

2018

Coastal Cloud Proposal to the City of Gainesville For Enterprise Permitting & Land Management Software



Sara Hale /Milissa Holland

Coastal Cloud LLC

1/25/2018



Corporate Overview

We're Different

Coastal Cloud offers 'big firm' experience process excellence, communications maturity and project management through our nimble, flexible, deeply-skilled team of developer and integration experts. A few things that set us apart:

We're local: Our unique cloud IT delivery center is on the beach in Palm Coast, Florida. Our Consultants are in major cities across the state.

We're the largest: We are the Largest Salesforce consulting partner based in Florida.

We have the highest client satisfaction rating of any Salesforce consulting partner in Florida: Coastal Cloud has earned a 9.9 out of 10 Client Satisfaction rating on the Salesforce AppExchange.

Public Sector Expertise: We work with many different entities including Economic Development Orgs, Employment and Training Agencies, Higher Education, Tourism and Development Agencies and numerous other public and semi-public entities.

100% Certified Staff: All consultants are required to be formally certified by Salesforce, many hold multiple advanced Salesforce accreditations.

Open and transparent: Through regular status meetings, standard deliverables and account reviews, we make sure that there are no surprises when working with us. Even our project management tools are cloud-based so our clients can see our progress & activity at any time.

Bringing the Public Sector Into the Cloud



What We Do

Coastal Cloud helps our clients dramatically improve their effectiveness by helping them take advantage of the latest cloud computing technologies. We are a consulting and implementation partner with Salesforce.com, the world's leading cloud computing platform. We help our clients move away from their inflexible, costly, legacy systems and embrace a new generation of technology that is flexible, affordable, mobile and social. No more buying servers, upgrading databases or paying high prices for data center services. We help our clients plan and execute a migration to next generation systems that allow them to focus on their mission, not on the issues with their systems. We are experts in Salesforce.com and other leading cloud technologies. We are also experts at program management, project execution, business analysis, data modeling, data migration, user training and the other skills necessary for a successful migration to next generation technologies.

Who We Are

Headquartered in Palm Coast, Florida we are a team of 100% Salesforce.com certified consultants and our leadership team is veterans from a range of industries. We recruit and retain our team with a unique work-life balance. Many of our consultants come from the large metropolitan areas and join us to enjoy the exceptional quality of life available in Florida. Our management team are senior executives from the large, global consulting companies, but they tired of the travel and lifestyle and have created a next generation consulting company that is easy to work with and produces powerful results for our clients.

Our Services

We guide our clients through the full lifecycle of making the journey to the cloud.

Strategy & Design: We develop results-focused solutions architecture and design. We immerse ourselves in your business objectives and apply our 'best practices' from our extensive project experience. We help design your new business processes, data architecture and ensure you are able to deliver a superior customer experience. We make sure you exploit the social, mobile and self-serve capabilities available with today's cloud platforms. We also make sure you have a solution that provides powerful insight and analytics.

Migration and Integration: We provide the people, process and technical expertise necessary to ensure a smooth migration from your legacy systems to your new cloud-based solution. We migrate your legacy data and provide tools to help cleanse it, if necessary. We also deliver any necessary integration to other systems that remain.

User Training & Education: We are experts in the latest user training tools & techniques. We offer on-site and virtual training. We also deliver engaging training videos and other creative learning techniques.

On-going Application Support: We also offer a flexible and ongoing support services to help you maintain, enhance and monitor your new solution.





City of Gainesville
General Government Procurement
200 East University Avenue, Room 339
Gainesville, Florida 32601

25th January 2018

To Whom It May Concern:

Coastal Cloud is honored to be submitting our formal response to the City of Gainesville for an Enterprise Permitting & Land Management System RFP#: DODX-180049-GD.

First, we would like to congratulate the City of Gainesville for prioritizing the needs of their residents. In doing so we will work with you to meet your priorities and provide user-friendly, efficient and cost-effective services to your local municipality. Coastal Cloud has proven Salesforce implementation experience that encapsulates a human-centered design approach with robust graphical user interfaces. We have a built out permitting land and management solution ready to demo at your convenience.

Our solution was built for another local county and we have worked on a tremendous number of public-sector projects throughout the state of Florida and across many other states. Our user-friendly enterprise permitting and land management system solution is intuitively designed for your citizens, industry and businesses. It is easy to use for internal staff with well-designed reporting capabilities and managerial controls. Our solution can be integrated with your financial system, electronic plan review system, geographic information system and has the capability to integrate with any future systems. Some of the capabilities of our system include:

- citizen centric
- utilized via mobile technical
- responsive design features,
- interfaces to city payment platforms,
- the issuance of permits,
- ability to route inspections,
- mobile enabled,
- integration with other systems,
- migration of legacy data,
- ability to edit permit types,
- benchmarking capabilities

Our clients are pleased with our service as we are generally able to complete our built-out solutions before the required timeline. Our training program includes both 'end user training' as well as 'super user' training. The super users learn how to configure our solution without technical programming. For the City of Gainesville, we will utilize both "Train the trainer" and super user training methods.

Coastal Cloud is headquartered in Palm Coast, FL and is a certified woman-owned IT consulting company. We are the largest Salesforce.com consulting partner in Florida and rank in the top 3% of Salesforce partners in North America. We are a Platinum-level Consulting Partner with Salesforce.com and have a team of 130 consultants. We are experts at tailoring Salesforce.com to meet the unique requirements of each customer. We are a collaborative, highly-skilled team who have many successful public and private sector projects. Coastal Cloud has been recognized with Florida's "Top 50 Companies to Watch" award from GrowFL and Florida Trend recognized Coastal Cloud in 2017 as one of the top three companies to work for in the state of Florida.

Our founders Tim and Sara Hale, were awarded the "Business Investor Medal" by Governor Scott based on our business growth in Florida and Sara Hale was appointed as a Board Member to the Florida High



Tech Corridor with a mission to grow high-tech industry and innovation through partnerships that support research, marketing, workforce and entrepreneurship. The partnership involves more than 20 local and regional economic development organizations (EDOs), 14 state/community colleges and 10 workforce boards. The Council is co-chaired by the presidents of UCF, USF and UF.

Combined with our code of honor and excellence we hold in high esteem the hard work and achievements of our team. Our team holds over 350 Salesforce.com certifications, have earned 300 clients, and completed nearly 1000 projects. Our proposed project team is available immediately and have completed numerous public-sector projects. All team members hold multiple certifications on the Salesforce.com platform. They are experienced in each of their roles and collectively represent the skills necessary to successfully complete this project. Coastal Cloud is passionate about delivering solutions that are streamlined, cost effective and will have long term benefits to our clients. Through extensive public-sector work experience having achieved major design, development, implementation, and managed service projects globally; our team is able to assist the City of Gainesville with all phases of the systems lifecycle including:

- | | |
|---|---------------------------|
| *Discovery | *Business Analysis |
| *Solution Design | *Technical Design |
| *Solution Configuration | *Technical Development |
| *Testing | *Configuration Management |
| *Data Migration | *Managed Services Support |
| *Production Implementation / Deployment | *User Training |
| *On-going Solution Administration & Support | *Requirements Analysis |

Coastal Cloud has been a disruptive force in the technology ecosystem as our unique and visionary business model has allowed us to attract and retain the very best local consulting talent on the market due to our healthy blend of challenging and rewarding work combined with our family focused lifestyle. We operate with lean management and are therefore able to deliver superb teams with lower hourly rates and much less project management overhead. Coastal Cloud delivers services and solutions efficiently, cost effectively and following the very best practices of the ecosystem.

Transmittal Letter Requirements:

Our proposal is true and accurate and the person signing the cover letter has authorization to do so.

- RFP and Day to Day Operations Contact:

Ms. Sara Hale
 Co-Founder, Managing Partner

 1 Hammock Beach Pkwy, Suite 200
 Palm Coast, FL 32137
 Office Phone: 800-237-9574
 Fax: 866-903-2014
 Mobile: +1 (386)237-7719
 Email: Sara.Hale@CoastalCloud.US

Ms. Milissa Holland
 Director of Business Development Public Sector

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 Palm Coast, FL 32137
 Office Phone: 800-237- 9574
 Fax: 866-903- 2014
 Mobile: +1 (386) 237-4526
 Email: Milissa.Holland@CoastalCloud.US

Thank you for this opportunity to submit our proposal to the City of Gainesville. We believe you will be impressed with our team, our services and our solutions and we look forward to demonstrating them to you at your convenience.



Sincerely,

A handwritten signature in black ink that reads "Sara Hale". The signature is written in a cursive style and is positioned above a horizontal line.

Sara Hale

Managing Partner, Co-Founder

Date: 1/25/2018



COMPANY BACKGROUND



Coastal Cloud	
i) The date vendor was established in its current business form	2008 – Graphene, 2012 – Coastal Cloud
ii) The number and location of current business facilities	<p>Corporate HQ and Delivery Center: 1 Hammock Beach Pkwy, Suite 200 Palm Coast, FL 32137</p> <p>Mid-West Solution Center: 201 East Jefferson St, Suite 125 Louisville, KY 40202</p> <p>Western Solution Center: 941 Lincoln Ave Steamboat Springs, CO 80487</p>
iii) Any other names under which the proposing entity has operated during the past five years.	Coastal Cloud LLC, wholly owned by Graphene LLC River Cloud, LLC, wholly owned by Coastal Cloud, (River Cloud is State of Kentucky Registered)
iv) Full Information on any material changes in the mode of conducting business, mergers and acquisitions within the last five (5) years	None
v) Any planned or pending merger or acquisitions	None
vi) A brief description of the range of project services and products provided to clients	Strategy & Design - Our team members immerse themselves in your business to design new business processes, operating models, and technology platforms that will transform your business results and



	<p>customer experience. Development, Integration, & Migration - Our functional and technical experts rapidly design, construct, and test your new solution including integration with other systems and the smooth migration of legacy system data. User Training and Education - Change management can be the most critical aspect of any new program launch. Our consultants work closely with your team to educate and empower your user base via on-site and virtual training. Continuous Innovation & Support - We will stay by your side with a range of flexible, ongoing support services to help you maintain your new solution. As platforms evolve, we help you take advantage of new innovations from our technology partners.</p>
<p>vii) A brief description of the company's business plan, visions, and goals</p>	<p>Coastal Cloud was founded as a modern consulting partner that can deliver innovative solutions with deep industry and cloud technology platform expertise. When you need a seasoned partner, who understands your business and has the know-how to quickly implement solutions, Coastal Cloud's leaders average 20+ years of experience across numerous core industries and are skilled in the latest cloud technology platforms. Our unique engagement model combines this deep industry experience with nimble delivery techniques that quickly deliver innovative, high impact solutions. We believe the Software as a Service (SaaS) and Platform as a Service (PaaS) revolution has changed more than just technology. It has changed the speed at which organizations operate, and raised expectations for a superior client experience. We've designed Coastal Cloud with these changes in mind. Our team at Coastal Cloud is 100% domestic, and 100% onshore. With a network of delivery centers coupled with local, certified consultants living in major metro areas across the US, our model results in closer collaboration, faster delivery, and better solutions. Your results are our focus and we strive to earn a trusted, long-term relationship with each client. We pride ourselves in earning the highest client satisfaction ratings in the industry. With every client, in every meeting, on every project, our goal is to fully deliver the value that you and your business needs. Now we are focused on replicating this model in various markets across the country with Florida, Kentucky, and Colorado as the foundation for our growth. In this way, we enable every client to leverage the latest in cloud computing technology.</p>
<p>viii) Other related corporate background information in summary format.</p>	<p>See Below</p>
<p>Company Name (include parent company, group or holding):</p>	<p>Coastal Cloud LLC, wholly owned by Graphene LLC</p>
<p>Please provide the main shareholder(s) of the Company:</p>	<p>Sara Hale & Tim Hale</p>



Person responsible for the information in this RFI:	Sara Hale Sara.Hale@CoastalCloud.us Phone: +1 (386) 237-7719	Milissa Holland Milissa.Holland@CoastalCloud.us Phone: +1 (386) 237-4526
Website: Telephone: Fax Number: Email Address:	www.CoastalCloud.US Phone: +1 (386) 237-4526 Fax: 866-903-2014 Milissa.Holland@CoastalCloud.us	
Jurisdiction of incorporation:	Coastal Cloud - Florida, USA River Cloud – Kentucky USA	
Initial year of operations:	2008 – Graphene, 2012 – Coastal Cloud	
Number of Employees:	130	

Coastal Cloud was founded in 2012 by former senior executives from Accenture who sought to build a next generation technology consulting company that was more nimble and efficient than the large, traditional consulting firms. Coastal Cloud only works with leading SaaS & PaaS platforms and all of our 130 team members are on-shore. Our team is organized into a nationwide network of Solution Centers complemented by local, certified consultants in major metro areas. Our 3 major Solutions Centers are in Palm Coast, FL, Louisville, KY and Steamboat Springs, CO.

Coastal Cloud Nationwide Delivery Network



Our team is highly experienced – in the past 5 years we have earned **300 clients** and completed nearly **1000 projects** across **12 major industries** (including many public-sector clients at the state, local, and regional level.) We have a deep focus on client satisfaction and are very proud that 70% of our new projects come from existing clients. We strive for long term, trusted relationships with our clients and appreciate when they continue to engage us time and again.



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2. Technical Proposal

Approach For this Project

Our approach to the City of Gainesville Enterprise Permitting & Land Management system is built on the Salesforce.com platform. Our solution is already built and supports the identified requirements of the City of Gainesville RFP. Unlike other enterprise permitting and land management solutions, ours can be easily modified and extended by The City of Gainesville without being dependent upon a vendor. We do the initial configuration and then train The City of Gainesville staff to be able to not only use but also enhance the solution over time. You may choose to hire us to do future enhancements or you may choose to do them yourselves. Our 'open architecture' approach is much more flexible than other vendors and avoids 'vendor lock-in.'

We have reviewed all requirements in the RFP and are confident that we can meet all requirements. Below we have provided sample solution requirements from our pre-built solution: (see sample screen shots below of many features).

Note: These are sample screenshots taken. We will work with the City of Gainesville to customize them to your specific requirements.

1. Citizen facing

- Our citizen facing Permitting solution is built on the flexible Salesforce.com Communities Portal. Salesforce Communities provide a portal that citizens can log into to create different types of requests, schedule inspections, monitor statues and stages within approval processes, and make sure all of their payments and fees relating to their permits are paid and up to date.
- Coastal Cloud's permitting solution will allow the City of Gainesville to reveal the data from the internal side of Salesforce that is important for the citizen to see, while keeping internal sensitive data hidden from Community Users.
- Communities are also supported on all mobile devices, so your citizens can receive updates, alerts, and access their Permitting information from anywhere.

2. Interface to the City payment system – Jet Pay

- Salesforce.com utilizes an open API which makes integration possibilities endless. We will be able to connect to any Jet Pay system through Salesforce, allow for payments to be made, and pass information bi-directionally, creating a two-way sync, if needed. We have researched Jet Pay's developer and integration documentation and this type of integration is typical for Salesforce builds of this scale.
- Coastal Cloud has extensive knowledge and experience in implementing these types of solutions to automate the payment processes.

3. Issue permits/entitlement and licenses, each with its individual workflow

- Permits/entitlements and licenses can be managed all within our Salesforce solution. From the time a citizen requests a permit to the notification that a citizen receives after final approval and inspection, the citizen is always kept up to date through notifications by email.
- Coastal Cloud will work with the City of Gainesville to determine the best end-to-end system process for each type of workflow that they want to manage within Salesforce.

4. Enables customers to schedule inspections

- Based on the City of Gainesville's technical requirements behind the functionality they want the customer to have, we can tailor the solution to provide that capability. There are prebuilt voice recognition apps available that will integrate with Salesforce.
- If the city's needs prove to be more challenging than what is offered as a pre-built package, we have the knowledge and experience to custom build the voice recognition software to meet the requirements. Out of the box functionality includes the ability for customers to schedule building inspections via mobile devices.

b. Enables customers to select whether the inspection is in the AM or PM



Community user/customers will have the ability to request an exact time and date for their inspection at their convenience.

c. Sends customers an email to confirm a scheduled inspection

Community users/customers will have the ability to confirm a scheduled inspection by email

5. Mobile-enabled

A. End-to-end mobile device enabled for internal and external users

Salesforce.com Lightning interface is supported on all mobile devices. Both internal users and external (Community) users will have access to the database through their mobile phones, tablets, and computers. Apple and Android are both supported by Salesforce.com

b. Application, scheduling, tracking and payment for customers

Below is a screen shot of an example of a Community user logging into the same City of Gainesville Permitting Salesforce org. They can view the most up to date data right from their mobile device at any time and check statuses at their convenience.

c. Management, reporting and tracking for staff

Our solution relies on Salesforce.com's robust reporting and dashboard capabilities to analyze your everyday data inputs. From a management perspective, you will have a top-down view on all of you team's records within the system, summarized and rolled up into 1 clearly defined Dashboard displaying the reports you care about most. This makes weekly management meetings a breeze because all that is required is to click a refresh button on the dashboard, which updates all data to show a real time accurate summary view. Staff are also able to create their own reports and customize list views to easily navigate to the information they want to see within the system.

6. Reporting, Benchmarking & Dashboard

Salesforce provides both standard reports and custom reports. Standard reports are preloaded into Salesforce and can be modified and saved as custom reports to fit your needs. Salesforce standard and custom reports come in four formats:

- Tabular Reports – A simple list of records that does not summarize data or display subtotals
- Matrix Reports – A grid that summarizes data
- Summary Reports – Like tabular reports except records are summarized into groups with subtotals
- Joined Reports – Shows blocks of related information on one report

The Salesforce report development environment provides administrators with the tools to develop the custom reports. And the Salesforce AppExchange provides tools that further enhance the Salesforce report offerings with sophisticated tools that can generate documents, presentations and reports by automatically populating richly-formatted templates with data from any standard or custom object.

In addition to reports, Salesforce provides a variety of dashboards. Customizable dashboards provide users high-level visibility at a glance along with capabilities to drill down for detail. Reports and dashboards can be developed without IT help and are viewable on any mobile device.

Coastal Cloud will work with the City of Gainesville to ensure all state and federally mandated reports can be generated from the system.

7. ArcGIS Services are source of spatial data

MapAnything Connector for ArcGIS gives users a map view of ESRI ArcGIS Online data inside Salesforce with their organizational data for strategic planning and powerful analysis.

8. Parcel Based

This will involve integration to the county property appraiser site, as the data will need to be pulled from the appraiser site into Salesforce. Coastal Cloud implemented this with Flagler County, for Gainesville this will be done through Alachua county. The user will have the ability to link to the previous parcel number within system.

