement of Work and Payment Schedule
 - c. Vendor response to City RFP 2023-03
 - d. City RFP 2023-03

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Signatures

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

City of Richmond, CA

Eduardo Martinez

Printed Name

Mayor

DocuSigned by:

Eduardo Martinez

Signature

1/5/2024

Date

Approved by:

JA For

By: *JA*
City Attorney

DocuSigned by:

Pamela Christian

Signature

City Clerk

Intuitive Municipal Solutions, LLC

Vance Bradshaw

Vance Bradshaw, President

Vance Bradshaw

Signature

1/3/2024

Date

Exhibits

All Exhibits hereto are made a part of this Agreement and incorporated herein.

Exhibit A – Statement of Work and Payment Schedule

Exhibit B – Selectron End User License Agreement

Exhibit C – Functional Requirements

Exhibit CA – Payment Processing Agreement Application and Fee Schedule

Exhibit D -- Vendor response to City RFP 2023-03

Exhibit E -- City RFP 2023-03

Exhibit F – Sanctuary City Compliance Statement

Exhibit A

Statement of Work and Payment Schedule



City of Richmond, CA

RFP# 2023-03

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



Statement of Work & Payment Schedule

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Section 1: Overview of the Project

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

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

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

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

Section 1.1: Project Criteria for Success

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

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



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

Section 1.2: Project Scope

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

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

Section 1.2.1: Functional / Module Scope

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

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



- Online payments (credit/ACH)

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

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

Section 1.2.2: Organizational Scope

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

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

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

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

Section 1.2.3: Data Conversion Scope

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

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

Community Development (CentralSquare's TRAKiT System)

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

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

Contra Costa County, CA Assessor (Parcel and Ownership)

Initial Migration and ongoing update routine for refreshing iMSLocations

Data Migration Summary Process Flow

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

Data Conversion Summary or Anticipated Milestones:

Proposed data conversion services are:

City of Richmond, CA Existing Data Conversion (TRAKiT)

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

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

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

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

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



Section 1.2.4: Interface Scope

Integrations or Interfaces are identified here:

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



Additional Integrations

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

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

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



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

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

Section 1.2.5: Modification / Enhancement Scope

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

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

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

Section 1.2.6: Reporting Scope

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

Custom Documents and Reports Included:

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

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



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

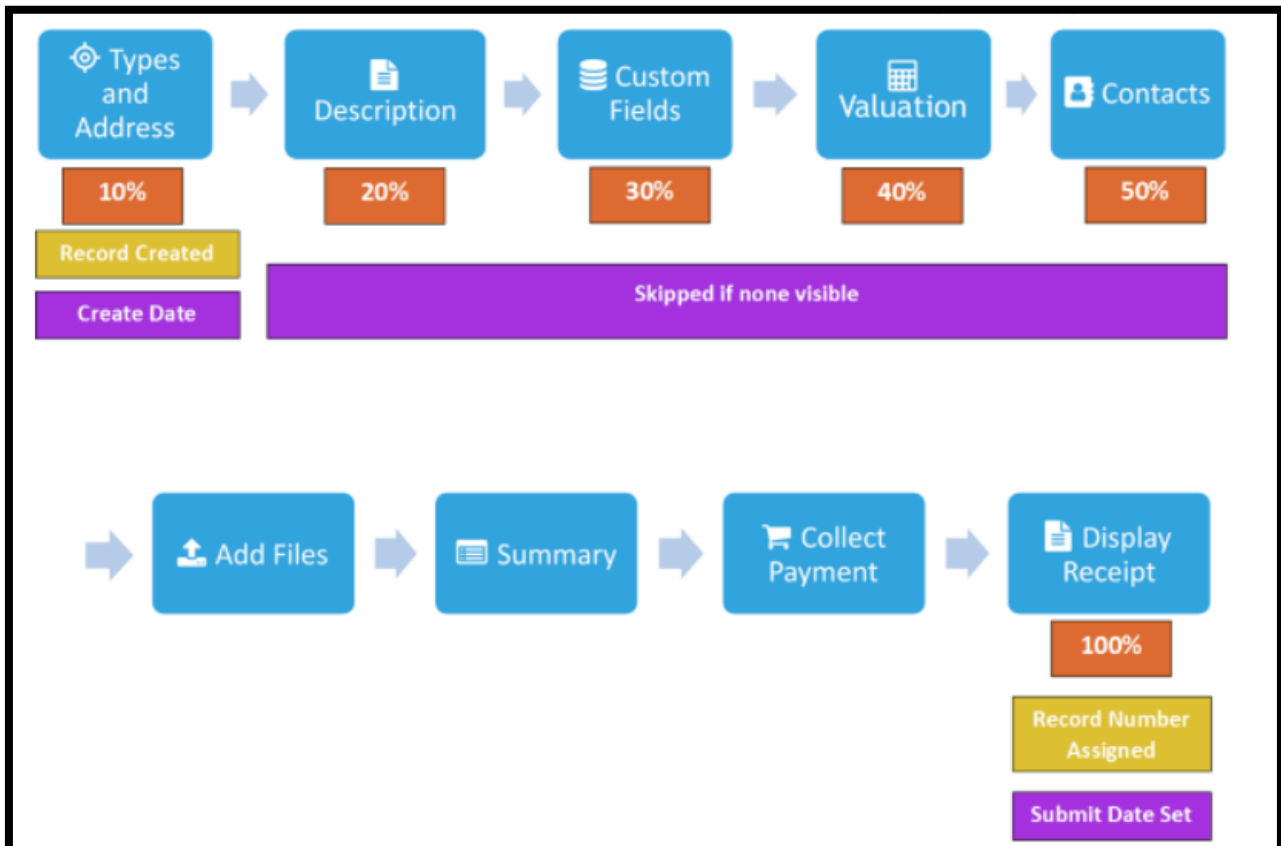
Section 1.2.7: REMOVED

Section 1.2.8: Workflow Scope

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

STANDARD IMS WORKFLOW

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



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

Section 1.2.9: Implementation Deliverables

Included in your iMS implementation are the following deliverables:

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



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

Professional Services Included

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

Software as a Service (SaaS) Items Included:

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



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

Included Selectron Deployment Model:

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

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

Third Party Services Included:

Selectron Products and Services:

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

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

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

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

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



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

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

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

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

SelectTXT - 100,000 text messages annually:

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

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

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

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



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

Integration with iMS

Relay Administrative Portal

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

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

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

Activity Widgets

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

Activity:

- Call Activity - Tracks and reports call activity with line graph
- IVR Usage - Display call statistics, including peak (concurrent) call activity
- SelectTXT Activity - Tracks and reports SelectTXT activity with line graph
- Inspection Widget - Tracks and reports inspection activity with displayed numbers
- SelectTXT Inspection Activity Widget - Tracks and reports SelectTXT inspection activity with bar graph

Support System:

- System Status Widget - Tracks status of the system through Ping and Database displays
- Today Widget - Displays date, holiday, office hours, and greeting information

Run System Reports

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

Reports Center:



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

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

Activity Reports:

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

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

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

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

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

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

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

Relay Permits Reports:

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

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



SelectTXT Reports:

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

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



ePermitHub Products and Services:

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



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

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

- Payment Processing Services
- Implementation Services
- Integration with iMS

Expected ON-SITE Project Meetings / Training:

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

NOTES:

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

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



Section 2: Project Governance

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

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

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

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

Section 2.1: City of Richmond Project Structure

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



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

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

Section 2.2: City of Richmond Project Roles and Responsibilities

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



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



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

Section 2.3: iMS Project Structure

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



Section 2.4: iMS Project Roles and Responsibilities

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

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

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

Section 2.4.1: iMS Executive Oversight

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

CEO & President of iMS - Vance Bradshaw

Section 2.4.2: iMS Steering Committee

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

Section 2.4.3: iMS Project Manager(s)

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



Section 2.5: Third Party Vendors

Section 2.5.1: Third Party Role(s)

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

Section 2.5.2: Third Party Oversight Responsibilities

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

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

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



Section 2.6: Project Plan

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

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

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

Section 2.6.1: Project Plan

Deliverables and Project Sample

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

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

0 (Team) REMOTE Agreement executed and project begins

1 (iMS) Install Server

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

3 (iMS) REMOTE Review supplied information and prepare questions

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

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



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

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



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

Section 2.6.2: Project Documentation

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

Section 2.6.3: Project Status Reports

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

Section 2.6.4: Steering Committee Meetings

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

Section 2.6.5: Requirements Traceability Matrix

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

Section 2.6.6: Issues Log

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

Section 2.6.7: Decision(s) Matrix

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



Section 2.7: Acceptance

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

Section 2.7.1: REMOVED

Section 2.7.2: REMOVED

Section 2.8: Issue Resolution

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

Section 2.8.1: Issue(s) Resolution Process

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



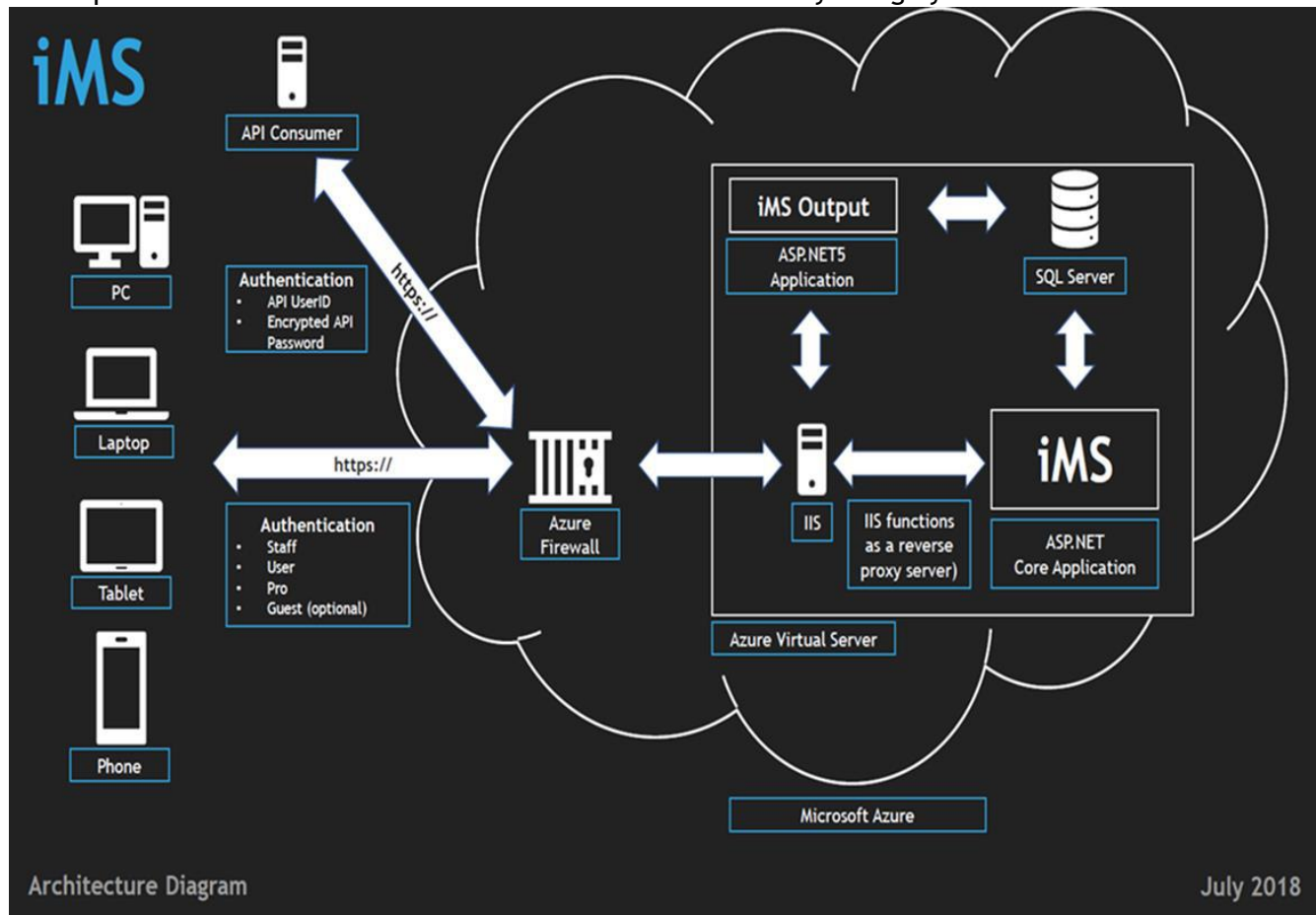
Section 3: Technology Requirements

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

Section 3.1: Technology Architecture

Typical iMS SaaS / Hosted Software Solution Topology Diagram

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



Section 3.2: System Requirements

iMS Production System Includes

SQL Server database:

- Created
- Initialized

SSRS (Reporting) instance configured

Core iMS website installed and configured
ASP.NET Core application

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

Fileshare configured:

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

iMS Test System Includes

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

System Software Specifics

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

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

Section 3.3: Required Environments

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

Section 3.4: Hardware Availability

Section 3.4.1: Requirements for Project Start

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

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

Section 4: Implementation

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

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

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

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

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

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

- System design document
- Entity Relationship Diagram (ERD)

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

- As-built documentation
- Test scripts

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

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

- Testing plan
- Testing results

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

- Training plan
- Knowledgebase
- End-user training materials

Include creating reports

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

Section 4.1: Schedule

See Section 2.6.1

Section 4.1.1: Project Phases

See Above and Section 2.6.1

Section 4.2: Implementation Methodology / High Level Plan

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

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



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

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

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

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



Section 5: Change Management / Project Management

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

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

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

Section 5.1: Onsite Activity

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

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

Section 5.2: Requirements Mapping

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



Section 6: Training

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

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

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

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

Section 6.1: Training Coordination

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

Your proposed training services are:

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



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

- End User Training

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

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

- Selectron Training Services

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

- ePermitHub Training Services:

Intake Specialists/Permit Technician Curriculum

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

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



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

Plan Reviewers/Managers Curriculum

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

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



ePermitHub Digital Plan Room embedded into iMS Public Portal

- Overview of customer usage of digital plan room
 - Plan submittals and file validation & processing
 - Reviewing and answering issues contextually from the plan markup

Administrative and Technical Training

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

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

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

Section 6.2: Training Material Development

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

Section 6.3: Training Courses

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

Section 6.4: Training Delivery

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

Section 6.5: Training Evaluation and Follow Up

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



Section 7: Quality Assurance

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

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

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

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

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

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



Section 8: Ongoing Support

Go Live Support

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

Section 8.1: Post Live Support Scope

See above.

Section 8.2: Post Live Support Duration

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



Section 9: Facility Requirements

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

Section 9.1: Project Team Equipment

See Above

Section 9.2: Project Team Facilities / Workspace / Security Access

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

Section 10: Personnel Requirements

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

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



Section 11: Acceptance Process

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

11.1: Deliverable or Service Acceptance

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

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

11.2: System / Phase Acceptance

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

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

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

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



Section 12: Payment Schedule

Section 12.1: Milestone Listing

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

Project Milestones Include the following PAYMENT MILESTONES:

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

Section 12.2: Payment Amounts

Payment Terms, First Year Cost, and Payment Amounts

PAYMENT TERMS:

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

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



FIRST YEAR PAYMENT AMOUNTS:

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

FIVE YEAR PAYMENT SUMMARY:

Year 2 = One Year from Contract Execution, etc.

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

Section 13: Service Level Agreement

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



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

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

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

EXHIBIT B

SELECTRON TECHNOLOGIES, INC. END USER LICENSE AGREEMENT

This End User License Agreement (this “**EULA**”) is part of a Software License and Implementation Agreement (the “**Master Agreement**”) whereby the person or entity identified in the Master Agreement as the Licensee (“**Licensee**”) is obtaining services that include a license to the proprietary software (the “**Licensed Software**”) of Selectron Technologies, Inc., an Oregon corporation (“**Selectron**”, “**we**”, “**our**”, or “**us**”). This EULA governs use by Licensee and all natural persons to whom Licensee provides access to the Licensed Software (each, an “**Authorized User**”). In this EULA, unless the context clearly indicates otherwise, all references to “**you**,” or “**your**” means both the Licensee and the Authorized User. All capitalized terms used but not defined in this EULA have the meanings given to them in the Master Agreement.

SELECTRON PROVIDES THE LICENSED SOFTWARE SOLELY ON THE TERMS AND CONDITIONS SET FORTH IN THIS EULA AND ON THE CONDITION THAT YOU ACCEPT AND COMPLY WITH THEM. IF YOU DO NOT AGREE TO THE TERMS OF THIS EULA, SELECTRON WILL NOT AND DOES NOT LICENSE THE LICENSED SOFTWARE TO YOU, AND YOU MUST NOT USE OR ACCESS THE SOFTWARE.

1. License Grant. Subject to your strict compliance with this EULA, Selectron hereby grants you a non-exclusive, non-transferable, non-sublicensable, limited license to use the Licensed Software solely in accordance with the documentation, the Master Agreement, and this EULA, for Licensee’s internal business purposes. The foregoing license will terminate immediately on the earlier to occur of:

(a) the expiration or earlier termination of the Master Agreement between Selectron and Licensee; or

(b) your ceasing to be authorized by Licensee to use the Licensed Software for any or no reason.

2. Scope of License. Subject to and conditioned upon Licensee’s timely payment of the fees set forth in the Master Agreement and your strict compliance with all terms and conditions set forth in this EULA and the Master Agreement, you have a limited right and license to:

(a) Use and access the Licensed Software in accordance with this EULA and the documentation, solely for Licensee’s internal business purposes.

(b) Download, display, and use the documentation, solely in support of Licensee’s use and access of the Licensed Software in accordance herewith.

(c) Download, display, copy, use, and create derivative works of reports and structured data generated using the Licensed Software, solely for Licensee’s internal business purposes.

3. Copies. All copies of the Licensed Software and documentation made by you:

(a) Will be the exclusive property of Selectron;

(b) Will be subject to the terms and conditions of the Master Agreement and this EULA; and

(c) Must include all trademark, copyright, patent and other intellectual property rights notices contained in the original.

4. Use Restrictions. You shall not, directly or indirectly:

(a) Use the Licensed Software beyond the scope of the license granted in the Master Agreement and Section 2 of this EULA;

(b) Copy all or any portion of the Licensed Software, except as expressly permitted in Section 2 of this EULA;

(c) Decompile, disassemble, decode, or otherwise reverse engineer the Licensed Software, or any portion thereof, or determine or attempt to determine any source code, algorithms, methods, or techniques used or embodied in the Licensed Software or any portion thereof;

(d) Modify, translate, adapt or otherwise create derivative works or improvements, whether or not patentable, of the Licensed Software or any part thereof;

(e) Provide any other person, including any subcontractor, independent contractor, affiliate, service provider, or other employee of Licensee, with access to or use of the Licensed Software, except as expressly permitted by the Master Agreement or this EULA;

(f) Distribute, disclose, market, rent, lease, lend, sell, timeshare, sublicense, assign, distribute, pledge, publish, transfer or otherwise make available the Licensed Software or any features or functionality of the Licensed Software, to any third party for any reason, whether or not over a network and whether or not on a hosted basis, including in connection with the internet, web hosting, wide area network (WAN), virtual private network (VPN), virtualization, time-sharing, service bureau, software as a service, cloud or other technology or service, except as expressly permitted by the Master Agreement or this EULA;

(g) Use the Licensed Software for the commercial or other benefit of a third party;

(h) Permit the Licensed Software to be used for or in connection with any facility management, service bureau, or time-sharing purposes, services, or arrangements, or otherwise used for processing data or other information on behalf of any third party;

(i) Remove, delete, alter or obscure any trademarks or any copyright, trademark, patent or other intellectual property or proprietary rights notices, legends, symbols, or labels appearing on or in the Licensed Software, including any copy thereof;

(j) Perform, or release the results of, benchmark tests or other comparisons of the Licensed Software with other software or materials;

(k) Incorporate the Licensed Software or any portion thereof into any other materials, products, or services, except as expressly permitted by the Master Agreement or this EULA;

(l) Use the Licensed Software for any purpose other than in accordance with the terms and conditions of this EULA and the Master Agreement.

(m) Use the Licensed Software in, or in association with, the design, construction, maintenance or operation of any hazardous environments or systems, including (i) power generation systems; (ii) aircraft navigation or communication systems, air traffic control systems or any other transport management systems; (iii) safety-critical applications, including medical or life-support systems, vehicle operation applications or

any police, fire or other safety response systems; (iv) military or aerospace applications, weapons systems or environments;

(n) Use the Licensee data or the Licensed Software in any way that is fraudulent, misleading, or in violation of any applicable laws or regulations (including federal, state, local, and international laws and regulations), including but not limited to export or import control laws, information privacy laws, and laws governing the transmission of commercial electronic messages; or

(o) Use the Licensed Software for purposes of competitive analysis of the Licensed Software, the development of a competing software product or service or any other purpose that is to Selectron's commercial disadvantage.

5. Collection and Use of Information. Selectron may, directly or indirectly through the services of others, including by automated means and by means of providing maintenance and support services, collect and store information regarding your use of the Licensed Software, its performance, the equipment through which the Licensed Software accessed and used, such as dates and times of use by each Authorized User, activities conducted using the Licensed Software, the type of web browser used to access the Licensed Software, the operating system/platform you are using, your IP address, and your CPU speed. You agree that the Selectron may use such information for any purpose related to the Licensed Software, including but not limited to improving the performance of the Licensed Software, developing updates, and verifying compliance with the terms of this EULA and enforcing Selectron's rights, including all intellectual property rights in and to the Licensed Software.

6. Intellectual Property Rights. You acknowledge that the Licensed Software is provided under license, and not sold, to you. You do not acquire any ownership interest in the Licensed Software under this EULA or the Master Agreement, or any other rights to the Licensed Software other than to use the Licensed Software in accordance with the license granted under this EULA and the Master Agreement, subject to all terms, conditions and restrictions contained therein and herein. Selectron reserves and shall retain its entire right, title and interest in and to the Licensed Software and all intellectual property rights arising out of or relating to the Licensed Software, subject to the licenses expressly granted in the Master Agreement and this EULA. You shall use commercially reasonable efforts to safeguard all Licensed Software (including all copies thereof) from infringement, misappropriation, theft, misuse or unauthorized access.

7. Login Credentials. You, the Authorized User, shall not share or disclose your log-in credentials with or to any other individual or entity, even if such other individual is also an Authorized User. If you discover or suspect that log-in credentials of any Authorized User have been accessed or used by anyone other than the individual to whom such log-in credentials were originally granted, you will promptly notify Selectron, and Selectron shall promptly reset or provide Licensee with a means of resetting the password associated with such log-in credentials.

8. Export Regulation. The Licensed Software may be subject to US export control laws, including the US Export Administration Act and its associated regulations. You shall not, directly or indirectly, export, re-export or release the Licensed Software to, or make the Licensed Software accessible from, any jurisdiction or country to which export, re-export or release is prohibited by law, rule or regulation. You shall comply with all applicable federal laws, regulations and rules, and complete all required undertakings (including obtaining any necessary export license or other governmental approval), prior to exporting, re-exporting, releasing or otherwise making the Licensed Software available outside the US.

9. Governing Law. This EULA shall be governed by and construed in accordance with the internal laws of the State of California without giving effect to any choice or conflict of law provision or rule (whether of the State of California or any other jurisdiction) that would cause the application of laws of any jurisdiction other than those of the State of California.

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	S	iMSLicensing	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
2	Business Tax / Business License	Fee Collection	Provide for calculation of standard fees with effective dates using user provided formulas or tables.	Y	S	iMSLicensing	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
3	Business Tax / Business License	Fee Collection	Track fee collections and receivables, provide for late penalties as appropriate, and generate payment receipts.	Y	S	iMSLicensing	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
4	Business Tax / Business License	Fee Collection	Provide for the calculation of a fee estimate for printing in a City-defined format.	Y	S	iMSLicensing	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
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	S	iMSLicensing	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. This item may/may not be a custom report (we have included an up to number in our proposal for you). We also support Nightly Rules that could send out an email and appropriate document/invoice
6	Business Tax / Business License	Fee Collection	Provide capability to track an estimate of required fees.	Y	S	iMSLicensing	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
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	S	iMSLicensing	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.

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					
8	Business Tax / Business License	Fee Collection	Set variable rates by business type or category.	Y	S	iMSLicensing	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
9	Business Tax / Business License	Fee Collection	Ability to set flat rates based on specific charge codes.	Y	S	iMSLicensing	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
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	S	iMSLicensing	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
11	Business Tax / Business License	Fee Collection	Set rates by custom capacity fee based on square footage and usage type.	Y	S	iMSLicensing	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
12	Business Tax / Business License	Fee Collection	Ability to develop custom fee calculations.	Y	S	iMSLicensing	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
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	S	iMSLicensing	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
14	Business Tax / Business License	Fee Collection	Ability to assess multiple fees including plan check fee and all permit types	Y	S	iMSLicensing	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
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	S	iMSLicensing	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
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	S	iMSLicensing	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.

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					
17	Business Tax / Business License	Fee Collection	Allows for pre-payments on deposit for contractor/realtors.	Y	S	iMSLicensing	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
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	S	iMSLicensing	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
19	Business Tax / Business License	Fee Collection	Ability to modify fees.	Y	S	iMSLicensing	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
20	Business Tax / Business License	Fee Collection	Edit and calculate fees by different variables for different permit types (fixed rate, square footage, etc.)	Y	S	iMSLicensing	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
21	Business Tax / Business License	Fee Collection	Integrates with a cashiering system that allows for fee collection and receipt printing.	Y	S	iMSLicensing	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
22	Business Tax / Business License	Fee Collection	Apply fees electronically to the accounts specified.	Y	S	iMSLicensing	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
23	Business Tax / Business License	Fee Collection	Assess fees for applications, permits, licenses, inspections, and penalties.	Y	S	iMSLicensing	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
24	Business Tax / Business License	Fee Collection	Accept fees from the City's central cashiering system.	Y	S	iMSLicensing	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
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	S	iMSLicensing	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.

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					
26	Business Tax / Business License	Fee Collection	Ability to open permits and add and re-issue fees.	Y	S	iMSLicensing	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
27	Business Tax / Business License	Fee Collection	Allow for the collection and tracking of fees for other agencies (state, county)	Y	S	iMSLicensing	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
28	Business Tax / Business License	Fee Collection	Allow for waiver of fees in special condition.	Y	S	iMSLicensing	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
29	Business Tax / Business License	Fee Collection	Allows for the establishment of various fee structures.	Y	S	iMSLicensing	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
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	S	iMSLicensing	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
31	Business Tax / Business License	Fee Collection	Capability to export transactions to finance (revenue) module - General Ledger.	Y	S	iMSLicensing	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
32	Business Tax / Business License	Fee Collection	Capable of calculating estimated fees for permits without creating the permit.	Y	S	iMSLicensing	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
33	Business Tax / Business License	Fee Collection	Record company account information.	Y	S	iMSLicensing	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
34	Business Tax / Business License	Fee Collection	Support future date effective fee structures.	Y	S	iMSLicensing	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.

Functional Requirements

Implementation Response Available Definitions (Column E)	
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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)	
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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					
35	Business Tax / Business License	Fee Collection	All fees/permit charge codes are assigned a related GL revenue code	Y	S	iMSLicensing	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
36	Business Tax / Business License	Fee Collection	Ability to run mass Business License renewal letters to collect renewal fees	Y	S	iMSLicensing	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
37	Business Tax / Business License	Fees / Charges	System can calculate standard fees using effective dates and user-provided formulas or tables	Y	S	iMSLicensing	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
38	Business Tax / Business License	Fees / Charges	System allows City to set variable rates by business type or category	Y	S	iMSLicensing	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
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	S	iMSLicensing	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
40	Business Tax / Business License	Fees / Charges	System has the ability to assess multiple fees including plan review fees and all permit types	Y	S	iMSLicensing	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
41	Business Tax / Business License	Fees / Charges	System allows for pre-payments on deposit for contractor/developers	Y	S	iMSLicensing	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
42	Business Tax / Business License	Fees / Charges	System allows for waiver of fees in special conditions	Y	S	iMSLicensing	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
43	Business Tax / Business License	Fees / Charges	Integrates with a cashiering system that allows for fee collection and receipt printing	Y	S	iMSLicensing	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.

