



Proposal for the City of Gainesville, Florida

Enterprise Permitting & Land Management Software

RFP NO. DODX-180049-GD

January 31, 2018
3:00 PM

Prepared by

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

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

PROJECT: Enterprise Permitting & Land Management Software

RFP/RFQ#: DODX-180049-GD

RFP/RFQ DUE DATE:

Proposer’s Legal Name: Online Solutions, LLC
Proposer’s Alias/DBA: Citizenserve
Proposer’s Address: 1101 E Warner Rd, Suite 160
Tempe, Arizona 85284

PROPOSER’S REPRESENTATIVE (to be contacted for additional information on this proposal)
Name: Jim Garvey Telephone Number 800-325-9818 x703
Date: 1/27/2018 Fax Number 800-325-9818
Email address jim@citizenserve.com

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

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:

(CORPORATE SEAL)
PROPOSER:

Signature
By: _____

Title: _____

Signature
By: **Jim Garvey**

Title: **Manager**

COVER LETTER

January 31, 2018

Gayle Dykeman, Senior Buyer
City of Gainesville
General Government Procurement
200 East University Avenue, Room 339
Gainesville, Florida 32601

Ms. Dykeman,

Citizenserve® is a comprehensive software and service solution for community development departments that covers all aspects of permitting, planning & zoning, code enforcement, licensing and inspections. The software not only encompasses internal functions but also expands into an electronic relationship with citizens, contractors and businesses involved in the processes of permitting, licensing, inspections and enforcement. **The opportunity for increased service for citizens, efficiency and costs savings are profound using Citizenserve.**

The software was developed from the beginning as an internet software service, commonly referred to Software-as-a-Service (SaaS) or Cloud computing. This is the future of software. The benefits include:

1. You pay as you go; no upfront capital costs, no long-term commitments, and no hardware or software to install and maintain.
2. You are up and running quickly. You only need an internet connection and a browser. Citizenserve works with many browser and device combinations (iPad, Android, etc.).
3. You are really paying for service not software. The Citizenserve subscription comes with unlimited customer support. This includes setting up new permits, changes in fees or letters, creation of new reports and processes, etc.
4. You get frequent updates. Through our unlimited customer support we constantly improve the service and make updates to the software monthly.

Citizenserve is already up and running with thousands of users. We simply need to add your users to the software and configure your implementation with your permit types, applications, fees, violation types, letters, etc. Citizenserve pricing is based on an annual subscription per named user. The number of users can be increased or decreased at any time. The subscription includes all components, all features and unlimited support. Because Citizenserve comes with unlimited customer support there are no surprises. Need a new report, its included! Need to change your setup after going live, its included! Need additional technical or end-user training, its included!

Citizenserve is low cost, comes with unlimited service, does not require a multiyear commitment, provides world class data protection, disaster recovery and business continuance assurance, and has over fourteen years of success solving the problems you seek help with.

Online video demonstrations of Citizenserve can be viewed at the following links:

<https://www.citizenserve.com/portfolio/#>

<https://www.citizenserve.com/blog/>

No subcontractors will be used in performance of the work proposed. Online Solutions, LLC is debt free, litigation free and investor free. Online Solutions, LLC has not been involved in any customer disputes or litigation...ever. Online Solutions, LLC and its' employees are free of any conflict of interest with the City of Gainesville. We have received, reviewed and acknowledge Addendum No. 1, Addendum No. 2, Addendum No. 3 and Addendum No 4. The pricing in this proposal is valid until December 31, 2018.

Sincerely,

Jim Garvey
Manager
Online Solutions, LLC
1101 E Warner Rd Suite 160
Tempe, AZ 85284
800-325-9818 x703
jim@citizenserve.com

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SCOPE OF WORK

We understand the goal of the project to be to deliver a comprehensive and integrated turn-key system for permit/license applications, fees, workflow and review, document generation, inspection completion and reporting. Training of all users and ongoing support is also a requirement of the project as well as ongoing enhancements and workflow improvements once the system is live. We also understand the solution must be easy to use and browser/device independent. The following are specific features of Citizenserve in the major requirement categories:

Plan Review and Permit Tracking: Citizenserve supports a wide-variety of planning and permitting projects. An unlimited number of permit application types can be created. Each application type can have an unlimited number of custom fields. The creation of the custom fields is integrated with the online or citizen application. Each custom field can be controlled as to whether it appears and works the citizen application. An unlimited number of permit documents can be created including permits, placards, certificates of occupancy, etc. Each permit document can have mandatory or warning conditions based on issues with the file. Such as a contractor has an expired license or a balance is due. Each application type can have a specific review route or workflow route. Each workflow route can contain different activity types and assignments. An unlimited number of activity types can be created in Citizenserve. Each activity can have its specific form or custom fields. Each activity type can also have template outputs. A review activity can be completed and template e-mail sent to the contractor or other people involved in the project. An unlimited number of inspection types can be created in Citizenserve. Each inspection type can have its specific form or custom fields and template outputs such as an inspection report. Templates can be created as letters or e-mails or any other combination of text and graphics. Documents from the file can easily be included in communications, integrated in the templates or attached. Forms and documents can be changed and configuration changes made on the fly with no system downtime. Documents can have associated processing, such as the assessing of a late fee when late notices are generated.

Building Permit & Certificate of Occupancy Issuance: Application review activities and inspections can be easily tracked in Citizenserve and optionally shown in the citizen application. A complete history of permit and application activity is maintained with the file. All permit documents can have specific conditions that must be met before issuance.

Inspection Tracking and Scheduling: Citizenserve has a built-in device/browser independent calendar feature that allows inspections and tasks to be easily assigned and managed. When task or inspections are assigned to a user there is an option to have an e-mail reminder sent. The e-mail can contain an ICS file that adds an appointment to the inspectors Outlook or Google calendar. Inspections are activities in Citizenserve and all activities can be setup as custom forms with template outputs. For example, an inspector can receive and inspection request while in the field, complete the inspection while on the

construction site, fill out the inspection form and generate an inspection report for mailing or e-mailing to a citizen or contractor.

Code Enforcement-Compliance: Citizenserve has robust case management capabilities. Code enforcement cases can be created with multiple violations. Each violation can be tracked and resolved separately. An unlimited number of people, businesses, and other contact types can be associated with cases. Each person or entity can have a different association with the case. An unlimited number of notice or letter types can be created. Each letter type can be completely customized and letters can initiate database processing such as fee assessment or file status changes. Code enforcement case processes can take a case from courtesy notice, citation, abatement to court. Violations can also be associated with specific permits or licenses.

Business/Contractor License Management: Licenses have a file structure where multiple licenses can be tracked and managed under one business. Permits and licenses are similar in Citizenserve so if you are familiar with one the other is easy to use and understand both from an end user technical user perspective. An unlimited number of license applications can be created with an unlimited number of custom fields. The custom fields can be visible on the citizen application and have specific behaviors necessary in electronic relationship and process. For example, a field for a SSN or Federal Tax ID number can be created for an application where it is entered once in the application yet never visible again via the citizen application. Each license application can have one or multiple review or work flow routes. Each review or activity in a workflow can have a custom form and template e-mails or letters. License documents can have mandatory or warning conditions. An unlimited number of inspection types with custom forms and fields can be setup in licensing. Custom renewal processes can be created. Renewal letters can direct businesses and individuals to the web site/citizen application for renewal and payment. Within the application forms custom fields can be dependent on other custom fields. For example, if a user selects a business type that requires additional information those fields will be displayed.

Finance: All license, permit and code enforcement fees can be tracked and managed in Citizenserve with related general ledger codes associated with financial information.