9. Additional Requirements:



a. Migrate legacy data into convention

Coastal Cloud has the ability to migrate all data from other legacy systems into Salesforce. We will perform data analysis on the full export from each legacy system to determine the appropriate data model to use within Salesforce. Custom objects can be App specific and we will work with the City of Gainesville to determine the best approach to use multiple Apps if necessary

b. Route inspections using GPS - Coastal Cloud has a built-out solution that was used for our client, Florida Fish and Wildlife, for their tracking solution. This solution will far exceed any other GPS tracking capabilities. Our system can integrate with your requirements to locate and view entitlements, violations and inspections using GIS/ GPS. We have the experience and knowledge to develop a solution using GIS/GPS field data to display your entitlement, violations, and inspection data through a Google map powered, filterable map page.

c. Enables customers to search for past entitlements

On-line search for previous entitlements on a property (i.e. building permits, land use & zoning, lot splits, etc.). We can customize the options for your external users to be able to query your database for different types of information including, permits, land use, zoning, etc. Please see the screen shot below where we can lead the customer to the correct search link to perform the search they are wanting to complete

d. Integrated

Since Salesforce.com allows for API access through connected apps, we can build any integration as long of the other system also has the capability. We will work with your team to identify and prioritize any additional integrations and define a scope and technical requirements needed to accomplish the goal. Many times we are able to quickly integrate using a third-party tool available as a middleware between Salesforce and another system. If there is no middleware available for the integration required, our team is well experienced in developing a custom API to successfully create the integration and pass data between the two systems seamlessly.

e. Mobile App - Public Facing App to do all building and planning business.

We are able to utilize the Salesforce.com mobile App, Salesforce1, to carry the functionally right into the users' hands, while they are on-the-go. Many of the standard features our solution are available "out-of-the-box" without any additional mobile app specific configuration necessary.

f. Autofill Feature

Salesforce allows autofill of certain fields of data to streamline data entry where possible. We will work with the City of Gainesville to determine their needs and implement the autofill features where required

10. Permitting Permits

We have included an example screenshot of permits that the City issues. We have our Enterprise Permitting and Land Management solution built out and would be able to further demonstrate all the permits listed in the RFP at your convenience.

11. Building Permits

We have included an example screenshot of permits that the City issues. We have our Enterprise Permitting and Land Management solution built out and would be able to further demonstrate all the permits listed in the RFP at your convenience.

12. Training

- a) Create Training documentation
- b) Provide Onsite - End User Training
- c) Provide Onsite – Super User Training
- d) Advanced reporting and dashboards
- e) Add, update fields, picklist values, page layouts
- f) Add, remove users and other System Administrator functionality
- g) Ongoing webinars and sessions on specialized topics including but not limited to



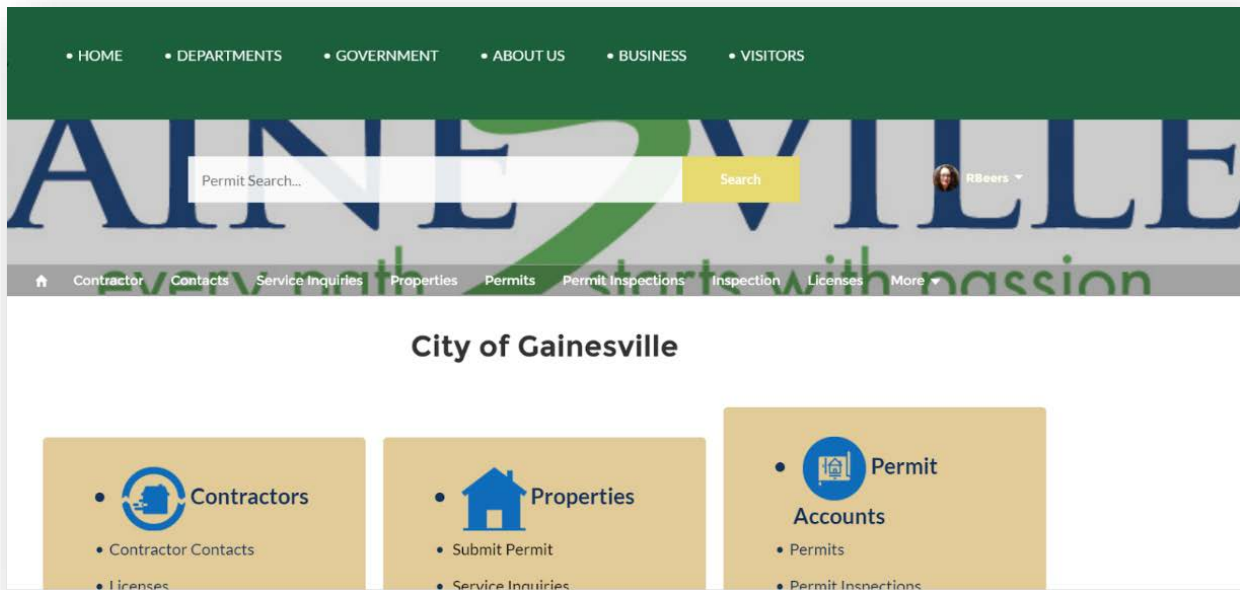
- Salesforce to Outlook Integration (if applicable)
- Best ways to take advantage of chatter in support of team collaboration
- Reports and Dashboards

Sample Screenshot Examples (Note: These are sample screenshots taken. We will work with the City of Gainesville to customize them to your specific requirements.)

1. Citizen Facing

- a. Our solution has a robust, intuitive citizen portal, below are screenshots of the portal.

Community Home Page (External Users)



Community User Permits View

PER...	APPLI...	A...	PROC...	EXPIR...	GENE...	ISSUE ...	CONT...	NAME	NOTIC...	CRE...
1	P-00073	Brad Tho...	M1	E-911 Ap...	Auburn ...		\$200.00...	OARE AS...	Not Reco...	12/14/2...
2	P-00072	Brad Tho...	M1	Central P...	Auburn ...		\$12,555...	OARE AS...	Not Reco...	12/13/2...
3	P-00071	Brad Tho...	M1	Central P...	Auburn ...		\$500.00...	OARE AS...	Not Reco...	12/13/2...
4	P-00070	Brad Tho...	M1	Central P...	Auburn ...		\$25,000...	RITTER ...	Not Reco...	12/12/2...
5	P-00069	Brad Tho...	M1	Central P...	Auburn ...		\$123.00		Not Reco...	12/12/2...
6	P-00068	Brad Tho...	M1	Central P...	Auburn ...			OARE AS...	Not Reco...	2/16/20...
7	P-00067	Brad Tho...	M1	Planning...	Auburn ...		\$300.00...	OARE AS...	Not Reco...	11/29/2...

Community User Permit Inspections View

PERMIT IN...	PERMI...	IN...	I...	STATUS	TYPE	NOT...	REQUEST ...
14	P-INS-00050	P-000...	356	cgreb	Pending	Shear Wall	10/27/20...
15	P-INS-00051	P-000...	354	cgreb	Pending	Roof Sheathing	10/27/20...
16	P-INS-00052	P-000...	352	cgreb	Pending	Exterior Wall Sheathing	10/27/20...
17	P-INS-00053	P-000...	350	cgreb	Fail	Framing, Plumbing, HVAC & Elec...	10/27/20...
18	P-INS-00054	P-000...	652	cgreb	Pass	Gas Piping Pressure Test	10/27/20...
19	P-INS-00055	P-000...	650	cgreb	Pending	Gas Piping	10/27/20...
20	P-INS-00056	P-000...	604	cgreb	Pending	Handicapped Parking and Signage	10/27/20...

Community User Fee Payments View

	FEE PAYME...	PERMIT NUMBER	FEE DESCRIPTION	PERMIT FEE	AMOUNT PA...
1	00003	00001	Intake/Processing Fee	P-FEE-00004	\$10
2	00004	00001	Intake/Processing Fee	P-FEE-00004	\$10
3	00005	00001	Intake/Processing Fee	P-FEE-00005	\$20
4	00008	P-00019	Boat House	P-FEE-00482	\$20
5	00010	P-00002	Boat House	P-FEE-00040	\$40
6	00012	P-00065	Building Addition	P-FEE-01978	\$30
7	00013	P-00066	Building Addition	P-FEE-02012	\$30

Community User Create Permit Page

Create Permit

Job Description: Residential Building Permit

Property ID: 04-11-31-2984-000E1-0180

Notice of Commencement: Not Recorded

Type: BUILDING RESIDENTIAL

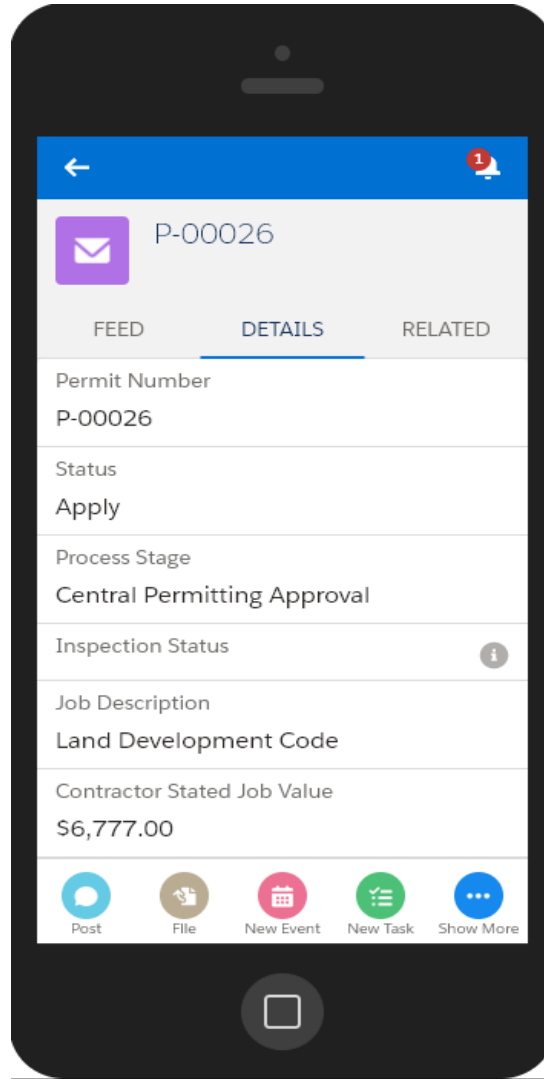
Contractor Stated Job Value: \$650,000.00

Home Sq. Footage: 4,300

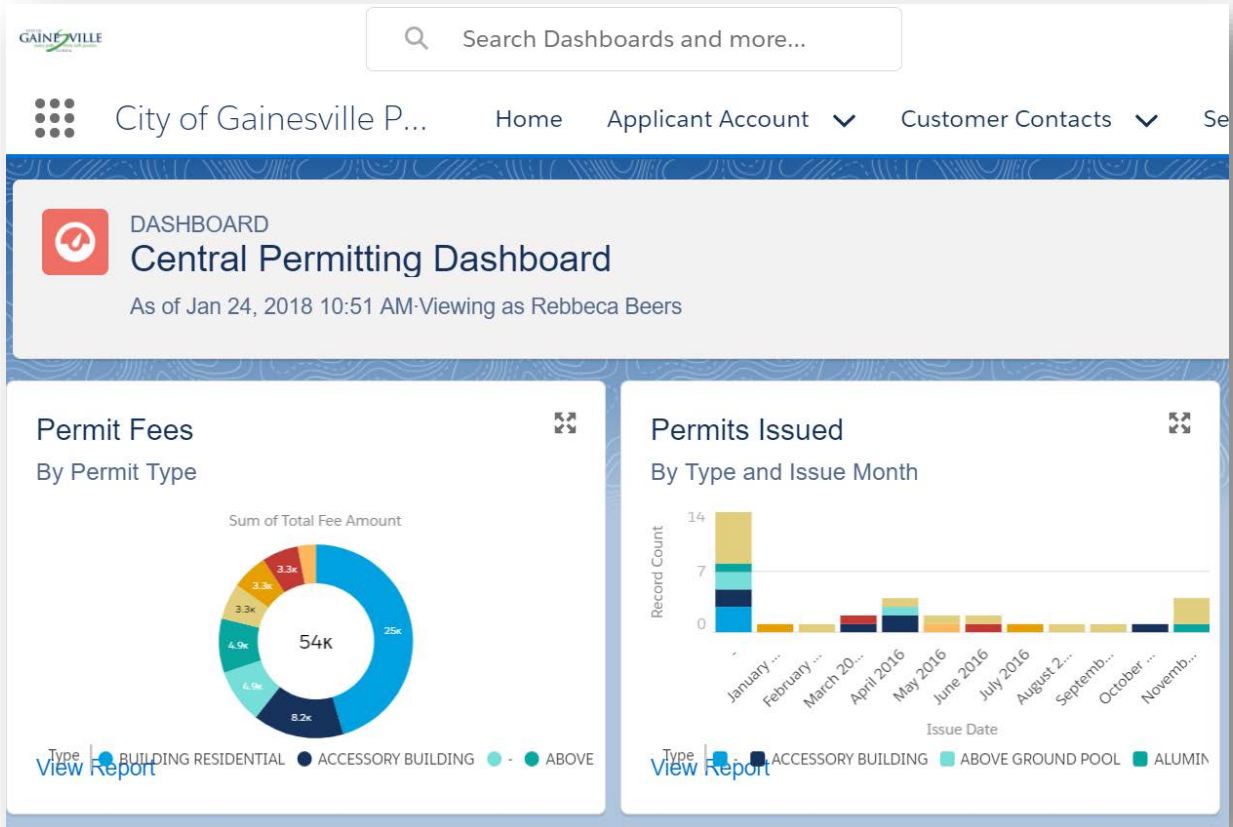
of Baths: 3.0

Confirm

b. Application, scheduling, tracking and payment for customers - example of a Community user logging into the same City of Gainesville Permitting Salesforce org using a mobile device.



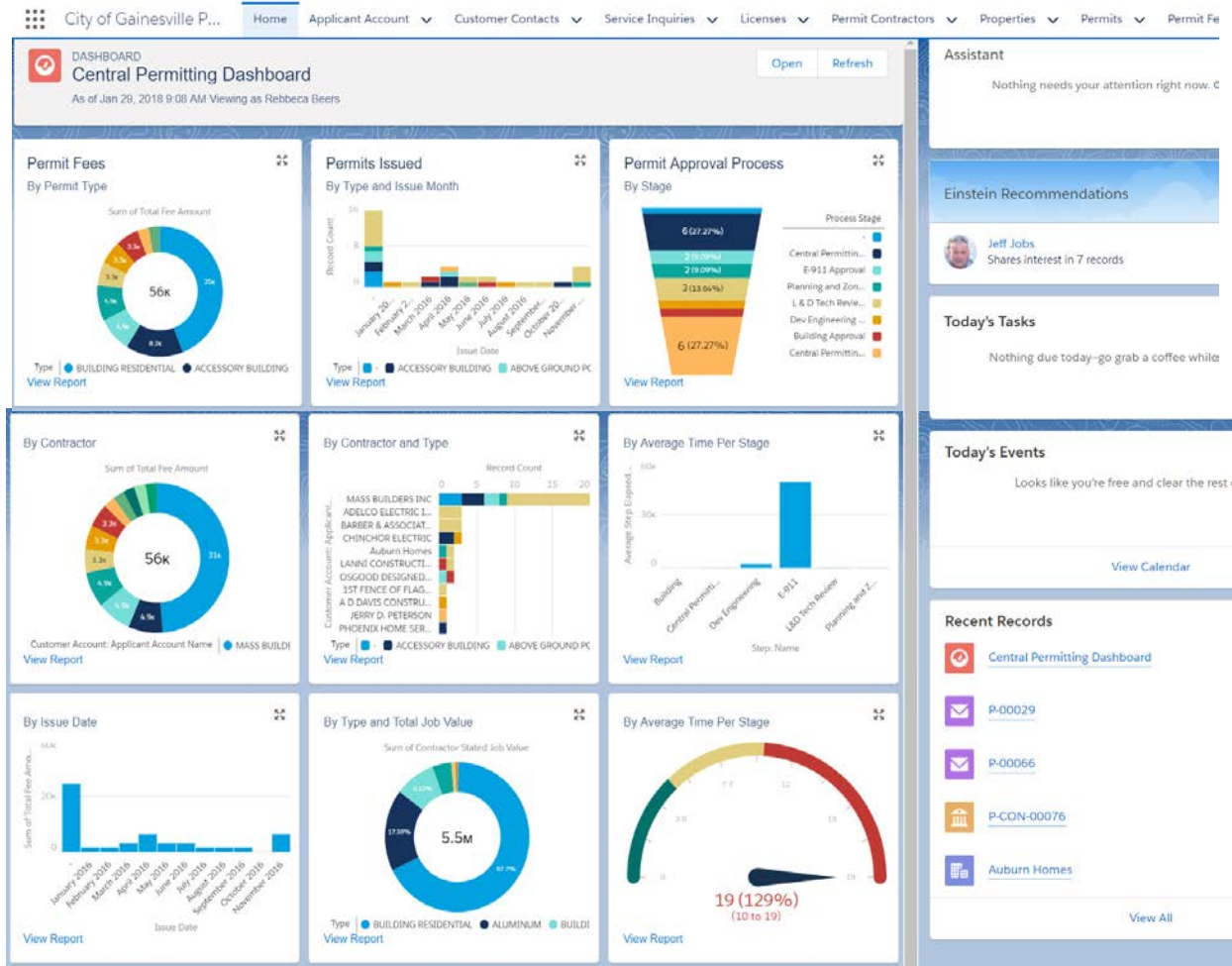
- c. Management, reporting and tracking for staff - Staff are able to create their own reports and customize list views to easily navigate to the information they want to see within the system





6. Reporting, Benchmarking & Dashboard

- a. Includes reporting capabilities, benchmarking tools and a dashboard. This is the first page users will see upon logging into Salesforce. It can be customized to show information most important to users. Upon logging in daily, the user will be notified here if there are outstanding tasks or approvals that need attention.





b. Easily create customized reports

Approval Process Stage Report

PROCESS STAGE ↑	PERMIT: PERMIT NUMBER	NAME	STATUS
Dev Engineering Approval (1 record)	P-00047		Apply
	00001	MORRONE GUY & ANN M H&W	Apply
Building Approval (1 record)	P-00015	GAMBLE JULIE J TRUSTEE	Apply
Central Permitting Issue (6 records)	P-00013	Jake Scully	Issued
	P-00033	ORTLAM CHARLES L & GAIL A H&W	Inspect
	P-00028	ORTLAM CHARLES L & GAIL A H&W	Issued
	P-00019	RITTER CONSTANCE S	Inspect
	P-00017	RITTER CONSTANCE S	Approved
P-00070	RITTER CONSTANCE S	Approved	