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)
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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					
44	Business Tax / Business License	Fees / Charges	Allow for the collection and tracking of fees for other agencies (state, county)	Y	S	iMSLicensing	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
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	S	iMSLicensing	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
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	S	iMSLicensing	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
47	Business Tax / Business License	General	System utilizes workflow to accommodate the City business rules for each type of license	Y	S	iMSLicensing	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
48	Business Tax / Business License	General	System allows for multiple classification codes on the same business license	Y	S	iMSLicensing	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
49	Business Tax / Business License	General	System can track businesses that may be exempt from a certain license type	Y	S	iMSLicensing	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
50	Business Tax / Business License	General	System allows businesses to apply for and renew licenses online	Y	S	iMSLicensing	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
51	Business Tax / Business License	General	System can create user-defined renewal letters for each type of license	Y	S	iMSLicensing	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
52	Business Tax / Business License	General	System can generate business license certificate and user/customer can print certificate from system	Y	S	iMSLicensing	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.

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					
53	Business Tax / Business License	General	System tracks delinquent payments for licenses	Y	S	iMSLicensing	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
54	Business Tax / Business License	General	System defines an expiration date for each business license issued	Y	S	iMSLicensing	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
55	Business Tax / Business License	General	System workflow to notify appropriate staff that a license is approaching the expiration	Y	S	iMSLicensing	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
56	Business Tax / Business License	General	System can calculate business license fee based on license type	Y	S	iMSLicensing	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
57	Business Tax / Business License	General	System allows user to view business license history at a given property	Y	S	iMSLicensing	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
58	Business Tax / Business License	General	System workflow will generate communication with business license applicant to provide necessary information related to the application	Y	S	iMSLicensing	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
59	Business Tax / Business License	General	System notifies appropriate staff that a license is approaching expiration at user-defined interval	Y	S	iMSLicensing	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
60	Business Tax / Business License	General	System generates license renewal letter with user-defined text	Y	S	iMSLicensing	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
61	Business Tax / Business License	General	Staff can send license renewal letter from the system	Y	S	iMSLicensing	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.

Functional Requirements

Implementation Response Available Definitions (Column E)	
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N	Requirement Not Met with Proposal
I	Need More Information/Discussion

Column F: Available Responses (Column F)	
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TPS	Requirement and Feature Supported by Third Party
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IF Y-ND Selected (Column J)	
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E	Feature Developed as Enhancement for this Project

Req #	Process	Sub-Process	Requirement					
62	Business Tax / Business License	General	System generates renewal reminders	Y	S	iMSLicensing	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
63	Business Tax / Business License	General	System accommodates multiple licenses at the same business location	Y	S	iMSLicensing	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
64	Business Tax / Business License	General	System allows user to view outstanding fees for any business	Y	S	iMSLicensing	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
65	Business Tax / Business License	General	Create linkage going forward for old business tax accounts that are transferred to new owners. Businesses cannot be transferred, but it is important to know who the previous account/owner was	Y	S	iMSLicensing	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
66	Business Tax / Business License	Self-Service	System allows customer to view their own existing applications, permits, and comments online	Y	S	iMSLicensing	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
67	Business Tax / Business License	Self-Service	System allows customer to view plan review status online	Y	S	iMSLicensing	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
68	Business Tax / Business License	Self-Service	System allows customer to request inspections and view inspection results online	Y	S	iMSLicensing	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
69	Business Tax / Business License	Self-Service	System allows customer to attach/upload supporting documents when submitting applications via self-service portal	Y	S	iMSLicensing	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
70	Business Tax / Business License	Self-Service	System is ADA compliant	Y	S	iMSLicensing	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.

Functional Requirements

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Req #	Process	Sub-Process	Requirement					
71	Business Tax / Business License	Self-Service	System supports credit card payments	Y	S	iMSLicensing	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. Please note iMS currently has five integrations (Paymentus, PayTrace, BridgePay, USBank, and CardKnox). If one of these will not be utilized more information and/or scope and cost(s) may be associated with overall final proposal.
72	Code Enforcement	Complaint	Citizens can file anonymous complaints via web portal	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
73	Code Enforcement	Complaint	Citizens can upload supporting documentation (e.g., photos) in complaint portal	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
74	Code Enforcement	Complaint	Location and other land use information about property are called up from GIS	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
75	Code Enforcement	Complaint	Inspectors can update and view historical changes to case records	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
76	Code Enforcement	Complaint	A Plaintiff can receive status of complaint via preferred communication method (e.g., email, phone call, etc.)	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
77	Code Enforcement	Complaint	Open and Closed cases can be queried by Inspectors to determine if repeated complaints have occurred	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.

Functional Requirements

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Req #	Process	Sub-Process	Requirement					
78	Code Enforcement	Complaint	Customer can select inspection times based on availability or published schedule and criteria	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
79	Code Enforcement	Complaint	Ability to prioritize cases by case type and geographic location.	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
80	Code Enforcement	Complaint	Ability to view and track planning, building and licensing with a code case.	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
81	Code Enforcement	Complaint	Send violations that need to be corrected along with code site and narrative.	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
82	Code Enforcement	Complaint	Supporting documents for an complaint can be attached to an on-line submitted complaint	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
83	Code Enforcement	Complaint	Define business rules and workflows required to guide system procedural flow.	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
84	Code Enforcement	Complaint	System can assign City staff by type of complaint and geographic area.	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
85	Code Enforcement	Complaint	Attach various document types, pictures and video to an application/permit/inspection	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
86	Code Enforcement	General	System can track mandatory, inspection-generated and complaint-based code enforcement actions	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.

Functional Requirements

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Req #	Process	Sub-Process	Requirement					
87	Code Enforcement	General	System can track evidence of code enforcement violations	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
88	Code Enforcement	General	System can generate code enforcement actions	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
89	Code Enforcement	General	System can produce code enforcement violation listings with related fines and fees	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
90	Code Enforcement	General	System can generate notifications to enforcement staff	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
91	Code Enforcement	General	System can generate multiple types of fines based on City Ordinances	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
92	Code Enforcement	General	System tracks escalation of enforcement actions	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
93	Code Enforcement	General	System can generate invoices for non-compliance	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
94	Code Enforcement	General	System can flag outstanding/delinquent invoices for special assessment	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
95	Code Enforcement	General	System can generate case and violation number	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.

Functional Requirements

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Req #	Process	Sub-Process	Requirement					
96	Code Enforcement	General	User is able to identify and note a case within the system for safety concerns	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
97	Code Enforcement	General	System provides notifications and updates when a case is noted for safety concerns	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
98	Code Enforcement	General	The system has the ability to allow staff to add internal notes to a property (e.g., dangerous dog).	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
99	Code Enforcement	Inspection	Inspectors can schedule inspections based on case criteria (e.g., location, type of property) and payroll schedule (e.g., work availability)	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
100	Code Enforcement	Inspection	Attach supporting inspection data into case record (upload photos, recordings, Office docs, other)	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
101	Code Enforcement	Inspection	Inspectors can print violation notices by type (e.g., door hangars, letter, etc.) based upon user selection	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
102	Code Enforcement	Inspection	Re-inspections are scheduled based on same rules as initial inspections	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
103	Code Enforcement	Inspection	System maintains history of record changes in inspection record so that Inspector can view notices, proposed remedies, and court decisions associated with inspection record	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
104	Code Enforcement	Inspection	Fines associated with violations are tracked like receivables so that outstanding fines can be tracked	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.

Functional Requirements

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Req #	Process	Sub-Process	Requirement					
105	Code Enforcement	Inspection	System includes checklist of inspection steps/process for inspector to follow and track	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. Checklists are configured by iMS Project Team members for you.
106	Code Enforcement	Inspection	System includes templates for presentations to Hearing Officer or other required stakeholder	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. Merge Templates (MS Word) are created and part of our proposal.
107	Fire	CRM	Citizens may file a complaint online	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
108	Fire	CRM	System ability to assign personnel to investigate	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
109	Fire	CRM	System ability to (a) refer complaint to another department (b) close case	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
110	Fire	Fees	System capability to automatically add 2% fee if clients pay via credit card online. Currently department adds 2% fee manually and if clients pay via check department has to remove the fee, send check back to client due to overpayment, then generate a new invoice	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. Accomplished through Payment Processor Integration.
111	Fire	Fees	System ability to generate fees based on # of devices, sprinklers, risers - Currently under Custom Screens	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.

Functional Requirements

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Req #	Process	Sub-Process	Requirement					
112	Fire	GIS	Inspectors and/or engine/truck companies ability to access GIS when conducting inspections	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
113	Fire	GIS	Ability to cluster inspection and schedule by district (e.g., VHFHSZ, Apartment, Mercantile, Aerial Pre-Plan) currently on Custom Reports	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
114	Fire	GIS	System ability to map out/add pins on the map based on permits or cases	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
115	Fire	Inspections	While on the field, Fire Inspectors should have the capacity to search for permit history (e.g., permit #, last inspection, previous violation, balance due, chronology, and/or any links attached to it)	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
116	Fire	Inspections	While on the field, Fire Inspectors should have the capacity to complete Fire Safety Reports, add violations, add comments, capture and upload photos	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
117	Fire	Inspections	While on the field, Fire Inspectors should have the to search for forms, site plans, supporting documents	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
118	Fire	Inspections	System capability to batch schedule inspections based on subtypes to inspectors and/or engine/truck companies	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
119	Fire	Inspections/Investigations	System capability to integrate third-party software such as: RMS (listing run number, dispatched investigator, incident narrative)	I	S	IMSEnforce	Phase I	See iMS Zoll Fire Interface item in that spreadsheet. More information may still be necessary to ensure scope and integration methodology.

Functional Requirements

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Req #	Process	Sub-Process	Requirement					
120	Fire	Inspections/Investigations	Generate Fire Safety Report: print reports listing violations and referenced fire codes, pictures, last inspection date, follow-up date, fees - Currently under Trakit: CodeTRAK	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. Met with either a Demand Report, Ad-Hoc Report, or one of the Custom Reports we are proposing.
121	Fire	Inspections/Investigations	System ability to generate and print reports based on incidents (HAZMAT, VHFHSZ, Fire Hazard, Fire Safety).	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
122	Fire	Permits	System ability to generate and print invoices, PTO, permit card, inspection report/results	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
123	Fire	Permits	System ability to categorize permits based on subtypes	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
124	Fire	Plan Review	Applicant can complete an application online and submit plans	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
125	Fire	Plan Review	Applicant can pay online	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
126	Fire	Plan Review	Applicants are notified about plan check comments and/or approval	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
127	Fire	Plan Review	Applicants can retrieve plan check comments/and or approval online	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.

Functional Requirements

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Req #	Process	Sub-Process	Requirement					
128	Fire	Plan Review	Applicants can upload revisions and/or resubmittals online	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
129	Fire	Plan Review	System ability to share plans to third-party reviewers	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
130	Fire	Reports	Ability to easily print reports. Trakit tends to crash when generating and/or printing larger files	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
131	Fire	System	Sytem ability to link permits based on address/APN	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
132	Fire	System	System ability to send reports, invoice, permits via email on file	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
133	Fire	Permits	System ability to log inspections and add attachments	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
134	Fire	Permits	System ability to add payment, generate invoice	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
135	Fire	System	System capability to integrate third-party software such as: RMS (see # 17), Brycer Compliance Engine	I	S	IMSEnforce	Phase I	Should not be an issues. See our Interface responses spreadsheet. However, more information for true scope and deliverables may be necessary. We are open to providing this pre-contract.

Functional Requirements

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Req #	Process	Sub-Process	Requirement					
136	PLAN/BUILD/ENVIRON.	Application	As an Applicant, I can apply for land use permits online.	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
137	PLAN/BUILD/ENVIRON.	Application	As an Applicant, I can pay for any application fees online.	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
138	PLAN/BUILD/ENVIRON.	Application	As an Applicant, I can view the status of my application online.	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
139	PLAN/BUILD/ENVIRON.	Application	As an Applicant, I can receive email updates of my application status.	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
140	PLAN/BUILD/ENVIRON.	Application	As an Applicant, I can view guides or additional information to assist me to complete the application.	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
141	PLAN/BUILD/ENVIRON.	Application	As an Applicant, I have a checklist of tasks to complete based upon the type of application.	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
142	PLAN/BUILD/ENVIRON.	Application	As an Applicant, I can view online help tools to guide me through the application process.	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. This may need to be configured by staff and iMS based on requirement(s).
143	PLAN/BUILD/ENVIRON.	Application	As an Applicant, I can enter an electronic signature indicating my certification of a submittal.	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.

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Req #	Process	Sub-Process	Requirement					
144	PLAN/BUILD/ENVIRON.	Application	As a Reviewer, I can pull land use information - including GIS data - for land use applications	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
145	PLAN/BUILD/ENVIRON.	Application	Multiple Reviewers (from different Reviewing Organizations) can review an application at the same time.	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
146	PLAN/BUILD/ENVIRON.	Application	Solution calculates fees based on fee and rate structure	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
147	PLAN/BUILD/ENVIRON.	Application	As a Reviewer, I can add a reference to an external document that cannot be stored digitally	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
148	PLAN/BUILD/ENVIRON.	Data Requirements	Maintain the following information on each permit:	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
149	PLAN/BUILD/ENVIRON.	Data Requirements	Prerequisite documents	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
150	PLAN/BUILD/ENVIRON.	Data Requirements	Departments from which approval is required	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
151	PLAN/BUILD/ENVIRON.	Data Requirements	Department which must be notified that permits will be issued	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
152	PLAN/BUILD/ENVIRON.	Data Requirements	Original application date	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.

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Req #	Process	Sub-Process	Requirement					
153	PLAN/BUILD/ENVIRON.	Data Requirements	How many permits may be issued in total	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
154	PLAN/BUILD/ENVIRON.	Data Requirements	Staff Comments	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
155	PLAN/BUILD/ENVIRON.	Data Requirements	Additional User Defined Fields	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
156	PLAN/BUILD/ENVIRON.	Data Requirements	List of documents to be provided applicant along with permits	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
157	PLAN/BUILD/ENVIRON.	Data Requirements	Includes the following Permit data:	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
158	PLAN/BUILD/ENVIRON.	Data Requirements	Permit Type	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
159	PLAN/BUILD/ENVIRON.	Data Requirements	Work Type (e.g. Task or Activity)	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
160	PLAN/BUILD/ENVIRON.	Data Requirements	Tenant Name	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
161	PLAN/BUILD/ENVIRON.	Data Requirements	Tenant Type	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.

Functional Requirements

Implementation Response Available Definitions (Column E)	
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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)	
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E	Feature Developed as Enhancement for this Project

Req #	Process	Sub-Process	Requirement					
162	PLAN/BUILD/ENVIRON.	Data Requirements	Square Footage	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
163	PLAN/BUILD/ENVIRON.	Data Requirements	Job Number	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
164	PLAN/BUILD/ENVIRON.	Data Requirements	Other User-defined data	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
165	PLAN/BUILD/ENVIRON.	General Requirements	Ability to track bonds	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
166	PLAN/BUILD/ENVIRON.	General Requirements	Ability to make cash receipt corrections	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. With proper security authority.
167	PLAN/BUILD/ENVIRON.	General Requirements	Ability to communicate with state licensing board to confirm active license	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. iMS much like TRAKiT has integration with CSLB.
168	PLAN/BUILD/ENVIRON.	General Requirements	Ability to check for current fictitious business names, contractors licenses, and sellers permits for Business Licensing.	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. Based on requirement more information may be necessary or a custom report on criteria used to search for this detail.

Functional Requirements

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Req #	Process	Sub-Process	Requirement					
169	PLAN/BUILD/ENVIRON.	Inspection	As a local builder, I can request inspections online or by phone	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. By the phone would be with a staff member assisting in iMS. We also can integrate with an IVR (Interactive Voice Response) vendor such as our business partner, Selectron, or other(s).
170	PLAN/BUILD/ENVIRON.	Inspection	Inspectors enter comments during inspections and upload supporting documents	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
171	PLAN/BUILD/ENVIRON.	Inspection	As an Inspector I can add additional for re-inspections	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
172	PLAN/BUILD/ENVIRON.	Inspection	Inspections are scheduled based on scheduling criteria	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
173	PLAN/BUILD/ENVIRON.	Inspection	System maintains status of inspections	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
174	PLAN/BUILD/ENVIRON.	Inspections	Provide notification of inspection results as soon as possible upon completion of the inspection.	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
175	PLAN/BUILD/ENVIRON.	Inspections	Alert user when there are code violations, outstanding permit or license fees by applicant, multiple permits as an owner/builder.	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.

Functional Requirements

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Req #	Process	Sub-Process	Requirement					
176	PLAN/BUILD/ENVIRON.	Inspections	Allows for the list of close-out documents to be required once the Final Inspection is held prior to recommending a close-out to be edited by City staff.	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
177	PLAN/BUILD/ENVIRON.	Inspections	Allows users to enter, display, and modify inspection data either through an "inspections" selection on the basic permit/application, or through another menu option.	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
178	PLAN/BUILD/ENVIRON.	Inspections	Application/module contains an enhanced inspection checklist, which would enable the user to use predefined inspection result comments as well as to tie those same comments to specific building code text.	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
179	PLAN/BUILD/ENVIRON.	Inspections	Assign an inspector to a project when the permit is issued.	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
180	PLAN/BUILD/ENVIRON.	Inspections	Automatically calculate permit expiration date based on user parameters. Extend expiration date automatically based on inspection activity and manually based on written request.	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
181	PLAN/BUILD/ENVIRON.	Inspections	Functionality provided to help users identify and display information concerning inspection activities in the system.	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
182	PLAN/BUILD/ENVIRON.	Inspections	Generate a daily inspection schedule for each inspector or inspector group.	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
183	PLAN/BUILD/ENVIRON.	Inspections	Generates form letters, certificates and permits. Typical examples include: violation notices, public notices, expiration notices, approval letters, flood zone letters, etc.	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
184	PLAN/BUILD/ENVIRON.	Inspections	Inspection results must be recorded into a permit history file. Permit history files must include:	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.

Functional Requirements

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Req #	Process	Sub-Process	Requirement					
185	PLAN/BUILD/ENVIRON.	Inspections	Partial inspections	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
186	PLAN/BUILD/ENVIRON.	Inspections	Stop work orders	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
187	PLAN/BUILD/ENVIRON.	Inspections	Re-inspections	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
188	PLAN/BUILD/ENVIRON.	Inspections	Final Inspections	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
189	PLAN/BUILD/ENVIRON.	Inspections	Certificates of Occupancies	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
190	PLAN/BUILD/ENVIRON.	Inspections	Other special conditions	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
191	PLAN/BUILD/ENVIRON.	Inspections	Application for modifications	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
192	PLAN/BUILD/ENVIRON.	Inspections	Modifications granted	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
193	PLAN/BUILD/ENVIRON.	Inspections	Inspector calendar coordination – View each inspector's schedule.	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.

Functional Requirements

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Req #	Process	Sub-Process	Requirement					
194	PLAN/BUILD/ENVIRON.	Inspections	Issue a permit with a list of appropriate inspections for the job..	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
195	PLAN/BUILD/ENVIRON.	Inspections	Provides field inspectors the ability to check the status of existing violations and update information.	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
196	PLAN/BUILD/ENVIRON.	Inspections	Easily store and retrieve real-time inspection information, as well as have the capability to coordinate and distribute inspection data to other City departments with a need for this data.	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
197	PLAN/BUILD/ENVIRON.	Inspections	Schedules multiple inspections for a particular location at the same time.	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
198	PLAN/BUILD/ENVIRON.	Inspections	Schedules inspections based on predefined time amounts assigned to each inspection type.	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
199	PLAN/BUILD/ENVIRON.	Inspections	Generates a daily schedule for each inspector.	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. Can be accomplished through Task List and/or Dashboard in addition to report or schedule.
200	PLAN/BUILD/ENVIRON.	Inspections	The system has the ability to generate inspection schedules that accommodates entering the following scheduling constraints:	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
201	PLAN/BUILD/ENVIRON.	Inspections	Normal operating hours;	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.

Functional Requirements

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Req #	Process	Sub-Process	Requirement					
202	PLAN/BUILD/ENVIRON.	Inspections	Observed holidays;	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
203	PLAN/BUILD/ENVIRON.	Inspections	Single occurrence vacations by inspector with the ability to designate an alternate;	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
204	PLAN/BUILD/ENVIRON.	Inspections	Single occurrence shut-down days;	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
205	PLAN/BUILD/ENVIRON.	Inspections	Other user defined dates; and	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
206	PLAN/BUILD/ENVIRON.	Inspections	Outside normal business hours with or without associated additional fees.	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
207	PLAN/BUILD/ENVIRON.	Inspections	The system has the ability to allow inspection requests to be submitted through a portal on the City's website with the ability to add notes or comments.	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
208	PLAN/BUILD/ENVIRON.	Inspections	The system has the ability to allow applicants to view the status of requested inspections via a portal on the City's website.	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
209	PLAN/BUILD/ENVIRON.	Inspections	The system has the ability to allow City staff to schedule inspections by appointment in AM or PM.	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
210	PLAN/BUILD/ENVIRON.	Inspections	The system has the ability to allow City staff to schedule inspections by appointment to the day.	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.

Functional Requirements

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Req #	Process	Sub-Process	Requirement					
211	PLAN/BUILD/ENVIRON.	Inspections	The system has the ability to automate inspection assignments by inspection type.	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
212	PLAN/BUILD/ENVIRON.	Inspections	The system has the ability to allow supervisors to reassign selected inspections with appropriate security permissions.	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
213	PLAN/BUILD/ENVIRON.	Inspections	The system has the ability to allow supervisors to reassign selected inspections or all inspections for a selected date(current or future) from one inspector to more than one inspectors by load balancing in the same inspection group.	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
214	PLAN/BUILD/ENVIRON.	Inspections	The system has the ability to mass reassign all incomplete future inspections assigned to a single inspector to another inspector.	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
215	PLAN/BUILD/ENVIRON.	Inspections	The system has the ability to reassign all future incomplete inspections of a selected permit from one inspector to another inspector.	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
216	PLAN/BUILD/ENVIRON.	Inspections	The system has the ability to reassign inspections to another inspector (i.e. due to absence).	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
217	PLAN/BUILD/ENVIRON.	Inspections	Schedules multiple inspections for a particular location at the same time.	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
218	PLAN/BUILD/ENVIRON.	Inspections	Schedules inspections based on predefined time amounts assigned to each inspection type.	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
219	PLAN/BUILD/ENVIRON.	Inspections	Provide for inspection request via:	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.

Functional Requirements

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Req #	Process	Sub-Process	Requirement					
220	PLAN/BUILD/ENVIRON.	Inspections	IVR	N	TPS	iMSApprovals	Phase I	This would be through an IVR provider; i.e., Selectron, etc.
221	PLAN/BUILD/ENVIRON.	Inspections	Internet.	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
222	PLAN/BUILD/ENVIRON.	Inspections	The system has the ability to provide a native and/or fully integrated IVR functionality for inspection requests and permit status look-up.	Y	TPS	iMSApprovals	Phase I	Yes. We have several clients using an IVR solution (Selectron) with iMS and the integrations have already been built.
223	PLAN/BUILD/ENVIRON.	Inspections	The system has the ability to provide IVR functionality that allows City staff to record audio instructions and messages for contractor and applicants to hear when they dial into the IVR number.	Y-ND	TPS	iMSApprovals	Phase I	Through your selected IVR Provider and integration to iMS.
224	PLAN/BUILD/ENVIRON.	Inspections	The system has the ability to provide IVR functionality that allows for contractors and applicants to obtain status information on a submitted permit.	Y-ND	TPS	iMSApprovals	Phase I	Through your selected IVR Provider and integration to iMS.
225	PLAN/BUILD/ENVIRON.	Inspections	The system has the ability to provide IVR functionality that allows for contractors and applicants to request inspections.	Y-ND	TPS	iMSApprovals	Phase I	Through your selected IVR Provider and integration to iMS.
226	PLAN/BUILD/ENVIRON.	Inspections	The system has the ability to provide IVR functionality that allows for contractors and applicants to obtain status information on a scheduled inspection (e.g., request received, inspection scheduled).	Y-ND	TPS	iMSApprovals	Phase I	Through your selected IVR Provider and integration to iMS.
227	PLAN/BUILD/ENVIRON.	Inspections	The system has the ability to provide IVR functionality that allows for contractor and applicants to cancel a scheduled inspection.	Y-ND	TPS	iMSApprovals	Phase I	Through your selected IVR Provider and integration to iMS.
228	PLAN/BUILD/ENVIRON.	Inspections	The system has the ability to provide IVR functionality that allows for contractors and applicants to obtain status information on a completed inspection (e.g., pass, re-inspection required, etc.).	Y-ND	TPS	iMSApprovals	Phase I	Through your selected IVR Provider and integration to iMS.

Functional Requirements

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Req #	Process	Sub-Process	Requirement					
229	PLAN/BUILD/ENVIRON.	Inspections	The system has the ability to provide text message (SMS) functionality that allows for contractors and applicants to request inspections.	Y-ND	TPS	iMSApprovals	Phase I	Through your selected IVR Provider and integration to iMS.
230	PLAN/BUILD/ENVIRON.	Inspections	The system has the ability to provide text message (SMS) functionality that allows for contractors and applicants to obtain status information on a scheduled inspection (e.g., request received, inspection scheduled).	Y-ND	TPS	iMSApprovals	Phase I	Through your selected IVR Provider and integration to iMS.
231	PLAN/BUILD/ENVIRON.	Inspections	Allow inspection scheduling and logging of inspection results.	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
232	PLAN/BUILD/ENVIRON.	Inspections	Provide for logging of inspection results from field.	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
233	PLAN/BUILD/ENVIRON.	Inspections	Records travel time and actual inspection time summarized by permit and Inspector.	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
234	PLAN/BUILD/ENVIRON.	Inspections	Print out a permit visitation which displays any of the data that has been collected and any pertinent comments as well as a place for an inspector to document his work	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
235	PLAN/BUILD/ENVIRON.	Inspections	Allows for holds to be placed on applications, permits, and/or parcels to stop development	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
236	PLAN/BUILD/ENVIRON.	Inspections	Allows for recalculation of application/permit fees based upon updated information.	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
237	PLAN/BUILD/ENVIRON.	Inspections	Allows for the capture and storage of scanned images.	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.

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Req #	Process	Sub-Process	Requirement					
238	PLAN/BUILD/ENVIRON.	Inspections	Allows for the issuance of permits based upon one application/permit number for the entire project, regardless of the permits attached to the project	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
239	PLAN/BUILD/ENVIRON.	Inspections	Allows for the use of mobile devices in the field	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
240	PLAN/BUILD/ENVIRON.	Inspections	Allows multi-tasking enabling users to access multiple applications or functions without leaving the initial application, function or system.	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
241	PLAN/BUILD/ENVIRON.	Inspections	Allows the capture of multiple telephone numbers and e-mail addresses for all applicants, owners, and contractors.	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
242	PLAN/BUILD/ENVIRON.	Inspections	Allows the City to create workflow procedures to duplicate or replace existing procedures.	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
243	PLAN/BUILD/ENVIRON.	Inspections	Allows the City to determine/identify items that would prevent certain permits from being issued. For example, outstanding fees, code enforcement cases or utility system holds, etc.	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
244	PLAN/BUILD/ENVIRON.	Inspections	Allows the user to change or divide property addresses for newly created properties - full integration with GIS and master streets and address systems	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
245	PLAN/BUILD/ENVIRON.	Inspections	Allows users to maintain contractor/licensee information in a central location	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
246	PLAN/BUILD/ENVIRON.	Inspections	Automatically calculate user-defined "key dates" for a permit as part of the approval process.	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.

Functional Requirements

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Req #	Process	Sub-Process	Requirement					
247	PLAN/BUILD/ENVIRON.	Inspections	Automatically enters "today's date" as the date of creation on a permit at the time of application; also identifying the creator and time of data entry activity	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
248	PLAN/BUILD/ENVIRON.	Inspections	Calendar for scheduling daily building inspections that can be queried and included in reports	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
249	PLAN/BUILD/ENVIRON.	Inspections	Scheduling of inspections by geographic area, project/permit types and inspection types. Allow rescheduling by authorized users.	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
250	PLAN/BUILD/ENVIRON.	Inspections	Captures/pulls comments from one type of permit to another type of permit on the same property when requested by user.	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
251	PLAN/BUILD/ENVIRON.	Inspections	Create custom permit templates for common permit types	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
252	PLAN/BUILD/ENVIRON.	Inspections	Issue permit refunds	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
253	PLAN/BUILD/ENVIRON.	Inspections	Electronically route permit application for approval and inspection management	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
254	PLAN/BUILD/ENVIRON.	Inspections	Generates a tickler file of deadline dates.	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
255	PLAN/BUILD/ENVIRON.	Inspections	Generates list of permits nearing expiration.	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.