Land Management and Tracking: Maintaining property data and GIS layers in Citizenserve is a standard part of the Citizenserve subscription. Properties can have an unlimited number of custom fields. Property data is pulled into files or projects and maintained in an as-is state for historical reference. Custom fields in Citizenserve can include http links to external systems such as external GIS systems or document management systems.

Renewable Permitting & Licensing: The renewal process is completely customizable in Citizenserve. Letters or e-mails can be generated, necessary inspections can be automatically scheduled, and document can be generated and distributed. Changes in the process are included in the unlimited support.

Public Online Application Submittal and Inquiry Capabilities: The Citizenserve citizen access portal is a configurable and customizable solution that allows citizens, contractors and businesses to participate

electronically in the process of permitting, licensing, code enforcement, inspections and requests. Your constituents can apply online, pay online, upload documents, send messages, schedule inspections, request services and get information.

Mobility-In Field Usage: Citizenserve is fully functional in the field. There is no designation between desktop or tablet users. Citizenserve uses a device and browser independent architecture. There is no software required on the local desktop or device. A LTE or 4G broadband data plan is recommended on mobile devices or laptop computers.

Reporting: The creation of custom reports is included in the subscription. Reports can be organized into user specific folders and shared with other users. Reports can be exported in PDF format or Excel. A reporting wizard is built into the application that allows users to create their own reports.

Document Management and Review: Citizenserve has built in document management and currently supports a 100% paper free environment. In addition to incorporating all submittal documents into the license or permit applications and review process there is a built in markup and comment tool. Links to other systems such as online chat sessions can be easily setup on the citizen portal and embedded in applications.

Integration capability with Financial Management System: The fee schedule for licensing and permitting can record accounting general ledger codes for each fee type and an export can be created for allocation in financial systems. Custom integration can be via web services or by exporting a daily closeout file for input into the general ledger.

Integration capability with Geographical Information System (GIS): Google Maps is built into Citizenserve. Links to external systems can be setup easily. Keeping property information and GIS layers updated is included in the subscription. Custom real-time integration with an ESRI GIS server is also possible via web services integration for an additional charge.

PROJECT APPROACH

Implementation Approach

Our project approach involves the following setups oftentimes by department or function:

1. **Project Kickoff:** The first portion of the project is the project kick off meeting which will include the key client team and the Citizenserve engagement manager. Key components of the project will be discussed including roles, responsibilities, timeline, objectives. The Citizenserve engagement manager will provide a Setup Checklist of supporting documentation that will be required to begin the setup. The supporting documentation typically includes things like copies of permit applications, fee structures, notices and forms, etc.
2. **Completion of the Setup Checklist:** The client team will work to gather all documentation and information included in the setup checklist
3. **Initial setup:** The Citizenserve engagement manager will work from the information on the setup checklist to configure the system, typically the initial setup 50% of the entire setup.
4. **System Walkthroughs:** Once the initial setup is complete a weekly meeting will be scheduled with the client team and the engagement manager. During the walkthrough meetings the team will review each area of the system and make a list of changes or additions. The walkthroughs are an iterative process that allows the client to clarify or improve upon existing processes and configure Citizenserve to support those processes.
5. **Data Migration:** Once the setup is nearly complete the Citizenserve team will begin creating programs to migrate and import the client data. The client will have the opportunity to review the migrated data; changes will be made to the migration script as needed. The data migration import can be modified and run as many times as needed to ensure accuracy of imported data.
6. **Training:** One to two weeks before go live; staff members will be trained via web conferencing in small groups. Each training session will focus on that groups core job responsibilities. Most users attend 1 or 2 ninety-minute training sessions, additional one-on-one training sessions can be scheduled for users who would benefit from additional training. Our cost proposal also includes 5 days of on-site training.
7. **Go Live:** Final data is typically provided on a Friday afternoon. Over the weekend all test data is removed from the system and the data is imported. The weekly walkthrough meetings typically continue for 2-4 weeks after go live to identify any issues or changes that could be beneficial.
8. **Ongoing Support:** Users can request support for any needs or questions through the Citizenserve support center. Response time to a support request is within 4 hours, urgent requests

receive a response within an hour. Our support staff is available to help you utilize existing and new features as well as modifying your setup for process changes as needed.

Risk Management

There is a reason most IT initiatives fail, especially in government. The City's staff needs to come up with requirements and plan for a budget. The requirements determine a scope for the work the vendor is to perform. Once the scope is complete the vendor needs to move on to the next project and the City is stuck with whatever was delivered for the budget. The vendor typically provides support within the scope to fix bugs or issues under a maintenance agreement. During a project understanding of the requirements often change, sometimes City staff changes and the perception of scope or requirements change. Technology can also change and oftentimes there are good ideas that will help improve processes and service to citizens. What if these ideas weren't developed or understood and stated in the scope and requirements?

With Citizenseve the hardware and software implementation is already complete. It literally takes minutes to setup your installation, create departments and users. We can jump right into setting up permit and license applications, fees, workflows, system outputs, etc. Because we cut out most of the doldrums of the traditional software model being an internet based software and service we can offer unlimited support for our customers. This means there really isn't a scope and new requirements are included in the subscription. This is one of the reasons Citizenseve has never had a failed implementation.

Critical success factors during implementation include:

- 1) Getting us the information we need at the beginning of the setup.
- 2) Making sure key stakeholders and key users are attending setup meeting and walkthroughs.
- 3) There is always some resistance to change and disagreements among staff members. Strong executive sponsorship is necessary to lead the troops to the finish line.

Issue Management

We keep an issue log with who is responsible for items that come up and what the plan is for resolution. If there is a problem issue we will need the executive leadership to make the call.

Quality Assurance

We focus on getting the initial setup in front of key stakeholders quickly to insure the setup is going in the right direction. We also do frequent walkthroughs with the key users during the project. It is important for these meetings to occur once or twice a week during setup. Setup is iterative process until the key stakeholders and key users are ready to go live. Regular meetings and engaging key personnel are important aspects of the quality of the initial setup.

Data Conversion

Our team developed custom systems in the 1990s for state and local government completing many major projects in community development, case management and financial systems. For the past 13 years we have worked exclusively in community development and have extensive experience working with community development data such as permitting and licensing data. We have extensive experience with legacy systems and the architecture of systems development and databases extending back to the late 80s. In our business we are frequently tasked with migrating data from twenty year old systems and getting it done efficiently and quickly. Our approach is to first complete the setup of your permit and license applications and fees in Citizenserve. Then we map the data from legacy systems to the Citizenserve setup. Once this is complete we write a migration script and run a test migration. We do walkthroughs with key users to make sure files are getting setup properly. We have a test migration environment where we can do this or we run the migration into production. All migrated records are marked so we can delete the migration and rerun it. With Citizenserve we can do the migration before going live, we can also do the migration after the system is live. Some of our customers opt to start using Citizenserve for new records and close out files in their older systems. Depending on the implementation plan, we can also run the migration by department if the departments are going live separately.

A data conversion environment is available for test runs of the data migrations. Additionally a test environment is maintained for new features. Setup and implementation takes place in production because Citizenserve has an on-the-fly configuration capability.

Training

We use web conferencing, GoToMeeting, for all training and support. Initial training is usually two or three 90 minute sessions in small groups of three to five users. We can transfer screen control to the users so they get experience using the system during the training. Because we offer unlimited support which includes ongoing training the pressure to learn everything you will ever need to know in a one-time classroom training doesn't exist. Ongoing training included in support can be end user training or technical training.

Within the system the permit or license application instructions are usually where staff or the public might need help. Links can be embedded in the applications to help documents. There is also context sensitive help that can be placed on each field in the application.