Permit Fees by Contractor Report

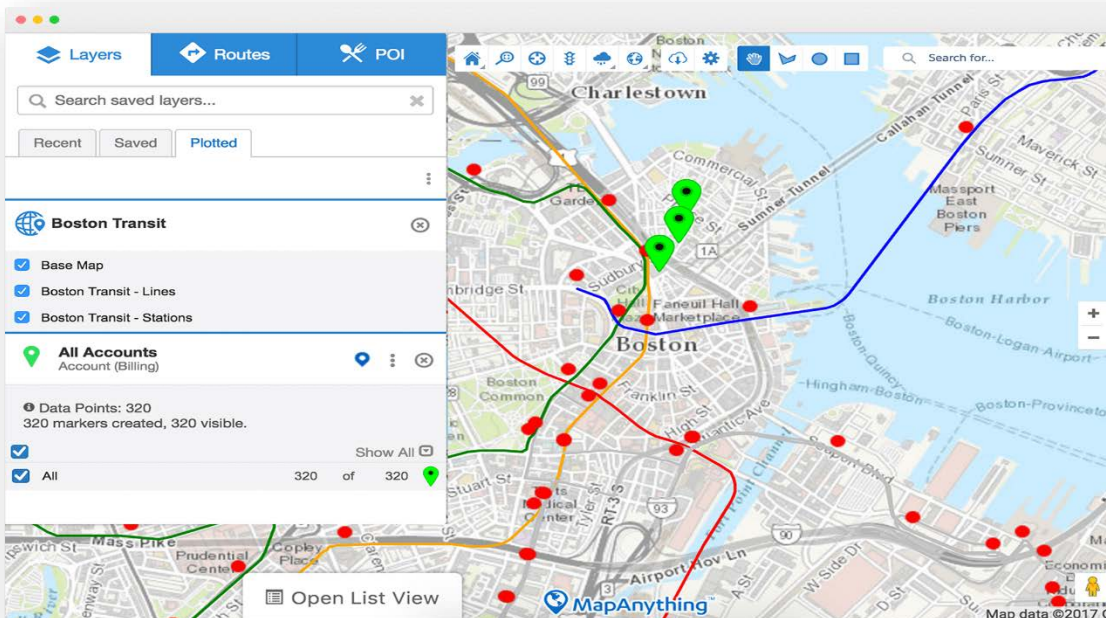
Total Records: 39
 Total Total Fee Amount: \$54,160

CUSTOMER ACCOUNT: APPLICANT ACCOUNT NAME ↑	TYPE ↑	ISSUE DATE	TOTAL FEE AMOUNT Sum	PERMIT: PERMIT NUMBER
1ST FENCE OF FLAGLER INC (1 record)	BUILDING RESIDENTIAL (1 record)	11/28/2016	\$1,640	P-00066
	Subtotal		\$1,640	
Subtotal			\$1,640	
A D DAVIS CONSTRUCTION CO. INC (1 record)	BUILDING MULTI (1 record)	6/4/2016	\$1,640	P-00026
	Subtotal		\$1,640	

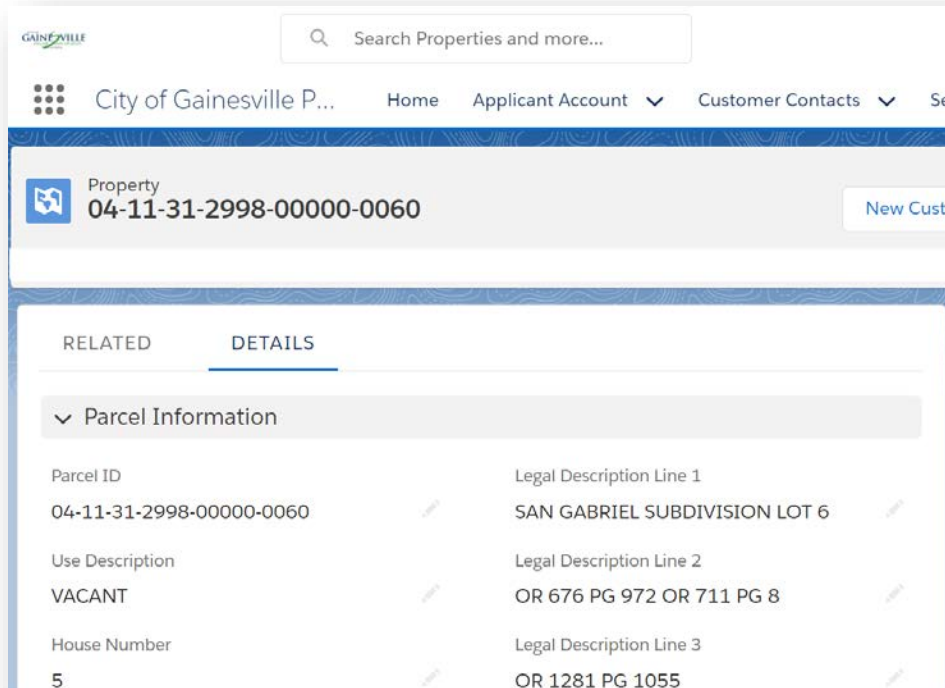
Permits by Job Value Report

TYPE ↑	CONTRACTOR STATED JOB VALUE Sum	PERMIT: PERMIT NUMBER ↓
Subtotal	\$503,566.00	
BOATHOUSE (1 record)	\$9,500.00	P-00019
Subtotal	\$9,500.00	
BUILDING RESIDENTIAL (15 records)	\$500,000.00	P-00071
	\$300,000.00	P-00067
	\$500,000.00	P-00066
	\$500,000.00	P-00065
	\$350,000.00	P-00060
	\$500,000.00	P-00050

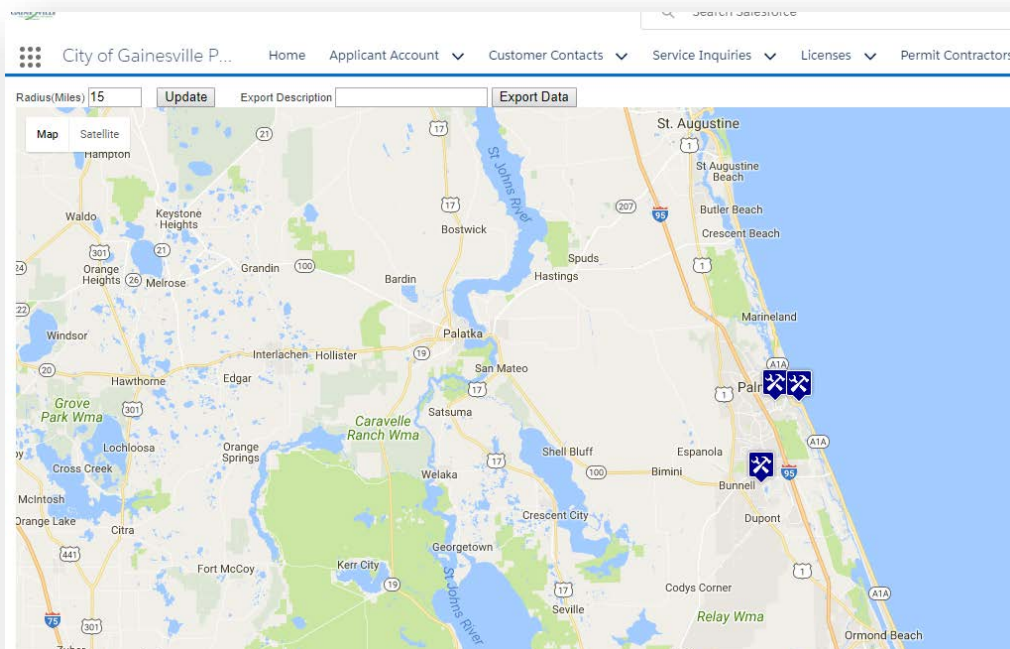
7. ArcGIS Services are source of spatial data - here is an example of the MapAnything map showing the pin pointed data set all in Salesforce.



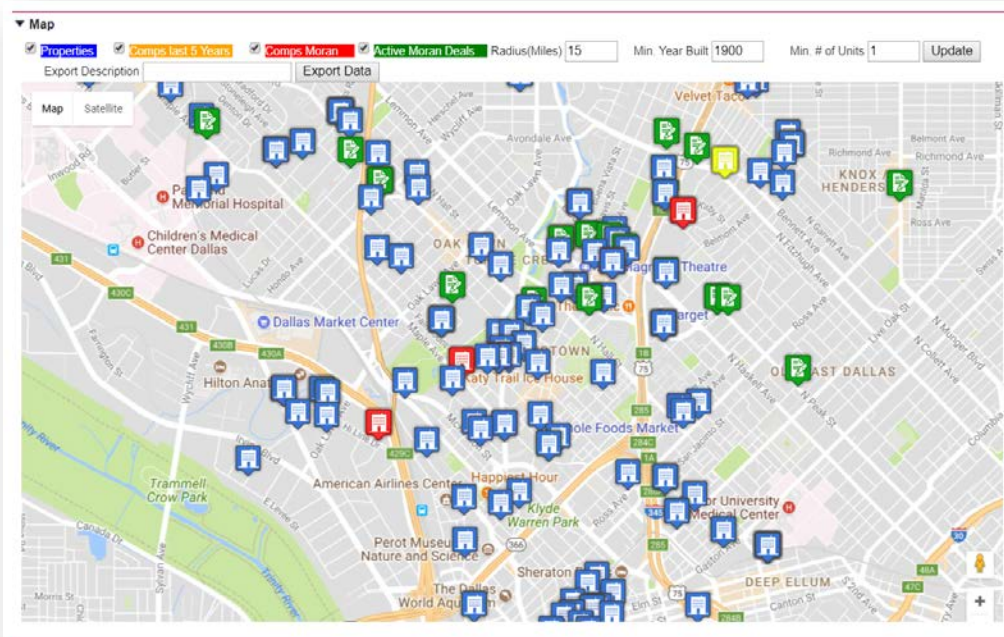
8. Parcel Based - All data has unique parcel number as unique id.



9b. Route inspections using GPS - Locate and view entitlements, violations and inspections using GIS/ GPS



- 9c. Enables customers to search for past entitlements - On-line search for previous entitlements on a property (i.e. building permits, land use & zoning, lot splits, etc.)



We have included screenshots of permits that the City issues. We have our Enterprise Permitting and Land Management solution built out and would be able to further demonstrate all the permits listed in the RFP at your convenience.



Planning Permits example – Commercial Tree Removal

The screenshot displays the 'Permit P-00029' details page in the City of Gainesville Permitting System. The page includes a navigation menu at the top with options like Home, Applicant Account, Customer Contacts, Service Inquiries, Licenses, Permit Contractors, Properties, and Permits. The main content area is titled 'DETAILS' and is organized into two columns of key-value pairs. The first column lists permit attributes such as Permit Number, Status, Process Stage, Inspection Status, Job Description, and Contractor Stated Job Value. The second column lists corresponding details like Type, Issue Date, Expiration Date, Home Sq. Footage, # of Baths, and Notice of Commencement. A 'Property Information' section is also visible, containing Property ID, Location Address, Subdivision, Block, and Lot information.

DETAILS	
Permit Number	Type
P-00029	COMMERCIAL TREE REMOVAL
Status	Issue Date
Approved	4/13/2016
Process Stage	Expiration Date
Planning and Zoning Approval	
Inspection Status	Home Sq. Footage
Inspections Passed	2,500
Job Description	# of Baths
Planning Permit	3.0
Contractor Stated Job Value	Notice of Commencement
\$256.00	Recorded
Property Information	
Property ID	Location Address
04-11-31-2995-00000-0150	LA COSTA
Subdivision	Block
2995	00000
Link to Property Appraiser Site	Lot
Click Here	0150



Building Permit Example – Building Residential

The screenshot shows a Salesforce interface for a permit record. The top navigation bar includes 'City of Gainesville P...', 'Home', 'Applicant Account', 'Customer Contacts', 'Service Inquiries', 'Licenses', 'Permit Contractors', 'Properties', and 'Permits'. The main content area is titled 'Permit P-00066' and contains a 'DETAILS' section with a table of permit information.

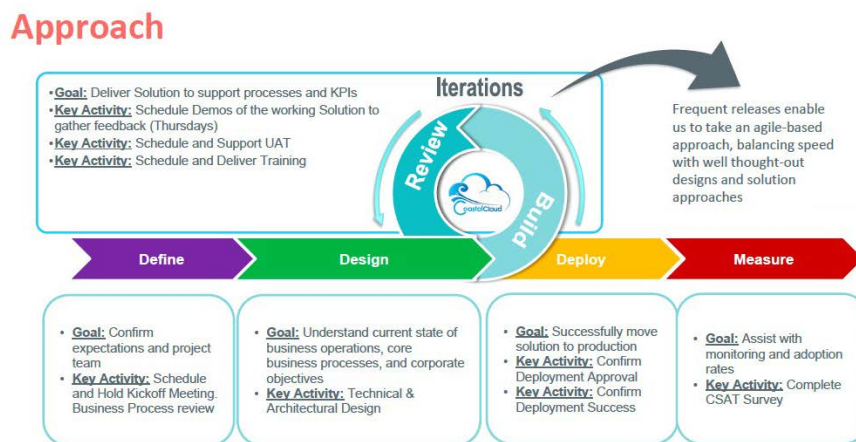
Field	Value	Action
Permit Number	P-00066	
Type	BUILDING RESIDENTIAL	
Status	Issued	
Issue Date	11/28/2016	
Process Stage	Central Permitting Issue	
Expiration Date	5/28/2016	
Inspection Status	Inspections Pending	
Home Sq. Footage	3,000	
Job Description	Residential Building Permit	
# of Baths	4.0	
Contractor Stated Job Value	\$500,000.00	
Notice of Commencement	Recorded	
Property Information		
Property ID	04-11-31-2998-00000-0260	
Location Address	SAN GABRIEL	
Subdivision	2998	
Block	00000	
Link to Property Appraiser Site	Click Here	
Lot	0260	
Applicant Information		

Methodology

Coastal Cloud has pioneered our own Implementation and Support Methodology we term the **Cumulus Methodology**. The Cumulus Methodology encompasses an agile-based delivery approach utilizing the following primary components to manage development initiatives:

- Agile-Based Iterative Configuration
- Project Management
- Test and Quality Management
- Change Management
- Training and adoption management
- Ongoing support and administrative tasks

The following diagram provides a good illustration of the approach we will take on each engagement resulting from this RFP. We will define these components in detail in our response below.



Coastal Cloud | Live at the beach. Work in the Cloud.

Agile-Based Iterative Configuration

Define

During the Define step we will confirm through our kick-off meetings with the “buyer” and relevant agency teams our approach to business process review, task grouping, and schedule as we outline each proposed solution.

Design

During the Design step we will confirm the steps we plan to take for each identified task. We believe success requires that we review each design directly with interested parties once the project begins.

Build

During the Build step, we will implement the design according to the business process and ERD outlined in the list of tasks we have confirmed with the project team.

Review

During the Review step, we will employ our Quality and Testing Management methodology to ensure the system is meeting requirements and the goals of the project.



Deploy

During the Deploy step, we will employ our release management methodology to move developed components through the development, test, and ultimately production environments.

Measure

During the Measure step, we will assess and generate metrics on how the system is performing from a technical and functional perspective in conjunction with the project team.

1. Project Management

The Project Management component of our Cumulus methodology addresses the following requirements:

- Plan, execute, control, and close the project plan as defined
- Ensure stakeholders have up-to-date and consistent understanding of status.
- Effectively manage risks, issues, and change.

Our methodology includes the following sub-components, and these will be catered to the specific deliverables as outlined in the individual projects:

- Project Planning and Control
- Monitor project planning estimating factors
- Monitor commitments
- Monitor risks
- Monitor stakeholder involvement
- Technical and Account Status Reporting
- Establish a weekly cadence of status conference calls.
- Publish a weekly status report.
- Review the status report on the weekly calls.

2. Risk Management

- Determine risk sources and categories
- Define risk parameters
- Establish a risk management strategy
- Identify risks
- Evaluate, categorize, and prioritize risks
- Develop risk mitigation plans
- Implement risk mitigation plans

3. Root Cause Analysis and Resolution

- Select defect data for analysis
- Analyze root causes
- Develop action proposals
- Evaluate the effectiveness of implementing the proposals
- When appropriate, implement the change and communicate the change

throughout the organization

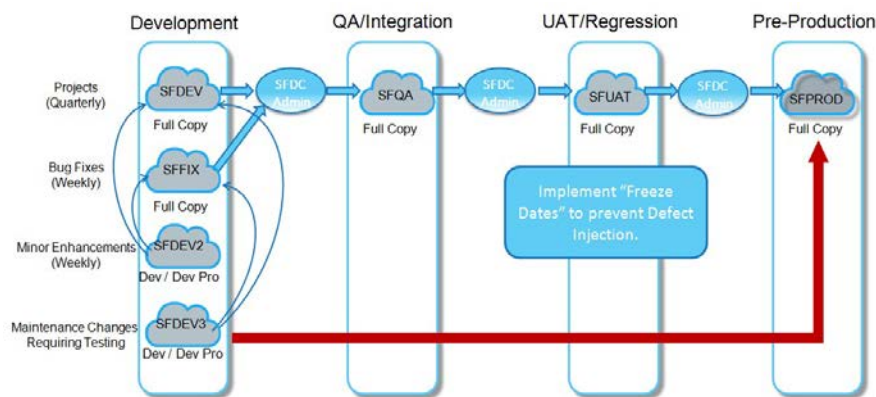
- Track and record the impact of the change for use in further analysis efforts

4. Change Request Administration

- Capture change requests in a change request log
- Document business justifications for captured changes
- Determine the technical and functional impact of the requested change
- Develop an assessment of the impact
- Host periodic change request review sessions
- Approve, reject, or defer requested changes

5. Release Management

- Coastal Cloud has a comprehensive release management process to work with clients to prioritize requirements into phases/releases of delivery. The following graphic summarizes our release management methodology and plan.



In addition to a methodology for moving releases through the testing and production deployment life cycle, we categorize releases and apply different governing principles based on the release category. The following matrix provides insight into this process:

Release Type	Change Type	Activity	Examples
Ad Hoc	<ul style="list-style-type: none"> • Maintenance • No training required 	<ul style="list-style-type: none"> • Minimal User Impact • Limited to a small set of operational activities/changes 	<ul style="list-style-type: none"> • Dashboards/ Reports • Email Templates • List Views
Integration	<ul style="list-style-type: none"> • Bug Fixes • Config. Changes • No training required 	<ul style="list-style-type: none"> • Production Defects • Low Complexity Config. Changes • Small Data Migrations 	<ul style="list-style-type: none"> • Production defects could be code or config • Config that does not impact integrations or code • Data migrations less than 1000 records in a single object

Functional	<ul style="list-style-type: none"> • Projects • Major Enhancements • Steering Committee • Oversight 	<ul style="list-style-type: none"> • Major Config. changes, any code changes, large or complex data migrations 	<ul style="list-style-type: none"> • Integration modifications • Changes with major user impact
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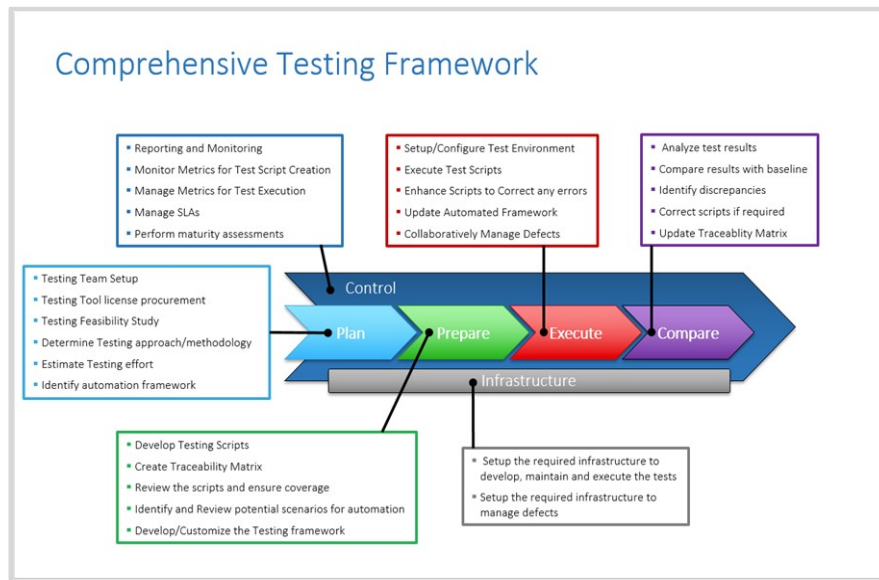
6. Testing and Quality Management

The Testing and Quality Management component of our Cumulus methodology addresses the following requirements:

- Ensure delivered features and functions meet requirements and deliver expected benefits
- Ensure the project and the deliverables generated by the project meet our high-quality standards

Our methodology includes the following sub-components:

- Test Management - Our comprehensive test management methodology is captured by the following diagram:



The methodology calls for applying the above steps to a variety of different test phases.