Functional Requirements

Implementation Response Available Definitions (Column E)	
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Column F: Available Responses (Column F)	
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TPS	Requirement and Feature Supported by Third Party
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IF Y-ND Selected (Column J)	
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Req #	Process	Sub-Process	Requirement					
256	PLAN/BUILD/ENVIRON.	Inspections	Generates corresponding notices on delinquency of permits	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
257	PLAN/BUILD/ENVIRON.	Inspections	Provides a method of archiving or creating a history file for closed applications/permits.	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
258	PLAN/BUILD/ENVIRON.	Inspections	Provides a method to allow the homeowner to act as his own contractor for all permit types.	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
259	PLAN/BUILD/ENVIRON.	Inspections	Shows the current status of applications/permits under one specific development project.	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
260	PLAN/BUILD/ENVIRON.	Inspections	Interfaces with Microsoft Office in order to produce written notifications regarding finding of inspections.	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
261	PLAN/BUILD/ENVIRON.	Inspections	Track code violations and related documentation	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
262	PLAN/BUILD/ENVIRON.	Inspections	Issues and track multiple permits associated with one address.	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
263	PLAN/BUILD/ENVIRON.	Inspections	Links all permits and inspections activity to property records, owners and contractors.	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
264	PLAN/BUILD/ENVIRON.	Inspections	Provide narrative description of business, notations, etc.	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.

Functional Requirements

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Req #	Process	Sub-Process	Requirement					
265	PLAN/BUILD/ENVIRON.	Inspections	Provides a user-defined table of standard or recurring conditions that can be accessed and applied to a permit during permit processing, thereby eliminating the need to key standard' conditions	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
266	PLAN/BUILD/ENVIRON.	Inspections	The system has the ability to accommodate recurring inspections.	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
267	PLAN/BUILD/ENVIRON.	Inspections	The system has the ability to automate the scheduling and notification of recurring inspections.	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
268	PLAN/BUILD/ENVIRON.	Inspections	The system has the ability to allow for an unlimited number of inspections on each application/case.	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
269	PLAN/BUILD/ENVIRON.	Inspections	The system has the ability to support follow-up inspections for tracking warranty periods (e.g., inspection prior to expiration of warranty).	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
270	PLAN/BUILD/ENVIRON.	Inspections	The system has the ability to require steps in the inspection process to be followed and not skipped with the ability to override, with appropriate security permissions.	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
271	PLAN/BUILD/ENVIRON.	Inspections	The system has the ability to identify an inspection as conducted by a third-party or special inspector.	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
272	PLAN/BUILD/ENVIRON.	Inspections	The system has the ability to display flags, holds, and other conditions from the permitting application process to be viewable in the inspections module.	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
273	PLAN/BUILD/ENVIRON.	Inspections	The system has the ability to support multiple types of application flags, visible to inspectors from the inspection module.	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.

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Req #	Process	Sub-Process	Requirement					
274	PLAN/BUILD/ENVIRON.	Inspections	The system has the ability to set a default user by permit type to allow automatic assign first inspection of a new permit to that default user (e.g., default inspector) and allow users change the default inspector as needed.	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
275	PLAN/BUILD/ENVIRON.	Inspections	Provides integration with word processing for entry of comments and conditions and produce permit summary documentation.	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
276	PLAN/BUILD/ENVIRON.	Inspections	Provides on-demand listings of permits in various sort orders (by address, date, type of permit, permit number, assigned inspector, etc.) and with various selections criteria (i.e., permit status, application data ranges, inspector assigned or involved in	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
277	PLAN/BUILD/ENVIRON.	Inspections	Browse and access any permit by permit number, PIN number, property address, permit description, any of the names associated with the permit (owners, applicants, developers, etc.), type of permit, and user-defined lookup fields.	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
278	PLAN/BUILD/ENVIRON.	Other	Businesses can be identified by geocode for business analysis purposes (e.g., groupings, etc.)	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
279	PLAN/BUILD/ENVIRON.	Owner Transfer	As a Reviewer, I can view the history of business ownership	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
280	PLAN/BUILD/ENVIRON.	Permit	As a Reviewer/Approver, I can select properties to receive notice about an application request	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
281	PLAN/BUILD/ENVIRON.	Permit	As a Reviewer/Approver, I can print notices (letters or signs) to send to impacted property owners	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
282	PLAN/BUILD/ENVIRON.	Permit	As a Reviewer/Approver, I can send notifications via email, text, or print	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.

Functional Requirements

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Req #	Process	Sub-Process	Requirement					
283	PLAN/BUILD/ENVIRON.	Permit	As a Reviewer/Approver, I can issue a service order with Inspectors to post a notice on property based on the Inspector's schedule and notification requirements	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
284	PLAN/BUILD/ENVIRON.	Permit	As an Applicant, I receive updates of my permit application status during each for each application review change	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
285	PLAN/BUILD/ENVIRON.	Permit	As an Applicant, I can select the way that I am notified about my permit application status (e.g., email, text, etc.)	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
286	PLAN/BUILD/ENVIRON.	Permit	Planners update land use in GIS from the approved application record	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
287	PLAN/BUILD/ENVIRON.	Permit	Departments responsible for enforcing code and other standards can review and comment in the application record	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
288	PLAN/BUILD/ENVIRON.	Permit	Development orders are printed from system after proper approvals are recorded	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
289	PLAN/BUILD/ENVIRON.	Permit	Solution calculates fees based on type of permit (e.g., residential and non-residential)	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
290	PLAN/BUILD/ENVIRON.	Permit	Applicant can pay fee or establish escrow for fees	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
291	PLAN/BUILD/ENVIRON.	Permit	Escrow balance is tracked in solution	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.

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Req #	Process	Sub-Process	Requirement					
292	PLAN/BUILD/ENVIRON.	Permit	Planners can establish drawdown schedule so that fees are drawn from escrow balance first before establishing receivable	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
293	PLAN/BUILD/ENVIRON.	Permit	Reviewers can provide comments during permit review	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
294	PLAN/BUILD/ENVIRON.	Permit	Permits are issued from system with punch list of items to be completed before occupancy permit is issued	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
295	PLAN/BUILD/ENVIRON.	Planning	Support online pre-planning process with workflow capabilities	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
296	PLAN/BUILD/ENVIRON.	Planning	Collect revenue fee for pre-planning process and distribute to applicable departments	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
297	PLAN/BUILD/ENVIRON.	Planning	Ability to track actual costs of pre-application process	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
298	PLAN/BUILD/ENVIRON.	Planning	Provide for the tracking of the following Planning applications:	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
299	PLAN/BUILD/ENVIRON.	Planning	Planning Site Plan Reviews	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
300	PLAN/BUILD/ENVIRON.	Planning	General Plan Amendments	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.

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Req #	Process	Sub-Process	Requirement					
301	PLAN/BUILD/ENVIRON.	Planning	Design Review and revisions	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
302	PLAN/BUILD/ENVIRON.	Planning	Modifications	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
303	PLAN/BUILD/ENVIRON.	Planning	Zone Changes	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
304	PLAN/BUILD/ENVIRON.	Planning	Conditional Use Permits and revisions	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
305	PLAN/BUILD/ENVIRON.	Planning	Administrative Site Plan and revisions	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
306	PLAN/BUILD/ENVIRON.	Planning	Design Review	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
307	PLAN/BUILD/ENVIRON.	Planning	Tentative Tract, Tentative Parcel Map and revisions	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
308	PLAN/BUILD/ENVIRON.	Planning	Provide the ability to establish review and expiration dates for all events.	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
309	PLAN/BUILD/ENVIRON.	Renewal	As a Permit Owner, I can renew my permit online	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.

Functional Requirements

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Req #	Process	Sub-Process	Requirement					
310	PLAN/BUILD/ENVIRON.	Renewal	Renewals are issued as a type of receivable so that organization can track all receivables the same way	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
311	PLAN/BUILD/ENVIRON.	Renewal	As a Permit Owner, I can receive renewal invoices are received based on my preferred communications method	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
312	PLAN/BUILD/ENVIRON.	Renewal	As a Reviewer, I can view the payment history on an invoice before approving a permit renewal	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
313	PLAN/BUILD/ENVIRON.	Renewal	Renewals are issued after receivable payment is complete	Y	S	iMSApprovals	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
314	Service Request	Service Request	Allow users to directly input a service request into the system	Y	S	iMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
315	Service Request	Service Requests	Identifies duplicate service requests for user review	Y	S	iMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
316	Service Request	Service Requests	Routes the service request to the appropriate reviewer based on pre-defined roles	Y	S	iMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
317	Service Request	Service Requests	Allows requester to review the status of the service request and make additional comments.	Y	S	iMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
318	Service Request	Service Requests	Notifies requester whether the service request has been rejected or approved and converted into a work order	Y	S	iMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.

Functional Requirements

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Req #	Process	Sub-Process	Requirement					
319	Service Request	Service Requests	System can track the total cost of a service request from origination to completion	Y	S	iMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
320	Service Request	Service Requests	System can show multi-channel inbound request capabilities (e.g. citizen requests can be received through the following channels). Please indicate all that apply: smartphone app	Y	S	iMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
321	Service Request	Service Requests	System can show multi-channel inbound request capabilities (e.g. citizen requests can be received through the following channels). Please indicate all that apply: voicemails	Y	S	iMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. Selectron? Or if manually entered by staff
322	Service Request	Service Requests	System can show multi-channel inbound request capabilities (e.g. citizen requests can be received through the following channels). Please indicate all that apply: phone calls	Y	S	iMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. Selectron? Or if manually entered by staff
323	Service Request	Service Requests	System can show multi-channel inbound request capabilities (e.g. citizen requests can be received through the following channels). Please indicate all that apply: SMS/text messages	Y	S	iMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. Selectron?
324	Service Request	Service Requests	System can show multi-channel inbound request capabilities (e.g. citizen requests can be received through the following channels). Please indicate all that apply: web forms	Y	S	iMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
325	Service Request	Service Requests	System can show multi-channel inbound request capabilities (e.g. citizen requests can be received through the following channels). Please indicate all that apply: Facebook	Y	S	iMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
326	Service Request	Service Requests	System can show multi-channel inbound request capabilities (e.g. citizen requests can be received through the following channels). Please indicate all that apply: Twitter	Y	S	iMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.

Functional Requirements

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327	Service Request	Service Requests	System can show multi-channel inbound request capabilities (e.g. citizen requests can be received through the following channels). Please indicate all that apply: Walk-ins	Y	S	iMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
328	Service Request	Service Requests	System can show multi-channel inbound request capabilities (e.g. citizen requests can be received through the following channels). Please indicate all that apply: Citizen communication portal	Y	S	iMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
329	Service Request	Service Requests	System supports social media integration	I	TPS	iMSEnforce	Phase I	Integration requirements need to be determined and more discussion may be necessary.
330	Service Request	Service Requests	System supports multi-channel outbound response capabilities (e.g. responses to service request can be sent through the original communication channel used to submit the request) (indicate any limitations in the comments column)	Y	S	iMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. Email and/or Text Messaging can be sent via iMS currently. Phone numbers are listed but staff would need to physically make the call.
331	Service Request	Service Requests	System can leverages a single inbox for all citizen requests, regardless of type or communication channel used to submit request	Y	S	iMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
332	Service Request	Service Requests	System can convert citizen requests into service inquiries and/or work orders for public works and other departments	Y	S	iMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
333	Service Request	Service Requests	System allows staff and/or the public to track the progress of a service request	Y	S	iMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
334	Service Request	Service Requests	System can facilitate follow-up notifications internally (with staff) and externally (with the resident)	Y	S	iMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.

Functional Requirements

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335	Service Request	Service Requests	System manages automated internal follow-ups for work-in-progress	Y	S	iMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
336	Service Request	Service Requests	System can provides reports, dashboards, and quires and other general visibility on the status of each request	Y	S	iMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. May be a custom report configured by iMS and already part of our overall proposal.
337	Service Request	Service Requests	System can generate reminders	Y	S	iMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
338	Service Request	Service Requests	System can generate automated external follow-ups to residents to let them know that work is complete	Y	S	iMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
339	Service Request	Service Requests	System can produce service request analytics and quantifiable service-level data to track community-level trends	Y	S	iMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. Accomplished through reports, searches (Ad-Hoc queries), dashboard items, or customized reports.
340	Service Request	Service Requests	System can produce reports on resident requests	Y	S	iMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
341	Service Request	Service Requests	System documents and tracks individual citizen correspondence	Y	S	iMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.

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IF Y-ND Selected (Column J)	
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Req #	Process	Sub-Process	Requirement					
342	Service Request	Service Requests	System allows resident to review the status of their request	Y	S	iMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
343	Service Request	Service Requests	Systems allows residents to include photos and/or videos with a request	Y	S	iMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
344	Service Request	Service Requests	System allows users to geotag the incident or service request on a map	Y	S	iMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
345	Service Request	Service Requests	System assigns each request/incident a unique tracking number	Y	S	iMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
346	System	Audit	As a System Administrator, I can select types of transaction activity to record for audit purposes.	Y	S	iMS Suite	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. Auditing is accomplished on all areas within iMS that can be altered. Viewing audited information is based on security rights for Administrators or others.
347	System	Audit	For audit purposes, the system can track user application or business transaction activity.	Y	S	iMS Suite	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
348	System	Audit	To conserve storage, audit data can be purged after a defined period of time	Y	S	iMS Suite	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.

Functional Requirements

Implementation Response Available Definitions (Column E)

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Req #	Process	Sub-Process	Requirement					
349	System	Documents	Supporting documents are attached to business transactions	Y	S	iMS Suite	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
350	System	Field / Mobility	System allows staff to access the system using wireless technology	Y	S	iMS Suite	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. As long as wireless
351	System	Field / Mobility	System allows staff to generate citations/inspection reports/tickets and record information on the job site using a mobile device	Y	S	iMS Suite	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. As long as wireless
352	System	Field / Mobility	System has a mobile solution so staff can record information in the field and then synchronize with the system upon reconnection to a wifi network/cellular network	Y	S	iMS Suite	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. As long as wireless
353	System	General Requirements	Ability to upload MS Excel spreadsheets into software to look for matches and provide a report (preferably another Excel report for mail merge). Ex: Reference multiple Excel spreadsheets against the system, to check for current business licenses.	Y	S	iMS Suite	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. As long as wireless
354	System	General Requirements	Ability to upload an MS Excel spreadsheet and have the software create its own type of mail merge on preset letters.	Y	S	iMS Suite	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. As long as wireless
355	System	General Requirements	Business Tax Accounts - Create linkage going forward for old accounts that transferred to new owners.	Y	S	iMS Suite	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. As long as wireless

Functional Requirements

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Req #	Process	Sub-Process	Requirement					
356	System	Land Management	System allows the GIS to act as a querying tool for BL/permit/inspection data	Y	S	iMS Suite	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. As long as wireless
357	System	Land Management	System allows permit/inspection information to be retrieved by selecting a parcel or address in GIS and allows a user to select a GIS area or attribute (i.e. zoning/neighborhoods) and print a report of permit/inspection activities pertaining to that area	Y	S	iMS Suite	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. As long as wireless
358	System	Land Management	System can visually represent data and property information on map	Y	S	iMS Suite	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. As long as wireless
359	System	Land Management	System can report on all activity related to an address/parcel record (permits, history of payments, code enforcement history, land use changes, outstanding balance, etc.)	Y	S	iMS Suite	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. As long as wireless
360	System	Land Management	System can track special property tax assessments placed on a property	Y	S	iMS Suite	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. As long as wireless
361	System	Land Management	System can generate notification to staff when a special assessment is placed on a property	Y	S	iMS Suite	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. As long as wireless
362	System	Land Management	User can enter a special assessment on a property record by uploading a spreadsheet (.xls or .csv file) into the system	Y	S	iMS Suite	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. As long as wireless

Functional Requirements

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Req #	Process	Sub-Process	Requirement					
363	System	Land Management	System can interface with the property County tax system to update property ownership information	Y	S	iMS Suite	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. As long as wireless
364	System	Reports	The system has the ability to generate reports in the following in multiple formats: (e.g. PDF, Microsoft Word and Excel)	Y	S	iMS Suite	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. As long as wireless
365	System	Reports	The system has the ability to provide a library of standard reports (i.e., "canned" reports).	Y	S	iMS Suite	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. As long as wireless
366	System	Reports	The system has the ability to allow a user to modify existing reports and create new reports, with appropriate security permissions.	Y	S	iMS Suite	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. As long as wireless
367	System	Security	As a user, I can access the entire proposed solution after logging onto the network	Y	S	iMS Suite	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. As long as wireless
368	System	Security	As a Security Administrator, I can assign security by role instead of user so that security definitions are easier to manage	Y	S	iMS Suite	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. As long as wireless
369	System	Security	As an end-user, I cannot access and view data without having the correct role.	Y	S	iMS Suite	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. As long as wireless

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Req #	Process	Sub-Process	Requirement					
370	System	Self-Service	System includes a Contractor Master File file to store:	Y	S	iMS Suite	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. As long as wireless
371	System	Self-Service	Maintain information on applicant including:	Y	S	iMS Suite	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. As long as wireless
372	System	Self-Service	Applicant Name	Y	S	iMS Suite	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. As long as wireless
373	System	Self-Service	Applicant Address	Y	S	iMS Suite	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. As long as wireless
374	System	Self-Service	Business Name	Y	S	iMS Suite	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. As long as wireless
375	System	Self-Service	Business Address	Y	S	iMS Suite	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. As long as wireless
376	System	Self-Service	Type of Business, meaning what kind of business are they conducting	Y	S	iMS Suite	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. As long as wireless

Functional Requirements

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Req #	Process	Sub-Process	Requirement					
377	System	Self-Service	Officers of the business (ex: president, secretary etc.)	Y	S	iMS Suite	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. As long as wireless
378	System	Self-Service	Social Security, Drivers License, or Federal ID number	Y	S	iMS Suite	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. As long as wireless
379	System	Self-Service	Ability to code businesses using the citys preset classification numbers	Y	S	iMS Suite	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. As long as wireless
380	System	Self-Service	Start date for business	Y	S	iMS Suite	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. As long as wireless
381	System	Self-Service	Sections to enter sellers permit number, contractors license number, and permit numbers with the expiration date	Y	S	iMS Suite	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. As long as wireless
382	System	Self-Service	Gross receipts	Y	S	iMS Suite	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. As long as wireless
383	System	Self-Service	Contractor name or permit expeditor	Y	S	iMS Suite	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. As long as wireless

Functional Requirements

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Req #	Process	Sub-Process	Requirement					
384	System	Self-Service	Doing Business As name (DBA)	Y	S	iMS Suite	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. As long as wireless
385	System	Self-Service	Business Type	Y	S	iMS Suite	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. As long as wireless
386	System	Self-Service	Telephone (multiple)	Y	S	iMS Suite	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. As long as wireless
387	System	Self-Service	Email	Y	S	iMS Suite	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. As long as wireless
388	System	Self-Service	Date of issuance	Y	S	iMS Suite	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. As long as wireless
389	System	Self-Service	Date of final approval	Y	S	iMS Suite	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. As long as wireless
390	System	Self-Service	Date of expiration (if applicable)	Y	S	iMS Suite	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. As long as wireless

Functional Requirements

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Req #	Process	Sub-Process	Requirement					
391	System	Self-Service	Multiple locations (per license)	Y	S	iMS Suite	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. As long as wireless
392	System	Self-Service	online applications for community members for permits, etc	Y	S	iMS Suite	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. As long as wireless
393	System	Transaction	Plan	Y	S	iMS Suite	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. As long as wireless
394	System	Transaction	Users can use transaction templates to reduce data entry	Y	S	iMS Suite	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. As long as wireless
395	System	Transaction	Users can default data in data entry forms to reduce data entry and errors	Y	S	iMS Suite	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. As long as wireless
396	System	Transaction	The system allows for capturing business data based on the Standard Industrial Classification (SIC) Codes.	Y	S	iMS Suite	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. As long as wireless
397	System	Transaction	The system allows for capturing business data based on the National Industry-Specific Occupational Employment and Wage Estimates(NAICS)Code	Y	S	iMS Suite	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. As long as wireless

Functional Requirements

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Req #	Process	Sub-Process	Requirement					
398	System	Workflow	As an approver, I am quickly notified when an approval is required because I am notified by:	Y	S	iMS Suite	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. As long as wireless
399	System	Workflow	Notification after I log into solution	Y	S	iMS Suite	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. As long as wireless
400	System	Workflow	Notification by email	Y	S	iMS Suite	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. As long as wireless
401	System	Workflow	As a Workflow Designer, I can save versions of workflow design	Y	S	iMS Suite	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. As long as wireless
402	System	Workflow	As an approver, I can approve transactions from all proposed functions.	Y	S	iMS Suite	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. As long as wireless
403	System	Workflow	As an approver, I can approve transactions from all proposed third-party solutions	Y	S	iMS Suite	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. As long as wireless
404	System	Workflow	As an approver, I can request more information or explain my decision during workflow approval	Y	S	iMS Suite	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. As long as wireless

Functional Requirements

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Req #	Process	Sub-Process	Requirement					
405	System	Workflow	The system reports the status of a workflow transaction so that the originator does not need to manually track the transaction	Y	S	iMS Suite	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. As long as wireless
406	System	Workflow	The originator can add comments when responding to approver request for information	Y	S	iMS Suite	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. As long as wireless
407	System	Workflow	I can assign approval to a designated user when I am on leave	Y	S	iMS Suite	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. As long as wireless
408	System	Workflow	The system has the ability to accommodate a City-defined checklist for initial application acceptance.	Y	S	iMS Suite	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. As long as wireless
409	Work Orders	Mobile Work Orders	System supports viewing, updating, and adding information to work orders through mobile devices	Y	S	iMS Assets	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
410	Work Orders	Mobile Work Orders	Mobile units receive new work orders or updates to existing work orders in real time	Y	S	iMS Assets	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
411	Work Orders	Mobile Work Orders	Mobile unit logs start and stop time for completing work order	Y	S	iMS Assets	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
412	Work Orders	Work Order Billing	Costs for work order can be billed by: Actual costs (salary, benefits, supplies, etc.)	Y	S	iMS Assets	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.

Functional Requirements

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Req #	Process	Sub-Process	Requirement					
413	Work Orders	Work Order Billing	System can apply pre-determined overhead rate to work order billing	Y	S	iMS Assets	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
414	Work Orders	Work Order Billing	System to bill outside entities based on work order, including the billing of city over head costs	Y	S	iMS Assets	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
415	Work Orders	Work Order Closing	Upon completion, system closes work order and tracks necessary result, labor, material, equipment and other cost information	Y	S	iMS Assets	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
416	Work Orders	Work Order Closing	Workflow for approval of closed work orders, based on type of work order	Y	S	iMS Assets	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
417	Work Orders	Work Order Closing	System allows soft close of a work order pending inspection for user selected or user defined work orders	Y	S	iMS Assets	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
418	Work Orders	Work Order Closing	System tracks follow up work that is required	Y	S	iMS Assets	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
419	Work Orders	Work Order Management	System interfaces with City's GIS database (ESRI)	Y	S	iMS Assets	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
420	Work Orders	Work Order Management	Generates work orders for land	Y	S	iMS Assets	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
421	Work Orders	Work Order Management	Service requests can be initiated by internal and external customers	Y	S	iMS Assets	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.

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Req #	Process	Sub-Process	Requirement					
422	Work Orders	Work Order Management	Ability for requester (citizens, employees) to enter or create a service request from an online portal/self-service, or City website	Y	S	iMS Assets	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
423	Work Orders	Work Order Management	System tracks requester's name	Y	S	iMS Assets	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
424	Work Orders	Work Order Management	System tracks requester's phone number	Y	S	iMS Assets	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
425	Work Orders	Work Order Management	System tracks requester's email address	Y	S	iMS Assets	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
426	Work Orders	Work Order Management	System tracks requester's physical address	Y	S	iMS Assets	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
427	Work Orders	Work Order Management	Work orders to tie to property file/parcel (track workers orders by property)	Y	S	iMS Assets	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
428	Work Orders	Work Order Management	Ability to notify customer (internal or external) on the completion or status of a task	Y	S	iMS Assets	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
429	Work Orders	Work Order Management	Work order applies to multiple assets with same task	Y	S	iMS Assets	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
430	Work Orders	Work Order Management	Service requests can be routed to appropriate user for review and approval	Y	S	iMS Assets	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.

Functional Requirements

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Req #	Process	Sub-Process	Requirement					
431	Work Orders	Work Order Management	Track the status and cost of the work order from generation to completion	Y	S	iMS Assets	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
432	Work Orders	Work Order Management	Generate a work order from a service request	Y	S	iMS Assets	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
433	Work Orders	Work Order Management	Generate a work order without a service request (e.g. respond to an emergency)	Y	S	iMS Assets	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
434	Work Orders	Work Order Management	Template to generate common work orders	Y	S	iMS Assets	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
435	Work Orders	Work Order Management	Group templates of work order	Y	S	iMS Assets	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
436	Work Orders	Work Order Management	Copy old work order to create new work order	Y	S	iMS Assets	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
437	Work Orders	Work Order Management	Create template from old work order	Y	S	iMS Assets	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
438	Work Orders	Work Order Management	System can generate multiple work orders from one service request	Y	S	iMS Assets	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
439	Work Orders	Work Order Management	System can divide the work order into multiple activities, tasks, and phases	Y	S	iMS Assets	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.

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440	Work Orders	Work Order Management	Work orders can contain unlimited number of phases (tasks) (please indicate limit)	Y	S	iMS Assets	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. Tasks can be grouped based on a Phase. Generally recommend a report to review a multi-phase work order
441	Work Orders	Work Order Management	Ability to prioritize work orders (determined and set manually)	Y	S	iMS Assets	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
442	Work Orders	Work Order Management	User can identify (override) priority for work order	Y	S	iMS Assets	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
443	Work Orders	Work Order Management	Work orders can be grouped to accommodate full multiple work order process	Y	S	iMS Assets	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. Tasks can be grouped based on a Phase. Generally recommend a report to review grouped a multiple work order process and sibling linking of records
444	Work Orders	Work Order Scheduling	Planner can easily view prioritized work and schedule jobs either daily or weekly	Y	S	iMS Assets	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
445	Work Orders	Work Order Scheduling	Provides ability to carry scheduled jobs not completed to next schedule day or week.	Y	S	iMS Assets	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
446	Work Orders	Work Order Scheduling	Requester or Employees can view the reason that the work order is in a current status (e.g., started, delayed, % completion, complete)	Y	S	iMS Assets	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.

Functional Requirements

Implementation Response Available Definitions (Column E)	
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Column F: Available Responses (Column F)	
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TPS	Requirement and Feature Supported by Third Party
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IF Y-ND Selected (Column J)	
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Req #	Process	Sub-Process	Requirement					
447	Work Orders	Work Order Scheduling	Notification to the requester when a work order has been completed	Y	S	iMS Assets	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
448	Work Orders	Work Order Scheduling	Scheduling of work orders on calendar by time	Y	S	iMS Assets	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
449	Work Orders	Work Order Scheduling	Track employee time charged to work orders	Y	S	iMS Assets	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
450	Work Orders	Work Order Scheduling	Ability to view work orders that are assigned to each employee	Y	S	iMS Assets	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
451	Work Orders	Work Order Scheduling	Ability to sort work orders by type and sub-type	Y	S	iMS Assets	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
452	Work Orders	Work Order Tracking	Generates bill s (auto create necessary items needed on a standard routine job from actual work orders completed)	Y	S	iMS Assets	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
453	Work Orders	Work Order Tracking	Prioritize the work order based on user-defined thresholds and available resources.	Y	S	iMS Assets	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
454	Work Orders	Work Order Tracking	Assign the work order to one employee, multiple employees, or groups of employees	Y	S	iMS Assets	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. iMS supports Roles which can contain one or more grouped employees

Functional Requirements

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Req #	Process	Sub-Process	Requirement					
455	Work Orders	Work Order Tracking	Assign work order to non-employees, or groups of non employees	Y	S	iMS Assets	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal. iMS supports Roles which can contain one or more grouped non-employees
456	Work Orders	Work Orders	Ability to send automated notifications to the requesting department (or citizen) via electronic methods of changes in the work order status.	Y	S	iMS Assets	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
457	Work Orders	Work Orders	Ability for work orders to display and print special instructions.	Y	S	iMS Assets	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
458	Work Orders	Work Orders	Ability to track all dates throughout the work order life cycle (e.g., date received, date scheduled, date started, etc.).	Y	S	iMS Assets	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
459	Work Orders	Work Orders	Ability to record date and time, changes made, and the user who made changes to any work order.	Y	S	iMS Assets	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
460	Work Orders	Work Orders	Ability to create approval process for the following:	Y	S	iMS Assets	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
461	Work Orders	Work Orders	Open Work Order	Y	S	iMS Assets	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
462	Work Orders	Work Orders	Place Work Order on Hold	Y	S	iMS Assets	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.