If we find documentation is necessary at any point in time our support staff can assemble written instructions or a training video for an additional cost to be determined based on the documentation needs.

The Citizenserve subscription includes unlimited support. This support includes unlimited end user and technical training. We use web conferencing for training. Any of the web conferences can be recorded and edited for later viewing. In most cases embedded help and training is necessary to explain the

specific permit or license process rather than how to use an internet browser-based software application.

The configuration of Citizenserve is mostly performed using HTML and SQL scripting. These skills are helpful for any technical users configuring the system. The user subscription includes unlimited support which includes unlimited technical training. Administrative support is included in the subscription. So we can either provide support to administrators or provide direct administrative support as required or desired.

Customer Service

All Citizenserve users are on the same version of the software; this is the essence of internet software that delivers continuous and rapid improvements. We have a support line that users can call anytime. This includes end user support and technical support. The software has a built-in support center and we encourage users to use this for submitting requests. Support requests can be marked as standard or urgent. Standard requests are resolved in four hours, urgent requests within an hour. We realize that sometimes support is needed when a customer is waiting at the permit counter, so urgent requests get jumped on by the support team.

Support requests can range from help dealing with a complex permit issue, creating a custom report, requesting additional training, setting up new permit or license applications, setting up new fee schedules, creating or modifying letters or other system outputs, changing workflows, changing or creating inspection forms, setting up a new process such as a batch letter, etc. We also frequently help users with browser configuration issues and sometimes desktop support. If we need to see what the user is seeing or show them something we initiate a GoToMeeting conference. Using web conferencing for training and support allows us to provide higher quality resources in a timelier fashion while providing consistency in the people your staff will be working with.

Software updates are rolled out twice monthly. If the update addresses an issue that was part of a support request, like adding a new feature, the user receives an e-mail noting resolution. All other users receive a notification on their home page about the recent changes.

Updates are performed off hours and involve a two-minute application reload. Citizenserve is architected with an on-the-fly configuration. New permits, licenses can be added, license and permit applications can be changed while the system is live. No down time is required for system configuration changes. This is important because the citizen portal is a 24/7 operation.

PROJECT TEAM AND SCHEDULE

Project Team

The following Citizenseive staff will be assigned to the project:

Daniel Burt – Citizenseive Engagement Manager

Dan has a degree from Arizona State University in Public Policy. Dan has recently led implementations with Walton County Florida, St. Charles County Missouri, Urbana Illinois, Mount Prospect Illinois, and Merriam Kansas. Dan will be responsible for implementation and will also be the lead on training and support.

Syama Pisapati – Citizenseive Engineer

Mr. Pisapati is a software architect with 15 years of experience architecting, developing and implementing software solutions for online retailers and municipalities. Mr. Pisapati has a Master of Science in Information Systems from Arizona State University.

Ray Barker – Project Manager

Ray Barker is an experienced IT executive and has acted as the central resource for sales, marketing, product development, and product support in the education and government industry. Ray certified as a Project Management Professional (PMP #1647672) in July of 2013 and is working toward his Project Management Professional (PMP) certification. Ray is currently an Account Manager with Citizenseive. He serves as the interface between customer service and existing Citizenseive customers. He manages relationships with Citizenseive customers in order to ensure their continued success in using Citizenseive for their community development needs. Before coming to Citizenseive, Ray was the Vice President of Academic Technology at Education Management Corporation (EDMC). At EDMC, Ray manages the Student Success Portfolio of Services for the 140,000 students represented with Argosy University, South University, The Art Institutes, and Brown Mackie Colleges. In addition, Ray has held the Chief Executive Officer role for two software companies serving the higher education industry. At rSmart, Ray executed the strategic and tactical growth plans for this early stage, open source, application software provider. He executed fundraising efforts to ensure the company's continuing success by presenting the company's ongoing strategic product/market vision and operating business plan to venture funds. In this role, he closed a \$1.8M investment round of funding. For UNICON, a leading provider of enterprise portal and learning management systems, Ray executed the company's turnaround strategy encompassing the transformation from a service provider to a product company and the acquisition of an established competitor. UNICON supported over 450,000 students in 10,000 higher education institutions.

Gainesville, Florida	PROJECT PLAN (by Department)	
Phase/Task	Responsible Parties	Duration
Planning Define/Document all processes Identify all forms, notices, standard letters Identify all information required for setup Identify workflow routes Identify and refine gaps in current processes/policies Define user accounts and security rights Define integration requirements and gather data sources	Citizenserve Engagement Manager, Client Team	8 week
System Setup and Configuration Document integration specifications Define data migration specifications Setup basic installation Setup forms, notices letters Setup user accounts and rights System setup / configuration Create data migration programs Create integration programs	Citizenserve Engagement Manager and Engineer	8 weeks
System Readiness Review system setup configuration Refine configuration as needed	Citizenserve Engagement Manager, Client Team	4 weeks
Training Online training for basic users Online training for system administrators	All	4 weeks
Implementation Go live Supplemental online training as needed System monitoring and adjusting as needed	All	
Total Implementation Duration		24 weeks

Example - Statement of Work

1. Setup users and departments in Citizenseve
2. Setup security roles
3. Setup Permit and License types in Citizenseve
4. Configure Permit and License type on Citizen Portal
5. Configure review routes based on application types
6. Setup inspection types, checklists, and inspection reports (letter and e-mail formats)
7. Setup fee schedule for each application type, including late fees and interest
8. Setup case types, violation types and enforcement processes.
9. Setup system outputs, letter and e-mail templates
10. Import and geocode property data including parcel number, legal description and owner information
11. Import any GIS layers used in mapping and reporting
12. Setup payment gateway for applications paid for via the Citizen Portal
13. Setup integration points
14. Create data migration scripts
15. After setup is complete perform test data migration, walkthrough data migration with key users.
16. Train staff users in small groups, two 90 minute training sessions to start. Provide additional sessions where necessary.
17. Run final data migration before go live date
18. Provide end user and IT support.

MINIMUM REQUIREMENTS

There are extensive video demonstrations on our web site under the DEMOS and BLOG sections:

<https://www.citizenserve.com/portfolio/#>

<https://www.citizenserve.com/blog/>

There are also demonstration and training videos on our Vimeo page:

<https://vimeo.com/user52244410>

Suggested video demonstrations to watch:

<https://vimeo.com/247187597> (includes some information on configuration and administrative features)

<https://www.citizenserve.com/building-permit-software/community-development-software-ohio/>

<https://www.citizenserve.com/building-permit-software/community-development-software-illinois/>

1. Citizen Facing

The system will have a robust, intuitive citizen portal	The citizen portal is built into Citizenserve and included in the subscription. It is user-friendly and uses a HTML5 responsive design architecture which is device and browser independent. The citizen portal enables a complete electronic relationship with your constituents.
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2. Interface to City Payment system

Connection to end-to-end automated payment system	Citizenserve is integrated with over a dozen payment processors and gateways. The system can also be
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	configured so different departments can use different payment providers. Cashiering and features to create separation of accounting duties are available throughout the system.
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3. Issue permits/entitlement and licenses, each with its individual workflow

All permits and license types can have one or more automatic and/or manual workflows based on the permit or license type. Automatic workflows are created with the permit or license application type is submitted or added in the system.

4. Enables customers to schedule inspections

Enables customers to schedule building inspections via mobile enabled devices and links with voice recognition for phone requests for inspections	The citizen portal can be used to schedule inspections and a IVR system which support SMS texting and voice recognition is also available.
Enables customers to select whether the inspection is in the AM or PM	Inspection scheduling can be configured for AM/PM in the citizen portal configuration.
Sends customer an email to confirm a scheduled inspection	Automated templates can be configured to facilitate the inspection process, such as sending reminders and inspection reports.