Test Phase	Objectives
Functional	<ul style="list-style-type: none"> • To ensure that individual packages and applications perform their package specific requirements and capabilities • To verify the configuration and customization
Integration	<ul style="list-style-type: none"> • To verify cross-application integration points • To validate integrated processes and workflows, transaction management, complex scenarios involving error handling/fallout is captured at the appropriate level of detail



User Acceptance	<ul style="list-style-type: none"> • To ensure the combined systems support business processes and key scenarios • To validate the operational legitimacy off the integrated systems, perform over longer periods of time
Data Validation	<ul style="list-style-type: none"> • Field level - to validate at least one member of each data equivalence class • Record level - to ensure that number of source + error records = number of target records for converted data • Object level - to ensure data at the object level supports the design of the object. This testing is the most complex as it requires an extensive grasp of how the entity relationships are maintained. • Functional level - to exercise test cases with converted data. Testing should include execution of reports and a comparison on reports between current and the future systems.
Performance	<ul style="list-style-type: none"> • To ensure customizations and complex configurations do not introduce unacceptable performance. • To implement automated testing to reduce the time required to perform regression testing.
Operational Readiness	<ul style="list-style-type: none"> • To confirm backup and recovery procedures. • To simulate and verify roll-back scenarios to test security

The result of applying the methodology to the different tests is a matrix that outlines entry criteria for each test followed by the exit criteria for completing the test. The matrix also includes deliverables that result from each test.

Testing Types	Entry Criteria	Exit Criteria	Example Deliverables
Functional	<ul style="list-style-type: none"> • Signed Off - Unit Test Summary Report • Signed Off - Test Strategy and System Test Plan document • Testing environment and tools are available according to the Test Strategy and System Test Plan documents • Testing resources allocated and available • Testing Data available according to requirements defined in the Test Strategy and System Test Plan documents • Testing support agreements in place • Approved Testing Checklist 	<ul style="list-style-type: none"> • Approved System Test Summary Report • All planned test cases including Regression Tests have been executed with: • No outstanding Severity 1 or 2 defects • All Severity 3 or 4 defects must have workaround and a solution schedule approved by the business. • Severity 5 defects require a business approved delivery schedule. 	<ul style="list-style-type: none"> • System Test Plan document • System Test Cases • Daily/weekly testing progress report • Approved System Test Summary • Report



Integration	<ul style="list-style-type: none"> • Signed Off - System Test Summary Report • Signed Off - Test Strategy and Integration Test Plan document • Testing environment and tools are available according to the Test Strategy and Integration Test Plan documents • Testing resources allocated and available • Testing Data available according to requirements defined in the Test Strategy and Integration Test Plan documents • Testing support agreements in place • Approval of Testing Checklist 	<ul style="list-style-type: none"> • Approved Integration Test Summary Report • All planned test cases including Regression Tests have been executed with: <ul style="list-style-type: none"> • No outstanding Severity 1 or 2 defects • All Severity 3 or 4 defects must have workaround and a solution schedule approved by the business. • Severity 5 defects require a business approved delivery schedule. 	<ul style="list-style-type: none"> • Integration Test Plan document • Integration test cases • Daily/weekly testing progress report • Approved Integration Test Summary Report
Performance	<ul style="list-style-type: none"> • Approved System Test Summary Report Approved Test Strategy and Performance Test Plan document • Testing environment and tools are available according to the Test Strategy and Performance Test Plan documents • Testing resources allocated and available • Production Data available according to requirements defined in the Test Strategy and Performance Test Plan documents • Testing support agreements in place • Approval of Testing Checklist 	<ul style="list-style-type: none"> • Approved Performance Test Summary Report • All planned test cases have been executed with: <ul style="list-style-type: none"> • No outstanding Severity 1 or 2 defects • All Severity 3 or 4 defects must have workaround and a solution schedule approved by the business. • Severity 5 defects require a business approved delivery schedule. 	<ul style="list-style-type: none"> • Performance Test Plan • Performance test scenario and scripts • Daily/weekly testing progress report • Approved Performance Test • Summary Report
User Acceptance	<ul style="list-style-type: none"> • Signed Off • Integration Test Summary Report 	<ul style="list-style-type: none"> • User Acceptance Test Summary 	<ul style="list-style-type: none"> • User acceptance test plan



	<ul style="list-style-type: none"> • Signed Off - Test Strategy and User Acceptance Test Plan document • Testing environment and tools are available according to the Test Strategy and User Acceptance Test Plan documents • Testing resources allocated and available • Testing Data available according to requirements defined in the Test Strategy and User Acceptance Test Plan documents • Testing support agreements in place • Approved Testing Checklist 	<ul style="list-style-type: none"> • Report (TSR) • All planned test cases including Regression Tests have been executed with: • No outstanding Severity 1 or 2 defects • All Severity 3 or 4 defects must have workaround and a solution schedule approved by the business. • Severity 5 defects require a business approved delivery schedule. 	<ul style="list-style-type: none"> • UAT test cases/scripts • Daily/weekly testing progress report • User Acceptance Test Summary • Report
Operational Readiness	<ul style="list-style-type: none"> • Signed Off – User Acceptance Test Summary Report • Signed Off - Test Strategy and Operational Readiness Test Plan document • Testing environment and tools are available according to the Test Strategy and Operational Readiness Test Plan documents • Testing resources allocated and available • Testing Data available according to requirements defined in the Test Strategy and Operational Readiness Test Plan documents • Testing support agreements in place • Approved Testing Checklist 	<ul style="list-style-type: none"> • Operational Readiness Test • Summary Report • All planned test cases including regression tests have been executed with no outstanding defects 	<ul style="list-style-type: none"> • Operational Readiness Test Plan document • ORT test cases/ scripts • Operational Readiness Test • Summary Report

7. Quality Management

Coastal Cloud’s comprehensive approach to quality delivery management integrates our work methodology and work plan, as well as the measures needed to improve quality. The following graphic encapsulates our iterative approach to delivering quality results:



- Our methodology includes the development of a documented quality management plan that forms part of the project governance plan.
- Our methodology and work plan templates encompass quality management principles, activities and duties.
- The client takes part in our quality management process.
- Our quality management approach focuses on prevention while ensuring that quality forms an integral part of the project and management processes.
- Quality is measured by means of an ongoing evaluation of offerings (deliverables, work products and components) and project management processes.

In addition to on-going quality management activities of the project team, formal reviews will be conducted at scheduled intervals throughout the project life with the objectives to:

- ✓ Provide an independent assessment of the project processes (from both the business process and technical process perspectives) used by the project team to confirm delivery of a successful project
- ✓ Recommend or agree on corrective strategies to deal with issues identified during the assessment, which, if left unchecked, could undermine the likelihood of success.
- ✓ Help the project team anticipate and minimize the occurrence of any situation that:
 - Reduces project value
 - Reduces the effectiveness & efficiency of their work
 - Compromises the team's ability to meet stakeholder needs & requirements
 - Create the need for rework during or at the end of the project
 - Limits the team's ability to properly manage scope and control change
 - Ineffectively deploys team resources.

We believe client relationship management is crucial for the success of any engagement regardless of size or scope. The key to working through any issue is collaboration. We will be available to work through issues with you and make sure that your expectations are always met. We have one of the highest Customer Satisfaction ratings in the industry, which is very important to us.

8. Change Management

The Change Management component of our Cumulus methodology addresses the following requirements:

- Effectively initiate the project.
- Ensure timely and accurate notification of process and organizational change to all affected parties.



- Ensure everyone understands how to employ new processes and systems

Our methodology includes the following sub-components:

- Project Initiation (a.k.a. Project Kick-off)
 - Introduce team members and assign project team roles to all participants.
 - Schedule onsite kick-off meeting.
 - Publish agenda for kick-off meeting.
 - Publish contact information for project team members.
 - Confirm technical status report topics. Topics typically include a recap of process activity and next steps.
 - Confirm account status topics. Topics typically include a recap of progress against contracted milestones and projected costs.
 - Identify status report recipients and preferences for receipt of status reports.
 - Create document repositories and populate with existing artifacts
 - Publish meeting minutes including decisions and modifications to original RFP requirements.
 - Obtain sign-off on kick-off meeting minutes.
- Process and Organization Impact Management & Change Communication
 - Identify and document standard processes
 - Establish process life-cycle descriptions
 - Establish organizational models
 - Map organizations to processes to confirm understandings of responsible parties
 - Establish process performance objectives
 - Schedule communication including project announcements, training availability
 - Draft announcements
 - Review announcements with stakeholders
 - Publish announcements
- Training
 - Establish the strategic training needs.
 - Establish tactical training plan
 - Establish the training capability including the materials and training personnel
 - Deliver training
 - Establish training records
 - Assess training effectiveness
- Ongoing Support
 - Coastal Cloud provides a warranty on all new development and will fix any defects spotted in SIT, UAT or post deployment for a period of sixty (60) days without any incremental cost to the City of Gainesville. In addition, we have built time into the Cost Reply so that Coastal Cloud can provide ongoing support for ten hours per month for a five-month period to the City of Gainesville. We believe in long term relationships with our clients and understand the needs of the City of Gainesville will continue to expand and include new capabilities as they are enabled in the Salesforce.com Ecosystem, so we will stand ready to provide support on an ongoing basis.
 - If the City of Gainesville would like to outsource the System Administrator role, we can provide full or part time admins to handle all normal Administrative tasks related to Salesforce. This has not been built into the Cost Reply but can be provided upon request and execution of a separate agreement.



City of Gainesville Enterprise Planning and Land Management Solution Proposed Project Deliverables

- Set Up Salesforce Instance including Permissions and Profiles
- Development of a Customer Community to allow permit applicants:
 - To create accounts, Edit/update information
 - Complete online permit applications
 - Check the status of submitted application
 - Receive automated communications regarding permits
- Configuration of Salesforce.com to collect and manage permit related information including:
 - Permit Fees based on permit type
 - Inspections Required and inspectors
 - Application process steps and timing
 - Approval Processes
 - Automation of application communications (submission, status, request for information)
- Create a set of reports and dashboards to track permits, approval processes, applicants, inspections, customer feedback
- Testing of Salesforce and Community
- Training
 - Create training materials for Users and Super Users
 - Train internal users
 - Applicant training
 - Video recorded training guides available on the Community
- Provide Follow-up Support post training

Task Name	RYGB	Milestone	Start Date	End Date
City of Gainesville Enterprise Permitting & Land Management	●	☐	04/02/18	06/15/18
Define	●	☐	04/02/18	06/15/18
Create Project Plan: Assign Resources	●	☐	04/02/18	04/02/18
Start BRD or Implementation Guide	●	☐	04/02/18	04/02/18
Kickoff Meeting and Process Review	●	☐	04/02/18	05/31/18
Review Project Plan	●	☐	04/03/18	04/03/18
Review Communication Plan: Frequency of status meetings, RACI Matrix & Establish POC's	●	☐	04/03/18	04/03/18
Review Status Report Format (Scope Schedule & Budget)	●	☐	04/03/18	04/03/18
Review Project Issues & Action Plan (Risk)	●	☐	04/03/18	04/03/18
Project Management	●	☐	04/02/18	05/31/18
Design	●	☐	04/03/18	04/16/18
Define requirements for Community Users	●	☐	04/03/18	04/09/18
Define Internal Approval Process	●	☐	04/09/18	04/13/18
Gain Access to Client	●	☐	04/16/18	04/16/18
Build	●	☐	04/23/18	05/30/18
Testing/Deployment	●	☐	06/04/18	07/20/18
Sandbox Testing	●	☐	06/04/18	06/04/18
Bug Fixes	●	☐	06/04/18	06/04/18
UAT Testing	●	☐	06/04/18	07/20/18
Migration to Production and Testing	●	☐	06/04/18	06/20/18
Go Live	●	☐	07/18/18	07/31/18
Post Go Live Support	●	☐	07/31/18	08/08/18



3. Price Proposals

Table 1: Our pricing estimate below is for implementation and training (ONE TIME COST) with an optional ongoing support (240hrs annually). There are no maintenance costs with our solution.

Table 2: These are the estimated annual costs for the Salesforce Licenses. There are a number of factors that contribute to the price and we would very much like to discuss in greater detail your requirements.

**City of Gainesville - Enterprise Permitting & Land Management Software Estimate
 RFP NO. DODX-180049-GD**

Activity	Estimated Hours	Rate	Estimated Cost
Requirements/Design	200	\$185	\$37,000
Permitting and Land Management System Implementation	1280	\$185	\$236,800
Citizen Portal - Mobile Ready	400	\$185	\$74,000
Interfaces and Integrations	660	\$185	\$66,600
Data Migration	400	\$185	\$74,000
Testing Deployment	160	\$185	\$29,600
Training	160	\$185	\$29,600
Reports and Dashboards	120	\$185	\$22,200
Project Management	360	\$185	\$66,600
Total One-Time	3740		\$636,400
Ongoing Support (Annual Hours)	240	\$185	\$44,400

Estimated Annual Costs	Annual Cost	# of Lic	Total
Salesforce.com Force.com Platform Licenses	\$677	70	\$47,419
Salesforce Community License (2,000 logins per month)	\$10.32	2,000	\$20,640
Premier Success Plan	\$12.27	1,110	\$13,620
Total Annual Cost			\$81,679.10



4. Qualifications

B. QUALIFICATIONS/STATEMENT OF QUALIFICATIONS

Team Technical Expertise

The main reason for the stunning growth and employee retention Coastal Cloud has experienced is our commitment to treat our clients and staff as we wish to be treated. We deliver the extra effort, which makes our client partnerships ongoing and cohesive. As a result, we have satisfied clients and healthy work relationships that contribute to happy consultants who want to stay at Coastal Cloud. With minimal effort, turnover at Coastal Cloud has stayed below 5% because of our commitment to client excellence coupled with work/life balance, family friendly policies and effective team camaraderie. We attract, nourish and retain the very best talent in the ecosystem. As our reputation has grown we have seen an influx of sharp consultants fleeing the policies, bureaucracy, politics and demands of the large strategic consultancies and searching for work life harmony. With our low attrition rate, our team builds client partnerships that last, as the City of Gainesville moves towards more innovative enterprise IT solutions, Coastal Cloud will be ready to scale without friction or interruption to match your needs.

Our proposed project team is local and available immediately, they have completed numerous public-sector projects, and all hold multiple certifications on the Salesforce.com platform.

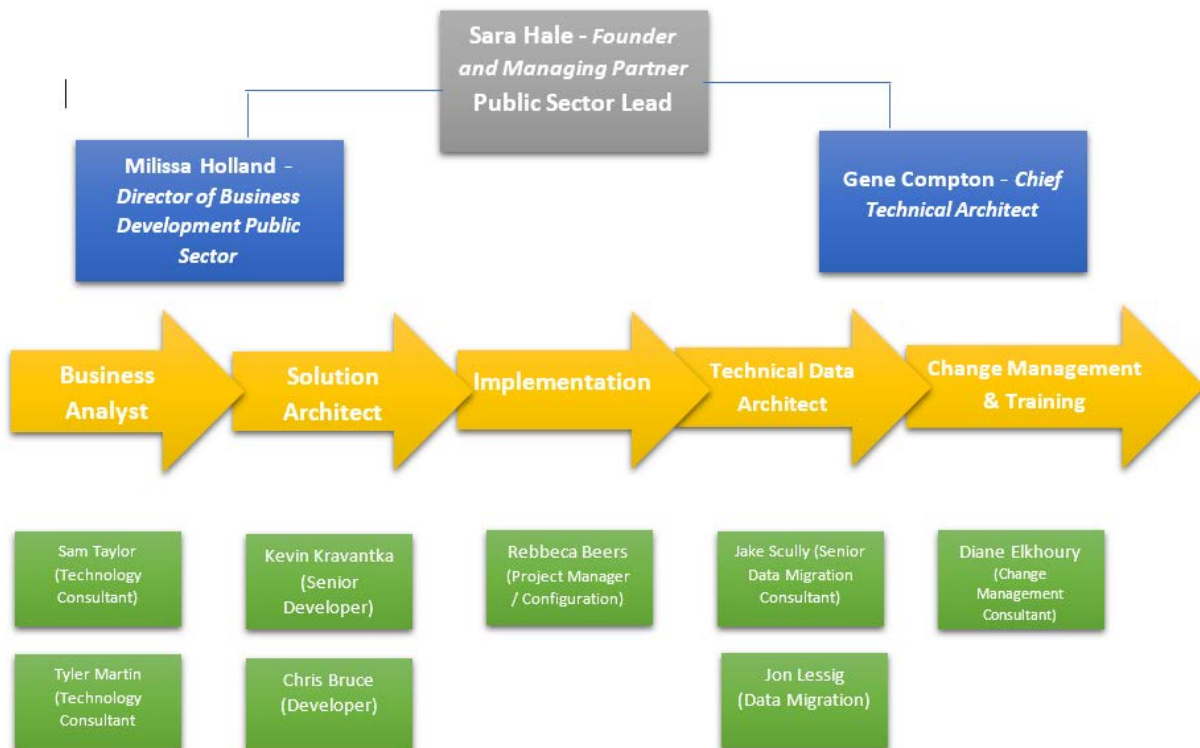
Proposed Project Team

NAME	ROLE	SUMMARY
SARA HALE	Founder and Managing Partner -Executive Sponsor and Solution Architect	Senior Business Operations & Technology Executive with demonstrated expertise in cloud-based technologies and innovative, domestic service delivery models. In recent years, developed deep client experience in Workforce Development and Economic Development with multiple public-sector clients in the southeastern United States.
GENE COMPTON	Project Manager	Gene is an experienced IT architecture and development professional who holds multiple active technology certifications and has extensive experience in Service Cloud implementations across public and private sector industries. Gene has worked in several public-sector projects.
REBBECA BEERS	Project Manager/Configuration Builder	Rebecca has over fifteen years of experience in marketing, customer service, business analysis, and client relationship management. At Coastal Cloud, she is focused on implementing the market leading Software as a Service (SaaS) solutions in the Economic Development sector. Rebecca has worked in several public-sector projects.
KEVIN KRAVANTKA	Senior Developer	Kevin is an experienced development professional with multiple active certifications. He has extensive experience in computer programming and networking technologies. Kevin has worked in several public-sector projects.
CHRIS BRUCE	Developer	Chris is a senior consultant with experience, designing and implementing Salesforce.com based solutions. Salesforce.com certifications include Salesforce Administrator, Force.com Developer, and Salesforce Sales Cloud Consultant. Chris has worked in several public-sector projects.
SAM TAYLOR	Consultant	Sam has several years experience on the Salesforce.com platform. He is focused on implementing the market leading Software as a Service (SaaS) solutions in multiple industries including Public Sector, Entertainment, and Non-Profits. He is a Salesforce.com and internet security expert. Sam has worked in several public-sector projects.