Functional Requirements

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Req #	Process	Sub-Process	Requirement					
463	Work Orders	Work Orders	Close Work Order	Y	S	iMS Assets	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
464	Work Orders	Work Orders	Voided Work Order	Y	S	iMS Assets	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
465	Work Orders	Work Orders	User-defined status	Y	S	iMS Assets	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
466	Work Orders	Work Orders	Ability to identify and prevent duplicate work orders.	Y	S	iMS Assets	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
467	Work Orders	Work Orders	Ability to prioritize work orders based on user-defined parameters or assignments.	Y	S	iMS Assets	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
468	Work Orders	Work Orders	Ability to create master work orders with associated sub-work orders (e.g., renovation project work order is made up of destruction, construction, electrical, plumbing, etc.) and provide an obvious cross-reference.	Y	S	iMS Assets	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
469	Work Orders	Work Orders	Ability to generate automatic form letters (notification documents) to notify specified users when preventative maintenance is due.	Y	S	iMS Assets	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
470	Work Orders	Work Orders	Ability to override/modify recurring or PM work orders before they are actually generated.	Y	S	iMS Assets	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
471	Work Orders	Work Orders	Ability to place a work order on "hold" pending parts arrival, etc.	Y	S	iMS Assets	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.

Functional Requirements

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Req #	Process	Sub-Process	Requirement					
472	Work Orders	Work Orders	Ability to notify users when a work order is on hold with reason.	Y	S	iMS Assets	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
473	Work Orders	Work Orders	Ability to notify user when a work order on hold will be completed	Y	S	iMS Assets	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
474	Work Orders	Work Orders	Ability to notify work order manager or requestor when items that have caused a work order to be placed on "hold" has been addressed or solved.	Y	S	iMS Assets	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
475	Work Orders	Work Orders	Ability to print out work orders for technician or field use.	Y	S	iMS Assets	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
476	Rent Program	Counseling	The system allows Housing Counselors to create cases related to issues reported by property owners, tenants, and other clients	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
477	Rent Program	Counseling	System includes a Master Client file to store:	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
478	Rent Program	Counseling	Case-Updates	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
479	Rent Program	Counseling	Date and Time Case was Created	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.

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Req #	Process	Sub-Process	Requirement					
480	Rent Program	Counseling	Case Status (open/closed)	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
481	Rent Program	Counseling	Client Type (tenant, landlord, attorney, advocate, etc.)	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
482	Rent Program	Counseling	Property Address	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
483	Rent Program	Counseling	Client Phone Number, primary and secondary	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
484	Rent Program	Counseling	Client Email	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
485	Rent Program	Counseling	Issue Type	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
486	Rent Program	Counseling	Counselor notes	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
487	Rent Program	Counseling	Follow-Up Actions (e.g. (Call, Email, Referral to City or Community Agency)	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
488	Rent Program	Reports	The system has the ability to generate reports in the following in multiple formats: (e.g. PDF, Microsoft Word and Excel)	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.

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Req #	Process	Sub-Process	Requirement					
489	Rent Program	Reports	The system has the ability to provide a library of standard reports (i.e., "canned" reports).	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
490	Rent Program	Reports	The system has the ability to allow a user to modify existing reports and create new reports, with appropriate security permissions from data in the master client file	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
491	Rent Program	Reports	The system shall include an email function to allow for follow-up or response emails to clients.	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
492	Rent Program	Reports	The system will maintain a record of emails that are associated with a particular case	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
493	Rent Program	Reports	The system shall have an incident reporting feature that associates with clients (landlords, tenants, agents etc.) and allows for incident note entry	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
494	Rent Program	Reports	The system shall provide a dashboard that will capture the current operational state of the Rent Program. This operational dashboard shall include:	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
495	Rent Program	Reports	Total number of cases assigned to each member of the registration unit in a given period.	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
496	Rent Program	Reports	Number of cases open and pending a first action by case type in a given period.	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
497	Rent Program	Reports	Number of cases closed and verified in a given period.	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.

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Req #	Process	Sub-Process	Requirement					
498	Rent Program	Reports	Average resolution time by case type in a given period.	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
499	Rent Program	Reports	Total number of units in compliance in a given period.	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
500	Rent Program	Reports	Total number of units in various types of status in a given period.	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
501	Rent Program	Reports	Total number of units in exemption verification process in a given period.	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
502	Rent Program	Reports	Total number of units involved in evictions in a given period.	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
503	Rent Program	Reports	Total number of registration and enrollment filed in a given period.	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
504	Rent Program	Reports	Total number of unit status changes performed in a given period.	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
505	Rent Program	Reports	Total Payments collected, by payment type in a given period.	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
506	Rent Program	Reports	Total Payments (collected & outstanding) by fee type in a given period.	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.

Functional Requirements

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Req #	Process	Sub-Process	Requirement					
507	Rent Program	Reports	The system shall provide a Hearing Examiner/Mediator dashboard that shall include:	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
508	Rent Program	Reports	Total Petitions filed, by petition type in a given period.	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
509	Rent Program	Reports	Total Petitions filed by outcomes in a given period.	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
510	Rent Program	Reports	Total Mediations requested, by mediation issue(s) in a given period.	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
511	Rent Program	Reports	Average resolution time for mediation cases by reasons for closing.	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
512	Rent Program	General	The system provides scheduling capabilities such as setting-up a counseling appointment.	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
513	Rent Program	General	The System allows for supervisors to schedule and monitor cases assigned to a housing counselor	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
514	Rent Program	Enrollment	The system shall allow Rent Program staff to add and update property and unit information:	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
515	Rent Program	Enrollment	Tract	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.

Functional Requirements

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Req #	Process	Sub-Process	Requirement					
516	Rent Program	Enrollment	Subdivision	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
517	Rent Program	Enrollment	Assessor's Parcel Number (APN)	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
518	Rent Program	Enrollment	Number of units	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
519	Rent Program	Enrollment	Details about compliance	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
520	Rent Program	Enrollment	Type of building	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
521	Rent Program	Enrollment	Owner information	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
522	Rent Program	Enrollment	Owner representative information	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
523	Rent Program	Enrollment	Additional owner information & their ownership percentages	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
524	Rent Program	Enrollment	Agent information	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.

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Req #	Process	Sub-Process	Requirement					
525	Rent Program	Enrollment	The system shall allow Rent Program staff to track and manage Condo Conversion and Parcel Splits.	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
526	Rent Program	Enrollment	The system shall generate a unique owner code identifier for every owner in the system.	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
527	Rent Program	Enrollment	The system shall prevent registration staff from creating duplicate property or unit information and deliver warning message	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
528	Rent Program	Enrollment	The system shall prevent registration staff from creating duplicate owner and agent information	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
529	Rent Program	Enrollment	Based on the information entered by registration staff, the system shall calculate outstanding fees and penalties owed on the property.	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
530	Rent Program	Enrollment	The system allows for the City to define criteria for an Exemption Verification Process for use relating to properties	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
531	Rent Program	Enrollment	The system shall allow Rent Program staff to customize the template and content of the notice and denial letters generated by the system	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
532	Rent Program	Enrollment	System can generate notifications to rental staff relating to the steps in the verification process	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
533	Rent Program	Self-Service	The system shall allow landlord and agents to register for a username and password to login into the public portal	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.

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Req #	Process	Sub-Process	Requirement					
534	Rent Program	Self-Service	The system shall allow authorized users to login to the public portal to view all their properties, any outstanding balances on properties, unit status (rented or exempt) and all of the tenancy details for current tenancies	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
535	Rent Program	Self-Service	The system shall allow authorized users to request the unit status from exempt to rented, rented to exempt, and change the exempt reason using the public portal.	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
536	Rent Program	Self-Service	The system shall allow users to make payments using all major credit and debit cards and e-checks on the public portal.	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
537	Rent Program	Self-Service	The system shall allow authorized users to view each property's balance (inclusive of fees, penalties, and waivers), and select the properties to make a payment using the public portal.	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
538	Rent Program	Rent Increase tracking	The system shall track rent histories for all units in a RENTED status	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
539	Rent Program	Rent Increase tracking	The system shall be able to maintain rent histories established and regulated for units with a tenancy start date on or before July 21, 2015.	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
540	Rent Program	Rent Increase tracking	System can calculate standard fees using effective dates and user-provided formulas or tables for the following:	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
541	Rent Program	Rent Increase tracking	Base Rent	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.

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E	Feature Developed as Enhancement for this Project

Req #	Process	Sub-Process	Requirement					
542	Rent Program	Rent Increase tracking	Annual General Adjustment	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
543	Rent Program	Rent Increase tracking	Compliance	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
544	Rent Program	Rent Journal	The system is able to generate a rent journal with the following information:	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
545	Rent Program	Rent Journal	Rent Effective Date	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
546	Rent Program	Rent Journal	Description/Reason for Adjustment	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
547	Rent Program	Rent Journal	Adjustment Amount	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
548	Rent Program	Rent Journal	Adjustment Type	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
549	Rent Program	Rent Journal	Temporary or Non-temporary Adjustment	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
550	Rent Program	Rent Journal	Adjustment Granted Date	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.

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					
551	Rent Program	Rent Journal	Adjustment stop date	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
552	Rent Program	Rent Journal	Total Rent	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
553	Rent Program	Fees	The system shall be able to assess fees and penalties mid-year, on a per-unit basis when a unit status changes from EXEMPT to RENTED status.	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
554	Rent Program	Fees	The system shall calculate penalties based on the landlord's payment history for the property in accordance from a user-provided formulas or tables	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
555	Rent Program	Fees	The system shall allow Rent Program staff to create an Administrative waiver request for a property that can be reviewed and approved by the Rent Board.	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
556	Rent Program	Billing, Payment, & Deposit	The system shall allow Rent Program staff to generate property bills for the Annual billing. Annual billing is generated for all owners of properties with at least one unit in RENTED status	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
557	Rent Program	Billing, Payment, & Deposit	The system shall allow Rent Program staff to generate property bills for the Penalty billing.	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
558	Rent Program	Eviction	The system shall allow Rent Program staff to track and manage eviction cases.	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
559	Rent Program	Eviction	The system shall allow Rent Program staff to locate a unit within the database when creating a new eviction case in the system.	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.

Functional Requirements

Implementation Response Available Definitions (Column E)	
Y	Requirement Met and Proposed (Standard features in the generally available product)
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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					
560	Rent Program	Eviction	The system shall allow Rent Program staff to add property and unit information to the system while creating an eviction case if the unit is not registered and covered under rent ordinance.	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
561	Rent Program	Eviction	The system shall allow Rent Program staff to add tenant information to the system while creating an eviction case if the unit is not registered and covered under rent ordinance.	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
562	Rent Program	Eviction	The system shall allow the Rent Program Board staff to create different types of evictions.	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
563	Rent Program	Eviction	The system shall allow the Rent Program staff to record relocation payments that are collected and paid in relation to certain eviction types such as owner move-in (OMI) and Ellis Act.	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
564	Rent Program	Eviction	The system shall allow the Rent Program staff to record administrative fee payments that are collected under Ellis Act-type eviction cases.	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
565	Rent Program	Eviction	The system shall allow the Rent Program staff to generate letters in response to Eviction Notices for both owners and tenants.	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
566	Rent Program	Eviction	The system shall allow the Rent Program staff to generate letters in response to Notices to Pay or Quit for both owners and tenants. The letter template shall be configurable.	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
567	Rent Program	Eviction	The system shall have the ability to assign evictions cases to a staff attorney for review.	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
568	Rent Program	Eviction	The system shall have the ability to upload all documents related to an eviction case to the document management system.	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.

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)
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Column F: Available Responses (Column F)	
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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					
569	Rent Program	Eviction	The system shall allow Rent Board staff to set and change the status of an eviction case and enter various outcomes.	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
570	Rent Program	Eviction	The system shall list all the eviction cases for a unit/property under the unit/property detail screen.	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
571	Rent Program	Eviction	The system allows for the City to define criteria for an Petition Process for use relating to properties	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
572	Rent Program	Eviction	The system shall allow Rent Program staff to create a petition case related to a unit in the system and move it to different stages of the process per the above chart.	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
573	Rent Program	Eviction	The system shall notify staff and hearing examiner that a property has not yet been registered. After a petition case is created, Rent Program staff shall be able to upload the petition document and supporting document that was provided by the petitioner.	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.
574	Rent Program	Eviction	System maintains history of record changes in the petition case record so that staff can view notices, proposed remedies, hearings, and court decisions associated with the case record	Y	S	IMSEnforce	Phase I	The proposed iMS Suite meets this requirement (standard) and is part of our proposal.



EXHIBIT CA to "Software License and Implementation Agreement" between Intuitive Municipal Solutions, LLC and the City of Richmond, California

PAYMENT PROCESSING AGREEMENT APPLICATION AND FEE SCHEDULE

A Registered Service Provider of Merrick Bank Corporation ("Merrick")

PRINT CLEARLY

ASSOCIATE:	ACCOUNT REP: Chris Di Lucca 1130	DATE:
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Corporate/ Legal Name: City of Richmond			Federal Tax ID Number: 94-6000403		
Address (Physical Location): 450 Civic Center Plaza			Mailing Address: 450 Civic Center Plaza PO Box 4046		
City: Richmond	State: CA	Zip: 94804	City: Richmond	State: CA	Zip: 94804
Business Phone #: (510) 620-6740		Fax #: (510) 620-6522	Website Address: https://www.ci.richmond.ca.us/		

TYPE OF BUSINESS: Government	CHAIN MERCHANT <input checked="" type="checkbox"/> YES <input type="checkbox"/> NO
NUMBER OF YEARS IN BUSINESS: 20+ Years	BUSINESS LICENSE #: _____

CURRENT PROCESSOR: _____	POS DEBIT: <input checked="" type="checkbox"/> NO <input type="checkbox"/> YES	NETWORK: _____
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(Z) Star MAC (W) Star East (Q) Star West (G) Interlink (8) Maestro (K) EBT

TRADE REFERENCES:			
Company: _____	Contact: _____	Phone: _____	Fax: _____
Company: _____	Contact: _____	Phone: _____	Fax: _____

Authorized Signer (First): MI: Last: Andrea Miller	Title: Finance Director	Phone Number: (510) 620-6790	Email Address: andrea_miller@ci.richmond.ca.us
Alternate (First): MI: Last: Mubeen Qader	Title: Deputy Director of Finance	Phone Number: (510) 412-2077	Email Address: mubeen_qader@ci.richmond.ca.us
Alternate (First): MI: Last: _____	Title: _____	Phone Number: _____	Email Address: _____

To help the government fight the funding of terrorism and money laundering activities, Federal law requires all financial institutions to obtain, verify, and record information that identifies each person who opens an account. What this means for you: when you open an account, we may ask you for information that will allow us to identify you, including a copy of your driver's license or other identifying documents.

By checking this box, Merchant opts out of accepting American Express.

THE PAYMENT PROCESSING AGREEMENT IS EFFECTIVE UPON THE DATE LAST PARTY SIGNS THIS AGREEMENT			
Merrick Bank Corporation		Wonderware Inc. d/b/a CORE Business Technologies	
By: _____	By: _____	Date: _____	Date: _____
135 Crossways Drive North, Suite A Woodbury, NY 11797		950 Warren Avenue, 4 th Floor East Providence, RI 02914	

The Government and Education Fee Schedule

You understand and acknowledge that you have elected to participate in the Government and Education Program provided by the Payment Brands (the "Program"). The Program allows registered and approved merchants (approved Merchant IDs or MIDs) to assess a variable service fee (a "Service Fee") on certain debit and credit card transactions. Registration and participation in the Program are subject to approval by the applicable Payment Brands and you acknowledge that you may not be eligible to participate in the Program. If registration and Payment Brand approval is obtained, you agree to comply with all Program requirements. ISO may terminate, amend, modify or otherwise alter this Agreement, the Program, or the structure, nature or amount of the Service Fee at any time with written notice to you. You authorize and direct Member Bank to settle the proceeds received for Service Fees into the ISO's bank account. In the event that you receive any portion of the Service Fees, you agree to promptly pay such amounts to ISO. **Service Fees collected by ISO are identified in the CORE – Merrick Location Addendum form, will be retained by ISO and you will not be responsible for the payment of any interchange fees, assessments and other third-party charges charged to, directly or indirectly incurred or otherwise paid by, ISO and/or Member Bank which are attributable to your Card transactions other than Penalties (collectively, "Third-Party Costs") with the exception of the fees listed below ("Fees").** Nothing in this Section shall be deemed to alleviate or reduce any of your other obligations under the Agreement, including, but not limited to, your responsibilities with regard to Penalties and Dispute Items and your obligation to pay the Early Termination Fee (as defined in this Agreement), if applicable, pursuant to Section 10 of the Payment Processing Agreement.

Chargebacks, ACH Returns and Optional Reporting Item Costs

Chargebacks	ACH Rejects	Optional Reporting Fee
\$ 10.00	\$ 30.00	\$ 8.00

Early Termination Fee See Section 10.

In the event a customer disputes, refuses to pay and/or charges back the Service Fee amount to ISO, Merchant is responsible for collecting and paying the Service Fee and the Chargeback Fee to ISO.

ACH Processing Fees for Merchant Funded and Convenience Fee Merchant Accounts

Setup Fee	Monthly Access Fee	Transaction Fee	Transaction Return Fee	Transaction Re-deposit Fee
\$ Waived_	\$ 0.00	\$ 1.00	\$ 5.00	\$ N/A

The Transaction Return Fee and Optional Transaction Redeposit Fee is paid by the Merchant.

ACH Processing Fees for Service Fee Merchant Accounts

Setup Fee	Monthly Access Fee	Transaction Fee	Transaction Return Fee	Transaction Re-deposit Fee
\$ Waived	\$ 0.00	\$ 1.00	\$ 5.00	\$ N/A

The Transaction Return Fee and Optional Transaction Redeposit Fee is paid by the Merchant.

Integrated EMV Terminal	One-Time
PAX A80 Device with stand (QTY 2)	\$1,050.00

Merchant: City of Richmond, CA

Signature of Authorized Signer _____ Date _____

Print Name _____ Title _____

MERCHANT SIGNATURE AUTHORIZATION**Name of Entity:** City of Richmond

The undersigned certifies and agrees to as follows:

1. The undersigned and any of the persons identified below are duly authorized to sign this Payment Processing Agreement and bind the entity indicated above to it. If any official indicated below resigns or is replaced, that official's successor(s) in office shall be deemed to have signed this certification and the Payment Processing Agreement. These persons also have the authority to perform the duties and functions defined in 2, 3 and 4 below.

TITLE	PRINT NAME	SIGNATURE
Finance Director	Andrea Miller	
Deputy Director of Finance	Mubeen Qader	

2. The persons listed below are duly authorized to act for and on behalf of the entity indicated above in any manner relating to this Payment Processing Agreement and any additional merchant location forms.
3. Both CORE and Merrick Bank may rely on the authority granted in this certification and the undersigned official represents and warrants that this certification shall remain in full force and effect until revoked upon written notice to CORE.
4. The following are the names, titles and genuine signatures of the persons authorized by this certification to perform ongoing organizational processes and updates:

TITLE	PRINT NAME	SIGNATURE

I have subscribed my name as the official indicated above as of _____, _____ (date)

Signature: _____ Print Name: _____

Title: _____

MERCHANT INQUIRY:

Has Merchant or Owners/Principals ever been terminated from accepting payment cards from any payment network for this business or any other businesses?

 NO YES (if yes, please explain) _____

How Many Chargebacks Last Year? _____ Total Amount: \$ _____

Please Mark all Card Types Accepted and Initial Here: _____ (initials)

 Debit Cards: V/MC (consumer signature cards/ all foreign issued cards/ PIN debit cards)

*For Details on how these transactions qualify at each level, please refer to your Merchant Operating Guide.

 Other Cards: V/MC/DISC/AMEX (business credit/debit, consumer credit, & all foreign issued cards)

This is a Payment Processing Agreement entered into as of the date accepted by ISO (defined below) and is by and among Merrick Bank, a Utah state chartered bank ("Member Bank"), Wonderware Inc. d/b/a CORE Business Technologies ("CORE") and the governmental entity ("Merchant", "you", "your", "yours" and the like) that signed the attached application included with this Agreement (the "Application"). The term "Agreement", as used herein, shall include the Application, the fee schedule included with this Agreement, as applicable, (the "Fee Schedule"), the terms and conditions set forth below, and all attachments, exhibits, schedules and the like included herewith.

BACKGROUND INFORMATION

Member Bank is a member/acquirer of Visa U.S.A. Incorporated ("Visa"), Mastercard International ("Mastercard"), DFS Services, LLC ("Discover"), is authorized to process and settle certain transactions originated on the American Express Travel Related Services Company, Inc. ("American Express") payment network and is authorized to process Card transactions for such financial institutions and various other payment brands, payment networks and Card issuers (each a "Payment Brand"). For purposes of this Agreement, "Card" means an account, or evidence of an account, authorized and established by a Payment Brand or representatives thereof that merchants accept from their customers as payment for goods or services. Cards include, but are not limited to, credit cards, debit cards, stored value cards, loyalty cards, electronic gift cards, authorized account or access numbers, paper certificates and credit accounts. Member Bank and CORE have entered into an agreement whereby CORE acts as Member Bank's service provider and provides certain services to you through various third-party service providers (CORE and such third-party service providers shall hereinafter collectively be referred to as "ISO"). You desire to accept one or more types of Cards issued by a Payment Brand. Member Bank and ISO agree to provide services in accordance with the terms and conditions set forth below. Accordingly, the parties to this Agreement, intending to be legally bound, agree as follows:

OPERATIVE PROVISIONS

1. Services. Member Bank and ISO agree to provide you, at your U.S. locations identified in the Application (as defined below), transaction gateway, processing and/or settlement services (the "Services") in accordance with the terms and conditions of this Agreement. You agree to use Member Bank to sponsor, clear and settle all of your Card transactions. You will be responsible for the installation, servicing and maintenance of the point-of-sale devices and related equipment at your facilities and will likewise be responsible for the connection of those devices to the Services in compliance with ISO's requirements. ISO hereby grants to you a limited, non-exclusive, non-transferable, revocable, royalty free right, during the Term, to use the Services, subject to the restrictions herein and any other restrictions communicated by ISO to you, solely for your internal use. ISO and its suppliers shall retain title and all ownership rights to the Services and this Agreement shall not be construed in any manner as transferring any rights of ownership or license to the Services or to the features or information therein, except as specifically stated herein. ISO is providing you with information concerning the technical requirements for allowing the Services to send and receive electronic transaction data for authorization and/or settlement from and to ISO. To utilize the Services, you must: (i) provide for your own access to the internet and pay any fees associated with such access, and (ii) provide all equipment necessary for you to make such connection to the internet, including a computer, modem and web browser. If you elect to receive transaction gateway services or certain other services from ISO, you may receive a password when registering for such services. Upon approval, that password will allow you access to those Services. You are responsible for maintaining the confidentiality of the password and account, and are fully responsible for all activities that occur under your password or account. You agree to immediately notify ISO of any unauthorized use of your password or account or any other breach of security. You shall not: (A) decompile, disassemble, reverse compile, reverse assemble, reverse translate or otherwise reverse engineer the Services; (B) circumvent any technological measure that controls access to the Services; or (C) use the Services other than pursuant to the terms of this Agreement.

2. Payment Brand Regulations. All Card transactions and this Agreement are subject to, and the parties agree to be bound by, applicable Payment Brand operating rules and regulations ("Payment Brand Regulations"). The Payment Brand Regulations include the Payment Card Industry Data Security Standard, the Consortium Merchant Negative File published by Discover, Discover Information Security Compliance, Visa Cardholder Information Security Program, Mastercard's Site Data Protection Program, and the American Express Data Security Requirements, as may be amended, supplemented or replaced from time to time. A copy of the American Express Data Security Requirements ("DSR") can be obtained online at www.americanexpress.com/dsr. Merchant shall abide by and fully comply with the Payment Brand Regulations, DSS, CISP, SDP, DSR, and any other security requirements. You are responsible for demonstrating your own, your agents, and your servicers' compliance with Payment Brand Regulations as they may be amended from time to time. ISO is not responsible for providing copies of the Payment Brand Regulations to you and makes no representations or warranties regarding the accuracy of any summaries of Payment Brand Regulations it may provide. Most Payment Brand Regulations are available online, and ISO will provide you with specific website information upon request. You will comply with all state and federal laws and Payment Brand Regulations, including without limitation laws, rules and regulations regarding disclosure to customers on how and why personal information and financial information is collected and used. Furthermore, you shall comply with all of ISO's policies, procedures and guidelines governing the Services provided hereunder, as may be amended from time to time. You agree not to use, disclose, sell or disseminate any cardholder or card member (as used in and defined by the applicable Payment Brand Regulations, collectively, "Cardholder") information obtained in a Card transaction to any third-party other than to, or authorized by, ISO. You agree not to store any Cardholder information obtained in a Card transaction unless specifically permitted to do so under applicable Payment Brand Regulations. You agree that ISO shall not be liable for any improperly processed transaction or third-party, illegal or fraudulent access to your account, your IDs and passwords, end-user data or transaction data. ISO is not liable for your non-compliance or any costs of such non-compliance with any Payment Brand Regulation. If there is a conflict between this Agreement and the Payment Brand Regulations, the Payment Brand Regulations will apply. You will pay ISO and Member Bank immediately for all fines, charges, penalties, assessments and all other costs, expenses and indebtedness levied by any Payment Brand, Card issuer, regulatory authority or other third-party that are assessed against, likely to be assessed against, charged to, likely to be charged to, incurred by (directly or indirectly) or otherwise paid by, ISO and/or Member Bank to the extent that such Penalties are attributable to, arise out of, or are related to your (i) Card transaction processing or business, or (ii) your breach or alleged breach of this Section (collectively, "Penalties"). You are solely responsible for the security of data residing on the servers owned, controlled or operated by you or a third-party designated by you (e.g., a web hosting company or other service provider). You warrant that your servers and electronic systems are secure from breach or intrusion by unauthorized third-parties and will hold ISO harmless for a breach of your systems. If there is a security breach of your system and/or access to end-user data or transaction data by an unauthorized third-party, you shall immediately notify ISO upon discovery of such breach and shall take such precautions as may be necessary to prevent such breaches from occurring in the future, as required by ISO. You agree that ISO may disclose to any Payment Brand information regarding you and your transactions, and that such Payment Brand may use such information to perform its responsibilities in connection with its duties as a Payment Brand, promote the Payment Brand, perform analytics and create reports, and for any other lawful business purposes, including commercial marketing communications purposes within the parameters of the Payment Brand Regulations. A Payment Brand may use the information about you obtained in this Agreement at the time of setup to screen and/or monitor you in connection with Payment Brand marketing and administrative purposes. You agree that you may receive messages from a Payment Brand, including important information about Payment Brand products, services, and resources available to your business. These messages may be sent to your mailing address, phone numbers, email addresses or fax number. You may be contacted at your wireless telephone number and communications sent may include autodialed short message service (SMS or "text") messages or automated or prerecorded calls.

3. Fees. The fees to be charged by Member Bank or ISO to you or your customers for the Services provided to Program Locations are set forth in the Application and Fee Schedule (collectively, the "Fees"). ISO may change such Fees from time to time upon ten (10) days prior written notice to you. The Fees do not include, and you hereby agree to pay, all (i) Penalties, (ii) third-party fees and charges incurred by ISO and/or Member Bank which are attributable to your Card transactions other than Penalties (collectively, "Third-Party Costs"), for which you are responsible hereunder, and (iii) chargebacks of Card transactions, refunds and related interchange fees and assessments (collectively, "Dispute Items"). Interchange fees and assessments charged hereunder will not be credited back to you if a transaction is subsequently reversed or otherwise processed as a credit or chargeback. Third-Party Costs for a given Card transaction depends on a number of factors such as the type of Card presented, specific information contained in the Card transaction, how and when the Card transaction is processed and other factors. Payment Brands and other third-parties regularly add new Third-Party Costs, change the rates for existing Third-Party Costs, or change the qualification criteria for existing Third-Party Costs. Changes in the way you accept and process Card Transactions, the volume of your Card Transactions, the products and services you provide, and numerous other factors may affect Third-Party Costs.