5. Mobile-enabled

End-to-end mobile device enabled for internal and external users	Citizenserve is browser and device independent. Any device or browser can be used, this includes internal staff and the citizen portal.
Application, scheduling, tracking and payment for customers	Citizenserve is device aware and fully functional on mobile devices.
Management, reporting and tracking of staff	Citizenserve has metric, tracking and reporting capabilities. Creating new

	custom reports and metrics is included in the subscription unlimited support.
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6. Reporting, Benchmarking & Dashboard

Includes reporting capabilities, benchmarking tools and a dashboard	Citizenserve has standard reports, an end user reporting tool and the creation of custom reports is included in the unlimited support. Reports can be displayed on the user home page as metrics or links. Reports can also be put anywhere on the citizen portal for public consumption.
Easily create customized reports	The advanced search feature, end user reporting tool and custom reporting options allow for many options.

7. ArcGIS Services are source of spatial data

ArcGIS services published by the Property Appraiser, e911 and the City will be the source of spatial data	The pricing proposal includes integration with GIS and property data.
Ex.) zoning, homestead exemption status, jurisdiction, flood zone context area, historic preservation context area, wellfield context area, land use designation, Enterprise zones, CRA districts, Parking zones, Parcels, e911 addresses	Citizenserve supports having an unlimited number of custom property fields.

8. Parcel Based

All data has unique parcel number as unique id	Citizenserve supports parcel numbers and various options for property data configuration based file, permit and license types.
Ability to link to previous parcel number	Parent and child parcels as well as a complete history of files, cases, permits and

	licenses can be linked and tracked in Citizenseve.
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The proposal includes migration of the legacy data from Innoprise, BDS & eWacker. The format will be searchable.

Inspection routing, GIS features and GPS are available.

The citizen portal has search capabilities for citizens and any reports can be published on the citizen portal for public consumption.

Citizenseve charges a one-time fixed price for integration points of \$5,000. These can be accomplished using web services or a file upload/download approach depending on the system to be integrated.

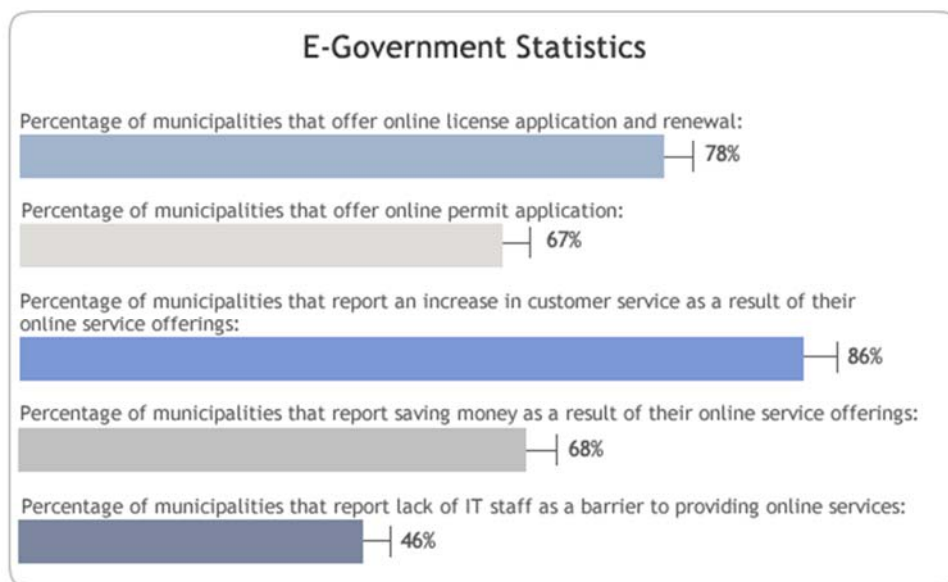
The citizen portal is browser and device independent and designed using a device responsive and aware design.

All permits listed in the current permit type list are supported and our support and implementation staff are skilled and experienced in simplifying the permit and license application experience for citizens, contractors and businesses.

CLOUD COMPUTING

With citizenseve® cloud computing you have access to fast, secure, leading edge technologies at a low cost. The citizenseve cloud was initially launched in 2002, and currently has processed over a billion transactions. Over the last 14 years the citizenseve cloud has had no data loss, no security breaches, and has maintained 99.99% system uptime.

As citizens' expectations for online services continue to grow, state and local agencies are pressured to provide online services without a significant increase to their budget or IT staff. With the citizenseve cloud, get your constituents' online services up and running quickly while providing an easy-to-use solution for your staff.



Source: Norris, D., & Reddick, C. (2011). *The Electronic Government Survey*. Washington, DC: International City/County Management Association.

FEATURES

Citizenserve offers robust solutions filled with rich features in a user-friendly interface. All of our components, features, and services are included with every user subscription with no hidden fees. Through our Concierge Program you'll have all the help you need configuring, implementing, and using citizenserve.

Give your citizens, contractors, and business owners access to your services 24-7 through the citizenserve device and browser independent online portal.

A fully mobile solution provides your inspectors with the ability to access all system features and functions from the field using a tablet or laptop.

Load your GIS layers such as zoning districts and parcel lines. View or look up your files or inspections due on a map.

Create your own custom reports with the report writer or let our support engineers create reports for you at no additional costs. You can easily add pie-charts, bar-charts, and line graphs to your reports.

“We began using citizenserve in 2010, the internet based feature and customization were the initial selling points for our town; however, the service response and continuing improvements to the software has been the real key to the software.”

-Town of Duck



PERMITTING

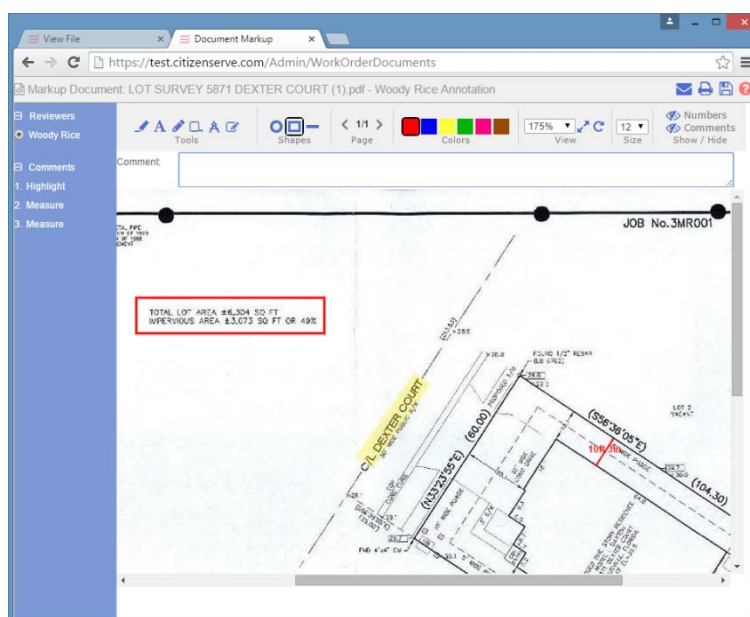
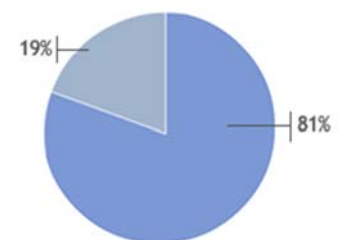
With citizenserve permitting software your contractors, architects, engineers, and property owners can apply for a permit, upload digital plans, and pay application fees online. Municipalities have reported online applications through the citizenserve portal making up more than 80% of total permit applications.