TYLER MARTIN	Consultant	Tyler is a senior consultant with experience, designing and implementing Salesforce.com based solutions. Salesforce.com certifications include Salesforce Administrator, Force.com Developer, and Salesforce Sales Cloud Consultant. He has experience working with different industries ranging from healthcare, financial, real estate, telecommunications, technology, defense contractor, and state and local government. Tyler has worked in several public-sector projects.
JAKE SCULLY	Senior Data Migration Consultant	Jake is a proven leader with over 25 years of experience leading complex organizational change, system implementations, and project delivery. Jake has worked in several public-sector projects.
JON LESSIG	Data Consultant	Jon is an experienced data specialist with two Salesforce certifications and extensive experience with data migrations and cleanup. His background has included a variety of work in the healthcare, insurance, transportation, and non-profit sectors.
DIANE ELKHOURY	Change Management Consultant	Diane is an experienced business consultant and training expert with extensive background in business analysis, implementation, project management, eLearning, instructional design and training. A certified Project Manager (PMP) as well as a certified Salesforce Administrator and Sales Cloud Consultant with experience on systems implementation (Salesforce and SAP).

We have included our proposed project team resumes in the Appendix for you to refer to at your convenience.



Financial Stability

Please see sealed envelope marked “Confidential – Financial Statement” included in the postage of this RFP.



Recent References

DODX-180049-GD
 Enterprise Permitting & Land Management Software

**Attachment A
 BUSINESS REFERENCES**

BIDDER: Coastal Cloud LLC

PROJECT: Enterprise Permitting & Land Management Software

BID#: DODX-180049-GD **BID DUE DATE:** January 31, 2018

Provide the following business reference information for three clients that a same or similar project has been provided within the past five years. You may include photos or other pertinent information.

#1 Project dates (i.e. 6/2009 to 9/2009): May 2014 - March 2017 Project Amount \$ \$900,000

Project Client Name: CareerSource Florida

Project Location: PO Box 13179

City, State Zip: Tallahassee, FL 32317

Client Contact Name: Nathan Roberts

Phone Number: 850-378-1021 Fax Number: _____

Email Address (if available): nroberts@careersourceflorida.com

#2 Project dates (i.e. 6/2009 to 9/2009): June 2017 - June 2018 Project Amount \$ \$380 million annually

Project Client Name: Florida Department of Economic Opportunity

Project Location: 107 E Madison St,

City, State Zip: Tallahassee, FL 32399

Client Contact Name: Brandy Terrie

Phone Number: (850) 245-7105 Fax Number: _____

Email Address (if available): brandy.terrie@deo.myflorida.com

#3 Project dates (i.e. 6/2009 to 9/2009): July 2014 – September Project Amount \$ \$240,000

Project Client Name: Florida Department of Fish and Wildlife (FWC)

Project Location: 2590 E Executive Center # 202,

City, State Zip: Tallahassee, FL 32301

Client Contact Name: Sarah Barrett

Phone Number: (850)922-4330 Fax Number: _____

Email Address (if available): sarah.barrett@myfwc.com



APPENDIX
 FORMS AND ACKNOWLEDGEMENTS

Exhibit E

PROPOSAL RESPONSE FORM – SIGNATURE PAGE
 (submit this form with your proposal)

TO: City of Gainesville, Florida
 200 East University Avenue
 Gainesville, Florida 32601

PROJECT: City of Gainesville Enterprise Permitting & Land Management System

RFP/RFQ#: DODX-180049-GD

RFP/RFQ DUE DATE:

Proposer's Legal Name: Coastal Cloud LLC

Proposer's Alias/DBA: _____

Proposer's Address: 1 Hammock Beach Pkwy, Suite 200
Palm Coast FL 32137

PROPOSER'S REPRESENTATIVE (to be contacted for additional information on this proposal)

Name: Sara Hale Telephone Number: (386)237-7719
 Date: 1/26/2018 Fax Number: 866-903-2014
 Email address: Sara.Hale@CoastalCloud.US

ADDENDA

The Proposer hereby acknowledges receipt of Addenda No.'s 1, 2, 3 & 4 to these Specifications.

TAXES

The Proposer agrees that any applicable Federal, State and Local sales and use taxes, which are to be paid by City of Gainesville, are included in the stated bid prices. Since often the City of Gainesville is exempt from taxes for equipment, materials and services, it is the responsibility of the Contractor to determine whether sales taxes are applicable. The Contractor is liable for any applicable taxes which are not included in the stated bid prices.

LOCAL PREFERENCE (check one)

Local Preference requested: YES NO

A copy of your Business tax receipt and Zoning Compliance Permit should be submitted with your bid if a local preference is requested.

QUALIFIED LOCAL SMALL AND/OR DISABLED VETERAN BUSINESS STATUS (check one)

Is your business qualified as a Local Small Business in accordance with the City of Gainesville Small Business Procurement Program? (Refer to Definitions) YES NO



Exhibit E

Is your business qualified as a Local Service-Disabled Veteran Business in accordance with the City of Gainesville Small and Service-Disabled Veteran Business Procurement Program? (Refer to Definitions)

YES No

SERVICE-DISABLED VETERANS' BUSINESS (check one)

Is your business certified as a service-disabled veterans' business? YES NO

LIVING WAGE COMPLIANCE

See Living Wage Decision Tree (Exhibit C hereto)

Check One:

- Living Wage Ordinance does not apply (check all that apply)
 - Not a covered service
 - Contract does not exceed \$100,000
 - Not a for-profit individual, business entity, corporation, partnership, limited liability company, joint venture, or similar business, who or which employees 50 or more persons, but not including employees of any subsidiaries, affiliates or parent businesses.
 - Located within the City of Gainesville enterprise zone.
- Living Wage Ordinance applies and the completed Certification of Compliance with Living Wage is included with this bid.

NOTE: If Contractor has stated Living Wage Ordinance does not apply and it is later determined Living Wage Ordinance does apply, Contractor will be required to comply with the provision of the City of Gainesville's living wage requirements, as applicable, without any adjustment to the bid price.

SIGNATURE ACKNOWLEDGES THAT: (check one)

- Proposal is in full compliance with the Specifications.
- Proposal is in full compliance with specifications except as specifically stated and attached hereto.

Signature also acknowledges that Proposer has read the current City of Gainesville Debarment/Suspension/Termination Procedures and agrees that the provisions thereof shall apply to this RFP.

ATTEST:

Sara Hale
 Signature
 By: Sara Hale
 Title: Managing Partner



Diana Abarca
 COMMISSION #FF901092
 EXPIRES: July 19, 2019
 www.AARONNOTARY.COM

Diana Abarca
 Signature
 By: DIANA ABARCA
 Title: Notary

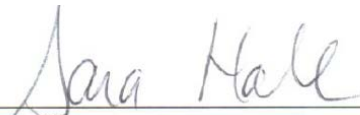


DRUG-FREE WORKPLACE FORM

The undersigned vendor in accordance with Florida Statute 287.087 hereby certifies that

Coastal Cloud LLC _____ does:
 (Name of Business)

1. Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing,
2. possession, or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.
3. Inform employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for the drug abuse violations.
4. Give each employee engaged in providing the commodities or contractual services that are under bid a copy of the statement specified in subsection (1).
5. In the statement specified in subsection (1), notify the employees that, as a condition of working on the commodities or contractual services that are under bid, the employee will abide by the terms of the statement and will notify the employer of any conviction of, or plea of guilty or nolo contendere to, any violation of Chapter 893 or of any controlled substance law of the United States or any state, for a violation occurring in the workplace no later than five (5) days after such conviction.
6. Impose a sanction on, or require the satisfactory participation in a drug abuse assistance or rehabilitation program if such is available in the employee's community, by any employee who is so convicted.
7. Make a good faith effort to continue to maintain a drug-free workplace through implementation of this section.
8. As the person authorized to sign the statement, I certify that this firm complies fully with the above requirements.



 Bidder's Signature

1/25/2018

 Date

An equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers on this document may be reached by persons using TTY/TDD equipment via the Florida Relay Service at 711.



CITY OF GAINESVILLE

CERTIFICATION OF COMPLIANCE WITH LIVING WAGE

The undersigned hereby agrees to comply with the terms of the Living Wage Ordinance and to pay all covered employees, as defined by City of Gainesville Ordinance 020663 as amended at 030168 (Living Wage Ordinance), during the time they are directly involved in providing covered services under the contract with the City of Gainesville for

RFP DODX-180049-GD a living wage of \$11.8269 per hour to covered employees who receive Health Benefits from the undersigned employer and \$13.08 per hour to covered employees not offered health care benefits by the undersigned employer.

<p>Name of Service Contractor/Subcontractor: <u>Coastal Cloud LLC</u></p> <p>Address: <u>1 Hammock Beach Pkwy, Palm Coast FI 32137</u></p> <p>Phone Number: <u>(386)237-7719</u></p> <p>Name of Local Contact Person: <u>Sara Hale</u></p> <p>Address: <u>1 Hammock Beach Pkwy, Palm Coast FI 32137</u></p> <p>Phone Number: <u>(386)237-7719</u></p> <p>\$ <u>\$636,400</u> (Amount of Contract)</p>
--

Signature: *Sara Hale* Date: 1/29/2018
 Printed Name: Sara Hale
 Title: Managing Partner



Exhibit D

LIVING WAGE COMPLIANCE
See Living Wage Decision Tree (Exhibit C hereto)

Check one:

- Living Wage Ordinance does not apply
(check all that apply)
- Not a covered service
 - Contract does not exceed \$100,000
 - Not a for-profit individual, business entity, corporation, partnership, limited liability company, joint venture, or similar business, who or which employees 50 or more persons, but not including employees of any subsidiaries, affiliates or parent businesses.
 - Located within the City of Gainesville enterprise zone.
- X Living Wage Ordinance applies and the completed Certification of Compliance with Living Wage is included with this bid.

NOTE: If Contractor has stated Living Wage Ordinance does not apply and it is later determined Living Wage Ordinance does apply, Contractor will be required to comply with the provision of the City of Gainesville's living wage requirements, as applicable, without any adjustment to the bid price.



**CERTIFICATION REGARDING
DEBARMENT, SUSPENSION, INELIGIBILITY AND VOLUNTARY EXCLUSION
CONTRACTS & SUBCONTRACTS**

This certification is required by the regulations implementing Executive Order 12549, Debarment and Suspension, signed February 18, 1986. The guidelines were published in the May 29, 1987, Federal Register (52 Fed. Reg., pages 20360-20369).

INSTRUCTIONS

1. Each provider whose Contract/subcontract equals or exceeds \$25,000 in federal monies must sign this certification prior to execution of each Contract/subcontract. Additionally, providers who audit federal programs must also sign, regardless of the Contract amount. The Department of Economic Opportunity cannot Contract with these types of providers if they are debarred or suspended by the federal government.
2. This certification is a material representation of fact upon which reliance is placed when this Contract/subcontract is entered into. If it is later determined that the signer knowingly rendered an erroneous certification, the Federal Government may pursue available remedies, including suspension and/or debarment.
3. The provider shall provide immediate written notice to the Contract manager at any time the provider learns that its certification was erroneous when submitted or has become erroneous by reason of changed circumstances.
4. The terms "debarred," "suspended," "ineligible," "person," "principal," and "voluntarily excluded," as used in this certification, have the meanings set out in the Definitions and Coverage sections of rules implementing Executive Order 12549. You may contact the Contract manager for assistance in obtaining a copy of those regulations.
5. The provider agrees by submitting this certification that, it shall not knowingly enter into any subcontract with a person who is debarred, suspended, declared ineligible, or voluntarily excluded from participation in this Contract/subcontract unless authorized by the Federal Government.
6. The provider further agrees by submitting this certification that it will require each subcontractor of this Contract/subcontract, whose payment will equal or exceed \$25,000 in federal monies, to submit a signed copy of this certification.
7. The Department of Economic Opportunity may rely upon a certification of a provider that it is not debarred, suspended, ineligible, or voluntarily excluded from contracting/subcontracting unless it knows that the certification is erroneous.
8. This signed certification must be kept in the Contract Manager's Contract file. Subcontractors' certifications must be kept at the Contractor's business location.

CERTIFICATION

- (1)The prospective provider certifies, by signing this certification, that neither he nor his principals is presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this Contract/subcontract by any federal department or Department.
- (2)Where the prospective provider is unable to certify to any of the statements in this certification, such prospective provider shall attach a explanation to this certification.



*Authorized Representative's Signature
Representative

_____ Sara Hale_(Managing Partner)_____

*Typed Name and Title of Authorized

* This individual must have the authority to bind the respondent

An equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. All voice telephone numbers on this document may be reached by persons using TTY/TDD equipment via the Florida Relay Service at 711.



Public Entity Crimes

We acknowledge, in accordance with section 287.133. FS, Certification Regarding **Public Entity Crimes.**

Scrutinized Companies List

We acknowledge, in accordance with section 287.135. FS, Certification Regarding **Scrutinized Companies List**

Sara Hale

_____ Sara Hale_(Managing Partner)_____

*Authorized Representative's Signature Representative

*Typed Name and Title of Authorized

* This individual must have the authority to bind the respondent

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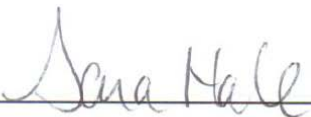
**CERTIFICATION REGARDING LOBBYING CERTIFICATION FOR CONTRACTS, GRANTS,
LOANS AND COOPERATIVE AGREEMENTS**

The undersigned certifies, to the best of his or her knowledge and belief, that:

No federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of any agency, a member of congress, an officer or employee of congress, or an employee of a member of congress in connection with the awarding of any federal Contract, the making of any federal grant, the making of any federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any federal Contract, grant, loan, or cooperative agreement.

If any funds other than federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a member of congress, an officer or employee of congress, or an employee of a member of congress in connection with this federal Contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form-LLL, "Disclosure Form to Report Lobbying," in accordance with its instructions. The undersigned shall require that the language of this certification be included in the award documents for all sub-awards at all tiers (including subcontracts, sub-grants, and contracts under grants, loans, and cooperative agreements) and that all subrecipients shall certify and disclose accordingly.

This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by section 1352, Title 31, U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.



_____ Sara Hale (Managing Partner) _____

*Authorized Representative's Signature

*Typed Name and Title of Authorized Representative

* This individual must have the authority to bind the respondent

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CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
01/25/2018

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Norman Insurance Advisors, LLC 798 North Ponce de Leon Blvd. St. Augustine FL 32084		CONTACT NAME: PHONE (A/C No. Ext): (904) 819-5949 FAX (A/C. No.): (904) 819-5951 E-MAIL: ADDRESS:	
INSURED Coastal Cloud LLC 1 Hammock Beach Pkwy Palm Coast FL 32137		INSURER(S) AFFORDING COVERAGE NAIC # INSURER A: Technology Insurance Company, in 42376 INSURER B: INSURER C: INSURER D: INSURER E: INSURER F:	

COVERAGES CERTIFICATE NUMBER: Cert ID 5394 REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
	COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:						EACH OCCURRENCE \$ DAMAGE TO RENTED PREMISES (Ea occurrence) \$ MED EXP (Any one person) \$ PERSONAL & ADV INJURY \$ GENERAL AGGREGATE \$ PRODUCTS - COMPIOP AGG \$ \$ \$
	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY						COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$ \$
	UMBRELLA LIAB <input type="checkbox"/> OCCUR EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED RETENTION \$						EACH OCCURRENCE \$ AGGREGATE \$ \$
A	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below		N/A	TWC3679163	01/01/2018	01/01/2019	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTHER EL. EACH ACCIDENT \$ 1,000,000 EL. DISEASE - EA EMPLOYEE \$ 1,000,000 EL. DISEASE - POLICY LIMIT \$ 1,000,000 \$ \$

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)
 Offices covered in States Alabama, California, Colorado, Florida, Georgia, Idaho, Kentucky, New Jersey, New York, Utah, Virginia

CERTIFICATE HOLDER Insurance Purposes	CANCELLATION SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.
	AUTHORIZED REPRESENTATIVE

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ADDENDUM NO. 1



Date: January 4, 2018

Bid Date: January 31, 2018
at 3:00 P.M. (Local Time)

Bid Name: Enterprise Permitting & Land Management Software

Bid No.: DODX-180049-GD

NOTE: This Addendum has been issued only to the holders of record of the specifications.

The original Specifications remain in full force and effect except as revised by the following changes which shall take precedence over anything to the contrary:

1. Any questions shall be submitted in writing to the City of Gainesville Purchasing Division by 3:00 p.m. (local time), January 24, 2018. Questions may be submitted as follows:
Email: dykemangb@cityofgainesville.org
or
Faxed (352) 334-3163
Attention: Gayle Dykeman
2. Please find attached:
 - a) Copy of the black out period information (Financial Procedures Manual Section 41-423 Prohibition of lobbying in procurement matters) distributed during mandatory pre-bid meeting.

The following are answers/clarifications to questions received.

3. Question: Is the City requiring that the price proposal be submitted independent and separately sealed from the technical proposal? The following statement on page 2 of the RFP doesn't indicate specifically: *"The original, all copies, and the separate sealed price envelope, if required, must be submitted in a sealed envelope or container stating on the outside the proposer's name, address, telephone number, RFP title, number and due date ..."*
Answer: Pricing proposal does not need to be in a separately sealed envelope.
4. Question: Per the RFP schedule, the deadline for questions is January 24 at 3:00pm and the due date is January 31. Can you tell me how quickly the City will respond after questions are received on the 17th so that proposer can incorporate any required changes and still meet the deadline of the 31st (factoring in shipping time, etc.)?
Answer: Typical response is 2 business days, however, interested companies are encouraged to review the RFP and prepare all questions for the pre-proposal conference.



DODX-180049-GD
 Enterprise Permitting & Land Management Software

ACKNOWLEDGMENT: Each Proposer shall acknowledge receipt of this Addendum No. 1 by his or her signature below, and a copy of this Addendum to be returned with proposal.