4. Card Transactions. In addition to the requirements for Card transactions set forth in the Payment Brand Regulations, you agree that you will not, unless authorized to do so under the Payment Brand Regulations, (a) deposit into any bank account owned or controlled by you ("Account(s)") any sales or credits for any Card transaction between a Cardholder and an entity other than you; or (b) make a cash disbursement to a Cardholder arising out of a Card transaction or any other use of a Card, or use your personal Card(s) to process transactions using your merchant account with ISO that would constitute a cash advance.

5. Your Bank Account

- a. You shall establish, and at all times during the Term, maintain one or more Accounts with one or more banks in order to facilitate payment of amounts due from time to time under this Agreement, for which you are responsible hereunder, which banks and Accounts shall be identified in the Application. To secure the extension of credit and your obligations under this Agreement including, without limitation, your obligation to pay, to the extent applicable, Fees, Third-Party Costs, Dispute Items and/or Penalties, you grant to Member Bank and ISO a security interest in your deposited sales and all funds maintained in the Account(s).
- b. All credits, charges and debits in connection with Card transactions and other amounts owing under this Agreement shall be made to your Account. You authorize Member Bank, without further notice to you, to credit or debit the Account(s). Any Fees, Third-Party Costs, Dispute Items and/or Penalties payable by you pursuant to the terms and conditions of this Agreement not collected by Member Bank or ISO through a debit to the Account, for whatever reason, shall be invoiced to you by Member Bank or ISO and are due upon your receipt of such invoice.
- c. If you have more than one deposit account with your banks, any or all of such accounts may be treated as the Account and may be credited, charged or debited in connection with Card transactions and other amounts owing under this Agreement as Member Bank or ISO may determine; provided, that you may designate a particular Account with respect to certain amounts to be credited, charged or debited from time to time by Member Bank in connection with particular Card transactions. Member Bank agrees to comply with such designation so long as the designated Account(s) contain sufficient funds to satisfy such charges or debits.
- d. If a debit or chargeback to the Account results in an overdraft, you agree to immediately deposit with your bank an amount sufficient to cover such overdraft and any related service charges or fees.
- e. If you desire to change the Account, you shall notify ISO in writing at least ten (10) days prior to the effective date of the change and shall follow ISO's procedures for completing the change.

6. Display of Service Marks, Advertising and Promotional Materials

- a. You shall prominently display any service marks, identification logos and any other promotional materials (collectively, the "Service Marks") the ISO furnishes to you to alert Cardholders that Cards will be honored by you. This requirement shall not apply to private clubs or other merchants that do not serve the general public or other class of merchants exempted by a Payment Brand. The Service Marks for each Payment Brand must be at least the dimension of and as prominent as any other card program mark or logo displayed.
- b. You may use the Service Marks only to indicate that Cards are accepted by you for payment. You shall not state, imply or use the Service Marks to indicate that ISO or any Payment Brand endorses, sponsors, produces, offers, sells or is affiliated with any of your goods or services.
- c. You shall not refer to ISO or any Card or Payment Brand in stating eligibility for your merchandise, services or membership.
- d. Your use of the Service Marks of any Payment Brand shall be governed by the Payment Brand's Regulations.
- e. Your right to use or display the Service Marks shall continue so long as this Agreement remains in effect unless ISO directs that such use or display shall cease. You acknowledge that the Service Marks are the property of the applicable Payment Brand and you shall not infringe upon the Service Marks.
- f. All point of sale displays or websites must include appropriate Service Marks to indicate acceptance of Cards or Payment Brand approved signage to indicate acceptance of the limited acceptance category you have selected.

7. Term. This Agreement will be effective as of the date it is accepted by Member Bank and ISO and will continue in effect for a term of five (5) years following such date (the "Initial Term"), unless earlier terminated as provided for below. Following the Initial Term, this Agreement will automatically renew for additional one year renewal terms (each, a "Renewal Term" and collectively with the Initial Term, the "Term"), unless earlier terminated as provided for below. If either party desires not to renew the Agreement at the end of the Term, such party must provide written notice to the other parties of its intent not to renew this Agreement at least ninety (90) days prior to the expiration of the Term or Term, as applicable. Notwithstanding the forgoing, Member Bank may terminate this Agreement for any or no reason with 30 days' notice to you.

8. Events of Default. An "Event of Default" shall mean the occurrence or existence of one or more of the following events or conditions, whatever the reason for such Event of Default and whether voluntary, involuntary or effected by operation of law: (a) you fail to pay any obligation under this Agreement to Member Bank or ISO when due; (b) any representation or warranty made by you under this Agreement, the Application or any financial statement, certificate, report, exhibit or document required to be furnished by you to Member Bank or ISO pursuant to this Agreement shall prove false or misleading in any material respect as of the time when made, including any omission of material information necessary to make such representation, warranty or statement not misleading or the failure to provide required information; (c) you shall default in the performance or observance of any covenant, agreement or duty under this Agreement or any Payment Brand Regulation; (d) you are no longer allowed by a Payment Brand to accept such Payment Brand's Cards as payment or your name appears on a Payment Brand's terminated merchant file; (e) Member Bank or ISO reasonably conclude that any criminal, fraudulent, unauthorized or suspicious activity has occurred or is imminent with respect to your acceptance of Cards or your performance under this Agreement; (f) there is an unexplained material change in your processed volume, average ticket size or mode of sale;

(g) Member Bank or ISO reasonably conclude that there exists a risk of an abnormal level of chargebacks or that you may not fund Fees, Third-Party Costs for which you are responsible hereunder, Dispute Items, or Penalties as they occur; (h) you have defaulted on any obligation for borrowed money and the effect thereof may permit the holder of such indebtedness to accelerate the time when repayment is due; (i) there is an adverse material change in your business, operations, financial condition, properties, assets or prospects; (j) one or more judgments against you for the payment of money remain undischarged, unsatisfied or unstayed for a period of forty five (45) consecutive days; (k) your lender takes possession of your inventory; (l) a writ or warrant of attachment, garnishment, execution, or similar process shall have been issued against you or any of your assets; (m) a proceeding shall have been instituted with respect to you (1) seeking an order for relief or a declaration entailing a finding that you are insolvent or seeking a similar declaration or finding, or seeking dissolution, winding up, charter revocation or forfeiture, liquidation, reorganization, arrangement, adjustment, composition or other similar relief with respect to you, your assets or your debts under any law relating to bankruptcy, insolvency, relief of debtors or protection of creditors, termination of legal entities or any other similar law now or hereafter in effect, or (2) seeking appointment of a receiver, trustee, custodian, liquidator, assignee, sequestrator or other similar official for you or for all or any substantial part of your assets; or (n) you shall become insolvent, shall become generally unable to pay your debts as they become due, shall voluntarily suspend transaction of your business, shall make a general assignment for the benefit of creditors, shall institute a proceeding described in subsection (m)(1) above, or shall consent to any such order for relief, declaration, finding or relief described therein, shall institute a proceeding described in subsection (m)(2) above, or shall consent to any such appointment or to the taking of possession by any such official of all or any substantial part of your assets, shall dissolve, windup, revoke or forfeit your charter (or other constituent documents) or liquidate yourself or any substantial part of your assets, or shall take any action in furtherance of any of the foregoing; (o) accept a Card for an unlawful Internet gambling transaction; or (p) you fail to become or remain "PCI compliant" (as required under applicable Payment Brand Regulations) and/or you fail to certify such compliance to ISO upon request. You shall notify Member Bank and ISO in writing immediately upon becoming aware of an Event of Default, or an event which, with the passing of time or the giving of notice, or both, would constitute an Event of Default.

9. Remedies Upon Event of Default. Upon the occurrence of any Event of Default, Member Bank and ISO may employ any or all of the following remedies it deems appropriate: (a) terminate this Agreement immediately upon notice to you; (b) without prior notice to you, refuse to accept or revoke acceptance of any sales or credit, or the electronic transmission thereof if applicable, received by Member Bank or ISO on or at any time after the occurrence of any Event of Default; (c) without prior notice to you, Member Bank may debit your Accounts in an amount equal to any amount then owed to Member Bank or ISO; (d) establish a reasonable reserve using your funds in Member Bank's possession to cover foreseeable Fees, Third-Party Costs for which you are responsible hereunder, Dispute Items, Penalties, and Cardholder credits; (e) increase the Fees commensurate with the increased risk; (f) require you to deposit, as cash collateral, such amounts as Member Bank or ISO may require to secure your obligations hereunder; (g) report to one or more credit reporting agencies any outstanding indebtedness to Member Bank or ISO; or (h) take such other action as may be permitted by law.

10. Early Termination Fee. For purposes of this Section 10, an "Early Termination Event" shall mean: (i) a termination of this Agreement by Member Bank or ISO following an Event of Default specified in Section 8 above (ii); a termination of this Agreement by you for any reason whatsoever, other than following written termination notice given by you pursuant to Section 7 or 12; or (iii) your deposit or submission of any of your Payment Brand branded transactions with any entity other than Member Bank. Your payment of the monthly minimum Fees shall not fulfill your obligation to ISO. The parties agree that the actual damages which will result to ISO from an Early Termination Event are not readily ascertainable as of the effective date of this Agreement. In addition, you acknowledge and agree that in reliance on this Agreement and other long-term agreements, ISO will incur additional long-term costs, including without limitation, computer hardware, software, and labor. Accordingly, upon the occurrence of an Early Termination Event, you shall pay to ISO, in addition to all amounts owed for the Services provided to you pursuant to this Agreement, an Early Termination Fee. "Early Termination Fee" shall mean an amount equal to the greater of (i) \$500.00; or (ii) thirty percent (30%) of the average total monthly Fees and Service Fees collected by ISO during the Measurement Period, times the total number of months, or portion thereof, following an Early Termination Event. The "Measurement Period" shall mean the six (6) month period immediately prior to the Early Termination Event. The parties intend that this Early Termination Fee be in lieu of ISO's lost profits for the remainder of this Agreement, but not in lieu of any other damages to which ISO might otherwise be entitled arising out of your wrongful acts or omissions.

11. Change in Your Business. You shall provide Member Bank and ISO at least thirty (30) days prior written notice of your intent to change in any way the basic nature of your business, including without limitation, a change in the types of merchandise or services sold, or the method of selling such products or services. Upon its receipt of notice of such change, Member Bank and ISO shall have the right to terminate this Agreement without further obligation upon providing thirty (30) days prior written notice to you.

12. Termination by You. You may terminate this Agreement upon thirty (30) days prior written notice to Member Bank and ISO in the event of (a) your receipt of notice of any increase in Fees payable to Member Bank and ISO pursuant to Section 3 hereof (excluding Fee increases pursuant to Section 9); or (b) any material amendment or modification to this Agreement made by Member Bank or ISO pursuant to Section 17 hereof which adversely affects you in any material respect (excluding material amendments or modifications required due to changes to a Payment Brand Regulation or applicable federal, state or local law or regulation). Your right to terminate pursuant to this Section 12 shall expire thirty (30) days following your receipt of notice of any such Fee increase or material amendment or modification. If this Agreement is terminated, regardless of cause, Member Bank may withhold and discontinue the disbursement for all Card transactions in the process of being collected and deposited. If termination is due to the occurrence of an Event of Default or if you otherwise breach this Agreement, you acknowledge that Member Bank or ISO may be required to report your business name and the names and other identification of your principals to the terminated merchant file maintained by the Payment Brands. **You expressly agree and consent to such reporting if you are terminated for any reason requiring listing on the terminated merchant file.** You waive Member Bank and ISO from any claims that you may raise as a result of Member Bank or ISO terminated merchant file reporting. Further, you will return all Member Bank and ISO property, forms, or equipment. All obligations for transactions prior to termination (including payment for Fees, Third-Party Costs for which you are responsible hereunder, Dispute Items, Penalties and Member Bank's expenses relating to chargebacks) survive termination. Neither Member Bank nor ISO is liable to you for damages (including prospective sales or profits) due to termination. Upon termination, any amounts due to Member Bank or ISO will accelerate and be immediately due and payable, without any notice, declaration or other act whatsoever.

13. Credit Inquiries; Reporting; Financial Statements. You authorize Member Bank and ISO to make any credit inquiries they consider necessary to accept or to renew their acceptance of this Agreement. You also authorize any person or credit reporting agency to compile information to answer such credit inquiries and to furnish such information to Member Bank and ISO. You agree to provide to ISO such financial statements or other information concerning your business or operations as may be requested by ISO from time to time, in appropriate detail, promptly upon request by ISO. Upon request by ISO, you shall furnish to ISO, within 120 days after the end of your fiscal year, an audited financial statement of profit and loss for such fiscal year and an audited balance sheet as of the end of such fiscal year. ISO may, at its discretion, accept unaudited financial statements prepared by a public accounting firm.

14. Reserve. In addition to Member Bank's and ISO's right to establish a reserve in Section 9 of this Agreement, Member Bank and ISO may, in their reasonable discretion, establish a reserve if they believe there is a risk of potential loss or liability associated with your use of the Services or to ensure current or future payment of obligations Merchant owes to Member Bank and/or ISO under this Agreement. ISO will provide you with notice of the reserve and the terms of the reserve. Member Bank and/or ISO may require that a certain portion of your transaction proceeds be held by Member Bank in a reserve for a certain period of time or that you make a lump sum payment for the reserve. Member Bank and/or ISO may change the terms of the reserve at any time by providing you with notice of the new terms. Member Bank and/or ISO have the right to use funds otherwise owed to you to establish, increase, or maintain funds in the reserve. Member Bank may hold a reserve as long as Member Bank and/or ISO deem necessary to mitigate risk associated with your transactions or to mitigate damages as a result of your actions under this Agreement. You understand and agree that if you are required to establish a reserve, you have an obligation under this Agreement to maintain at all times the balance of the reserve set by Member Bank and/or ISO.

15. Representation and Warranties; Disclaimers. You make the following representations and warranties which shall be true and correct on the date of this Agreement and at all times thereafter: (a) all information contained in the Application or any other document delivered to Member Bank and ISO in connection therewith or with this Agreement is true and complete in all material respects; (b) you have the power to execute, deliver and perform this Agreement; (c) this Agreement is duly authorized and will not violate any provisions of law, or conflict with any other agreement to which you are subject or by which your assets are bound; (d) you have all required licenses, if any, to conduct your business and are qualified to do business in every jurisdiction where it is required to do so; and (e) there is no action, suit or proceeding at law or in equity pending, or to your knowledge, threatened, by or against or affecting you which if adversely decided to you would impair your right to carry on your business substantially as now conducted or adversely affect your financial condition or operations in any material respect. EXCEPT AS OTHERWISE SPECIFICALLY SET FORTH HEREIN, THE SERVICES ARE PROVIDED ON AN "AS IS," "AS AVAILABLE" BASIS WITHOUT ANY REPRESENTATIONS OR WARRANTIES. ISO DOES NOT REPRESENT OR WARRANT THE PRODUCTS AND SERVICES WILL BE AVAILABLE, ACCESSIBLE, UNINTERRUPTED, TIMELY, SECURE, ACCURATE, COMPLETE OR ENTIRELY ERROR-FREE. YOU MAY NOT RELY ON ANY REPRESENTATION OR WARRANTY REGARDING THE SERVICES MADE BY ANY THIRD-PARTY IN CONTRAVENTION OF THE FOREGOING STATEMENTS. ISO SPECIFICALLY DISCLAIMS ALL REPRESENTATIONS, WARRANTIES AND CONDITIONS WHETHER EXPRESS OR IMPLIED, ARISING BY STATUTE, OPERATION OF LAW, USAGE OF TRADE, COURSE OF DEALING, OR OTHERWISE, INCLUDING BUT NOT LIMITED TO, WARRANTIES OR CONDITIONS OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, NON-INFRINGEMENT, OR TITLE WITH RESPECT TO THE SERVICES. YOU UNDERSTAND AND AGREE THAT ISO SHALL BEAR NO RISK WITH RESPECT TO YOUR SALE OF YOUR PRODUCTS OR SERVICES INCLUDING, WITHOUT LIMITATION, ANY RISK ASSOCIATED WITH CARD FRAUD, PENALTIES, THIRD PARTY COSTS OR DISPUTE ITEMS. ISO MAKES NO WARRANTY THAT THE SERVICES WILL MEET YOUR REQUIREMENTS, NOR DOES ISO MAKE ANY WARRANTY AS TO THE RESULTS THAT MAY BE OBTAINED FROM THE USE OF THE SERVICES OR AS TO THE ACCURACY OR RELIABILITY OF ANY INFORMATION OBTAINED THROUGH USE OF THE SERVICES.

16. CHOICE OF LAW; JURISDICTION; WAIVER. THIS AGREEMENT SHALL BE GOVERNED BY THE LAWS OF THE STATE OF IN WHICH YOU ARE LOCATED. YOU, MEMBER BANK AND ISO HEREBY IRREVOCABLY AND UNCONDITIONALLY: (A) AGREE THAT ANY ACTION, SUIT OR PROCEEDING BY ANY PERSON ARISING FROM OR RELATING TO THIS AGREEMENT OR ANY STATEMENT, COURSE OF CONDUCT, ACT, OMISSION OR EVENT OCCURRING IN CONNECTION WITH THIS AGREEMENT (COLLECTIVELY, "RELATED LITIGATION") MUST BE BROUGHT IN A STATE OR FEDERAL COURT OF COMPETENT JURISDICTION IN THE COUNTY AND STATE IN WHICH YOU ARE LOCATED; (B) SUBMIT TO THE JURISDICTION OF SUCH COURTS; (C) WAIVE ANY OBJECTION WHICH IT MAY HAVE AT ANY TIME TO THE LAYING OF VENUE OF ANY RELATED LITIGATION BROUGHT IN ANY SUCH COURT; (D) WAIVE ANY CLAIM THAT ANY SUCH RELATED LITIGATION HAS BEEN BROUGHT IN AN INCONVENIENT FORUM, AND WAIVE ANY RIGHT TO OBJECT, WITH RESPECT TO ANY RELATED LITIGATION BROUGHT IN ANY SUCH COURT, THAT SUCH COURT DOES NOT HAVE JURISDICTION OVER YOU OR ISO; (E) CONSENT AND AGREE TO SERVICE OF ANY SUMMONS, COMPLAINT OR OTHER LEGAL PROCESS IN ANY RELATED LITIGATION BY REGISTERED OR CERTIFIED U.S. MAIL, POSTAGE PREPAID, TO YOU AT THE ADDRESS IN THE APPLICATION AND CONSENTS AND AGREES THAT SUCH SERVICE SHALL CONSTITUTE IN EVERY RESPECT VALID AND EFFECTIVE SERVICE (BUT NOTHING HEREIN SHALL AFFECT THE VALIDITY OR EFFECTIVENESS OF PROCESS SERVED IN ANY OTHER MANNER PERMITTED BY LAW); AND (F) WAIVE THE RIGHT TO TRIAL BY JURY IN ANY RELATED LITIGATION. THE PREVAILING PARTY IN ANY RELATED LITIGATION SHALL BE ENTITLED TO RECOVER ITS REASONABLE ATTORNEY'S FEES, COST AND EXPENSES.

17. LIMITATION OF LIABILITY. TO THE FULLEST EXTENT PERMITTED BY LAW, NO CLAIM MAY BE MADE BY YOU AGAINST MEMBER BANK OR ISO OR ANY OF THEIR RESPECTIVE AFFILIATES, DIRECTORS, OFFICERS, EMPLOYEES OR AGENTS OF ANY OF THEM FOR ANY SPECIAL, INCIDENTAL, INDIRECT, CONSEQUENTIAL OR PUNITIVE DAMAGES IN RESPECT OF ANY CLAIM ARISING FROM OR RELATING TO THIS AGREEMENT OR ANY STATEMENT, COURSE OF CONDUCT, ACT, OMISSION OR EVENT OCCURRING IN CONNECTION WITH THIS AGREEMENT UNLESS SUCH CLAIM ARISES FROM THE WILLFUL MISCONDUCT OF THE MEMBER BANK OR ISO AND YOU HEREBY WAIVE, RELEASE AND AGREE NOT TO SUE UPON ANY SUCH CLAIM FOR ANY SUCH DAMAGES, WHETHER SUCH CLAIM PRESENTLY EXISTS OR ARISES HEREFTER AND WHETHER OR NOT SUCH CLAIM IS KNOWN OR SUSPECTED TO EXIST IN ITS FAVOR. YOU FURTHER UNDERSTAND AND AGREE THAT YOUR RESPONSIBILITY TO PAY PENALTIES AS DESCRIBED IN THIS AGREEMENT SHALL NOT BE LIMITED OR RESTRICTED UNDER ANY CIRCUMSTANCES, EVEN IF SUCH PENALTIES ARE DEEMED TO BE SPECIAL, INCIDENTAL, INDIRECT, CONSEQUENTIAL OR PUNITIVE DAMAGES UNDER APPLICABLE LAW.

18. CONFIDENTIAL INFORMATION. You will not use for any purpose other than contemplated by this Agreement, will not disclose to any third-party, and will cause your employees, independent contractors, and agents to not use or disclose, any term of this Agreement, the Services, or any information learned about the business practices and ways in which ISO conducts business that is not generally known to others, including without limitation details about the Services, any data or information that is a trade secret or competitively sensitive such as computer software and documentation, data and data formats, and financial information (collectively, "Confidential Information"). You will inform ISO of any request by a court or government agency to disclose such Confidential Information to enable ISO to waive the provisions of this Section or defend the nondisclosure. You will not be obligated to maintain the confidentiality of Confidential Information: (i) you are required to reveal in performing your obligations under this Agreement, (ii) that is or becomes within the public domain through no act of yours in breach of this Agreement, (iii) was legitimately in your possession prior to its disclosure under this Agreement, and you can prove that, or (iv) is required to be disclosed by state or federal law, provided that you provide ISO with notice and an opportunity to oppose the disclosure. In the event of a breach of this section, the parties agree that ISO will suffer irreparable harm, and that the amount of monetary damages would be impossible to calculate. Thus, ISO will be entitled to injunctive relief in addition to any other rights to which it may be entitled, without the necessity of proof of actual damages or the requirement of a bond. This Section will survive termination of this Agreement.

Terms in Section 18 below are additional terms applicable specifically to American Express Card Acceptance (capitalized terms below not defined elsewhere in the Agreement shall have the meanings assigned in the American Express Network Rules). With respect to participation in an American Express acceptance program, in the event of a conflict between the terms below and other terms of this Agreement, the terms below shall control with respect to American Express transactions only. Merchant shall be bound by American Express Network Rules, including the Merchant Operating Guide, as it may be updated from time to time by American Express: www.americanexpress.com/merchanttopguide. In the event of conflict or inconsistency between the Operating Guide and any other relevant document, the Operating Guide will prevail.

19. AMERICAN EXPRESS OPTBLUE® TERMS AND CONDITIONS.

- a. Transaction Data. Merchant authorizes ISO and/or its affiliates to submit American Express Transactions to, and receive settlement on such Transactions from, American Express or Bank on behalf of Merchant.
- b. Marketing Message Opt-Out. Merchant may opt-out of receiving future commercial marketing communications from American Express by contacting ISO. Note that Merchant may continue to receive marketing communications while American Express updates its records to reflect this choice. Opting out of commercial marketing communications will not preclude Merchant from receiving important transactional or relationship messages from American Express.
- c. Conversion to American Express Direct Merchant. Merchant acknowledges that it may be converted from American Express Card OptBlue program to a direct relationship with American Express if and when its Transaction volumes exceed the eligibility thresholds for the OptBlue program. If this occurs, upon such conversion, (i) Merchant will be bound by American Express' then-current Card Acceptance Agreement; and (ii) American Express will set pricing and other fees payable by Merchant.
- d. American Express as Third-Party Beneficiary. Notwithstanding anything in the Agreement to the contrary, American Express shall have third-party beneficiary rights, but not obligations, to the terms of this Agreement applicable to American Express Card acceptance to enforce such terms against Merchant.
- e. American Express Opt-Out. Merchant may opt out of accepting American Express at any time without directly or indirectly affecting its rights to accept Cards bearing Marks of other Payment Brands.
- f. Refund Policies. Merchant's refund policies for American Express purchases must be at least as favorable as its refund policy for purchase on any other Card Network, and the refund policy must be disclosed to Cardholders at the time of purchase and in compliance with Law. Merchant may not bill or attempt to collect from any Cardholder for any American Express Transaction unless a Chargeback has been exercised, Merchant has fully paid for such Chargeback, and it otherwise has the right to do so.
- g. Establishment Closing. If Merchant closes any of its Establishments, Merchant must follow these guidelines: (i) notify ISO immediately; (ii) policies must be conveyed to the Cardholder prior to completion of the Transaction and printed on the copy of a receipt or Transaction record the Cardholder signs; (iii) if not providing refunds or exchanges, post notices indicating that all sales are final (e.g., at the front doors, by the cash registers, on the Transaction record and on websites and catalogs); (iv) return and cancellation policies must be clearly disclosed at the time of sale; and (v) for Advance Payment Charges or Delayed Delivery Charges, Merchant must either deliver the goods or services for which Merchant has already charged the Cardholder or issue Credit for any portion of the Transaction for which Merchant has not delivered the goods or services.
- h. Merchant shall not assign to any third-party any payments due to it under American Express Card Acceptance, and all indebtedness arising from Transactions will be for bona fide sales of goods and services (or both) at Merchant's business locations and free of liens, claims, and encumbrances other than ordinary sales taxes; provided, however, that the Merchant may sell and assign future Transaction receivables to Member Bank/ISO, its affiliated entities and/or any other cash advance funding source that partners with Member Bank/ISO or its affiliated entities, without consent of American Express. Notwithstanding the foregoing, Member Bank/ISO prohibits Merchant from selling or assigning future Transaction receivables to any third-party.
- i. Member Bank/ISO shall have the right to terminate Merchant's participation in American Express Card Acceptance immediately upon written notice to Merchant (i) if Merchant breaches any of the provisions of this Agreement, or (ii) for cause or fraudulent or other activity, or upon American Express' request. In the event Merchant's participation in American Express Card Acceptance is terminated for any reason, Merchant must immediately remove all American Express branding and marks from Merchant's website and wherever else they are displayed.
- j. Merchant must accept American Express as payment for goods and services (other than those goods and services prohibited by these provisions, the Agreement, or the Payment Brand Regulations) sold, or (if applicable) for charitable contributions made at all of its business locations and websites, except as expressly permitted by state statute. Merchant is jointly and severally liable for the obligations of Merchant's business locations and websites under the Agreement.
- k. In the event that Merchant or Member Bank/ISO is not able to resolve a claim against American Express, or a claim against Member Bank/ISO or any other entity that American Express has a right to join in resolving a claim, the Merchant Operating Guide explains how claims can be resolved through arbitration. Merchant or American Express may elect to resolve any claim by individual, binding arbitration. Claims are decided by a neutral arbitrator.
- l. Any and all Cardholder information is confidential and the sole property of the applicable issuer, American Express or its affiliates. Except as otherwise specified, Merchant must not disclose Cardholder information, nor use nor store it, other than to facilitate Transactions at Merchant's business locations and websites in accordance with the Agreement.
- m. Merchant must ensure that it and any third-parties it enlists to facilitate Transactions processing complies with the American Express Technical Specifications (available at www.americanexpress.com/merchanttopguide) (valid and accurate data must be provided for all data elements in accordance with the American Express Technical Specifications). Failure to comply with the American Express Technical Specifications may impact Merchant's ability to successfully process Transactions. Merchant may be assessed non-compliance fees if Merchant fails to comply with the Technical Specifications. To ensure compliance with the Technical Specifications, Merchant should work with Member Bank/ISO.
- n. American Express Right to Modify or Terminate Agreement. American Express has the right to modify the Agreement with respect to American Express Card transactions or to terminate Merchant's acceptance of American Express Card transactions and to require ISO to investigate Merchant's activities with respect to American Express Card transactions.