Create customized workflow routes that mimic your plan review process and digitally track plan review status and comments. With the document markup tool measure distances, add comments, shapes and highlights to plans and documents.

Custom rules will ensure permits are not issued without the required approvals. After construction begins inspections can be requested through the online portal, inspectors can enter inspection results directly from the field using a tablet or laptop. After the final inspection has been completed easily generate a certificate of occupancy that can be printed, emailed or downloaded by the applicant, contractor or property owner.

Move to the citizenserve cloud

Municipalities have reported online applications through the citizenserve portal making up more than 80% of total permit applications.



PLANNING & ZONING

Citizenserve planning and zoning software completely automates the process of application, review, routing, resubmittals, and public notification.

Applicants can submit applications, attach plan documents, and pay application fees through the online portal. Applications are automatically routed to the appropriate reviewers based on your workflow routes. Track due dates for public notice and legal advertisements based on the hearing dates you select. Build your plan review report by selecting comments from a custom library of review comments. Electronically comment on plans with the document markup tool by adding notes, highlights, and other annotations. Through a flexible and user-friendly interface, citizenserve helps keep your projects organized and on schedule.

“ The online portal has really helped cut down on the daily phone calls asking for a status on projects, with the reporting functions we can accurately track our review timelines.”

-City of Lewiston

The screenshot displays the Citiserve web application interface. The top navigation bar includes links for Home, My Activities, Create, Search, Reports, Support Center, Administration, and Logout. The main content area shows a 'Permit Project' for 'File #: 15-000240' at '1 FRANEY RD SOMERVILLE MA', with a description 'building something'. Below this, there are tabs for Permits, Reviews, Inspections, Activities, Documents, Contacts, and History. The 'Reviews' tab is active, showing a table of review activities. The table has columns for Route Name, Status, Permit#, Start, Complete, and Duration. Below this, there is a detailed view of a 'Special Permit Review' with columns for Activity Type, Department, Assigned To, Status, Due, and Complete. The data in the table is as follows:

Route Name	Status	Permit#	Start	Complete	Duration
Special Permit Review	Under Review	PZ15-000093	04/10/2015	Complete	0 days

Activity Type	Department	Assigned To	Status	Due	Complete
Plan Review	Planning and Zoning	Melissa Woods	Approved	04/24/2015	04/10/2015
Pipe Route	RD Building	Paul Nason	Approved	04/24/2015	04/10/2015
Legal Advertisement	Planning and Zoning	Lori Massa	Complete	05/01/2015	04/10/2015
Advertise Notice	Planning and Zoning	Lori Massa	Complete	05/01/2015	04/10/2015
Planning Board Meeting	Planning and Zoning	Lori Massa	Approved	05/15/2015	04/10/2015
City Council Meeting	Planning and Zoning	Lori Massa	Approved	05/22/2015	04/10/2015
Decision Filing	Planning and Zoning	Lori Massa	Pending	05/15/2015	

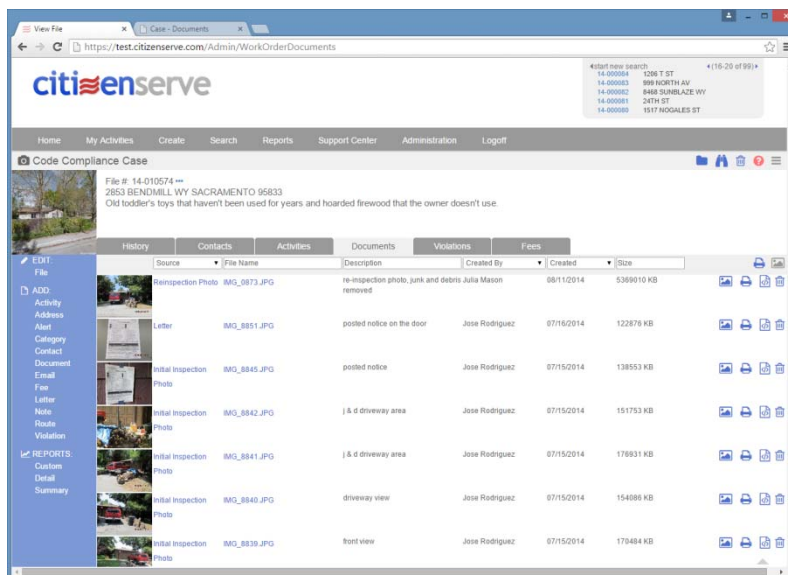
CODE ENFORCEMENT

Citizenserve code enforcement software completely automates the process of opening cases, scheduling inspections, recording violations, and coordinating resolutions. Property ownership, inspection results, photos, notices, violations, and notes become an electronic record of each case.

As a fully mobile solution, inspectors are notified of inspections due, can lookup property ownership information, add violations, take and attach photos, generate tickets or notices of violation, and schedule re-inspections all in the field from a tablet or laptop.

“ Citizenserve has made it possible for our officers to have access to records and the ability to enter case data in the field. This allows the officer to be accurate to the minute with code enforcement, keeping the officer in the field and not at a desk.”

-City of Boulder



BUSINESS LICENSING

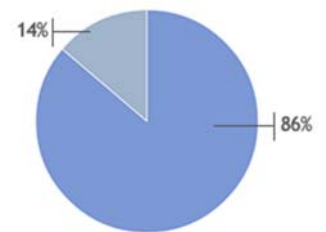
Citizenserve business licensing software automates the application, payment, review, and renewal of business licenses.

Businesses can submit applications, upload copies of required documents and pay application fees through the citizenserve online portal. Create customizable deficiency checklists based on application types and quickly generate and email of Deficiency Notices. If an inspection is required before issuance, citizenserve can automatically notify your inspectors of pending applications and required inspections. Upon final approval, generate License Certificates and ID cards that can be mailed, emailed or downloaded from the online portal.

When it comes time for renewal, create batch email or mail renewal notices quickly. Citizenserve can be configured to automatically calculate penalties and interest for late renewals. License holders can submit required documentation such as proof of identity and insurance verification through the online portal as part of their license renewal.

Move to the citizenserve cloud

Municipalities have reported online applications through the citizenserve portal make up more than 85% total business license applications.



REQUEST TRACKING

Citizenserve request tracking software automates the assignment, routing, and fulfillment of your citizens' requests.

Your citizens can submit requests on your municipal website through the citizenserve online portal. With configurable automatic routing based on request type, appropriate staff will be notified and can respond to your citizens' requests immediately. Communicate with your citizens effectively and efficiently by using citizenserve's automatic notifications, automated letters, and email templates.

“After years of research and studying various case management programs, we have found citizenserve to be the most comprehensive and user friendly solution on the market.”