CERTIFICATION BY PROPOSER

The undersigned acknowledges receipt of this Addendum No. 1 and the Proposal submitted is in accordance with information, instructions/ and stipulations set forth herein.

PROPOSER: Sara Hale
 BY: Sara Hale
 DATE: 1/25/18



DODX-180049-GD
 Enterprise Permitting & Land Management Software



ADDENDUM NO. 2

Date: January 22, 2018

Bid Date: January 31, 2018
 at 3:00 P.M. (Local Time)

Bid Name: Enterprise Permitting & Land Management Software

Bid No.: DODX-180049-GD

NOTE: This Addendum has been issued only to the holders of record of the specifications.

The original Specifications remain in full force and effect except as revised by the following changes which shall take precedence over anything to the contrary:

1. Any questions shall be submitted in writing to the City of Gainesville Purchasing Division by 3:00 p.m. (local time), January 24, 2018. Questions may be submitted as follows:
 Email: dykemangb@cityofgainesville.org
 or
 Faxed (352) 334-3163
 Attention: Gayle Dykeman
2. Please find attached:
 - a) Copy of the black out period information (Financial Procedures Manual Section 41-423 Prohibition of lobbying in procurement matters) distributed during mandatory pre-bid meeting.

The following are answers/clarifications to questions received.

3. Question: How many staff members will be using the system? Our pricing is based on named-users. If you can provide this list by department that would also be helpful.
 Answer: Code Enforcement 20 (estimate)
 Planning & Building 50 (estimate)
4. Question: Please confirm if the price proposal should be in a separate sealed envelope.
 Answer: Price proposals do not need to be in a separate envelope.
5. Question: It is mentioned on page 2 that a Corporate Seal is needed on the proposal and if one isn't available the proposal is to be notarized. One the "Proposal Response Form" there is a place for the corporate Seal and/or someone to "Attest". Is it acceptable to have another employee (VP) attest to the signature of the Proposer or does he need to have the document notarized?
 Answer: The document should be notarized.



6. Question: Is the Procurement Division Survey to be completed ONLY if we are NOT bidding or does the form need to be completed and included in our response?
Answer: The Procurement Division Survey is to be completed ONLY if you are NOT bidding.
7. Question: Which financial system does the City currently use that this software would need to interface with?
Answer: iNovah but Billing and Collections is looking to upgrade JetPay for online payments ie landlord, planning, business tax
8. Question: How many users (city-staff) will need access to the system?
Answer: Please refer to question 3.
9. Question: How many users (city-staff) work primarily in the field (i.e. building inspectors, code enforcement officers, engineering site inspectors, etc.)?
Answer: An estimate of 40 users will use the software in the field.
10. Question: Which financial system does the City currently use that this software would need to interface with?
Answer: Please refer to question 7.
11. Question: Does the City plan on replacing ProjectDox or integrating with it?
Answer: Integrate with ProjectDox
12. Question: What is the Synovia integration requirement – What is Synovia?
Answer: The Synovia integration requirement involves routing inspections using GPS. Synovia is the vendor that the Department currently uses to track our fleet.
13. Question: What does the city currently use for IVR?
Answer: The Department does not currently use IVR.
14. Question: Will the City continue to use Innoprise for Financials?
Answer: The City doesn't use Innoprise for Financials; it uses CGI Advantage.
15. Question: What does the City currently use of online payments?
Answer: Innoprise's Citizens Access portal with JetPay.
16. Question: What EDMS does the city currently use?
Answer: The City currently uses a hybrid of Hummingbird, but is looking at other options.
17. Question: Was the BDS and eWacker data converted to Innoprise and therefore we are only converting from Innoprise?
Answer: The BDS and eWacker data was not converted to Innoprise; all three systems will need to be converted to the new system.
18. Question: Is the City also looking for a Code Enforcement solution as part of this RFP?
Answer: Yes



19. Question: How many named users (In office) are required?
 Answer: Approximately 70 users in office.
20. Question: How many named mobile users are required?
 Answer: Code Enforcement 17 (estimate)
 Building 21 (estimate)
21. Question: Is there a specific requirements matrix vendors are to compete as part of this RFP?
 Answer: No

ACKNOWLEDGMENT: Each Proposer shall acknowledge receipt of this Addendum No. 2 by his or her signature below, and a copy of this Addendum to be returned with proposal.

CERTIFICATION BY PROPOSER

The undersigned acknowledges receipt of this Addendum No. 2 and the Proposal submitted is in accordance with information, instructions, and stipulations set forth herein.

PROPOSER: Sara Hale

BY: Sara Hale

DATE: 1/29/18



ADDENDUM NO. 3



Date: January 22, 2018

Bid Date: January 31, 2018
at 3:00 P.M. (Local Time)

Bid Name: Enterprise Permitting & Land Management Software

Bid No.: DODX-180049-GD

NOTE: This Addendum has been issued only to the holders of record of the specifications.

The original Specifications remain in full force and effect except as revised by the following changes which shall take precedence over anything to the contrary:

1. Any questions shall be submitted in writing to the City of Gainesville Purchasing Division by 3:00 p.m. (local time), January 24, 2018. Questions may be submitted as follows:
 - Email: dykemangb@cityofgainesville.org
 - or
 - Faxed (352) 334-3163
 - Attention: Gayle Dykeman
2. Please find attached:
 - a) Copy of the black out period information (Financial Procedures Manual Section 41-423 Prohibition of lobbying in procurement matters) distributed during mandatory pre-bid meeting.
 - b) Copy of the Pre-bid sign-in sheet for your information
 - c) Software and Data Examples
3. Gayle Dykeman, Procurement Division, discussed bid requirements.
 - a. Sign-in Sheet is circulating.
 - b. Questions/Answers and topics of discussion addressed at the pre-bid will be available through DemandStar.
 - c. Any questions after the meeting must be put in writing to Gayle Dykeman, dykemangb@cityofgainesville.org by 3:00pm, January 24, 2018.
 - d. Bids are to be received by the Purchasing office no later than 3:00 p.m. on January 31, 2018. Any bids received after 3:00 p.m. on that date will not be accepted.
 - e. All communication through Gayle Dykeman only. Do not communicate with other City staff.
 - f. Various forms (i.e. Tabulation of Subcontractor and Material Suppliers) are to be completed and returned with your bid.
 - i. Sign, date and return all Addenda.



4. Lila Stewart, Department of Doing, introduced other staff members in the room, Wendy Thomas and Andres Lazo and briefly discussed the overall scope of the project, emphasizing a Citizen Centered solution.
5. Wendy Thomas contributed a final comment that the Department of Doing does not want to purchase software that doesn't meet the needs of the citizens. This is a citizen centric endeavor.

The following are answers/clarifications to questions received at the non-mandatory pre-bid conference.

6. Question: Can you provide a list of reports that are needed?
Answer: We are looking for a dashboard, listing performance data, including, but not limited to: inspections by employee, status reports for review times, revenue reports and additional metrics.
7. Question: BTA – Still run out of finance?
Answer: Yes.
8. Question: What type of support team will be provided by the
Answer: There is a core team of 3 that put together the RFP and will be participating in implementation, but we also hope to hire support staff dedicated to the project.
9. Question: January next year is 'go live'. What is driving that date?
Answer: We're spending many man hours to meet the demand for service. Using outmoded programs, we're planning to do something that should have been done years ago.
10. Question: What is the existing system?
Answer: Innoprise
11. Question: Will Innoprise migrate to the new system?
Answer: Yes
12. Question: What is the number of users?
Answer: Department – 50, Code Enforcement 30; Code Enforcement is a separate department from Department of Doing
13. Question: How many other systems do you want to integrate with?
Answer: ARC GIS Servers, Spatial Boundary, Project Dox (2-way) (latest version); City ERP system, See Click Fix, Financial Management System – CGI Advantage
14. Question: IVR System?
Answer: We are interested in learning more about it.
15. Question: Are you seeking SaaS solutions only?
Answer: Software/Server support currently provided by local utility with robust use requirements. Open to recommendations.



16. Question: Can you provide Management roles?
Answer: System Administrators, Project Coordinators, Intake, Reviewers
17. Question: Have you polled citizens to understand what they think is intuitive?
Answer: No, not yet.
18. Question: Can you provide demographics?
Answer: Building contractors typically older male, not technology savvy. Planning and Code enforcement has people throughout the entire community; suggest vendors take a look at the community demographic for more information
19. Question: Mobile Enabled – end to end mobile device – native apps?
Answer: City wants flexibility to remote access data from an inspection site.
20. Question: Do you have data specific to what you want on mobile?
Answer: Should be able to work remotely, provide inspection reporting, input by staff should have the same look and feel as the citizen solution
21. Question: SaaS – do you want to have your own Amazon account or have it provide by vendor?
Answer: We are open to suggestions
22. Question: Can you provide some sample sets of legacy data?
Answer: Please see attachments.
23. Question: BDS, eWacker and Innoprise are all to be converted?
Answer: Yes
24. Question: Code Enforcement – when will they know if that are going to be a part of the project?
Answer: They are currently part of the process.
25. Question: Is there a specific requirements matrix vendors are to compete as part of this RFP?
Answer: No
26. Question: Has a centralized document management system been identified? Will you know by the close of the RFP?
Answer: Not yet identified and unlikely to be by the close of the RFP.
27. Question: For online payments what payment processor is preferred?
Answer: The Budget & Finance Department has selected JetPay.
28. Question: Are you trying to reduce the permit type by 50% or enable logic to reduce processing volume?
Answer: We wish to adjust and simplify, make it easier to use
29. Question: What percent of multiple permits are being filled out and submitted
Answer: Not very many, most are contractors, we'd like to implement an autofill system.



- 30. Question: How do you certify a contractor for permit licensure from other sources?
 Answer: Some fields are flagged.
- 31. Question: Is the City looking for IVR?
 Answer: Yes
- 32. Question: Do you require a local business license?
 Answer: Not now, but perhaps in the future
- 33. Question: If there is not a corporate seal, does the submission need to be notarized?
 Answer: Yes
- 34. Question: Upgraded ProjectDox?
 Answer: The City is currently using ProjectDox. Version 8.6
- 35. Question: How many estimated unique external users do you anticipate?
 Answer: Unlimited, certainly in the thousands.
- 36. Question: What is your definition of IVR?
 Answer: Interactive voice program that allows people to request inspections or information via telephone
- 37. Question: Is there a plan to integrate with GRU or City works outside of the Department of Doing?
 Answer: CRA and GRU use ProjectDoxs – it is easier to integrate than make one system work for all
- 38. Question: Is Code Enforcement doing code enforcement on rental housing?
 Answer: Landlords are required to get a rental permit
- 39. Question: Can the City please share the funding or budget amount that has been approved for this project?
 Answer: Vendors are expected to price according to their best pricing model

ACKNOWLEDGMENT: Each Proposer shall acknowledge receipt of this Addendum No. 3 by his or her signature below, and a copy of this Addendum to be returned with proposal.

CERTIFICATION BY PROPOSER

The undersigned acknowledges receipt of this Addendum No. 3 and the Proposal submitted is in accordance with information, instructions, and stipulations set forth herein.

PROPOSER: Sara Hale
 BY: Sara Hale
 DATE: 1/25/18



ADDENDUM NO. 4

Date: January 26, 2018

Bid Date: January 31, 2018
 at 3:00 P.M. (Local Time)

Bid Name: Enterprise Permitting & Land Management Software

Bid No.: DODX-180049-GD

NOTE: This Addendum has been issued only to the holders of record of the specifications.

The original Specifications remain in full force and effect except as revised by the following changes which shall take precedence over anything to the contrary:

1. Please find attached:

- a) Copy of the black out period information (Financial Procedures Manual Section 41-423 Prohibition of lobbying in procurement matters) distributed during mandatory pre-bid meeting.
- b) A copy of Attachment A

The following are answers/clarifications to questions received after the non-mandatory pre-bid conference.

1. Question: On the RFP, section II, subheading B (Minimum Requirements [page 9]), bullet point 4A states "...and links with voice recognition for phone requests for inspections". Later in the same section (page 10, Section 4 [Integrated], bullet A), "telephone voice recognition software" is listed as a desired integration feature. However, on Addendum 2, question 13 you state that the department is not currently using IVR. Is the intent of the RFP to include IVR in the quote and as part of the solution? If not, please explain or expand on the RFP wording for bullet 4A on page 9.

Answer: We would like the system to be compatible with two-way integration to a voice recognition software, but it could end up being a third party provider of the IVR software. It would be ideal if the solution included IVR, but it's only mandatory that there would be compatibility.

2. Question: For data conversions, the RFP lists 3 data sources (Innoprise, BDS, and eWacker). For each data source, please provide the following:
 - Approximately how many records will be converted from each system? This information is unknown, best guess is between 6-8000 records per year from 1987 to present.
 - How many tables in each data source will be used for the conversion effort? This information is unknown
 - Approximately how many fields will be brought over in the conversion from each system? This information is unknown.



- What database engine is each data source using? BDS is using DOS, E-Wacker uses Foxpro, and Innoprise is using Windows
- How will the proposing vendor access the data (data dump, VPN, etc.) for conversion? This information is unknown
- Does the City have a data source expert (or support personnel), or will the proposing vendor have to work with the OEM? Not at this time. OEM is not available. We do have config manuals for both older systems. Innoprise is still in existence for subject matter.

Answer: See responses underlined and in red above

3. Question: How many reports is your system currently providing? How many reports are to be re-created in the proposed system?

Answer: There are 100 reports, however not all reports are active. We would like a report generator that can be configured by staff, access the database and develop the reports based on the needs of the department.

4. Question: How many reports, if any, should be printable from the field?

Answer: Inspector routes, daily workload and inspection reports with a few additional reports to be determined during project discovery.

5. Question: Of the 41 permit types listed for Planning, how many different business processes do these permits follow? Does each have a unique process, or do several permit types have the same process steps?

Answer: ProjectDox has consolidated many of our *review* processes but in terms of business processes the answer is more nuanced. Many of our permits have unique business processes (i.e. page 2 and 3 of the fee schedule) but the majority of our work begins in a similar fashion but then follows more unique paths as each project moves through the workflow. So, some of our permit processes may have the same Steps 1, 2, 3, but different Steps 4 and 5.

6. Question: Of the 141 permit types listed for Building, how many different business processes do these permits follow? Does each have a unique process, or do several permit types have the same process steps?

Answer: There are several permits that may have the same business processes, however there are many different processes for each permit type.

7. Question: The RFP lists the Planning and Building record/permit types. Please provide a list of the Code Enforcement record types used by the City and indicate if any are planned for sunset.

Answer:



There are approximately 90 code enforcement record types being used in Innoprise. At this point, there has not been any discussion about sunseting any of these code enforcement permits. Please see specific permit types provided by the Code Enforcement Division below:

Notice of Violation

Notice of Violation – Building Regulations

Special Magistrate Hearing Forms

Case Continuance Request

Case Drop Request

Request for Hearing

Affidavit of Hand Delivery – Notice of Violation – no Special Magistrate Hearing

Affidavit of Post – City Hall – Notice of Violation

Affidavit of Hand Delivery

Affidavit of Post Property and City Hall

Affidavit of Compliance

Affidavit of Non-Compliance

Case Continuance

Drop Case

Certificate of Abatement

Chapter 13

Courtesy notice of overgrowth

Notice of Violation

Notice of Repeat Violation

Chapter 23

Courtesy Notice – Newspaper, Magazine, or Periodical Box in Right-of-Way

Notice of Violation

Notice of Repeat Violation

Chapter 26

Notice of Violation

Notice of Repeat Violation

Chapter 27

Notice of Violation

Chapter 30

Intent to Inspect – Over Occupancy

Notice of Violation – Land Development Code

Courtesy Warning – Prohibited Signs

Notice of Repeat Violation – Land Development Code

Commercial Building Code



Notice of Violation

Dangerous Building -16-19

Notice of Violation – Dangerous Building and/or Hazardous Land
Affidavit of Posting – Demolition Order
Notice of Violation – Dangerous Building/Hazardous Land - Demo
Notice of Violation – Hazardous Land

Driveway Documents

Driveway Implementation approval
Driveway Implementation disapproval
Driveway Implementation
Driveway Maintenance Courtesy Letter
Non-conforming Off Street Parking Plan Request
Off Street Parking Plan Request

Extension of Time Request Form

Service of Process

Gainesville Police Department Service of Process
Sheriff's Service of Process

Home Occupation

Home Occupation Permit
Home Occupation Permit Inspection Report
Home Occupation Permit Renewal Letter

Landlord Documents

Affidavit of Post – Notice of Violation
Affidavit of Post - SM Hearing – LLP
Affidavit of Compliance – SM Hearing
Affidavit of Non-Compliance – SM Hearing
Case Continuance Request – SM Hearing
Drop Request – SM Hearing
Request for Hearing
Notice of Violation

Public Records Request Letter

Special Event Permit
Special Event Receipt

UF Special Event Parking Permit
UF Special Event Parking Permit Receipt



Vision Triangle

Notice of Violation – Vision Triangle

Special Magistrate Letters and Legal Documents

Findings of Fact, Conclusions of Law and Order, Order Imposing Fine and Costs

Authorized Enforcement - Lien for Yard Maintenance Chronology

Partial release of Lien

Compliance Letter – Fine Owed

Compliance Letter – Cost Only Owed

Compliance Letter – No Fines or Costs

Cover Letter

Dismissal Letter

Landlord Permit Cycle Ended Compliance Letter – Fee Owed

Non-Compliance Letter – Ownership Change

Non-Compliance Letter - Fines

Non-Compliance Letter - Property has fines

Notice of Intent to Sue

Order of Dismissal

Order to Continue

Reduction/Rescission Request Form

Reduction/Rescission Receipt Letter

Reduction/Rescission Chronology

Release of Lien

Release of Lien Letter

Repeat Violator Letter

Non-Compliance Letter

Non-Compliance Letter – Yard Maintenance

Notice of Hearing and Letter

Lien Filed Letter – Yard Maintenance

Lien Letter Filed

8. Question: Of the Code Enforcement record types, how many business processes do these records follow? Does each have a unique process, or do several record types have the same process steps?

Answer: Code Enforcement generally follows two business processes: enforcement and permitting. The enforcement process can be somewhat complicated depending on the issue type, steps needed to resolve, and issues specific to each case. These variables determine the records used and the overall number of steps involved. The Codes permitting process is fairly simple and includes application submission, a multi department review and the issuing of the permit.

9. Question: Page 17 of the RFP refers to Attachment A for References however there is no attachment A included. Can this be sent to us?

Answer: The form is attached to this Addendum #4

10. Question: Has the City of Gainesville met with other vendors to provide the services they are looking for?



Answer: Aside from demos, the City of Gainesville has not met with any other vendors to discuss services.

11. Question: Who were the team members that put this RFP together (roles)?

Answer: Senior Buyer, Strategic Planning Manager, Planning Technician, Building Official, Director of the Department of Doing, IT Project Manager, Customer Support Specialist, Code Enforcement Manger, & Fire Protection Specialist.