20. ACH AND CHECK 21 TERMS AND CONDITIONS.

- a. Services. With respect to ACH Transactions, ISO shall be the ACH processor through which debit and credit transactions are submitted to the ACH Network in conjunction with ACH check processing origination and settlement services. With respect to transactions involving substitute check Images permitted under Check 21, ISO provides capture services which facilitates the processing of the substitute check Images with financial institutions in the Federal Reserve System.
- b. Definitions. The following terms used in this Section 19 shall have the meaning specified below:

"ACH Transaction": An electronic payment transaction originated by Merchant and processed through the ACH Network in the Federal Reserve System.

"Administrator": The Merchant's employee who has been designated as Merchant's primary contact with ISO for the Services and has been appointed by Merchant to manage the administration of Services access, including passwords, and communicate authorizations to ISO.

"Bank of First Deposit": In a Check 21 Transaction, the financial institution which receives the Entry from ISO and transmits the Entry through the Federal Reserve Bank system for transmittal to the Customer's financial institution for debit or credit to the Customer's account.

"Check 21": The Check for the 21st Century (Check 21) Act and all regulations pertaining to the Check 21 Act.

"Check 21 Transaction": An electronic payment transaction utilizing a Substitute Check Image permitted by Check 21.

"Customer": Merchant's customer who submits a payment to Merchant by means of a paper check or ACH transfer.

"Entry": A transaction submitted by Merchant for processing by the Services and further defined in the NACHA Rules.

"Image": The image that results from an electronic scan of a paper check by Merchant.

"NACHA Rules": The then-current rules, regulations and procedural guidelines published by the National Automated Clearing House Association ("NACHA") and/or all regional payment alliances associated with NACHA.

"Originating Depository Financial Institution" or "ODFI": In an ACH Transaction, the financial institution which receives the Entry from ISO and transmits the Entry to its ACH Operator for transmittal to a Receiving Depository Financial Institution for debit or credit to the Customer's account, as these terms are further defined in the NACHA Rules.

"Services": The ACH processing services and/or the Check 21 processing services provided to Merchant under this Agreement.

"Settlement Account": A commercial demand deposit bank account which Merchant has established for ISO's access and use to settle financial payment transactions processed by ISO on behalf of Merchant.

"Substitute Check": The electronic Image of a paper check, as defined in Check 21.

- c. Set-Up of Services. ISO shall provide the Services selected by Merchant in its application. Merchant shall utilize and access the Services in accordance with the terms of this Agreement and the practices and procedures established by ISO for the Services which have been communicated in writing to Merchant. As part of the Merchant set-up and boarding process, ISO will provide Merchant with an administrative and gateway user name and password to access the Services. Merchant will designate an Administrator who shall be the sole individual vested with the authority to determine who will be authorized to use the Services; establish separate passwords for each user; and establish limits on each user's authority to access information and conduct transactions. Merchant is responsible for the actions of its Administrator, the authority the Administrator gives others to act on Merchant's behalf, and the actions of the persons designated by the Administrator to use the Services. Merchant shall take reasonable security procedures and practices to safeguard the confidentiality of the passwords; limit access to its passwords solely to persons who have a need to know such information; closely and regularly monitor the activities of employees who access the Services; and prohibit its employees and agents from initiating entries in the Services without proper authorization and supervision and adequate security controls.

- d. Delivery of Services. ISO will provide Services for the Entry types indicated in the Merchant set-up and boarding documentation. ISO reserves the right to withdraw the Services provided generally to its customers including Merchant for individual Entry types from general market availability and coverage under this Agreement upon ninety (90) days prior written notice to Merchant. To the extent reasonably possible, ISO will first attempt to process an Entry in the Services as an ACH Transaction, unless the Entry has clearly been designated to be processed as a Check 21 Transaction, provided the Entry fully qualifies to be processed as an ACH Transaction according to applicable NACHA Rules and ISO has received all of the required information from the Image or paper check necessary to process the transaction as an ACH Transaction. If the Entry cannot be processed as an ACH Transaction for any reason, then ISO will process the Entry in the Services as a Check 21 Transaction. Prior to submitting an Entry to ISO for processing, Merchant shall secure all authorizations and approvals from its Customer and deliver any notifications pertaining to that Entry which are required by the NACHA Rules and/or applicable laws and regulations. Merchant shall be responsible for the accuracy and propriety of all Entries submitted to ISO for processing. If Merchant utilizes a scanner to create Images which are delivered to ISO for processing, Merchant shall be solely responsible to ensure the accuracy and completeness of the Image transmitted to ISO for processing. Merchant acknowledges that ISO has specific processing deadlines imposed by its ODFI and the ACH Operator for ACH Transactions and by the Bank of First Deposit for Check 21 Transactions. Files received by the deadline will be transmitted that day to the Federal Reserve Bank for settlement on the effective entry day. Files received after the deadline will be processed the next Banking Day as defined in the NACHA Rules. For Check 21 Transactions, ISO will not be responsible for printing any Substitute Checks which may be required by a financial institution in order to receive and process the Entry. In the event of any conflicts in the instructions received by ISO regarding Merchant or any Entries relating to them, ISO may at its option and with or without notice, hold or interplead, comply with the legal process or other order, or otherwise limit access by Merchant or by ISO to the funds, Entries or proceeds thereof.

- e. Recoupment and Set-Off. Merchant shall immediately reimburse ISO for any returns or shortfalls that occur in Merchant's Settlement Account. ISO reserves the right to delay the availability of funds for deposit without prior written notices to Merchant if, in its sole discretion, ISO deems itself at financial or relative risk for any and all Services performed under this Agreement. Merchant hereby acknowledges and agrees that ISO shall have a right of setoff against any amounts ISO would otherwise be obligated to deposit into Merchant's account, and any other amounts ISO may owe Merchant under this Agreement.

i. Additional Merchant Responsibilities. All checks deposited electronically by Merchant through use of the Services shall be subject to the following requirements: (i) The original paper check will not be deposited through the Services more than once; (ii) All checks will conform to the requirements of Merchant's deposit agreement with its financial institution; (iii) All checks will conform to the requirements of the applicable NACHA Rules and Check 21; and (iv) Merchant shall review and validate the accuracy and completeness of the check data being captured including but not limited to the amount of the check and the legibility of the check Image generated from use of the Services. Merchant shall be solely responsible for the selection, use and operation of the scanner equipment used to capture the Image using the Services, including the quality of the Image results generated from the scanner. Any scanner used by Merchant with the Services must meet the technical specifications for scanners published by ISO in order to be deemed compatible with the Services. Any purchase or lease of scanners by Customer from ISO or a Reseller for its use shall be transacted between Merchant and ISO or a Reseller in a separate equipment purchase/lease agreement. Merchant shall be solely liable and responsible for all damages, losses, expenses and claims arising from any of the following: (i) Duplication of Images transmitted by Merchant to ISO through the Services; (ii) Alteration of scanned Images not caused by ISO's Services; (iii) Deposit of checks on accounts with insufficient funds, counterfeit checks, fraudulent checks, or checks bearing unauthorized or forged endorsements; (iv) Acts of fraud, negligence or willful misconduct committed by employees of Merchant in depositing checks using the Services; (v) Hardware failure not caused by ISO's Services; or (vi) Merchant's failure to properly store or destroy original checks once the scanned Image has been captured. Merchant shall hold ISO harmless from any damages, losses, expenses and claims which arise from the foregoing events not caused by ISO.

g. Pricing and Payment. Merchant shall pay ISO the fees, penalties and charges for the Services set forth in the Application and Fee Schedule and such fees, penalties and charges shall be considered Fees for all purposes of this Agreement.

h. NACHA Rules and ISO Guidelines. Each party shall comply with the then-current NACHA Rules which apply to ACH Transactions processed under this Agreement. In addition, ISO may publish to Merchant and other merchants its own standard operating and implementation guidelines for the Services with respect to specific NACHA Rules which will govern and apply to this Agreement as if set forth herein.

i. Selection and Use of Hardware. Merchant is solely responsible for the selection, use and operation of the hardware used to capture Images of paper checks using the Service, including the quality of the scanned Image results generated from the hardware. Hardware utilized must be certified for use with the Services in order to be deemed compatible with the Services.

j. Third-Party Processing Services. CORE's third-party processing services partners are providing some of the Services, and as a result, these third-party services partners shall be an intended third-party beneficiary of this Agreement. Each third-party services partner shall have the right to enforce directly against Merchant, the terms of this Agreement which relate to the provision of the third-party services partner's processing services to Merchant and the ownership and protection of the intellectual property rights of the third-party services partner and its licensors in and to its processing services. Merchant acknowledges that the third-party services partner shall have no responsibility or liability with regard to CORE's obligations to Merchant under this Agreement.

21. MISCELLANEOUS PROVISIONS.

a. You shall not subcontract, assign or transfer any interest, obligation or right under this Agreement without the prior written consent of Member Bank and ISO. Subject to the foregoing, this Agreement shall be binding upon and inure to the benefit of the parties and their successors or assigns. ISO and Member Bank may transfer their respective rights and responsibilities hereunder to another institution authorized by the Payment Brand Regulations to hold such rights without your consent.

b. This Agreement may be modified by Member Bank to comply with any amendments or additions to the Payment Brand Regulations or as required by applicable law or regulation upon thirty (30) days prior written notice to you.

c. No party shall, by the mere lapse of time, without giving notice or taking other action, be deemed to have waived any of their rights under this Agreement. No waiver of a breach of this Agreement shall constitute a waiver of any prior or subsequent breach of this Agreement.

d. In order to maintain quality service, Member Bank or ISO may monitor or record your telephone communications.

e. No party shall be liable for any loss or damage due to causes beyond its control, including earthquake, war, fire, flood, power failure, acts of God or other catastrophes.

f. Each party and each person signing on behalf of a party represents and warrants that it has the full legal capacity and authority to enter into and perform the obligations of this Agreement without any further approval. Nothing in this Agreement shall be deemed to create a partnership, joint venture or any agency relationship between the parties.

g. This Agreement and the documents referenced herein constitute the entire understanding of the parties with respect to the subject matter of this Agreement, and all prior agreements, understandings and representations are terminated and canceled in their entirety.

h. If there is any conflict between a part of this Agreement and any present or future Payment Brand Regulation or applicable federal, state or local law or regulation, only the part of this Agreement that is affected shall be modified and that modification shall be limited to the minimum necessary to bring this Agreement within the requirements of the Payment Brand Regulation, law or regulation.

i. All notices, including invoices, given in connection with this Agreement, shall be in writing and shall be effective upon actual receipt. Notices shall be delivered to the appropriate party at its address set forth on the attached Disclosure Page.

j. You shall be liable for all taxes, except Member Bank and ISO's income taxes, required to be paid or collected as a result of this Agreement.

k. All of your obligations, warranties and liabilities incurred or existing as of the date of termination of this Agreement, including without limitation, your obligations with respect to subsequent Fees, Third-Party Costs for which you are responsible hereunder, Penalties or Dispute Items based upon Card transactions incurred prior to termination, shall survive termination and shall continue in full force and effect as if the termination had not occurred. The right to revoke credit as well as hold, retain or set off against amounts due to you, or to debit any of your Account(s), shall survive the termination of this Agreement and shall continue in full force and effect as if termination had not occurred.

l. No other person or entity may be deemed a third-party beneficiary of this Agreement.

ACH Debit/Credit Sender ID Notice

BEFORE PROCESSING TRANSACTIONS, It is important to update all ACH debit/credit company sender IDs with your Bank to ensure timely and successful deposits and processing. Failure to do so may cause your daily deposit to be delayed or may affect your ability to process transactions.

Please notify your Bank as soon as possible to allow debits/credits from all the following Sender ID's.

Company/Sender Name	Company/Sender ID	Comment
AMS CORE Fees	9000008713	Card Processing Fees
AMS CORE	9000088713	Chargebacks & Adjustments
Wonderware Inc, DBA CORE Business Technologies	4050427143	Misc. Fees/Adjustments from AMS/CORE. Profit Stars eCheck Processing Fees
AMERICAN EXPRESS	1134992250	AMEX TPSP Chargebacks & Adjustments
BANKCARD SYS	1310281170	Worldpay PayFac Deposits & Debits
T-Tech	T562207579	T-Tech eCheck Processing Fees

Note: An ACH reject fee may be assessed for each rejected ACH transaction, debit/credit card Chargeback or Adjustment that is rejected by your Bank.

Disclosure Page
(Processor Copy)

Member Bank Information

Name: Merrick Bank, a Utah state chartered bank
Address: 135 Crossways Park Drive North, Suite A,
Woodbury, NY 11797
Phone: (800)267-2256

Important Member Bank Responsibilities

1. Member Bank is the **only party** to the Payment Processing Agreement approved to accept Visa products directly from a Merchant.
2. Member Bank must be a principal (signer) to the Payment Processing Agreement.
3. Member Bank is responsible for educating the Merchant on pertinent Visa U.S.A. Inc. Operating Regulations with which the merchant must comply.
4. Member Bank is responsible for and must provide settlement funds to the Merchant.
5. Member Bank is responsible for all funds held in reserve that are derived from settlement.

Merchant Information

Merchant Name: City of Richmond
Merchant Address: 450 Civic Center Plaza
Richmond, CA 94804
Merchant Phone: (510) 620-6740

Important Merchant Responsibilities

1. Ensure compliance with cardholder data security and storage requirements.
2. Maintain fraud and chargebacks below thresholds.
3. Review and understand the terms of the Payment Processing Agreement.
4. Comply with Visa Operating Regulations.

The responsibilities listed above do not supersede terms of the Payment Processing Agreement and are provided to ensure Merchant understands some important obligations of each party.

Merchant's Signature

Date

Merchant's Printed Name & Title

Disclosure Page

(Merchant Copy)

Member Bank Information

Name: Merrick Bank, a Utah state chartered bank
Address: 135 Crossways Park Drive North, Suite A,
Woodbury, NY 11797
Phone: (800)267-2256

Important Member Bank Responsibilities

1. Member Bank is the **only party** to the Payment Processing Agreement approved to accept Visa products directly from a Merchant.
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2. Maintain fraud and chargebacks below thresholds.
3. Review and understand the terms of the Payment Processing Agreement.
4. Comply with Visa Operating Regulations.

The responsibilities listed above do not supersede terms of the Payment Processing Agreement and are provided to ensure Merchant understands some important obligations of each party.

Merchant's Signature

Date

Merchant's Printed Name & Title

Request for Taxpayer Identification Number and Certification

Give Form to the requester. Do not send to the IRS.

► Go to www.irs.gov/FormW9 for instructions and the latest information.

Print or type.
See Specific Instructions on page 3.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.	
2 Business name/disregarded entity name, if different from above	
3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes.	4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):
<input type="checkbox"/> Individual/sole proprietor or single-member LLC <input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ► _____ Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner. <input type="checkbox"/> Other (see instructions) ►	<input type="checkbox"/> C Corporation <input type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate Exempt payee code (if any) _____ Exemption from FATCA reporting code (if any) _____ <i>(Applies to accounts maintained outside the U.S.)</i>
5 Address (number, street, and apt. or suite no.) See instructions.	Requester's name and address (optional)
6 City, state, and ZIP code	
7 List account number(s) here (optional)	

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number									
				-			-		
or									
Employer identification number									
				-					

Part II Certification

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here	Signature of U.S. person ►	Date ►

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.

CORE - MERRICK LOCATION ADDENDUM

PRIMARY MERCHANT INFORMATION:		Location No: 1	Date:
Legal Name:	City of Richmond	Bank Chain:	204622
Main Contact:	Title: Accounting Manager	Merchant Number:	<small>(Assigned Upon Approval)</small>

LOCATION INFORMATION:		Sales Rep :Chris Di Lucca 1130	
DBA:	City of Richmond OTC	Statement DBA (23 Chr.):	City of Richmond OTC
Location Address:	450 Civic Center Plaza	City:	Richmond
Mailing Address:	PO Box 4046	ST:	CA
Customer Service Phone Number:	(510) 620-6747	Zip:	94804
Main Contact:	Title: Accounting Manager	Phone #:	(510) 620-6740
Avg Ticket:	\$451.00	Fax #:	(510) 620-6522
Max:		Monthly Vol:	\$123,180.00
Monthly Vol:	\$123,180.00	Swipe %	80
Merchant Products or Services Offered (be specific):	City Tax and Permits	Keyed %	20
Terminal / Payment Application:	iMS	MOTO %	
Does Merchant Use Independent Servicer (store, maintain, or transmits cardholder data)?		Internet %	0
Servicer / Payment App. Manufacturer:	BridgePay / iMS Software	Version:	
American Express (10 Digits):		Phone:	
American Express Annual Volume:		Program: Service Fees: Account Name:	AMS*Service Fee
Rate:	2.95% Service Fee with a \$2.00 minimum per transaction	MID:	730308288

SITE INFORMATION:	
Merchant Type:	Retail
Building Type:	Office Building
Area Zoned:	Commercial
Square Footage:	2501 - 5000
Merchant:	Owns
Landlord:	
Contact:	
Phone:	
Fulfillment Co.:	
Contact:	
Phone:	
This Location is Open for Business:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Inspected By:	
Date:	

MOTO – ECOMMERCE QUESTIONNAIRE		<i>Complete if Processing Less Than 70 % Card Present</i>	
Sell To:	Business: 75 % Public: 25 %	Does the Merchant Own Product/Inventory?	
Marketing:		Are Products Stored at the Business Location?	
Orders Processed by:		<i>If No, Where?</i>	
Cards Processed by:		If Processing Internet Transactions (Please Complete The Following)	
When is the cardholder Charged?		Internet transactions encrypted by SSL or Better?	
How many days to fulfill orders?		Digital Certificate Utilized?	Exp Date:
Shipped by:		Certificate Number:	
Products Shipped by:		Certificate Issuer:	
Delivery Receipt Requested?		URL:	https://www.ci.richmond.ca.us/

DDA BANK ACCOUNT INFORMATION:			
This area should be completed for Added/Subsequent locations with DDA other than main location. Please Include a Voided Check. If this is a "Deposit Only" account then a letter from the Financial Institution verifying Transit and Routing Number and DDA# is required.			
Account Type:	ACH Deposit Routing/Transit #	ACH Deposit Account Number	Bank Name:
C K			Mechanics Bank
Account Type:	ACH Fees Routing/Transit #	ACH Fees Account Number	Contact:
C K			
			Phone:
			() -

Merchant hereby authorizes Merrick and Automated Merchant Systems, LLC to initiate credit and/or debit entries for amounts originating under the Merchant Processing Agreement (via ACH or otherwise) including any reversals or adjustments on original entries to the Merchant's Bank Account (as defined in the Merchant Processing Agreement). **NOTE: Attach Voided Check**

The Merchant agrees to abide by the terms & conditions contained in the Merchant Processing Agreement signed on _____, provided, however, that the term of the Merchant Processing Agreement relating to the above-referenced Additional Location shall be for the same length of time as the initial Term (defined in the Merchant Processing Agreement), and such Initial Term for the Additional Location shall commence on the date signed by Officer/Owner, indicated below.

Printed Officer/Owner Name	Signature	Title	Date
----------------------------	-----------	-------	------

CORE - MERRICK LOCATION ADDENDUM

PRIMARY MERCHANT INFORMATION:		Location No: <u>2</u>	Date: _____
Legal Name: <u>City of Richmond</u>			Bank Chain: <u>204622</u>
Main Contact: _____	Title: <u>Accounting Manager</u>	Merchant Number: _____	
(Assigned Upon Approval)			

LOCATION INFORMATION:		Sales Rep :Chris Di Lucca 1130	
DBA: <u>City of Richmond Web</u>	Statement DBA (23 Chr.): <u>City of Richmond Web</u>	SIC: <u>9399</u>	
Location Address: <u>450 Civic Center Plaza</u>	City: <u>Richmond</u>	ST: <u>CA</u>	Zip: <u>94804</u>
Mailing Address: <u>PO Box 4046</u>	City: <u>Richmond</u>	ST: <u>CA</u>	Zip: <u>94804</u>
Customer Service Phone Number: <u>(510) 620-6747</u>	Phone #: <u>(510) 620-6740</u>	Fax #: <u>(510) 620-6522</u>	
Main Contact: _____	Title: <u>Accounting Manager</u>	Email: _____	
Avg Ticket: <u>\$451.00</u>	Max: _____	Monthly Vol: <u>\$123,180.00</u>	Swipe % <u>0</u> Keyed % <u>0</u> MOTO % <u>0</u> Internet % <u>100</u>
Merchant Products or Services Offered (be specific): <u>City Tax and Permits</u>			
Terminal / Payment Application: <u>iMS</u>		Version: _____	
Does Merchant Use Independent Servicer (store, maintain, or transmits cardholder data)? _____ (if yes, provide the following)			
Servicer / Payment App. Manufacturer: <u>BridgePay / iMS Software</u>		Phone: _____	
American Express (10 Digits): _____		American Express Annual Volume: _____	
Program: Service Fees: Account Name: <u>AMS*Service Fee</u> MID: <u>730308296</u> Rate: <u>2.95% Service Fee with a \$2.00 minimum per transaction</u>			

SITE INFORMATION:			
Merchant Type: <u>Internet Website</u>			
Building Type: <u>Office Building</u>	Area Zoned: <u>Commercial</u>	Square Footage: <u>2501 - 5000</u>	Merchant: <u>Owns</u>
Landlord: _____	Contact: _____	Phone: _____	
Fulfillment Co. _____	Contact: _____	Phone: _____	
This Location is Open for Business: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No		Inspected By: _____	Date: _____

MOTO – ECOMMERCE QUESTIONNAIRE		Complete if Processing Less Than 70 % Card Present	
Sell To: Business: <u>75</u> % Public: <u>25</u> % Locally _____	Does the Merchant Own Product/Inventory? <u>YES</u>		
Marketing: _____	Are Products Stored at the Business Location? <u>YES</u>		
	If No, Where? _____		
Orders Processed by: <u>Merchant</u>	If Processing Internet Transactions (Please Complete The Following)		
Cards Processed by: <u>Merchant</u>	Internet transactions encrypted by SSL or Better? <u>YES</u>		
When is the cardholder Charged? <u>Time of Order</u>	Digital Certificate Utilized? <u>YES</u> Exp Date: _____		
How many days to fulfill orders? <u>1 - 7 Days</u>	Certificate Number: _____		
Shipped by: <u>Merchant</u>	Certificate Issuer: _____ Individual		
Products Shipped by: <u>U.P.S.</u>	URL: <u>https://www.ci.richmond.ca.us</u>		
Delivery Receipt Requested? <u>NO</u>			

DDA BANK ACCOUNT INFORMATION:			
This area should be completed for Added/Subsequent locations with DDA other than main location. Please Include a Voided Check. If this is a "Deposit Only" account then a letter from the Financial Institution verifying Transit and Routing Number and DDA# is required.			
Account Type: <u>C K</u>	ACH Deposit Routing/Transit # _____	ACH Deposit Account Number _____	Bank Name: <u>Mechanics Bank</u>
Account Type: <u>C K</u>	ACH Fees Routing/Transit # _____	ACH Fees Account Number _____	Contact: _____ Phone: _____ (-)

Merchant hereby authorizes Merrick and Automated Merchant Systems, LLC to initiate credit and/or debit entries for amounts originating under the Merchant Processing Agreement (via ACH or otherwise) including any reversals or adjustments on original entries to the Merchant's Bank Account (as defined in the Merchant Processing Agreement).
NOTE: Attach Voided Check

The Merchant agrees to abide by the terms & conditions contained in the Merchant Processing Agreement signed on _____, provided, however, that the term of the Merchant Processing Agreement relating to the above-referenced Additional Location shall be for the same length of time as the initial Term (defined in the Merchant Processing Agreement), and such Initial Term for the Additional Location shall commence on the date signed by Officer/Owner, indicated below.

_____	_____	_____	_____
Printed Officer/Owner Name	Signature	Title	Date

iMS

4/14/2023

iMS

Address: 600 La Terraza Blvd
Escondido, CA 92025
Phone: (747) 222-8822
Email: info@ims16.com
Website: www.ims16.com

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

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 14th, 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.

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
B1	Scope of Project	
B.5	Complete Attachment 13 (Interface)	✓
B.6	Complete Attachment 14 (Anticipated Conversion)	✓
Error! Reference source not found.	Summary and Overall Scope	
Error! Reference source not found.	Introduction	✓
	Error! Reference source not found.	✓
	Error! Reference source not found.	✓
	Error! Reference source not found.	✓
Error! Reference source not found.	Proposer Team	✓
Error! Reference source not found.	Functional Requirements	✓
	Error! Reference source not found.	✓
Error! Reference	Software Proposal	



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	Error! Reference source not found.	✓
	Error! Reference source not found.	✓
Error! Reference source not found.	Professional Service Proposal	
	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.	✓
Error! Reference source not found.	Price Proposal	
	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 14th, 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



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 th , 2023	SAC

Scott Christensen (Sr. Account Executive)

PRINTED NAME OF AUTHORIZED AGENT (TITLE)

Scott A Christensen April 14th, 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:	Intuitive Municipal Solutions (iMS)
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

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"> ■ iMS Approvals ■ iMSPermits ■ iMSEnforce ■ iMSPros ■ iMSLocations ■ iMSLicensing ■ iMSRenewals 	Community Development / Land Management solutions	Unlimited License for contracting departments	None	



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

Requirement	Response	Comment
System Features		
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
Security Information		
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	
Data Entry		
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.

Software Background	
Software Product Name:	The iMS Suite
Firm Providing Software:	Intuitive Municipal Solutions (iMS)
Software History:	
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
Current Version	
What Were Top Five Enhancements in Current Version of the Software	<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"> • Electronic Plan Review (i.e., Bluebeam Software or other similar vendor(s)) Link • Links for ESRI GIS, or Maps • Links for End-User “Favorites” • Microsoft Outlook (Office 365) • California State Licensing Board (CSLB) • Active Directory (Office 365) • Twilio for text messaging • Payment Processor integrations (i.e., US Bank, PayTrace, BridgePay, Paymentus, and CardKnox) <ul style="list-style-type: none"> • SendGrid for email(s) • Works with documents creating PDF’s or Excel during report generation. • SSRS – Report Writing • SQL
---	---



Software Background

List any Third-Party Products Recommended for Use along with the Software

An Electronic Plan Review (Bluebeam, ProjectDox, ePermitHub, or Other)

Interactive Voice Response (IVR) and/or SelecTXT by Selectron

VueSpex if your agency is interested in virtual inspections.