-City of Sacramento

The screenshot shows the Citizenserve web application interface. The browser address bar displays the URL: https://test.citizenserve.com/Admin/WorkOrderNotes?Action=ListNotes&cidDisplay=none&WorkOrder_ID=73204257. The page title is "General Case" and the file number is "File #: 14-000080". The case address is "1517 NOGALES ST SACRAMENTO CA 95838". The case description states: "CALLER STATES THAT THE COMMERCIAL BINS AT THIS COMPLEX ARE NOT PICKED UP ON A REGULAR BASIS. STATES THAT THEY ARE OVERFLOWING WITH GARBAGE. STATES THAT AFTER IT IS EMPTIED THE REMAINING GARBAGE IS ENOUGH TO REFL. AT LEAST HALF WAY. CALLER STATES THAT THIS COMPLEX IS INFESTED WITH ROACHES, MICE, AND RATS. TAK". The page includes a navigation menu with options like Home, My Activities, Create, Search, Reports, Support Center, Administration, and Logout. The main content area has tabs for History, Contacts, Activities, and Documents. The "View File History: 14-000080" section displays case details:

Type:	Code	Status:	Closed
Parcel #:	25101816320000	Open Date:	01/02/2014
Owner Name:	PACCOYRORWERTES LP	Closed Date:	01/02/2014
Owner Address:	4209 ROCKLIN RD SITE 1	Disposition:	Work Completed
	ROCKLIN CA 95677	Responsible User:	Shawn Bartosh
Owner Phone:		How Received:	Phone
Categories:	Ann & Deeds	District:	2
Area:	4	Priority:	Normal
Legal Description:	THE E 56.31 FT OF LOT 32 AND THE S 100 FT OF THE W 112 FT OF LOT 33 ALL OF OAK RIDGE ACRES		
Approximate Location:	CORNER 34.250 600 FT NBL		

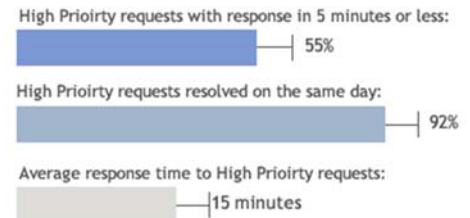
The "Notes" section shows a list of activities:

Date	Note Type	Note	Created By
01/02/2014 12:38 PM	RE-INSPECTION - Activity	1/5 Upon re-inspection the garbage around the dumpster is now in the dumpster. The dumpster is full. See photo, case closed.	Shawn Bartosh
01/03/2014 12:23 PM	INITIAL INSPECTION - Activity	1/3 Initial inspection - Apartment complex on the north side of the street brownish in color. From the public right of way I can see that this property is in a slight condition. At the trash can area there is garbage all around surrounding it on the ground see photos. As far as	Shawn Bartosh

CONCIERGE PROGRAM

Through our Concierge Program every user subscription comes with unlimited training and support at no additional cost. Your dedicated, certified support engineer and project manager will work with you to configure citzenserve to meet your needs. They will coordinate any other setup tasks such as data migration or system integration to ensure your success. When you need help our staff is available. Our certified support staff members are trained on all areas of citzenserve, and they will assist you with whatever you need. We guarantee response time of one hour or less on your high priority items; our average response time is fifteen minutes. For your standard requests, we will respond on the same business day, and our average response time is less than four hours.

Concierge Program Statistics



“When it comes to customer service and tech support the staff at citzenserve is at the top of my list ranking #1. I know they have many other users but when I contact them they make me feel like I am the only user with their personal, undivided attention.”

-Wood County

“We have been with citzenserve for a few years now and are very impressed with the level of service we receive and the speed of response. We would highly recommend them.”

-City of Athens

“My staff and I couldn’t be happier. Citzenserve has been fantastic in getting us up to speed and helping us with changes to our new procedures. It’s like dealing with good friends.”

-City of Oviedo

TECHNICAL ARCHITECTURE

Citizenserve is only offered as a cloud-based or software-as-a-service subscription. Citizenserve works on all contemporary browsers. For security reasons we recommend current versions of the major browsers, Internet Explorer, Safari, Chrome or Firefox. The unlimited support that comes with the subscription includes resolving browser configuration issues and sometimes desktop support if necessary. The application is HTML5 and JavaScript and does not require any applications be loaded locally on the desktop or device.

Citizenserve started 14 years ago running on a Java application server with a middle tier of Enterprise Java Beans using a back end database of Microsoft SQL Server. This is the same technology we use today although we incorporate much more JavaScript and HTML5 today as the current browser technology richly supports these features. Since we offer unlimited support to end users and technical staff we are motivated to keep the application easy to use and focus on usability. Our customers can submit support requests for new features and functionality. Updates containing new features and any fixes are rolled out twice a month.

We take advantage of opportunities to collaborate with our customers on new features and ideas which can expand our user community and make the software and service better. All new functions and features are included in the subscription. Citizenserve is essentially a pay-as-you-go service, we provide unlimited support and frequent upgrades to serve our clients and secure their annual renewals.

Client data is encrypted at the browser level using a VeriSign encryption certificate. Data cached in the browser is encrypted as well.

Citizenserve uses a Verisign certificate and all data sent over the internet is encrypted using HTTPS. A log of failed login attempts is monitored and maintained. A log of successful logins is monitored and maintained with IP address, Operating System and Browser version. Each file has a transaction/history log noting important changes to the file and who performed the change with a date and time stamp.

Security in the system is role based. Each department can have different roles setting create, view, modify, delete, delete file, edit closed files, edit completed items, assign activities and accept activities. Access can also be set to each module with access to code compliance, permitting, licensing, adding permits across departments, business licensing, violation tracking, fee tracking, edit payments and access to general cases. Each department can have its own permitting, licensing, code compliance and case configurations. For example, the health department can have its own permitting setup separate from the building department and all the associated rights. Rights can also be set to manage citizen permissions, to create, modify or delete. Management permissions are also set by department or sub department for managing configuration options, user accounts and running reports.

Personal identifying information can be setup on license and permit applications as masked so that municipal staff logged into Citizenseve cannot see information. License and permit applications can also be setup for the public that collect the secure information in the application process but that field is never shown again to the public. For instance, if applying for a business license the requirement is to collect a social security number or tax id number, this can be collected in the application but if the public user logs in again they can see information about their license but not the private information. That way someone gains access to the public user's account there is no private data showing.

Citizenseve has never had an electronic or physical security breach. Citizenseve has cyber security insurance in its coverage package and can name the City as additional insured.

Citizenseve is scanned daily by Intel McAfee Secure and Symantec (Qualys) for vulnerabilities and malware. Citizenseve uses Symantec Secure Site Pro with Extended Validation SSL Certificates.

Citizenseve uses secure FTP for data transfers and HTTPS for any web service interfaces.

Citizenseve has two geographically diverse data centers plus a standby facility. The data centers are located in the Southwest and Northeast. Both data centers have a 100% Uptime SLA, are Uptime Institute Tier III Design Certified and SSAE 16 SOC 1 Type II Certified.

Citizenseve has over 250 local government customers. With these customers we support thousands of end users on the same platform. Citizenseve was started 14 years ago as a cloud-based or software-as-a-service solution. Over the past 13 years we have exceeded 99.99% uptime. We have never had a security breach or lost data. In the IO Data Center Facilities the Citizenseve equipment is dual corded receiving power from two separate feeds including separate power supplies. The equipment itself has dedicated uninterruptible power supplies and staggered power to redundant power supplies. The database and application servers are backed up and replicated continuously to multiple locations. An indefinite log is kept so data can be restored to a point in time if necessary. We maintain several hundred terabytes of storage.

If a server fails, we have a backup server. If the facility fails, we have a geographically diverse backup data center. If our data center provider fails, we have a standby facility capable of restoring operations in less than an hour.

Physical security is managed by the IO Data Center, information about the facilities can be found at the following links:

<http://www.io.com/colocation/io-phoenix/>, <http://www.io.com/colocation/io-new-jersey/>



We limit the people who have direct access to the database and infrastructure. We maintain professional liability and computer crime insurance and can name the City as additional insured.

Citizenserve uses a virtual private network (VPN) for security between facilities and data centers. As well as a dedicated transport between the primary data centers. Backups are maintained in the data centers and standby facility, any external transport is encrypted. A perpetual log is kept of backups for archiving purposes.