12. Question: Who will be on the reviewing team for this proposal – which department heads?

Answer: IT Project Manager, Director of the Department of Doing, Strategic Planning Manager, Director of Citizen-Centered Gainesville

13. Question: What is the duration of the project?

Answer: We anticipate +/-18 months.

14. Question: What is the format of data in BDS, eWacker and Innoprise that needs to be migrated to the new system?

Answer: We are unsure of what you are looking for in this question, but we've provided screenshots of permits and interfaces from each of the three legacy systems.

15. Question: Can City please share more details on the use of BDS and eWacker?

Answer: Currently these legacy systems are used to identify permits and plans associated with a given project. The information is used to respond to public records requests, which could include everything from owner to contractor to permit dates, dates of actions on the permit, types of inspections, results of inspections, name of inspectors. Contractor records to include license information and insurance documentation. Attachments which include the whole array of documents used in permitting and inspection.

16. Question: What is the total number of permits that the City of Gainesville wants to be migrated and incorporated in its future solution?

Answer: Approximately 248,000



DODX-180049-GD
 Enterprise Permitting & Land Management Software

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CERTIFICATION BY PROPOSER

The undersigned acknowledges receipt of this Addendum No. 4 and the Proposal submitted is in accordance with information, instructions, and stipulations set forth herein.

PROPOSER: Sara Hale
 BY: Sara Hale
 DATE: 1/25/18



RESUMES



Sara J. Hale

1 Hammock Beach Pkwy, Suite 200, Palm Coast, FL 32137

Sara.Hale@coastalcloud.us

Managing Partner

Senior Business Operations & Technology Executive with demonstrated expertise in cloud based technologies and innovative, domestic service delivery models. Strong blend of business operations processes & systems and deep technology skills. Extensive experience with all operational aspects of the technology consulting business including service delivery, financial reporting, billing & collections, human resources, recruiting, staff development and facilities management. Proven track record of delivering complex solutions including: integration with legacy systems, data conversion, extensive use of Salesforce including: Visual Flow, Process Builder, Workflow Rules, Visual Force, Validation Rules, Customer and Partner Community and custom coding (if required). Follows full life cycle methodology from requirements, design, build, review, deployment and training. 25+ years in the Technology Consulting industry working with many major Fortune 500 companies: Verizon, AT&T, Bell Canada, and Fair Point Communications. In recent years, developed deep client experience in Workforce Development and Economic Development with multiple public-sector clients in the southeastern United States.

AREAS OF EXPERTISE

Software as a Service (SaaS) technologies
 Salesforce.com

Financial Operations & Systems

Economic Development Industry
 Communications Industry

Domestic, Rural Technology Solution Delivery
 Workforce Development Industry

Customer Relationship
 Management (CRM) solutions

Salesforce CPQ

PROFESSIONAL EXPERIENCE

Coastal Cloud (2012 - present) – Managing Partner & Solution Architect

Led the definition and launch of Coastal Cloud – a new Florida-based technology solution center that focuses on Software as a Service (SaaS) solutions, such as Salesforce.com, Google Apps, NetSuite, Microsoft Dynamics and HubSpot.

- Oversee all daily business operations including financial results, human resources, service delivery, quality assurance and client satisfaction
- Helped design the Coastal Cloud delivery model and associated differentiators
- Worked with strategic technology partners (Salesforce.com, DocuSign, HubSpot) to form alliance agreements
- Helped develop methods & tools for consistent, high quality delivery of technology services
- Recruiting, training and deployment of technology consultants
- Responsible for senior client relationships at major southeastern US clients including
- Solution Architect for 20+ Salesforce.com Implementations

Relevant Solution Architect and Client Experience

CareerSource Florida (Feb 2014 - present) – Project Manager and Solution Architect.

- Design, developed, deployed Statewide system for all 24 workforce boards and the state to manage the business services activities including, customer relation activities, grant



and incentive management from Application through compliance, self-service portal for the business to apply and request fund, API integration with EFM.

Alabama Dept. of Commerce (June 2014 - present) – Project Manager and Solution Architect.

- Designed and implemented solution CRM for business that are looking to expand or move to the state of Alabama. Implemented self-service portal for businesses who have been awarded incentives to request funds, submit status reports and check status. Provide ongoing admin support and on demand training.

JAXUSA – (Oct 2013 - present) – Project Manager and Solution Architect.

- Designed and implemented solution to track all businesses, activities and incentives that are prospects to expand or move to the Jacksonville area.

Kentucky – Cabinet for Econ Development (October 2015 - present) – Project Manager and Solution Architect.

- Designed and implemented solution to track all businesses, activities and incentives for business looking to expand or move in the State of Kentucky. Detailed management for 28 programs used to recruit businesses (loans, grants, bonds, investment, other incentives). Developed self-service portal for businesses to apply, requests funds, upload documents and check status.

Kentucky – Cabinet for Education and Workforce (Oct 2015 - present) – Project Manager and Solution Architect.

- Designed and implemented solution to support Team Based Case Management across multiple agencies to support Job Seekers including: data collection, assessments, individual career plans, trainings, work-based experiences. It includes a self-service portal for job seekers to update profile information and upload documents.

Graphene (2008 - present) – President

Responsible for all operational results for this management and technology consulting company. Graphene provides IT strategy, complex program management and enterprise architecture services.

- *FairPoint Communications (2012-2014)* - Worked closely with the CRO, CMO, SVP of Sales and Executive Director of Sales Operations to evaluate and select a high-performance sales tool – Salesforce.com. Led the selection, requirements design, configuration, testing, deployment and on-going support of this mission-critical sales and marketing platform. This multi-year program was a key part of an overall 'high performance sales transformation' for the enterprise. The successful deployment provided market-leading, real-time, mobile tools in the hands of this distributed sales team.
- *Coldwell Banker (2008-2013)* - Client Account Lead for this high growth real estate start-up in Northeast Florida. Worked closely with the CEO to conceptualize and deliver a leading-edge CRM capability for his growing sales team. The new platform was entirely cloud-based thus requiring little capital investment and able to meet the elastic demands of this client. A specialized industry solution was selected – BrightDoor. Led all configuration and data migration activities as well as integration with email, phone and other communications systems. Provided extensive training and on-going support as this client dramatically expanded their business

Accenture (1992 - 1999) – Senior Manager - Technology Practice

- Developed an expertise in advanced Customer Relationship Management (CRM) systems using innovative client-server technologies. These new, easy to use CRM tools transformed the sales & marketing teams with 'point and click' user interfaces and more customer-centric systems versus the traditional mainframe systems. As an expert in CRM and client-server technologies, led several client service delivery teams.
- Worked with a range of leading telecommunications clients including: Verizon, MCI, Bell South, Bell Canada, Bell Atlantic



RECOGNITION AND AWARDS

- **Board Member – Florida High Tech Corridor Council (FHTCC) -**
[HTTP://WWW.FLORIDAHIGHTECH.COM/](http://www.floridahightech.com/)
- **Florida Executive Leadership Program – Class VIII (April 2014) -**
[HTTP://WWW.LEADERSHIPFLORIDA.ORG/EXECUTIVE-LEADERSHIP-PROGRAM](http://www.leadershipflorida.org/executive-leadership-program)
- **Governor’s Business Investor Medal (Feb 2013)**

EDUCATIONAL BACKGROUND

- Bachelor of Science in Computer Science – DUKE UNIVERSITY, Durham, NC
-



Gene Compton

1 Hammock Beach Pkwy, Suite 200, Palm Coast, FL 32137

Gene.Compton@coastalcloud.us

Director – Chief Technical Architect

- Experienced IT architecture and development professional
- Extensive experience in Service Cloud implementations with healthcare, telecommunication, financial, retail and call center environments
- Expert in balancing business, technology, and client needs to produce results that drive business growth
- Holds multiple active technology certifications
- Perceptive, solutions-focused leader with proven success in the development, enhancement, and management of information technology systems
- Ability to communicate, build rapport, and create consensus at all levels of the organization

AREAS OF EXPERTISE

- Data Architecture
- Data Modeling
- Project Management
- Business Process re-engineering
- Software Development
- Salesforce.com
- IT Requirements & Analysis
- Salesforce CPQ
- Software Development and testing
- Product Lifecycle

PROFESSIONAL EXPERIENCE

Coastal Cloud (2013 – present) – Chief Technical Architect

Working with a variety of clients and industries including deep experience in public sector, healthcare and communication. Roles have included chief architect and testing lead. Was the architect of the Coastal Cloud Cumulus Methodology to Project Management and Testing. Key Clients have included:

- Market Traders Institute - Sales Cloud and Wave Analytics design, development, configuration, and testing.
- K-12 FuelEd - Design, development, configuration, system integration and data conversion, testing plan creation and implementation.
- CoventBridge Group - Design, development, configuration, system integration, data conversion and testing implementation.
- Cook Children’s Health Care System – Multi-Cloud design, development, configuration, optimization, data conversion, testing and implementation.
- VVivint Wireless – Multi-Cloud design, development, configuration, customization, optimization and data conversion. Built Network Infrastructure custom application utilizing Force.com platform.
- Alert Global Media - Service Cloud implementation for 60 seat call center including Live Chat, Knowledge and CTI.



- Florida Wildlife Commission (FWC) - Custom Service Cloud implementation utilizing Force.com licenses. System utilized for tracking of wildlife incidents throughout the state of Florida. Custom integration to Google Maps for incident mapping and tracking.
- Florida Department of Economic Opportunity (DEO) - Redesigned and reconfigured incentive tracking and financial system including interface to statewide accounting system (FLAIR). Deployed three custom-built visualforce customer communities for businesses, auditors and local jurisdictions.
- CASIS – Salesforce Single Sign-On implementation.

Link-IT Consulting, LLC - Hilton Head Island, SC (2013) – President/Owner – IT consulting, focusing on billing process and cost saving efforts

- Successfully launched, developed, and managed a consulting company providing expertise in the information technology, software development, Oracle, Salesforce and telecommunications arenas.
- Completed Cost of Billing Reduction Project for FairPoint communications resulting in a \$3.5M (25%) cost savings for billing.
- Advised Jester Communications on best practices for software development in the Sales Order mobile application environment.

Hargray Communications - Hilton Head Island, SC (1998-2012) – Director of Information Technology

Maintain full accountability for supervising all aspects of day-to-day IT management activities in support of organizational goals and objectives. Apply strategic planning, prioritization, and management skills toward consistently achieving critical deadlines while maintaining high quality standards. Allocate and administer a \$5.2M annual budget to maximize use of resources while controlling costs. Train, mentor, and lead a cross functional team of 5 direct reports with 26 total department employees to support enterprise and customer IT systems. Demonstrate sharp business acumen in overseeing all facets of both business and technical initiatives, including managing software development, network infrastructure, hardware/software architecture, web design and development, web hosting, ISP, and helpdesk support functions. Strategically prioritized and directed key technical projects to ensure on time, requirements-compliant completion. Effectively analyzed internal processes to define inefficiencies and provided expert recommendations to boost productivity and streamline workflow

- Implemented a Tech Sales program to enhance revenue by \$84K annually.
- Implemented complete enterprise network replacement and upgrade as well as enterprise upgrade to Microsoft Windows7, Office 2010, Exchange 2010, Active Directory 2008, and OCS 2007.
- Generated \$1.2M in annual cost savings by developing wireless operations support system.
- Improved customer service and reliability while saving \$800K annually by building and managing internal ISP group supporting 30K customers.
- Spearheaded the successful reduction of \$1.75M in annual costs by innovating a wireless IVR application and wireless portal.
- Achieved \$150K savings from annual budget by reducing printing costs for late payment notices.

Information Systems Solutions Inc. - Huntsville, AL (1996-1998) – President/Owner

Oracle and Information Technology consulting. Demonstrating sharp business acumen, have successfully launched, developed, and managed a consulting company, with broad scope responsibility for all areas of operations, including training, project management, client service, and business development.



- Built and steered multiple team members to maximize performance in consistently completing projects on time and within budget in a fast-paced, time-sensitive environment requiring superior strategic planning, organization, and leadership skills.
- Directed the successful reengineering of comprehensive automated travel system using business process diagrams, entity relationship diagrams, and functional hierarchy diagrams.

SESI - Huntsville, AL (1996) – Senior Consultant - Provided Oracle consulting for database design and development. Provided IT consulting for systems design and configuration.

- Provided Oracle expertise on several projects: administration support and application development support for Procurement and Documentation Data Support (PADDS) system.
- Assisted conversion of character based PADDS application to GUI client/server environment using Oracle 7.1, Forms, 3.0, SQL*Report Writer, Reports 2.5 on 8 HP UNIX servers, with one NT server.

ORACLE CORPORATION - Huntsville, AL (1994-1996) – Senior Principal Consultant - Provided Oracle consulting for multiple high-profile clients.

- Managed a five-person Consulting Support team in New Orleans for Naval Reserve IS Office, providing project management, database admin, Designer and Developer 2000 support for NT and Alpha Open VMS servers and Windows based clients.
- Performed database and applications tuning for the U.S. Navy Supply Depot in Kingsbay, GA on HP9000 running Oracle 7 and Windows clients running Forms 4.5, Reports 2.5, SQL*Net.
- Database Administration for U.S. Space and Strategic Defense Command (USASSDC) Command Information System (CIMS).
- Supervised nine developers in design, development and maintenance of an MIS system for 750 end-users implementing a 3.4 GB database using Oracle 7.1.3 and software suite on two VAX clusters.

Nichols Research - Huntsville, AL (1988-1994) – Directorate Manager - Provided Oracle software development and database administration for multiple government contracts and systems.

- Supervised applications development and conducted database administration for USASSDC.
- Managed and performed configuration management using DEC CMS; provided Oracle applications development and database administration consulting and supervision for MICOM.
- Developed Oracle database interface software for the client using Unix, Ada, MILSTD-2167A, & Silicon Graphics workstations & servers; created automated configuration management software.
- Installed, maintained, administered, trained technicians, developed, and supported Oracle mainframe, minicomputer and microcomputer clients using Unix, VMS, & MSDOS operating systems, gaining extensive experience with Unix workstations, including Silicon Graphics & Sun Systems.

Boeing Military Airplane Company - Huntsville, AL (1985 – 1988) – Software Engineer - Provided software development and database design for military simulator systems.

- Determined software requirements, hardware and software interfaces, graphics screens using Rastertech touch screen and developed software for Jammer Artillery Radar Missile System (JARMS) of the B-1B simulator on a Gould computer system using MPX O/S.

TECHNOLOGIES

• **Platforms:** Salesforce.com, Microsoft Dynamics

• **Networking:** LAN, WAN, TCP/IP, WINS, DHCP, DNS, Active Directory, MPLS, MLT, Split MLT, VLAN, SAN, IPSEC, SMTP



- **Databases:** Oracle 10g, Oracle 11g, SQL Server, Oracle Designer, Oracle 11G Fusion, Oracle OBIEE
- **Applications:** MS Word, Excel, Outlook, PowerPoint, Project, Visio, TOAD, Oracle EBusiness, SharePoint

- **Hardware:** EMC, Data Domain, Cisco, Juniper, Brocade, HP, Sun
- **Server Software:** Exchange, PVCS, Netcool, Altiris, Varonis, NetBackup, Networker

EDUCATIONAL BACKGROUND

- **University of Alabama, Huntsville, AL** – Bachelor of Science in Electrical Engineering & Computer Engineering

CERTIFICATIONS

- Salesforce.com Certified – Service Cloud Consultant
 - Salesforce.com Certified – Administrator
 - Salesforce.com Wave Analytics – Black Belt Certified
 - Salesforce.com Certified – Salesforce CPQ
-



Rebecca Beers

1 Hammock Beach Pkwy, Suite 200, Palm Coast, FL 32137

Rebecca.Beers@coastalcloud.us

Project Manager

Ms. Beers has over fifteen years of experience in marketing, customer service, business analysis, and client relationship management. At Coastal Cloud, she is focused on implementing the market leading Software as a Service (SaaS) solutions in the Economic Development sector. Ms. Beers possesses a strong project management skillset, Salesforce configuration knowledge, strong interpersonal skills and excellent verbal and written communication skills.

AREAS OF EXPERTISE

- Project Management
- Executive Communication
- Solution Design and Development
- Client and End-User Training
- Project Documentation
- Salesforce.com
- Requirements & Analysis
- Account Management
- Economic Development
- Business and Data Analysis

PROFESSIONAL EXPERIENCE

Coastal Cloud (April 2015 – present) – Consultant/Business Analyst –

Responsible for implementation of client projects. Consulting, focusing on project management, requirements development, solution design and cost estimation. Configuring custom Salesforce.com projects for the client, reviewing client feedback and implementing changes. Developing client training materials and leading client-training sessions. Data analysis, integration and loading into Salesforce

Platform. Certified Salesforce professional. Clients include: Kentucky Cabinet for Economic Development, Kentucky Cabinet for Education and Workforce, CareerSource Florida, Business Oregon, Fayette County Development Authority, Lake County Partners, Bowling Green Area Chamber of Commerce.

RELEVANT SOLUTION ARCHITECT AND CLIENT EXPERIENCE

- CareerSource Florida – Business analysis, testing, configuration, reporting
- CareerSource Volusia Flagler – Business analysis, testing, configuration
- Kentucky CED – business analysis, development, testing, configuration, reporting, support services, documentation, grant management
- Kentucky Workforce – business analysis, development, testing, configuration, reporting, support services
- Business Oregon – Econ Dev/Grant Applications and processing - project management (so all of the above), business analysis, project life cycle, and documentation, grant management, grant applications
- Fayette County Development Authority – Econ Dev, business analysis, project management (so all of the above), project life cycle, documentation, grant management
- Lake County Partners – Econ Dev/Workforce, business analysis, project management (so all of the above), project life cycle, documentation, grant management

ITT Corporation, TDS Corporate Services (June 2005 – March 2015) – Client/Carrier Relationship Coordinator



Performed data analysis for clients on current and historical trends, freight spend, cost reporting, carrier selection and usage. Client account management for ITT TDS' top 10 clients including issue resolutions, client presentations and special project coordination. Worked with carriers on account set ups, payment status, research, discount applications and customer/carrier liaisons. Calculation and reporting of client gain share programs. Client survey development, deployment and analysis. Client newsletter development. Auditing and processing of freight invoices. Freight claims processing. Performed industry competitive analysis. Marketing collateral development.

ArvinMeritor (February 2000 – March 2005) – Communications Specialist

Media Relations: Assisted in maintaining media relationships through verbal & written communications, including editorial pitching of subject matter experts & product information to trade publications. Wrote external press releases, media advisories, internal & external web content, employee notices. Managed global distribution of press releases using news wire services, as well as NYSE reporting requirements. Supported media events such as Product Deep Dives, Media Roundtables, Media Training, visits from foreign dignitaries/media, & product launch celebrations.