SolarAPP+



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:

iMS Approvals

Yes, it can usually start here. With iMS Approvals, 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. iMS Approvals 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.

iMS Permits

Imagine a streamlined interface that allows a tailored user experience for citizens, contractors, and Agency employees alike. Citizens and Contractors will benefit from iMS Permits 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? iMS Permits 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

SaaS	
Data Center	
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.
Availability	



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"> ✓ 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) <p>Also, as iMS hosted software solution uses Microsoft Azure, we are providing an additional link for MS Azure security information.</p> <p>https://docs.microsoft.com/en-us/azure/security/</p>
<p>Disentanglement</p>	
<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 \(1 Page\)](#)

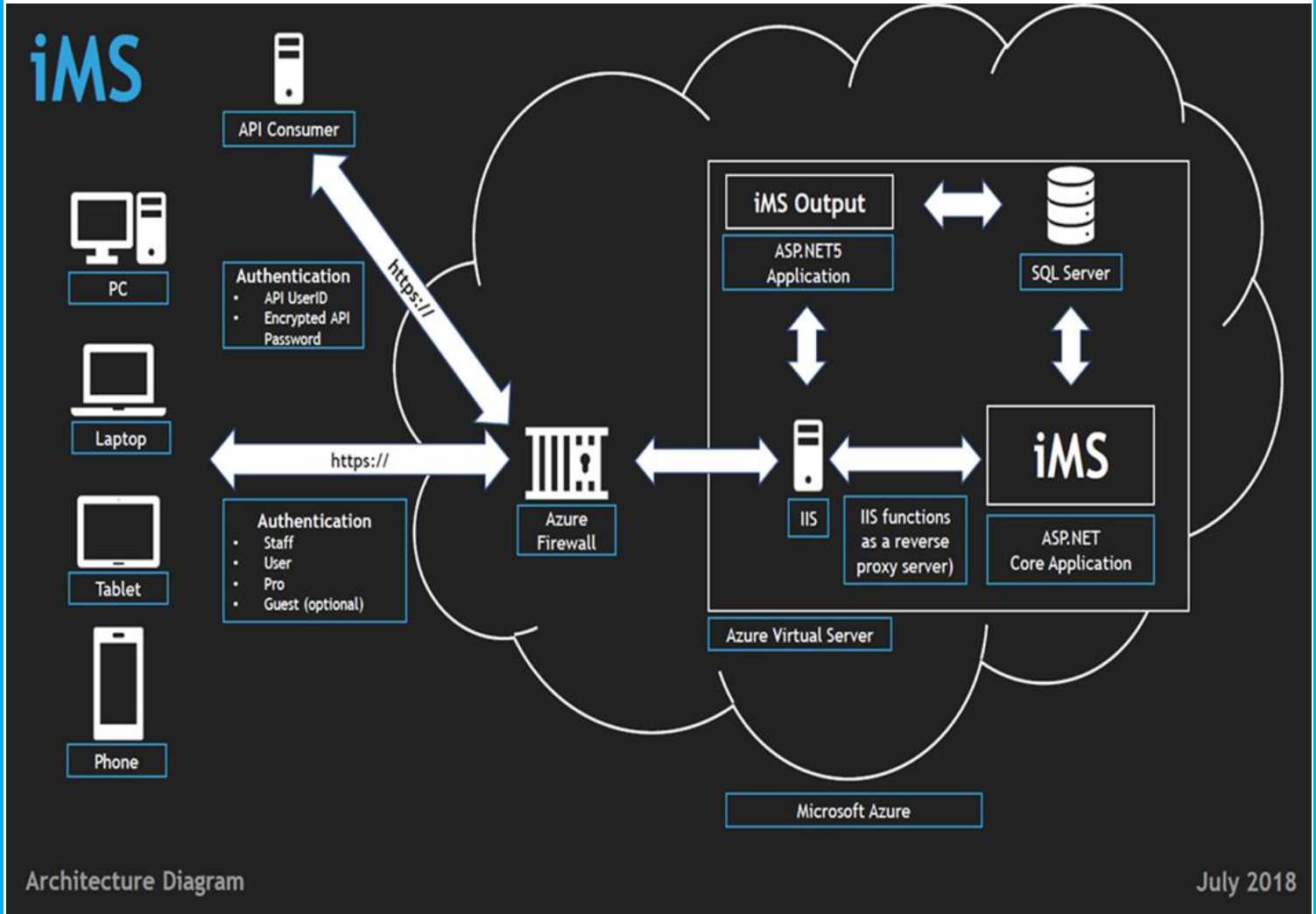
As noted, your iMS hosted software solution uses Microsoft Azure, we wanted to make sure you had easy access to the link for MS Azure security information, which I have also included here for you here:

<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:	Intuitive Municipal Solutions (iMS)
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"> 1. State of Minnesota (Department of Labor and Industry) 2. City of Palm Bay, FL 3. City of Blaine, MN 4. Kootenai County, ID 5. City of Englewood, CO 6. Also, City of Daytona Beach is really close to a go-live date, and they were also formerly TRAKiT customer.
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 or 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
- Inspections
- Plan Review
- Licensing
- Other (Please indicate) iMS Services, Workflows, Configurations, etc.

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 OR 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:

Permitting

Licensing

Inspections

Other (Please indicate) iMS Services, Workflows, Configurations, etc. Integration with Avolve’s ProjectDox

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
RFP 2023-03 Land Mgmt Community Development & Implementation Services



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.

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

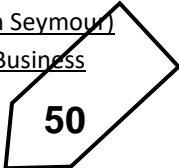
Hosted? Yes X No _____ If yes, hosting provider iMS (MS AZURE)

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).

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.

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

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:

- Permitting
- Inspections
- Plan Review
- Licensing
- Other (Please indicate) _____

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 2nd 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: DHauk@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:

- Permitting
- Inspections
- Plan Review
- Licensing
- Other (Please indicate) _____

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

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.

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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 & III, Physics, Biology, Chemistry, Organic Chem., Analytical Chem.</i>	
Immersion Internship Program - The Father's House Church	2011-2012



Trenton Seymour, Client Success Manager

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.

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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 from 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.

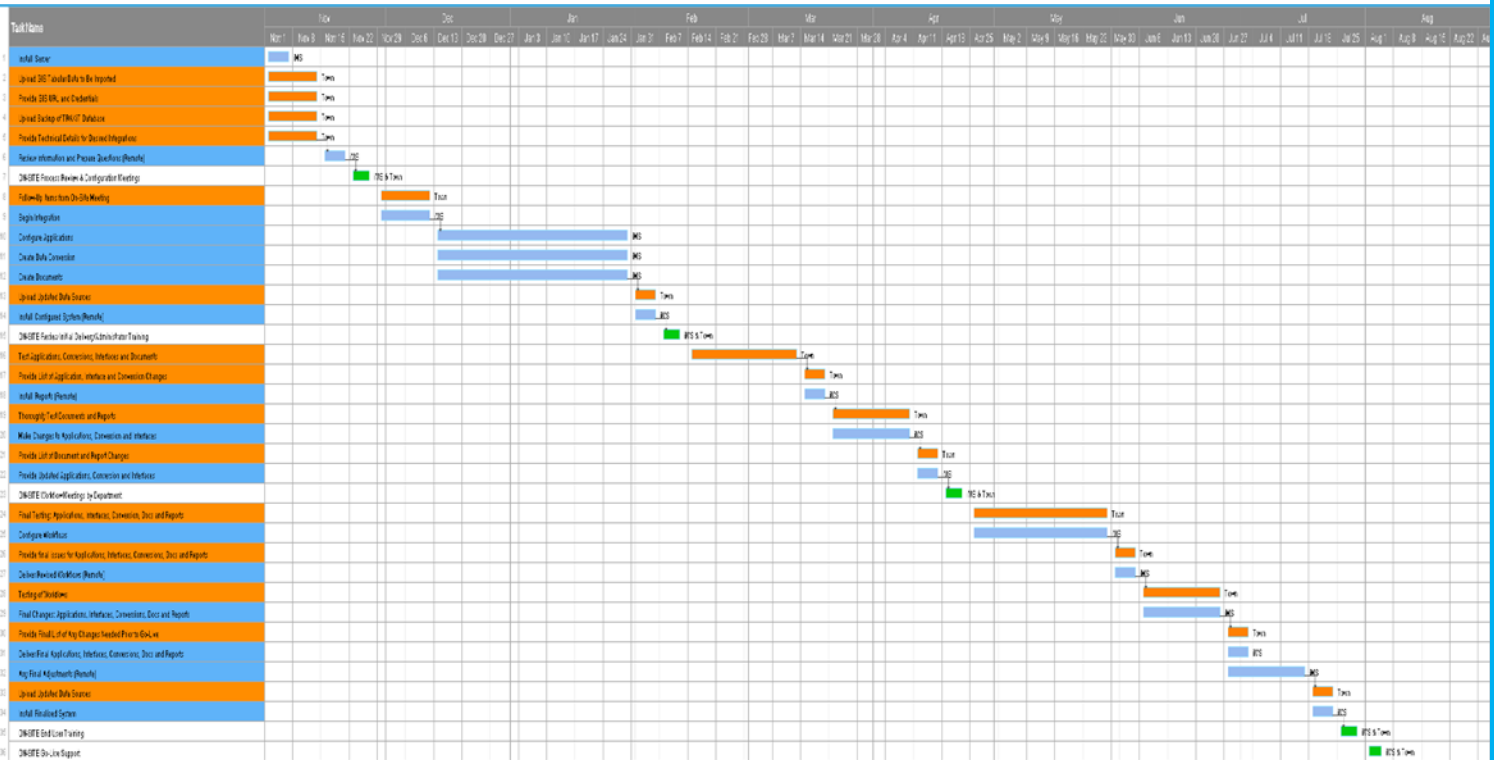


We have provided a standard Gantt Chart - **see below**, for you and your team(s) to “see” from an extremely prominent level the project breakdown in summary. Also, we understand this attached diagram is small to read and can provide, upon request or if necessary, a larger view of the project for you. 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, Conversion, Interfaces and Documents</u>
20	(City) Provide list of any <u>Application, Interfaces and Conversion</u> changes (iMS) REMOTE install <u>Reports</u>
21-23	(iMS) REMOTE Update <u>Applications, Conversion, and Interfaces</u> (City) Thoroughly evaluate <u>Documents and Reports</u>

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



- 24 (iMS) REMOTE Updated Applications, Conversion, and Interfaces provided
(City) Provide list of any Document and Report changes
- 25 (Team) ON-SITE (TBD after Project Kick Off) Workflow meetings by department
- 27-30 (iMS) REMOTE configure Workflows
(City) Final testing for Applications, Interfaces, Conversion, Documents and Reports
- 31 (iMS) REMOTE deliver revised Workflows
(City) Provide final issues for Applications, Interfaces, Conversion, Documents, & Reports
- 32-34 (City) Testing of Workflows
(iMS) REMOTE make final changes to Applications, Interfaces, Conversion, Documents and Reports
- 35 (iMS) REMOTE deliver final Applications, Interfaces, Conversion, Documents and Reports
(City) Provide final list of any changes needed prior to go-live
- 36-37 (iMS) REMOTE any final adjustments
- 38 (City) Upload updated data sources
(iMS) REMOTE install completed system
- 39 (Team) ON-SITE (TBD after Project Kick Off) End User Training
- 40 (Team) ON-SITE (TBD after Project Kick Off) **Go Live and Transition to iMS Support**

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

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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 functionality (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):

- | | |
|--------------|--|
| i. Observers | Limited Guest Access (with no login, if desired) |
| ii. Users | Public Access for Residents |
| iii. Pros | Public Access for Contractors |
| iv. Staff | Access for City of Richmond, CA Staff Members |



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

Your Total Anticipated Project Costs for 1st Year:	\$ 681,188.00
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For your convenience, here is a summarized breakdown by category of your agency's anticipated 1st 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 (one-time fee)
\$ 366,188.00	Professional Services (one-time fee)
\$ 78,750.00	Annual SaaS/Hosting Fee (annual recurring fee)
\$ 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 First Year Project Costs
\$ 82,688.00	Your Total Second Year Project Costs
\$ 86,822.00	Your Total Third Year Project Costs
\$ 91,163.00	Your Total Fourth Year Project Costs
\$ 95,720.00	Your Total Fifth Year 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 . 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
Error! Reference source not found.	Attachment 10 (Level of Effort)	Microsoft Excel (.xls or .xlsx)
Error! Reference source not found.	Error! Reference source not found.	Microsoft Excel (.xls or .xlsx)
Error! Reference source not found.	Error! Reference source not found.	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: *Vance Bradshaw* Date: April 14, 2023

Business Entity: Intuitive Municipal Solutions, LLC

Vendor SCCO Compliance Statement (Aug2020)



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 30th, 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.

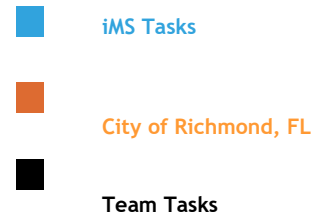
The following estimated schedule is provided to demonstrate a typical timeline for a successful project of this scope. A final SOW and schedule will be provided upon contract execution.

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





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):

City of Richmond, CA
RFP 2023-03 Land Mgmt Community Development & Implementation Services



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 30th, 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

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

Cost Categories	Total Costs	Explanation/Notes (if necessary)
Project Costs		
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)	\$ -	
Total Cost	\$ 1,037,581	Total five (5) year cost for your iMS Investment

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 <small>(CONCURRENT USERS, NAMED USERS, CPU, ENTERPRISE)</small>	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
Total			1.00	\$ 236,250	\$ -	\$ 435,143	

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

Schedule 4: Other Fees

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

Description	Cost
None	As it relates to the IMS project, we anticipate no additional costs for the agency.
Total	\$0

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

Functional Requirements

Implementation Response Available Definitions (Column E)

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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

Functional Requirements

Implementation Response Available Definitions (Column E)

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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

Functional Requirements

Implementation Response Available Definitions (Column E)

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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

Functional Requirements

Implementation Response Available Definitions (Column E)

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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

Functional Requirements

Implementation Response Available Definitions (Column E)

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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

Functional Requirements

Implementation Response Available Definitions (Column E)

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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

Functional Requirements

Implementation Response Available Definitions (Column E)

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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

Functional Requirements

Implementation Response Available Definitions (Column E)

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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

Functional Requirements

Implementation Response Available Definitions (Column E)

Y	Requirement Met and Proposed (Standard features in the generally available product)
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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

Functional Requirements

Implementation Response Available Definitions (Column E)

Y	Requirement Met and Proposed (Standard features in the generally available product)
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F	Feature Schedule for Future Release in Generally Available Software
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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

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	
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

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	
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

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	
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

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	
55	Business Tax / Business License	General	System workflow to notify appropriate staff that a license is approaching the expiration	Y

Accepted Interfaces

Legend: 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

Legend: Available Responses

C	Configurable Solution
P	Customized developed program

Legend: Available Responses

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

NO.	Main Application	Interface Description	Inbound, Outbound or Both	Vendor Response Section							Comments
				1 Interface Plan	2 Type of Solution	3 Consultant Work Effort (in hours)	4 Client Work Effort (in hours)	5 In Scope?	6 Included in Price?	7 Type of Support	
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								

Request for Proposals (RFP)
for an
Land Management Community Development System and
Implementation Services
for



The City of Richmond, California

RFP #	2023-03
Release Date	March 16, 2023
Due Date	April 14, 2023

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Section A: RFP Introduction

A.1 Purpose of the RFP

With this Request for Proposals (RFP) the City of Richmond, California (the City) desires to purchase or otherwise acquire rights for a land management and community development solution that meets the requirements identified in this RFP. The City requires that any proposal for a software solution also include professional services necessary to implement the system. The City will consider all technology platforms for this procurement. Proposers offering hosted services or software as service (SaaS) systems are encouraged to propose.

A.2 About the City

The City of Richmond has been a city in progress for nearly a century. It currently has a population of 116,448, and Richmond is one of two cities that sits on the shores of San Francisco Bay and San Pablo Bay.

From a struggling settlement to an industrial center, Richmond has a rich history of industries such as Winehaven, Pullman Palace Car Shops, American Radiator, Standard Sanitary Company, and Stauffer Chemical Company. However, Richmond's economy is significantly transitioning from its former heavy industrial character to more high technology ("high tech") and light industrial companies.

Richmond has grown into a friendly community of landscaped parks, recreational facilities, a marina, shopping centers, affordable housing, and planned business and commercial development.

The City provides various municipal services, including public safety (police, fire), community planning and economic development, public works, culture, administrative services, finance, information technology, procurement, and human resources.

The City of Richmond includes the following departments (partial list):

- Mayor's Office
- City of Attorney
- City Clerk
- City Council
- Community Development
- Community Services
- Economic Development
- Office of Neighbor Safety
- Transportation
- Information Technology
- Finance
- Public Safety
- Richmond Rent Program
- Port Operations
- Human Resources
- Library
- Parks & Recreation
- Public Works

Background Statistics	
Background Summary	
Population (2020)	116,448
General Fund Budget	\$206 million

Approximate Number of Employees (FTE)	570
Fiscal Year	July 1-June 30

Description	Value
Number of New Business Tax Receipts Issued	973
Number of Business Tax Receipt Renewals	5234
Number of Commercial Permits Issued	618
Number of Residential Permits Issued	2752
Number of Other Permits Issued	3269
Number of Plan Reviews	284
Number of Other Reviews	1352
Number of Inspections	18654
Number of Violations Issued	1467
Number of Cases	1239
Number of Projects	320
Number of Actions	116027
Number of Conditions	1016

A.3 Project Background

The City uses TRAKIT as the primary system for land management and many community development functions. TRAKIT was implemented April 6, 2004 and is the backbone of the city operations. It is used by all departments in the city to report issues and create work orders for other departments. Planning, building, code enforcement, water, waste water, business license, fire, public works, and rental program use TRAKIT to interact with the community.

Moreover, The City faced many challenges using the TRAKIT system, in which document management, self-service functions, integrations, implementation of Measure U tax, and workflow are less optimal for business operations. The lack of standardized processes and system integration requires manual exports and imports for data manipulation and duplicative processes.

The City would like to leverage new technologies and features and, more importantly, improve overall business processes and underlying system integration. Therefore, the City is releasing this RFP to procure a new Land Management Community Development System to replace TRAKIT. Ultimately, the City expects that the software procured through this RFP will interface with multiple systems including its ERP system to allow City staff to work more effectively and efficiently.

Project success will require implementing a modern system, optimizing business processes, and handling the City's Measure U ordinance, where customers can report gross tax receipts. Additionally, challenges are reporting and accounting for exemptions, deductions, and credits within the current system. The City will also treat project success to allow users with abilities to provide real-time data analytics in the system or connect to the BI software the city currently uses.

The City contracted with the Government Finance Officers Association to provide an initial assessment and recommendations for business process change and project readiness. The RFP requirements in this

document represent those efforts, and the City expects to use the Land Management Community Development project to implement those requirements.

Within process review and readiness activities, the City created process improvement teams, commonly referred to as PIT crews. These crews have thoroughly examined, documented, and begun designing improved and future business processes. In addition, the PIT crews have been tasked to review existing policies and procedures and recommend changes before implementation.

Furthermore, the selected vendor will review, define, and redesign business processes based on best practices relating to the City's requirements and the system functionality.

This Land Management Community Development project goes beyond technology. The City of Richmond considers it a transformative project –involving a change in business processes and project team dynamics. Therefore, communication and collaboration will be essential for the successful implementation of next-generation technology.

The project scope, project goals, and more information about the City is listed in Section B of this RFP.

A.4 Notice to Proposers

Failure to carefully read and understand this RFP may cause the proposal to be out of compliance, rejected by the City, or legally obligate the proposer to more than it may realize. Information obtained by the proposer from any officer, agent or employee of the City shall not affect the risks or obligations assumed by the proposer or relieve the proposer from fulfilling any of the RFP conditions or any subsequent contract conditions.

Attempts by or on behalf of a proposer to contact or to influence any member of the selection committee, any member of the City Council, or any employee of the City with regard to the acceptance of a proposal may lead to elimination of that vendor from further consideration. Only the format described in the RFP and the attachments included with this RFP will be accepted as compliant for the submitted proposal.

A.5 Conditions

- A.5.1** In the event that all RFP requirements are not met with products and services provided by one firm, *proposers are encouraged to partner with another firm to submit a joint proposal.* Failure to meet all requirements will not disqualify a firm. However, the City will evaluate each proposal to determine if its overall fit is in the best interests of the City. *In the event, a joint proposal is not submitted to meet the requirements, proposers should provide recommended vendors where they have an existing relationship* (e.g., where there is experience integrating the systems).
- A.5.2** In the event that multiple firms partner to submit a joint proposal, the proposal must identify one firm as the primary contact. This primary contact will be the primary point of contact throughout the procurement process and will be held responsible for the overall implementation of all partners included in the joint proposal.
- A.5.3** Pricing must be submitted on a fixed fee basis upon completion of pre-identified “**milestones.**” For implementation services under a milestone arrangement, the vendor shall invoice the City when the City has accepted the Services included as requirements for each milestone. The scope of the project, including the milestones, will be defined by the statement of work that describes both functional requirements of the software and business process expectations.
- A.5.4** All proposals and any subsequent clarification or response to the City's questions shall be valid

for a minimum of 120 days.

A.6 City's Rights Reserved

- A.6.1** The City reserves the right to select the proposal(s) which in its sole judgment best meets the needs of the City. The City has established an evaluation committee that will make a recommendation to its Land Management Community Development System Steering Committee. The lowest proposed cost will not be the sole criterion for recommending the contract award.
- A.6.2** The City reserves the right to award multiple contracts from this RFP.
- A.6.3** The City reserves the right to reject any or all proposals and to waive technicalities and informalities when such waiver is determined by the City to be in the City's best interest.
- A.6.4** The City may modify this RFP by issuance of one or more written addenda. Addenda will be posted on the City's website www.ci.richmond.ca.us/bids
- A.6.5** The City reserves the right to meet with select proposers at any time to gather additional information. Furthermore, the City reserves the right to remove or add functionality (i.e., modules, components, and/or services) until the final contract signing.
- A.6.6** This RFP does not commit the City to award a contract. All proposals submitted in response to this RFP become the property of the City and public records, and as such, may be subject to public review. Proposers concerned with release of proprietary or confidential information are encouraged to not submit that information in the proposal.
- A.6.7** The City shall not be liable for any pre-contractual expenses incurred by prospective vendors, including but not limited to costs incurred in the preparation or submission of proposals. The City shall be held harmless and free from any and all liability, claims, or expenses whatsoever incurred by, or on behalf of, any person or organization responding to this RFP.

A.7 Communication Regarding this RFP

All communication from prospective proposers regarding this RFP must be in writing via the City's BidsOnline System see section A.8.1 of this RFP. Communication by telephone or in person will not be accepted.

Attempts by or on behalf of a prospective or existing vendor to contact or to influence any member of the selection committee, any member of the City Council or any employee of the City with regard to the acceptance of a proposal may lead to elimination of that vendor from further consideration.

A.8 Inquiries and Requests for Clarification

- A.8.1** In an effort to maintain fairness in the process, inquiries concerning this procurement, including questions related to technical issues are to be directed electronically through the BidsOnline System on the Q&A tab. Questions over the phone will not be accepted
- A.8.2** All questions concerning the RFP must reference the RFP section heading. Questions will be answered and posted to the City's website in the form of addenda to the RFP. When addenda are issued, all firms that have registered as a proposer will be notified through email.
- A.8.3** Inquiries or requests for clarification will be accepted until March 29, 2023.
- A.8.4** Proposals may be changed or withdrawn prior to the deadline for proposals. All such changes and withdrawals must be submitted in writing and received by the City prior to the deadline for

proposals. After the deadline for proposals, no change in prices or other provisions prejudicial to the interest of the City or fair competition shall be permitted.

A.9 Procurement Schedule

The expected procurement schedule is listed below. The City reserves the right to change the procurement schedule. If significant changes are made, proposers will be notified by the City in the form of an addendum to this RFP, emailed directly to all registered proposers and posted on the City's website at: www.ci.richmond.ca.us/bids.

Procurement Schedule	
March 16, 2023	RFP released
March 23, 2023	Last day to accept questions and requests for clarification on the RFP - 11:30a.m. PDT (Pacific)
March 30, 2023	Answers to submitted questions provided
April 14, 2023	Proposals due – 2:00 p.m. PDT (Pacific)
April 2023	Initial vendor presentations/introductions
May 10, 2023	Proposers elevated and notified for vendor interviews and software demonstrations
End of May 2023	Vendor interviews and software demonstrations (May 23-25)
May 26, 2023	Elevate and notify semifinalist (s)
Mid-June 2023	Discovery sessions completed (1-2 days per elevated proposer, if necessary)
End of July 2023	Complete contract negotiations and Statement of Work (SOW)
August 2023	Implementation Begins

- A.9.1** Prior to the first elevation, vendors will have an opportunity for a short introductory presentation before the City's evaluation team. Presentations are expected to be 60 minutes in length, conducted remotely, and allow vendors the opportunity to highlight key features of their proposal. The City's evaluation team will also reserve time to ask questions. Performance from this presentation will be included as part of the first evaluation.
- A.9.2** Vendor demonstrations interviews will be conducted preferably in-person and can cover all functional areas listed in this RFP including software or implementation services. The City expects to elevate up to three (3) proposers for interviews. It is recommended that key members of the proposer's implementation staff proposed for this project be available for these interviews. The City expects that a portion of the evaluation criteria will focus on the proposed project team and failure to make project team members available could negatively impact proposal evaluations. The agenda and software demonstration scripts will be distributed to proposers that have been short-listed for software demonstrations approximately two to three weeks in advance

of the demonstrations.

- A.9.3** Discovery sessions will consist of an additional in-person (or remote) meeting with elevated proposers to focus on implementation issues and development of a statement of work (SOW). After vendor interviews, it is expected the City will elevate either one (1) or two (2) proposers to the Discovery phase. Each elevated proposal team will receive a Request for Clarification (RFC) letter that will ask proposers to clarify any necessary parts of the initial proposal. In addition, the RFC letter will identify a schedule for the on-site Discovery session that will include a detailed discussion of implementation issues. It is the expectation of the City that all key project team members will be available for the on-site Discovery sessions.

A.10 Evaluation Criteria

The City will review all proposals received as part of a documented evaluation process. For each decision point in the process, the City will evaluate proposers according to specific criteria and will then elevate a certain number of proposers to compete in the next level. Proposers not previously elevated may be elevated at a later date.

The sole purpose of the proposal evaluation process is to determine which solution best meets the City's needs. The evaluation process is not meant to imply that one proposer is superior to any other, but rather that the selected proposer can provide and has proposed the best software and implementation approach for the City's current and future needs based on the information available and the City's best efforts of determination.

The proposal evaluation criteria, which will be developed by the City prior to opening of proposals, should be viewed as standards that measure how well a proposer's approach meets the desired requirements and needs of the City. The City expects that evaluation criteria will focus on major risk areas for Land Management Community Development System implementations and include, but not be limited to the following:

- Ability to meet City's project goals
- Software functionality
- Implementation approach
- Project management
- Understanding of the City's needs
- Business process expertise
- Past experience with similar organizations and references
- Past experience/qualifications of consulting team
- Training
- Deliverables and project documentation
- Compliance with contract terms and conditions
- Responsiveness of proposal
- Performance in vendor interviews and discovery sessions

The City reserves the right to determine the suitability of proposals on the basis of any or all of these criteria or other criteria not included in the above list. The City's evaluation team will then make a recommendation to be approved by the City's steering committee to elevate proposals for software demonstrations, discovery, and final contract negotiations.

A.11 Proposal Submission Instructions

- A.11.1** Proposers must submit proposals electronically via the City’s secure online bidding system. Proposers will receive an e-bid confirmation number with a time stamp from the Bid Management System indicating that their bid was submitted successfully. Proposals should be uploaded. Proposers can upload documents via the City’s website: www.ci.richmond.ca.us/bids.
- A.11.2** Failure to comply with the requirements of this RFP may result in disqualification. Proposals received subsequent to the time and date specified above will not be considered.
- A.11.3** Signature of the proposal by the proposer constitutes acceptance by the proposer of terms, conditions, and requirements set forth herein.
- A.11.4** Use Attachment 1 (RFP Submittal Checklist) to ensure that all required documents, forms, and attachments have been completed and submitted as instructed.

In accordance with the California Government Data Practices, data submitted by a business to the City in response to an RFP is not public until the time and date specified in the solicitation that proposals are due. At that time, the name of the responder becomes public. All other data in a response to an RFP is private or nonpublic data until the City has completed negotiating the contract with the selected vendor. After the City has completed the evaluation process, all remaining data submitted by all responders is public, with the exception of trade secret data.

“‘Trade secret information’ means government data, including a formula, pattern, compilation, program, device, method, technique or process (1) that was supplied by the affected individual or organization, (2) that is the subject of efforts by the individual or organization that are reasonable under the circumstances to maintain its secrecy, and (3) that derives independent economic value, actual or potential, from not being generally known to, and not being readily ascertainable by proper means by, other persons who can obtain economic value from its disclosure or use.”

A blanket statement that data submitted as part of a proposal is copyrighted, proprietary, or otherwise protected in insufficient to prevent public access to the data.

A.12 Organization of Proposal

The proposal must be organized into major sections defined in Section C. Any required attachments must be included in the proper section as indicated by the instructions.

A.13 Format of Electronic Submission

Proposers must upload electronic copies of all files to the city website: 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
D.10	Attachment 10 (Level of Effort)	Microsoft Excel (.xls or .xlsx)
D.11	Attachment 11 (Functional Requirements)	Microsoft Excel (.xls or .xlsx)
D.12	Attachment 12 (Cost)	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)

Section B: Scope of Project

B.1 Project Scope – Overview

The overall project scope for the project is defined in Sections B2. – B4 below. Scope includes software, implementation, project management, and other ongoing services.

Functional Scope

- Permitting
- Licensing
- Plan reviews, including zoning reviews
- Inspections
- Building/property code enforcement / complaint tracking
- Land management
- Measure U Business Tax
- Customer Relationship Management
- GIS integration
- Mobility
- Workflow
- Work Orders
- Document Management (Folders and tags for attachments)
- Applicant Online Portal
- Conversion of all data from TRAKiT
- Rent Program
- Automated workflows
- User friendly internal reports and queries generation Accepting online and mobile payments
- Tamper-proof database with multifactor authentication for editing.