The City can schedule regular downloads of the data in Microsoft SQL Server format to mitigate risks or concerns it may have.

User and Password Management

User accounts can be added through the administrator features in Citizenserve. This can be done via a support request or by an internal administrator. Typically a user account is marked as inactive if it is not being used. This preserves the work history of the individual user. Citizenserve supports a variety of password setting by customer. Strong passwords can be individually enforced as well as login attempts and password expiration. The citizen portal has different password requirements and citizens can use

the same password perpetually. Citizenseve monitors login activity storing IP address, MAC address, operating system and browser information for each login. Failed login attempts are monitored as well.

With Citizenseve data is not archived and there is a never a charge for storage. The City can get a copy of its data at any time and there is no charge to get a copy. The copy is provided in Microsoft SQL Server format.

There is a built-in browser and device independent calendar in Citizenseve. Appointments created in Citizenseve can be replicated on a user's Google or Outlook calendar by sending an ICS or meeting invite that automatically adds the appointment to the users Outlook calendar. A higher level of integration is possible using Exchange Web Services, this is an integration point and a one-time cost of \$5,000 is required.

PRICING PROPOSAL

The following quote has been prepared for you based on our understanding of your needs. The Citizenserve subscription is only based on named users with a one-time setup and training of \$600 per user. All modules, functionality, current and future features are included in the subscription. Support is unlimited, including setting up new processes, improving processes, making changes in existing configurations, training, custom reports and configuring new features.

Annual Subscription Fees	
User Subscriptions (70 users at \$75 per user per month)	\$63,000
IVR Annual Subscription Fee***	\$5,000
One-Time Initial Fees	
Training	\$14,000
Setup and Configuration	\$21,000
Project Management	\$7,000
Data Migration (Innoprise, eWacker, BDS)*	\$40,000
Systems Integration (Financial, GIS/Property, ProjectDox, SeeClickFix, Payment Processor, Synovia, OpenText)**	\$35,000
IVR Setup and Configuration***	\$5,000
Total One-Time Fees	\$122,000
Total First Year Fees	\$189,000
Each Additional Year Fees	\$67,000

*The migration can be completed before going live or after going live. The migration can also be completed at the department level if departments are going live separately based on priorities.

**Integration points are a one-time fixed price of \$5,000 and are optional. After the integration is developed and tested, support for the integration is included at no additional charge with the subscription. Payment Processor integration may involve an additional cost of \$5,000, if the City uses an existing integration or if the selected payment processor supports an existing gateway that is already setup there will be no charge for the integration.

***IVR is optional.

COMPANY INFORMATION

Citizenserve was introduced into the market in 2003, in response to the need for a low-cost, high efficiency community development solution for government agencies. Prior to the Citizenserve launch, our team worked with government agencies across the country for over a decade to design, implement and maintain custom software applications. Through these experiences, we gained first-hand, in-depth knowledge of community development needs. We discovered that many agencies had similar problems. Without a readily available solution to address these needs, many agencies were forced to spend hundreds of thousands of dollars developing and implementing software applications or rely on manual processes to track and manage community development activities. We applied the experience and knowledge gained from working with these agencies to create Citizenserve.

Citizenserve is 100% focused on community development solutions for e-government and has no other offerings. There is only one version of Citizenserve and all customers use the same version. As a cloud based software service Citizenserve is more like Amazon.com than traditional software, everyone uses the same version. There are over 250 jurisdictions using Citizenserve and thousands of end-users. All customers are state and local government entities.

Online Solutions, LLC (DBA Citizenserve) is a Nevada Limited Liability Company formed on March 7, 2003. Citizenserve is a private company and is debt and investor free. The company has been profitable for the last 10 years and has never had a litigation or dispute. We keep things simple so we can focus on our customers. The company has a subscription based model which provides a predictable and growing revenue stream. The company maintains high levels of insurance coverage for general liability, professional liability and cyber security. An insurance certificate naming the City as additional insured can be provided.

Combine the fact that Online Solutions, LLC is debt free with a 14-year history of being dispute and litigation free with a pay-as-you-go low cost subscription with unlimited support and an insurance package to back everything up...Citizenserve is about as low risk as it gets.

EXPERIENCE

As demonstrated with clients like the City of Sacramento, we excel in helping our clients migrate off of older more expensive, less efficient applications. Citizenserve provided a low risk opportunity for the City of Sacramento to get online quickly with minimal time and budgetary investments. Sacramento engaged Citizenserve to help them migrate from their legacy code enforcement application, Permits Plus from Accela Systems, to a web based, fully mobile solution to support the needs of the Code Enforcement and Dangerous Buildings Department. The Citizenserve team worked with the City of Sacramento to understand their objectives, to configure the Citizenserve application, to convert their data, and to integrate with Permits Plus and their GIS. Citizenserve has turned out to be an ideal solution for the City of Sacramento and they have realized significant returns in the form of case load efficiency and increased customer satisfaction. Contact information for the City of Sacramento: Judy Tapia, jtapia@cityofsacramento.org, 916-808-8670.

Citizenserve has very diverse experience in the Community Development arena and we have in depth experience with many legacy technologies. For example, when the State of Florida Fire Marshal needed to migrate off of four retiring legacy systems that included a Focus 4GL mainframe application and a PowerBuilder/Oracle based application we were able to setup Citizenserve to improve the processes in four functional areas and migrate all their legacy data. Details of this contract and project can be reviewed at the following link:

<https://facts.fldfs.com/Search/ContractDetail.aspx?AgencyId=430000&ContractId=D0147&Tab=0>

Contact information for the State of Florida Fire Marshal (Four Sections/Departments use Citizenserve):

	<p>Casia Sinco, Chief of Fire Prevention casia.sinco@myfloridacfo.com 850-413-3621</p> <p>John Walker, Inspections Manager john.walker@myfloridacfo.com 850-413-3656</p> <p>Karl Thompson, Plans Review Manager karl.thompson@myfloridacfo.com 850 413-3736</p>
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	Greg Frazier, Boiler Safety Manager greg.frazier@myfloridacfo.com 352-433-7097 Keith McCarthy, Regulatory Licensing Manager keith.mccarthy@myfloridacfo.com 850-413-3670
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Project Management is a critical component of all implementations performed by Citizenserve. Our projects are successful because of our attention to detail and execution of all areas related to the project. With all of our projects you will see a consistent methodology including the following elements, initial planning, creation of a project work plan, institution of project management procedures, management of scope and management of risks. We use web conferencing during implementation, training and for support. This allows us to provide significantly more qualified resources on projects and to provide for resource continuity that would be impossible otherwise. In other words, the people working on your implementation and training will be the people you work with for support. This is critical in complex permitting, licensing and inspection processes.