Community Relations: Assisted in planning & hosting company-sponsored internal & external events with charitable organizations. Administer monthly payouts from ArvinMeritor Trust Fund (\$1.9 million) & charitable giving accounts to facilities nationwide, facilitated sponsorships & charitable contributions to local & national events & charities. *Internal Communications:* Managed internal communications efforts via internal web site to division employees worldwide including: Development of Global Marketing Communications Toolkit, managing global location database. Managing the internal

Company Store merchandising program. *Marketing Communications:* Assisted in Trade Show & Tech Fair planning, including logistics, signage & displays. Managing internal company displays such as lobby displays & graphics, & news/ information boards. Managed event sponsorships such as FutureTruck & Formula SAE. Collateral development, tracking, revision & translation of brochures, product & regional business profiles, internal & external web site content. Assisted with corporate & business division advertisement planning & placement.

Berkfield & Co., LTD (April 1999- February 2000) – Executive Administrative Assistant

Administrative Assistant to President & owner, Vice President & customer service representatives at the auto, home & recreational vehicle insurance agency. Managed accounts payable & receivable, customer relations & data entry. Developed spreadsheets for customer records, billing, form letters and bulk mailings.

EDUCATIONAL BACKGROUND

- Masters of Business Administration (MBA), March 2005, Walsh College, Troy, MI
- Bachelor of Arts, Performing Arts Major, May 1999, Oakland University, Rochester, MI
- Associate of Liberal Arts, August 1998, Oakland Community College, Auburn Hills, MI

CERTIFICATIONS

- Salesforce.com Certified Administrator
- Salesforce.com Certified Advanced Administrator
- Salesforce.com Certified Force.com Developer
- Salesforce.com Certified Sales Cloud Consultant
- Salesforce.com Certified Service Cloud Consultant
- Six Sigma Green Belt Certified



Christopher Bruce

1 Hammock Beach Parkway, Palm Coast, FL 32137

Christopher.Bruce@coastalcloud.us

Sr. Salesforce Consultant

- Certified Salesforce.com professional.
- Extensive experience in force.com declarative development.

Technical Skills

- Programming Languages: Salesforce.com/Force.com/APEX, Salesforce.com/Force.com/VISUALFORCE.

Certifications

- Salesforce.com Certified - Developer
- Salesforce.com Certified - Administrator

Professional Experience

Coastal Cloud – Palm Coast, FL - 2014 to Present (Senior Consultant)

Design, Development, Testing and Implementation of multiple implementations and Force.com - based applications. Selected, implemented and tested multiple applications from the AppExchange.

Primary Salesforce.com clients include:

AlphaStaff

- Designed, Developed, and Implemented declarative Salesforce solutions.
- Provided remote Salesforce administration.

Mainstream Engineering

- Designed, Developed, and Implemented declarative Salesforce solutions.
- Provided remote Salesforce administration.
- Designed, Developed, and Implemented custom integrations between MySQL, Salesforce, and Sage 100 ERP.

DMEautomotive

- Designed, Developed, and Implemented declarative salesforce solutions.
- Provided remote salesforce administration.
- Designed, Developed, and Implemented custom integrations between MySQL, and Salesforce.

WellCare

- Designed, Developed, and Implemented declarative Salesforce solutions.
- Provided remote Salesforce administration.

International Baccalaureate Organization

- Designed, Developed, and Implemented declarative Salesforce solutions.
- Provided remote Salesforce administration.

Source1 Purchasing (July 2014 - Nov 2016)

- Designed, Developed, and Implemented declarative Salesforce solutions.



- Provided remote Salesforce administration.

Herman Integration Services, LLC

2013 – 2014

Project Engineer Duties included:

- Assumed ownership of project installations.
- Provided positive and effective interaction with internal and external customers.
- Performed field-engineering support as needed.
- Performed field install/troubleshooting as needed.
- Performed control system programming as needed.
- Assisted with obtaining project sign-off as needed.
- Coordinated field-testing of integrated systems as needed.
- Provided positive and effective interaction with internal and external customers.
- Served as customer liaison in absence of Project Manager.
- Responsible for job documentation as needed.

Mediatech

2007 – 2013 Project Manager Duties included:

- Facilitated and coordinated small to large projects of varying scopes.
- Created Scopes of Work, line drawings and Bill of Materials.
- Ensured accurate and technically correct proposals for all assigned projects.
- Executed technical design, engineering, justification and implementation of projects for a large well-known computer manufacturer.

Education

- Associate of Science: Information Technology/Business Systems Analysis – University of Phoenix
 - Bachelor of Science: Information Technology/Business Systems Analysis – University of Phoenix
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Jake Scully

1 Hammock Beach Pkwy, Suite 200, Palm Coast, FL 32137

Jake.Scully@coastalcloud.us

Developer

Proven leader with over 25 years of experience leading complex organizational change, system implementations, and project delivery. Expert in balancing business, technology, and client needs to produce results that drive business growth. Talent for molding technical and nontechnical individuals into motivated, high performing teams that deliver successful solutions. Ability to communicate, build rapport, and create consensus at all levels of the organization.

AREAS OF EXPERTISE

- Data Migration and Interface Design
- Executive Leadership
- Business Process and System Reengineering
- Multi-Channel Help Desk
- User Acceptance Testing
- Systems Development & Integration
- Contact Center Management
- Cost Reduction - Process & System Efficiency
- Technology Strategy Planning

PROFESSIONAL EXPERIENCE

Coastal Cloud, Palm Coast, FL (2014-present) SaaS Technology Consulting & Implementation

Currently providing consulting expertise. Skilled in extracting maximum value out of the Salesforce Data Model, integration via the Salesforce API, and configuration leveraging declarative programming.

- *Cook Children’s Health Care System* – Service Cloud and Sales Cloud design, development, configuration, optimization and data conversion.
- *Inovalon* – Sales Cloud design and configuration, including data architecture and modeling to support custom business processes.
- *Plumchoice* – Service Cloud solution design and implementation for a Tech Support BPO call center.
- *Career Source Florida* – Leveraged cloud integration tool (Jitterbit) to manage data conversion.
- *IDignity* – Non-profit implementation to better manage donations. Lead data migration and user interface changes.
- *Test America* – Lead Data migration and Process Enhancements to better manage Revenue and Commissioning. Improved user experience through a series of interface changes to improve usability.
- *Duckcreek* - Data Architect and data migration - Service Cloud with Community for Company’s help desk. Industry: Software solutions for Insurance Industry.
- *Business Oregon* - Data Architect and data migration - Salesforce implementation for Economic Development for the State of Oregon.



Scully Consulting, Palm Coast, FL (2012-2014) President/Owner

Call Center Management and IT consulting, focused on process improvements and cost savings.

DigitalMojo

Glad2.com

LeanLocal.com

- Business Process Analysis, S Tactical recommendations & in
- Lead the implementation and successful deployment of WFM platform.
- Responsible for Internal and Vendor Call Center Management, Staffing, Training, Quality and General Business Processes from remote location and on-premise.

- Development and Implementation of Cloud-based (Zendesk).
- Help Desk platform for end-user support.

- Development and Implementation of Cloud-based Help Desk platform for end-user support.
- Built, staffed, and managed multi-channel Customer Support center providing Ticket, Chat, Voice and Social Media based help.

Evergreen Sales and Marketing, Daytona Beach, FL (1998-2012) President

- Maintain full accountability for supervising all aspects of day-to-day IT Operations, Contact Center Operations, Business Development, Client Services, and Finance in support of organizational goals and objectives.
- Lead the preparation of the company for sale and successfully navigated acquisition by American Support.
- Consistently achieved “Top Vendor in Quality” awards for major MSOs.
- Launched separately managed Satellite division (Alternate Channels).

Evergreen Sales and Marketing, Daytona Beach, FL (1998-2012) Vice-President

- Lead the custom software design and development of ERP system for Cable TV Call Center.
- Grew manual outbound sales operation of 60 employees to 350 employees in three locations serving the needs of the Cable Broadband Industry.
- Implemented BPO strategy to augment capacity and profitability.

Continental Cablevision, Jacksonville, FL (1986-1991) Customer Services Manager

- Managed customer care, tele-sales, and collections departments.
- Automated Tele-Sales and Collections through implementation and configuration of a Predictive Dialer.

UNITED STATES AIR FORCE, (1981-1985) Avionics – Target Designation Systems

TECHNOLOGIES

- **Applications:** Salesforce.com, ZenDesk, Conga, Verint, MS Word, Excel, Outlook, PowerPoint, Project, Visio
- **Platforms:** Windows, Unix
- **Integration Technologies:** Cloud based ETL tools (SF Data Loader, Jitterbit)
- **Databases:** MS SQL Server, MS Access, Informi

EDUCATIONAL BACKGROUND

- **University of North Florida - Jacksonville, FL, Marketing**
- **USAF:** CCAF and NCO Leadership School



- **Professional Association for Customer Engagement (PACE)** – Served on SelfRegulatory Organization (SRO) Advisory Board
- **Cable and Telecommunications Association for Marketing (CTAM)**

CERTIFICATIONS

- Salesforce.com Certified – Administrator
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Kevin Kravantka

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Kevin.Kravantka@coastalcloud.us

Developer

Mr. Kravantka is an experienced development professional with multiple active certifications. He has extensive experience in computer programming and networking technologies.

AREAS OF EXPERTISE

- Programming Languages:
 - Salesforce.com/Force.com/APEX
 - Java
 - Cold Fusion
 - SQL,PL/SQL
 - Javascript
 - HTML
- Salesforce.com
 - Data Migrations
 - *Databases*
 - Oracle
 - Mysql
 - Sql server
 - Access

PROFESSIONAL EXPERIENCE

Coastal Cloud (2014 – Present) –Developer

Design, Development, Testing and Implementation of multiple implementations and Force.com - based applications. Provided custom coded features and a variety of API integrations across 50+ Salesforce.com projects. Key clients have included:

- Georgia Technology Authority (GTA) – Sales Cloud, Service Cloud and Partner Communities implementation.
- Center for Advancements of Science in Space (CASIS) – Force.com customized application to support International Space Station proposed projects and enterprise wide calendaring.
- Cook Children’s Healthcare System – Sales Cloud, Service Cloud, Customer Portal and Force.com Asset Management application for a range of departments.
- I Dignity – Non-profit donor and client management based upon Salesforce’s Nonprofit Starter Kit package.
- Florida Wildlife Commission – Google Map API integration to map incidents, add polygons to map, display KML layers, address auto-completion, filter options by date and radius, geocode and reverse geocode address.
- Parallel Infrastructure – Create Visualforce page to track tower progress. Add multiple filtering options, multiple view options, ability to update projections and dates and color code results in spreadsheet format.
- Florida Department of Economic Opportunity – Design and develop web portal for remote access for business users and auditors. Allow change requests via portal that will alert internal staff.
- Cspire – Integration via REST API to externa customer database and sync to Salesforce
- CoventBridge – Write custom inbound and outbound APIs to integrate with external database and Salesforce.
- Career Source Florida – Write custom APIs to integrate with EFM system.



Palm Coast Data (2009 – 2014) – Programmer/Analyst

Responsible for developing content management system utilizing ColdFusion. Create adhoc reports using oracle DISCOVERER. Responsible for complete life-cycle involved from strategy designing to implementation. Create tables, indexes, views, cursors, triggers, packages, procedures, and functions. Tune applications by tuning SQL, PL/SQL.

Edumet (2008) – VP Software Development

Responsible for designing/coding HR, Payroll and Accounting applications using DEVELOPER 2000 (forms and reports). Designed student scheduler that was used to schedule schools with over 10K students. Created ad-hoc reports using oracle DISCOVERER. Responsible for complete life-cycle involved from strategy designing to implementation. Created tables, indexes, views, cursors, triggers, packages, procedures, and functions. Migrated client/server application on the web using oracle 10g. Used different modules in Oracle Enterprise Manager (OEM). Experience in database administration (DBA), performance tuning, database recovery, database security, auditing etc., including database enhancement, data migration, database replication. Performed backups, exports and imports. Responsible for designing, analyzing and creating databases for over 40 clients. Estimate current and future requirements in terms of storage and other resources including capacity planning. Helping other developers to debug and write tuned code. Responsible for creation of entire infrastructure from scratch. Responsibilities included coordination of all new installations and software/hardware upgrades for existing clients, training of new company personnel, programmers and hardware technicians, as well as phone and site support for over 40 clients. > Use SQL*LOADER to import data from 3rd party.

EDUCATIONAL BACKGROUND

- Rutgers University, New Brunswick, NJ – Major - Computer Science, Minor – Economics

CERTIFICATIONS

- Salesforce.com Certified – Developer
 - Salesforce.com Certified – Administrator
 - Salesforce.com Certified – Platform Developer
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Sam Taylor

1 Hammock Beach Pkwy, Suite 200, Palm Coast, FL 32137

Sam.Taylor@coastalcloud.us

Consultant

Mr. Taylor has several years' experience on the Salesforce.com platform. As an employee of Coastal Cloud, he is focused on implementing the market leading Software as a Service (SaaS) solutions in multiple industries including Public Sector, Entertainment, and Non-Profits. He is a Salesforce.com and internet security expert. Works well in varying roles including solution architect, developer, and customer relationship manager. Experience working on both large, multi-phase projects for public institutions and enterprise clients as well as more flexible projects for SMBs.

PROFESSIONAL EXPERIENCE

Coastal Cloud (2015-present) Senior Consultant

Responsible for the project management of client IT implementation projects. Overseeing successful client projects including those based upon Software as a Service (SaaS) solutions. As a certified Salesforce professional. Design, configuration and development work with Coastal Cloud clients in a variety of industries.

- **KY WIOA Pilot Program (Nov 2015-Jan 2016):** Developer on team working on new Salesforce implementation for employment-related state agencies. Led user training, Q&A sessions and ongoing development after initial delivery.
- **Recognition Media (Mar 2016-present):** Technical architect and lead support point of contact – project involved building a Sales Cloud org, Marketing Cloud instance, and Jitterbit integration with 3rd party custom online registration platform to unify reporting and marketing automation.
- **K12 Billing Upgrade (Apr 2016-Mar 2017):** Developer for Salesforce (formerly Steelbrick) Billing implementation for customer. Also researched, tested and delivered methodology for deploying reference data between sandbox and production orgs for project delivery and long-term client internal development.

Skip Barber Racing School Braselton, GA (2014-2015) Manager, Business Operations

- Created and updated financial planning tools for executive management team.
- Created new reconciliation process of customer deposits totaling over \$2.4 million, reducing time needed to run reports by over 80%.
- Audited accounts payable process and corrected improper documentation of payments and purchase orders.
- Developed new KPIs and reporting structure to upper management accurate, real-time sales and operations data.
- Implemented project management procedures company-wide under mentorship of COO
- Implemented and enhanced Salesforce.com to support all marketing, sales and eCommerce functions across the business.

Business Analyst

- Supported CFO with report writing, and internal forecasting as well as ad-hoc financial analysis.



- Reduced VOIP/Internet costs by 50% by managing the transition to new fiber, VOIP and PBX systems with independent IT contractor.
- Took ownership of Salesforce Sales Cloud and worked with developers to fix poor coding, redundancies and improve usability (with zero previous experience).

Jasper-Eco Tech (2012-2014) Director, Product Development

- Developed over 12 new lighting products, from initial specification to final delivery to customer.
- Wrote technical and sales documentation for new products, trained over 50 salesmen and customer support associates.
- Built comprehensive “all-in-one” Excel energy calculation, customer savings and quotation files.
- Performed market research for strategic planning with CEO.

EDUCATIONAL BACKGROUND

- Six Sigma Green Belt, Georgia Institute of Technology
- Master of Science, International Economics, Florida Atlantic University
- B. A., Economics, Flagler College
 - Quantitative Data Analysis and Visualization: STATA
 - Google Suite: Analytics, AdWords, Webmaster
 - CRM Tools: Salesforce
 - Microsoft Office: Word, Excel, PowerPoint, Access
 - Accounting Software: Quickbooks Enterprise
 - Operating Systems: Windows, Linux, Mac OS
 - Web Development: HTML, CSS, WordPress

CERTIFICATIONS

- Salesforce.com Certified – Administrator
 - Salesforce.com Certified – Sales Cloud
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Tyler Martin

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Tyler.Martin@coastalcloud.us

Consultant / Developer / Business Analyst

PROFESSIONAL EXPERIENCE

Coastal Cloud (2015-present) Consultant / Developer / Business Analyst

- WellCare Health Plans – Salesforce Configuration and automation development
- CareerSource Florida – Campaign Management
- JaxBridges – Salesforce Community Training Lead
- Ned Davis Research – Salesforce Quote/Order Process Automation
- Kentucky Workforce – Business CRM Phase 1-2, Visual Workflow
- Kentucky CED – Company Survey Automation, Visual Workflow, Process Automation
- World Emblem – Salesforce Build, Task Automation, Visual Workflow
- CSpire – CPQ Implementation, Salesforce Build, Process Automation, Visual Workflow
- Moran & Company – Salesforce Build, Workflow Automation, Custom Reports
- Tribalco – Complex approval processes, visual flow for field validation.

EDUCATIONAL BACKGROUND

- Daytona State College - BAS - Supervision and Management

CERTIFICATIONS

- Salesforce.com Certified – Administrator
 - Salesforce.com Certified – Developer
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Diane Elkhoury

1 Hammock Beach Pkwy, Suite 200, Palm Coast, FL 32137

Diane.Elkhoury@coastalcloud.us

Change Management Consultant

Experienced business consultant and training expert with extensive background in business analysis, implementation, project management, eLearning, instructional design and training. Extremely passionate about Salesforce and relishes the challenge of Salesforce implementation projects through to systems training. A certified Project Manager (PMP) as well as a certified Salesforce Administrator and Sales Cloud Consultant with experience on systems implementation (Salesforce and SAP).

Experience

Salesforce Business Analyst at Coastal Cloud

November 2017 - Present

- Communities
- Workflows
- Process Builder
- Training Content
- Training Workshops

Salesforce Consultant at Ohio Crime Victim Justice Center

June 2017 – December 2017

- Salesforce implementation for Non-Profit

Project Manager/ Data Lead / Coordinator at Verizon

January 2012 - March 2014 (2 years 3 months)

- PMO (Project Management Office) responsibilities

Senior Training Analyst/Instructional Designer at New York Presbyterian Hospital

March 2010 - May 2011

- Develop and deliver training manuals and user guides for all Microsoft applications from

Regional Project Manager (Public Sector) at A4E London UK

January 2003 - October 2006

- Works cross functionally with the global team to implement company HR learning solution systems.
- Source international vendors in UK, Israel, Turkey, South Africa etc. to deliver project deliverables
- Responsible for planning, developing, and managing the execution of a learning center network
- Involved with implementation and testing of learning systems with each contracted Organization

Regional HR Implementation Training Consultant at Workstream / Accenture South Africa

January 2002 - October 2006

- Leads the information gathering and document study of the HR department
- Developed a comprehensive DITL training program
- Leads the project team on execution of Training deliverables throughout South Africa

Education



University of West London

BBA, Bachelor of Business Administration Degree, Business, 1996 – 1999

Certifications

- Certified Salesforce Administrator
 - Certified Sales Cloud Consultant
 - PMP – Project Management Professional
 - MCT – Microsoft Certified Trainer
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