B.2 Project Goals

Within each individual scope category, the City expects to use this project to not only implement software, but also implement significant changes to City policy or business process. The City expects that the chosen vendor understand the City's goals and provide assistance in guiding the City towards achievement of the following goals.

B.2.1 Permitting: This scope is the ability to execute the critical functions of all the permitting processes necessary for the City of Richmond.

Project Goals:

- Utilize an enterprise-wide Land Management Community Development System for issuing and tracking permits so that data can be accessed easily by staff throughout the organization
- Streamlined (no duplicate) data entry with GIS integration for form generation and signature collections.
- Automatic file tagging for the attachments during upload through pre-defined cascading tag lists and system-generated tags.
- Accept payments for permits online

B.2.2 Licensing: The City issues several different types of licenses and several different categories.

Project Goals

- Use the system to generate license invoices and renewal notices
- Allow and encourage customers to apply for and renew licenses online
- Accept payments for licenses online

B.2.3 Plan Reviews: The City would like to utilize functionality within a new Land Management Community Development System to transition away improve plan review processes and electronic workflows. Electronic reviews and automated workflows will allow staff to review things in parallel, rather than in a linear fashion, passing plans from one reviewer to another. In addition, it allows managers to see where a review is in the process and follow-up as needed with applicable staff.

Project Goals:

- Implement electronic workflow for plan reviews
- Notes and comments made by reviewers are stored in the system, so reviewers are able to view them
- Bluebeam integration is a plus.
- Automatic customer updates and process transparency
- Accepts payments for plan review online

B.2.4 Inspections: The City conducts property inspections for building permits and rental licenses. Inspections are also conducted by the Fire department thus requiring access and interdepartmental work capabilities. The City would like to standardize its processes for conducting building inspections and track them in one enterprise-wide system.

Project Goals:

- Inspection data, including photographs, can easily be shared among inspectors in different departments.
- Mobile app inspection component so field inspection data, including pictures, notes, etc., are saved automatically to the permit record (without the need to scan, download, or upload).
- Light database viewer app optimized for mobile use.
- Inspectors are able to conduct inspections using a mobile device (tablet or smartphone)
- Robust reporting and document management capabilities are readily available
- Accepts payments for inspections online

B.2.5 Building/Code Enforcement: Several departments, including Fire, Police, Public Works, Building Inspections, and Community Development are responsible for responding to building or property-related complaints and inquiries. The follow-up on these complaints and inquiries is not maintained in a central system that all of the departments can access. The City would like to standardize its code enforcement processes and enable departments to share code enforcement information.

Project Goals:

- Enable better coordination among all departments that play a role in property and building code enforcement
- Enable staff to identify habitual property and building code offenders and collaborate to develop strategies to address such habitual offenders

- Accepts payments for building/ code enforcement online

B.2.6 Richmond Rent Program: The Rent Program promotes neighborhood and community stability, healthy housing, and affordability for Richmond tenants by regulating Landlord and Tenant matters related to rents and evictions while maintaining a Landlord's right to a fair return.

Project Goals:

- The Rent Program provides an array of services to the community relating to the Rent Ordinance. These services include counseling, mediation, outreach to Tenants and Landlords, administration of the Rent Adjustment Petition Process, community education workshops, and facilitating Richmond Rent Board meetings.
- The system will allow for property enrollment that will comply with the Tenancy Registration Form for each tenancy in a Fully Covered Unit.
- The system can calculate standard fees using effective dates and user-provided formulas or tables of rental housing fees.
- Accepts payments for rent program

B.2.7 Measure U Tax: The new system must be able to calculate business taxes based on the Measure U Tax table. In this context, fees and tax calculations are based on gross receipts, which requires the new system to apply accurately to the applicant and businesses.

Project Goals:

- System can classify businesses and assess/collect licenses due to the City in accordance with the City's Licensing Ordinances and Measure U
- System is able to set variable rates by business type or category
- System can calculate standard fees using effective dates and user-provided formulas or tables
- Measure U Gross Receipts Business Tax | Richmond, CA - Official Website
 - <https://www.ci.richmond.ca.us/66/Business-Licenses>
 - <https://www.ci.richmond.ca.us/DocumentCenter/View/54680/City-of-Richmond-Gross-Receipts-Tax-Ordinance---UPDATED-8-13-2022-PDF?bidId=>
- Accept payments online

B.2.8 Customer Relationship Management: The system allows community members and residents to quickly request services, access information, and monitor their status.

- Within the system, tasks can quickly be assigned based on request type and geographic boundaries
- The system also ensures service requests are completed and provided with real-time status updates
- Real-time data analytics dashboards & reporting or integration to BI software

B.3 Project Timeline

The City expects to be ready for implementation in the third quarter of 2023. Assuming an August 2023 start, proposers should communicate realistic timelines to both successfully implement the new Land Management Community Development System and to guide the City in achieving its stated goals.

B.4 Implementation Approach

The City understands that each proposer may take a different approach to implementation. However, to better compare different approaches and to ensure that essential components of the implementation are

proposed, the City requires that all vendors use the definitions below when describing implementation activities. Similarly, the City will require that vendors provide tasks in their response to meet both the stage requirements and deliverables contained below. When completing responses required in Section C of this RFP, use definitions listed within the section. In the event that proposed activities overlap multiple stages, select the stage that best applies.

B.4.1 Project Management – Vendor will be responsible for providing overall coordination and management to the project including governance support, schedule management, risk mitigation, project communications, contract management, and quality assurance. Specific deliverables expected during this stage include:

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

B.4.2 Knowledge Transfer – Vendor will be responsible for ensuring that the City’s core team has sufficient knowledge and understanding of the software to properly participate in the project and subsequent system and business process design discussions. Knowledge transfer stage will include all core team training. Specific deliverables expected during this stage include:

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

B.4.3 System Design – Vendor will be responsible for facilitating process to define how the system will be used to meet the City’s business process requirements and project goals. As part of the design, the City expects to engage in discussions around how to use the system most effectively, what changes in business process are required and to document configurations, interfaces, reports, workflows, and security roles. Specific deliverables expected during this stage include:

- System design document
- Entity Relationship Diagram (ERD)

B.4.4 Build – After completing design and after the City has made decisions on both business process and system configurations, the City expects that the vendor and City staff will work collaboratively on building the system. All activities related to system configuration, interface development, report creation, or other build tasks should be included in this stage. Specific deliverables expected during this stage include:

- As-built documentation
- Test scripts

B.4.5 Testing – Throughout the process, the City expects to engage in execution of a formal test plan. The test plan will be developed during the project and include testing approach, roles and responsibilities for testing, and clear deadlines and expectations around testing effort. The City expects to engage in detailed conference room pilot testing, unit testing, regression testing, integration testing, and user acceptance testing. Specific deliverables expected during this stage include:

- Testing plan

- Testing results

B.4.6 Go Live / Support – At time for go-live, the City expects that the vendor will assist with end-user training, work to prepare a cutover plan, and assist with the transition to the new software. Included with go-live could also be assistance for after go-live with management of help-desk type functions. Specific deliverables expected during this stage include:

- Training plan
- Knowledgebase
- End-user training materials
 - Include creating reports
- List of pre-built reports with descriptions
- Cutover plan
- Final acceptance documentation
- Type of Support provided (hours of support, business processes, administration, etc)

B.5 Interfaces

Interface requirements have been included in with the functional requirements. Proposers should respond to each functional requirement, including the interface requirements, to identify the proposed scope. Any positive response – “Y” or “Y-ND” is considered to be in-scope and all pricing for the proposed scope included in the submitted milestone pricing. Interfaces to the City’s existing systems are critical to the project success.

Proposers must provide responses to the interface requirements **Attachment 13 - Interface List**. Reference Table (Interfaces Requirements Key) below when completing the interface requirements form.

**Table
Interface Requirements Key**

Item	Response	Response Description
Interface Plan	Permanent	Permanent interface, even after the complete CD solution is installed.
	Temporary	Interface that is only required during implementation.
	Go-Away	Interface that is no longer required because of the new CD solution.
Type of Solution	C	Configurable solution
	P	Custom-developed program
Estimated Consultant Work Effort	Number of Hours	Include the number of estimated consulting work hours to complete the interface implementation based on the City plan.
Estimated Client Work Effort	Number of Hours	Include the number of estimated client work hours to complete the interface implementation based on the City plan.
In Scope	Y/N	Indicate with a Yes or No whether the interface is in scope based upon the City strategy.
Included in Price	Y/N	Indicate with a Yes or No whether the interface is included in the price based upon the City strategy.

Item	Response	Response Description
Type of Support	S	Requirement and feature supported by software developer.
	TPS	Requirement and feature supported by third party.
	NS	Requirement and feature not supported.
Comments	Text	Include any comments or assumptions relevant to the answers above.

B.6 Anticipated Conversion

The City understands the level of effort required to convert data and is interested in all the TRAKiT data into the new system.

Proposers must provide responses to the conversion requirements **Attachment 14 - Conversions**. Reference Table (Conversion Requirements Key) below when responding to the conversion requirements.

Table
Conversion Requirements Key

Item	Response	Response Description
Agree	Y/N	Proposers should identify whether or not your firm agrees that this item is convertible.
Included in Price	Y/N	If your firm agrees that this item is convertible, indicate with a Yes or No whether your firm's work effort to complete the conversion is included in the pricing schedule.
Estimated Consulting Hours	Number of Hours	Include the number of estimated consulting work hours to complete the conversion.
Estimated Client Hours	Number of Hours	Include the number of estimated client work hours to complete the conversion.
Comments	Text	Include any comments or assumptions relevant to the answers above.

B.7 Project Staffing

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

- Permits

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

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

B.8 Statement of Work

The City will require the development of a detailed statement of work, including a high-level project plan, prior to contract signing. The statement of work will include and describe at least the following and may include additional items the City deems necessary:

- Project scope
- Project milestones
- Project deliverables
- High level project schedule (listing of phases and go-live dates)
- Project resources
- Project roles and responsibilities
- Quality assurance and testing procedures
- Project change control procedures

B.9 Number of Users By Department

It is difficult for the City to envision exactly who will use the system as implementation of the system will result in a major change in the way that the City does business. Proposers should plan however on having all City departments with access to the system for at least a few users to enter transactions. The following user counts expected employees and primary system users within each City department. Proposers should plan to provide sufficient system access for the City to fully implement their desired business processes. Proposals should include services to complete implementation and any appropriate training services to prepare all City staff for using the system. (Note: Employees are counted in multiple columns).

City Users		
Type of User	Total Employees	Estimated Number of Primary System Users
Administration /IT	2	2

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LAND MANAGEMENT COMMUNITY DEVELOPMENT SYSTEM

Building	13	13
Code Enforcement	13	13
Engineering	25	25
Finance/Measure U	8	8
Fire	50	50
Planning	18	18
Public Works	39	39
Rent Control	19	19
External Agencies / Consultants	20	20

Section C: Detailed Submittal Requirements

Proposals should be prepared as simply as possible and provide a straightforward, concise description of the proposed products and services to satisfy the requirements of the RFP. Attention should be given to accuracy, completeness, relevance, and clarity of content. Proposals must address the following questions and contain the following sections.

C.1 Summary and Overall Scope

C.1.1 (Proposal Section 1.0 – Introduction) The introductory material should include a title page with the RFP name, name of the proposer, address, contact information, the date, a Letter of Transmittal, and a Table of Contents. The executive summary should be limited to a brief narrative (less than 3 pages) summarizing the proposal.

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

C.1.2 (Proposal Section 2.0 – Proposer Team) This section of the proposal should identify all firms included in the proposal and any necessary third party products/firms required or recommended for the City.

- 4) Identify and provide a concise summary of all firms providing software or professional services as part of this proposal
- 5) Identify all contract documents that would be required if the proposal is identified as finalist

C.1.3 (Proposal Section 3.0 - Functional Requirements) This section describes the software and implementation scope of the overall project and the requirements for each functional area. Responses to the functional requirements should be completed to identify the capability of the software and the scope of the implementation.

Functional Requirements Responses	
Column E: Available Responses	
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

6) Complete Attachment 11 (Functional Requirements)

- Failure to provide some requirements or excluding some requirements from scope will NOT eliminate the proposer from contention. The City will evaluate the proposal as a whole including price/value comparisons when evaluating proposals.
- The requirements responses submitted will become part of the agreement. Proposers are expected to warrant the delivery and configuration/implementation of all positive responses (every response except “N” and “I”).
- The City will clarify any requirements with the response of “I” during vendor interview. Immediately following software demonstrations, proposers would be expected to re-submit Attachment 11 (Functional Requirements).
- For requirement responses other than “N” or “I” proposers must indicate the module or product that is required to meet the requirement.
- For requirement responses other than “N” or “I” proposers must indicate the phase of the project that the functionality will be implemented.
- All responses which are marked Y, or Y-ND will be considered to be included in the scope, and the cost proposal and all other information submitted in this proposal should reflect this.
- For functionality that is not currently available and not available for viewing at a demo, but that will be in scope for the project either as generally available features in a future release or as a customization, modification, or enhancement specific for this project, Proposers should indicate a response code of Y-ND and answer column J.

C.2 Software Proposal

(Proposal Section 4.0 – Software Products) This section should provide information on the proposed software scope, and functional description of the software.

- 7) Complete Attachment 9 (Software Products)**
- 8) Complete Attachment 4 (Software Background) for each software product included in the proposal**
- 9) List and describe all proposed software products that will be delivered as part of the project, including third party products**
- 10) Identify any licenses, hardware, or other products not included in this proposal that would be required to operate any of the proposed solutions contained in this proposal.**
- 11) Describe the technical environment necessary for this software for any products that are to be hosted by the City**
- 12) Identify the security standards maintained in the data center and with the software. Please provide information on certification or audit process for each.**
- 13) Provide information on proposed disaster recovery services.**

(Proposal Section 5.0 – Technical Requirements) This section of the proposal should identify any technical requirements for operating the system and describe the key attributes of the vendor’s proposed delivery services.

- 14) Complete Attachment 7 (SaaS)**
- 15) Complete Attachment 8 (Proposed Service Level Agreement)**
- 16) Describe proposed services for hosting including:**

- Information on the specific hosting services provided
- Service desk support services
- User Setup, Authentication and Management processes
- Application support
- Operational support services
- Technology infrastructure services
- Disaster recovery
- Will all products (including third party products) be hosted through the same provider?
- Will the City need to host anything on its servers? If yes, what would be required?

17) 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.

- **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) This section should describe the proposed project team including the consultants proposed to provide services for the City.

- 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
 - Approximate dedication to the project of each resource and approximate time work will be completed on-site vs. off-site.
 - Major roles and responsibilities for each resource
- 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 Attachment 10 (Level of Effort)** - When completing Attachment 10 (Level of Effort), please refer to definitions found in section B.4 of this RFP.

(Proposal Section 7.0 – Implementation Approach) This section should describe the proposed implementation plan. Proposers should reference Section B for more information on the project scope, goals, and implementation effort.

22) Provide a detailed plan for implementing the proposed system. This information must include:

- Confirm completion of key tasks and deliverables as defined in section B.4 of this RFP.
- Description of implementation tasks and activities
- Description of key deliverables (and how they relate to the implementation approach and activities).

23) Explain proposed project management services including:

- Role of the vendor project manager
- Use of project collaboration site
- Expected role of the City project manager
- On-Site presence of vendor project manager
- Proposed quality assurance procedures

24) Explain the expected City staffing for the project including:

- Assumed participation in the project (average portion of FTE). This should include all time spent working on the project (including time spent with and without vendor consultants)
- Assumptions about prior skills / competencies of resources

25) Identify proposed data conversions

- Provide information on the scope of the data conversion and the approach for migrating data to the new system
- Identify City role in assisting to convert data

26) Identify interfaces

- Please confirm your understanding of the interfaces included in the scope and identify how you have proposed meeting each requirement

(Proposal Section 8.0 – Implementation Considerations) This section asks additional questions related to some of the unique goals and challenges with the City’s project. The City expects that proposers provide specific responses that take into account the challenge, the proposer’s past experience, and recommendations based on the information that has been presented in the RFP.

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.

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.

(Proposal Section 9.0 – Implementation Terms and Conditions) This section asks for proposers to accept key terms and conditions for the project.

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.
- **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.
- **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.
- **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.
- **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.

C.4 Price Proposal

(Proposal Section 10.0) - Proposers should submit price proposals using the format provided in Attachment 12 (Cost) to this RFP.

28) Complete and submit Attachment 12 (Cost)

- All pricing must be submitted as fixed by milestone. Costs listed as “to-be-determined” or “estimated” will not be scored.
- Identify major milestones as part of the project. It is required that costs will be invoiced upon completion of major milestones. Please provide a schedule of all payments necessary to complete the proposed scope.
- All service costs must be provided on a task or completion basis with costs assigned to each milestone, deliverable and/or task. Proposers are required to fill in deliverables and tasks under the provided headers (project initial knowledge transfer, process analysis/system design, system build, testing, training, and closure) Additional detail may be provided to further explain deliverable/task costs.
- Proposers should include all software modules and state any limitations on module use. If no limitations are listed, the City will consider that pricing is based on full enterprise wide access for the City.
- Proposers must submit implementation costs as fully loaded rates that include all necessary travel or other expenses. By submitting a proposal, all proposers acknowledge that all pricing (including travel) must be a fixed fee or included in the implementation milestones.

REQUEST FOR PROPOSALS
LAND MANAGEMENT COMMUNITY DEVELOPMENT SYSTEM

Section D: Attachments

D.1 Attachment 1 (RFP Submittal Checklist)

Submittal Checklist		
Section	Item	Submitted
B1	Scope of Project	
B.5	Complete Attachment 13 (Interface)	
B.6	Complete Attachment 14 (Anticipated Conversion)	
C.1	Summary and Overall Scope	
C.1.1	Introduction	
	Complete Attachment 1 (RFP Submittal Checklist)	
	Complete Attachment 2 (Signature Page)	
	Complete Attachment 3 (Proposer Statement)	
C.1.2	Proposer Team	
C.1.3	Functional Requirements	
	Complete Attachment 11 (Functional Requirements)	
C.2	Software Proposal	
	Complete Attachment 4 (Software Background) for each software product included in the proposal	
	Complete Attachment 7 (SaaS)	
	Complete Attachment 8 (Proposed Service Level Agreement)	
	Complete Attachment 9 (Software Products)	
C.3	Professional Service Proposal	
	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 Attachment 10 (Level of Effort) - When completing Attachment 10 (Level of Effort), please refer to definitions found in section B.4 of this RFP.	
C.4	Price Proposal	
	Complete and submit Attachment 12 (Cost)	

D.2 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: _____

Address: _____

City: _____ State: _____ Zip: _____

Authorized Representative (print): _____ Title: _____

Authorized Signature: _____ Date: _____

Contact Information:

Name: _____

Title: _____

Address: _____

City: _____ State: _____ Zip: _____

Email: _____

Phone: _____

Cell Phone: _____

Fax: _____

D.3 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

PRINTED NAME OF AUTHORIZED AGENT (TITLE)

SIGNATURE OF AUTHORIZED AGENT

DATE

D.4 Attachment 4 (Software Background)

Complete one form for each firm included in the proposal.

Software Background	
Software Product Name:	
Firm Providing Software:	
Software History:	
Current Version of the Software:	
Date of Release for Current Version:	
Date of First Release of Software:	
Identify any Precursor Software Products or Alternate Names for Software	
Current Version	
What Were Top Five Enhancements in Current Version of the Software	1 2 3 4 5
How as Software Changed Over Previous Three (3) Years	Attach additional pages if necessary
Biggest Limitation of Current Software	
Third Party Products:	
List any Third-Party Products embedded in the Software	
List any Third-Party Products Recommended for Use along with the Software	

D.5 Attachment 5 (Professional Services Background)

Complete one form for each firm included in the proposal.

Proposer Background						
Company Name:						
Location of corporate headquarters:						
Firm History						
Years of Experience Providing Land Management Community Development System Implementation						
Previous Names / Successor Firms						
Current/Recent Projects						
List up to five (5) current or recent projects that provided relevant experience						
In the past, what has been your firm’s target market						
What is primary lesson learned from recent projects you have adjusted for the City						
Size						
Number of current (new) implementation clients						
Number of current upgrade clients						
Number of ongoing support clients						
Number of other clients						
Consulting Team						
Size of consulting team						
Average tenure with firm						
Source of recent hires (Where do you recruit for consultants?)						
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	Role	Project Manager	Consultant	Consultant	Consultant	Consultant
	Resource	Name	Name	Name	Name	Name
City of A	X	X	X			
City of B				X		X
City of C				X		
City D			X			
City E		X			X	

D.6 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: _____

Project Manager/Contact: _____ Title: _____

Phone: _____ E-mail: _____

Software Program/Version: _____

Summary of Project: _____

Number of Employees: _____ Size of Operating Budget: _____

PROJECT SCOPE

Please indicate (by checking box) functionality installed:

- Permitting
- Inspections
- Plan Review
- Licensing
- Other (Please indicate) _____

TECHNOLOGY INFORMATION

Hosted? Yes _____ No _____ If yes, hosting provider _____

IMPLEMENTATION INFORMATION

Project Duration: _____

Initial Go-Live: _____

Describe Role on Project: _____

Project Challenges: _____

Major Accomplishments: _____

D.7 Attachment 7 (SaaS)

*Attach additional pages if necessary

SaaS						
Data Center						
Where are data centers located?						
Are any third party providers used to deliver PaaS or IaaS services? If so, please list.						
How many environments are proposed?						
Availability						
Provide historical availability for data center for past six months.						
Month	Total Minutes/Hours in Month	Downtime	Scheduled Maintenance	Other Downtime	Total Downtime	% Availability
Updates						
How often is solution updated?						
How much advance notice are customers provided for new updates?						
How long do customers have to test new update?						
Authentication						
Does the system support SSO or LDAP?						
Information Security						
Protections provided for data breach? Please include information on notification process, remedy, and indemnification provided.						
Disentanglement						
Can customer data be exported in non-proprietary format?						

D.8 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)			
System Response (Performance)			
Issue Response Time			
Issue Resolution Time			
Recovery Point Objective (RPO)			
Recovery Time Objective (RTO)			
System Data Restore			
Implementation of System Patches			
Notification of Security Breach			
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	

D.9 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

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

Requirement	Response	Comment
System Features		
System accessible on mobile device		
System provides app for use on mobile device		
System requires download of any software on device		
Security Information		
System provides role based security		
System provides role based security connection to position file (assigning employee to position allows employee to inherit roles of the position)		
Data Entry		
System allows for user-defined fields		
System provides audit trail for entered and modified information		
System allows masking data upon entry (sensitive fields)		
System allows designating mandatory fields		
System allows data to be encrypted		

D.10 Attachment 10 (Level of Effort)

(See Separate Excel Spreadsheet)

D.11 Attachment 11 (Functional Requirements)

(See Separate Excel Spreadsheet)

D.12 Attachment 12 (Cost)

(See Separate Excel Spreadsheet)

D.13 Attachment 13 (Interface)

(See Separate Excel Spreadsheet)

D.14 Attachment 14 (Anticipated Conversion)

(See Separate Excel Spreadsheet)

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

RESOLUTION NO. 142-23

**A RESOLUTION OF THE COUNCIL OF THE CITY OF RICHMOND,
CALIFORNIA, AUTHORIZING A CONTRACT WITH INTUITIVE MUNICIPAL
SOLUTIONS (iMS) FOR AN ENTERPRISE COMMUNITY DEVELOPMENT AND
LAND MANAGEMENT SYSTEM**

WHEREAS, the City of Richmond and iMS Software and Partners Subscription Services (the Software) are implementing an Enterprise Community Development and Land Management system, which will allow for interdepartmental, online permitting, business licenses, rent program permits, online payments, concurrent electronic plan review, meeting the City’s goals of a more sustainable, customer friendly, efficient, and cost effective city processes; and

WHEREAS, the purpose of the project is to replace TRAKiT, a legacy system that is in limited support by the vendor as the version used by the City is at end of life. The vendor ended full support last December 2022; and

WHEREAS, on October 18, 2022, the City executed an agreement with GFOA, a consulting firm, to help assess the City’s needs and prepare a Request for Proposals (RFP) establishing the requirements for development and implementation of a comprehensive community development and land management system; and

WHEREAS, on March 16, 2023, an RFP was issued to solicit bids for a land management and community development software to replace TRAKiT with a modern robust solution; and

WHEREAS, the total cost for replacing TRAKiT and additional change orders shall not exceed \$1,758,596 (\$1,529,213.17 original project cost and five years of services plus an approximately fifteen percent for contingency funding to pay for integrations with the Enterprise Resource Planning System); and

NOW, THEREFORE, BE IT RESOLVED by the City Council of the City of Richmond that the agreements with Intuitive Municipal Solutions and sub-vendors are approved and the City Manager is authorized to execute the documents subject to minor adjustments that do not impact costs.

BE IT FURTHER RESOLVED that the cost for the Enterprise Community Development and Land Management system and additional change orders shall not exceed \$1,758,596.00 (\$1,513,424.72 original project cost plus a fifteen contingency) to pay for integrations with the Enterprise Resource Planning System without City Council approval.

I certify that the foregoing resolution was passed and adopted by the City Council of the City of Richmond at a regular meeting thereof held on December 19, 2023, by the following vote:

AYES: Councilmembers Bana, Jimenez, Robinson, Willis, Zepeda, and Mayor Martinez.

NOES: None.

ABSTENTIONS: None.

ABSENT: Vice Mayor McLaughlin.

PAMELA CHRISTIAN

 CLERK OF THE CITY OF RICHMOND
 (SEAL)

Approved:

EDUARDO MARTINEZ
 Mayor

Approved as to form:

DAVE ALESHIRE
 City Attorney

State of California }
 County of Contra Costa } : ss.
 City of Richmond }

I certify that the foregoing is a true copy of **Resolution No. 142-23**, finally passed and adopted by the City Council of the City of Richmond at a regular meeting held on December 19, 2023.

 Pamela Christian, Clerk of the City of Richmond

cityofrichmondcamunisapp.tylerhost.net:6473prod/munis/gas/app/usa/mugwrc/mentpst

Contract Entry [CITY OF RICHMOND | LIVE]

Contract * 6855 To Be Rolled Status APPROVED
Method * Non-Encumbered GL Accounts Hold Payments
Customer * Require PO for Payment Change Order NONE
Vendor * 16320 INTUITIVE MUNICIPAL SOLUTIONS, LLC
Address 0

Main Retainage User Defined Accounts Items Subcontractors Insurance

Main Information
Dept/Loc * 26 INFORMATION TECHNOLOGY
Bid/RFP
Requestion Year/Number
Project
Description ECDLMS
Year * 2024 Period 7
Type * OPR (OPERATING)
Subtype
Review code
Percent complete 0.00 as of
Administrator 6473swon SANDI WONG
Workflow None Notification Percentage 0.00

Dates
Estimated start 01/02/2024
Estimated completion 01/01/2028
Bid awarded
Approved 12/19/2023
Initial expiration 01/01/2028
Renewal action
Extended through

Days
Original 1460
Modified 0
Revised 1460

Totals
Original 1,758,596.00 Open Req 0.00 0.00 Requisitions (0) Milestones (0)

https://portal.pinsadvantage.com/v2/companies/30358/insureds/288211

CAL Card online City of Richmond MUNIS Self Service... MUNIS Tyler Hub Manage your Benar... Outlook Web Access Remote Login from... SIRE WebCenter Lo... Search Configure s... Yardi eTrakit Lansweeper - Login Zendesk Support

PINS SW Sandi Wong City of Richmond

Intuitive Municipal Solutions, LLC

Approved

Active Records (1)

Project Name	Project Number	Record Number	Department Name	Status
Enterprise Community Development Land Management System			Information Technology	Approved

Required Policies

Umbrella / Excess Liability	<input checked="" type="checkbox"/> Umbrella Liab	<input type="checkbox"/> 12/15/2023 - 12/15/2024 20SBWAY1Z6F Hartford Underwriters Insurance Co.	Aggregate: \$5,000,000 Each Occurrence: \$5,000,000 Deductible Limit: Retention Limit:	Compliant
General Liability		<input type="checkbox"/> 12/15/2023 - 12/15/2024 20SBWAY1Z6F Hartford Underwriters Insurance Co.	Deductible: Retention: Damage to Rented Premises: Each Occurrence: \$1,000,000 General Aggregate: \$2,000,000 Personal & ADV Injury: \$1,000,000 Med Exp (Any one person): \$10,000	Compliant