Attachment A BUSINESS REFERENCES

BIDDER: Online Solutions, LLC (Citizenserve)

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): customer since 2010 Project Amount \$ 34 users

Project Client Name: City of Titusville, Florida

Project Location: n/a

City, State Zip: Titusville Florida

Client Contact Name: Gary Stepalavich, Building Official

Phone Number: 321-567-3764 Fax Number: 321-383-5700

Email Address (if available): gary.stepalavich@titusville.com

#2 Project dates (i.e. 6/2009 to 9/2009): customer since 2010 Project Amount \$ 34 users

Project Client Name: City of Sanford, Florida

Project Location: n/a

City, State Zip: Sanford Florida

Client Contact Name: Darrel Presley, Director of Community Improvement

Phone Number: 407-688-5162 Fax Number: _____

Email Address (if available): darrel.presley@sanfordfl.gov

#3 Project dates (i.e. 6/2009 to 9/2009): customer since 2012 Project Amount \$ 13 users

Project Client Name: University of Florida
Project Location: n/a
City, State Zip: Gainesville Florida
Client Contact Name: Tony McMahon, Asst Building Code Administrator
Phone Number: 352-294-7111 Fax Number: _____
Email Address (if available): tcmahon@ehs.ufl.edu

#4 Project dates (i.e. 6/2009 to 9/2009): customer since 2017 Project Amount \$ 40 users

Project Client Name: Walton County Florida
Project Location: n/a
City, State Zip: DeFuniak Springs Florida
Client Contact Name: Rick Wilson, Special Projects Manager
Phone Number: 850-892-8155 x1055 Fax Number: 850-892-8454
Email Address (if available): wilrick@co.walton.fl.us

#5 Project dates (i.e. 6/2009 to 9/2009): customer since 2011 Project Amount \$ 64 users

Project Client Name: State of Florida Department of Financial Services
Project Location: n/a
City, State Zip: Tallahassee Florida
Client Contact Name: Casia Sinco, Bureau of Fire Prevention Chief
Phone Number: 850-413-3172 Fax Number: _____
Email Address (if available): casia.sinco@myfloridacfo.com

ADDITIONAL CUSTOMER REFERENCES

City of Urbana, Illinois (Population: 42,014)

Sanford Hess, IT Director

sfhess@urbanaininois.us, 217-384-2354

City of Merriam, Kansas (Population: 11,281)

Bryan Dyer, Community Development Director

bdyer@merriam.org, 913-322-5527

St. Charles County, Missouri (Population: 373,495)

Jared Agee, Director of Building and Code Enforcement

jagee@sccmo.org, 636-949-7900 x7279

Village of Mount Prospect, Illinois (Population: 54,167)

Joe Massani, Environmental Health Inspector

jmassani@mountprospect.org, 847-818-5310

City of Somerville, Massachusetts (Population: 75,754)

Goran Smiljic, ISD Superintendent

gsmiljic@somervillema.gov, 617-625-6600 x5610

Spanish Fork City, Utah (Population: 36,956)

Dave Anderson, Community Development Director

danderson@spanishfork.org, 801-804-4582

Wakulla County, Florida

James Melvin, Building Official

850-926-7636

jmelvin@mywakulla.com

City of Gulf Shores, Alabama

Shana Edmond, IT Systems Administrator

251-968-1130

sedmond@gulfshoresal.gov

City of Destin, Florida

Web Warren, Information Systems and Tech Director

850-337-3156

wwarren@cityofdestin.com

DRUG-FREE WORKPLACE FORM

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

Online Solutions, LLC (DBA Citizenserve) does:
(Name of Business)

1. Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, 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.
2. 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.
3. Give each employee engaged in providing the commodities or contractual services that are under bid a copy of the statement specified in subsection (1).
4. 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.
5. 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.
6. Make a good faith effort to continue to maintain a drug-free workplace through implementation of this section.

As the person authorized to sign the statement, I certify that this firm complies fully with the above requirements.

Bidder’s Signature

Date

**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.

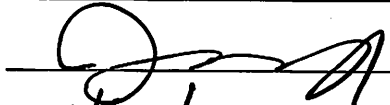
3. Question: Is the City requiring that the price proposal be submitted independent and separately sealed from the technical proposal? The following statement on page 2 of the RFP doesn't indicate specifically: *"The original, all copies, and the separate sealed price envelope, if required, must be submitted 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.

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: Online Solutions, LLC (DBA Citizenserve)

BY: 

DATE: 1/27/2018

CITY OF _____ FINANCIAL SERVICES
GAINESVILLE PROCEDURES MANUAL

41-424 Prohibition of lobbying in procurement matters

Except as expressly set forth in Resolution 060732, Section 10, during the black out period as defined herein no person may lobby, on behalf of a competing party in a particular procurement process, City Officials or employees except the purchasing division, the purchasing designated staff contact. Violation of this provision shall result in disqualification of the party on whose behalf the lobbying occurred.

Black out period means the period between the issue date which allows for immediate submittals to the City of Gainesville Purchasing Department for an invitation for bid or the request for proposal, or qualifications, or information, or the invitation to negotiate, as applicable, and the time the City Officials and Employee awards the contract.

Lobbying means when any natural person for compensation, seeks to influence the governmental decision making, to encourage the passage, defeat, or modification of any proposal, recommendation or decision by City Officials and Employees, except as authorized by procurement documents.

**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.

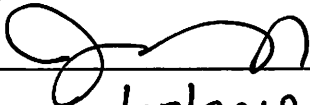
6. Question: Is the Procurement Division Survey to be completed ONLY if we are NOT bidding or does the form need to be completed and included in our response?
Answer: The Procurement Division Survey is to be completed ONLY if you are NOT bidding.
7. Question: Which financial system does the City currently 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: Online Solutions, LLC (DBA Citizenserve)
BY: 
DATE: 1/27/2018

CITY OF _____ FINANCIAL SERVICES
GAINESVILLE PROCEDURES MANUAL

41-424 Prohibition of lobbying in procurement matters

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Lobbying means when any natural person for compensation, seeks to influence the governmental decision making, to encourage the passage, defeat, or modification of any proposal, recommendation or decision by City Officials and Employees, except as authorized by procurement documents.

**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.

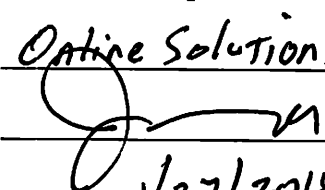
- 30. Question: How do you certify a contractor for permit licensure from other sources?
Answer: Some fields are flagged.
- 31. Question: Is the City looking for IVR?
Answer: Yes
- 32. Question: Do you require a local business license?
Answer: Not now, but perhaps in the future
- 33. Question: If there 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: Optine Solutions, LLC (DBA Citizenserve)

BY: 

DATE: 1/27/2018

CITY OF _____ FINANCIAL SERVICES GAINESVILLE PROCEDURES MANUAL

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Permit Input
BP-17-01002 : New Residential Dwelling
08241 NW 54TH ST
Weschester Lot 101

Innoprise Software

Community Development

System Functions

Jump To...

Permit | Land | Contractor | Inspections | Business | Cash Batch | Fee Calculator

Return | Application | Print Permit | Print CC | Print CO | Print Temp CO | Print Temp CC | Print Comments

Permit | Party | Contractor | Fee | Statement | Review | Requirement | Inspection | Attachment | Activity | Attributes | Comments | Blanketed | Workflow | Acknowledgements | Projects

Permit Status CLOSED ?

Classification	New Residential Dwelling	Parcel	06009040101
Applicant Type	Contractor-Sub contractors required	Address	08241 NW 54TH ST, Gainesville, FL, 32653
Project Name	Weschester Lot 101		
Submit Date	02/28/2017	Warning Flagged	Expiration Date 01/23/2018
Issue Date	03/17/2017	Final Inspection Date 07/27/2017	IVR pin 59728
Exemption		CO Date 07/27/2017	CC Date
		TCO Issue	TCO Expiration
Hide current review rounds from online	<input type="checkbox"/>		
Show fees online	<input checked="" type="checkbox"/>		
Create record in Document Management Application	<input checked="" type="checkbox"/>		
Description of Work	New Single Family Dwelling Lot 101 - 1974 heated sq ft 2565 total sq ft		
Comments	NOC rec/sublist rec *****project doc*****		

Parties	Primary	Name	Role	Company	Phone	Address	City
	<input checked="" type="radio"/>	REO FUNDING SOLUTIONS V LLC				3424 PEACHTREE RD NE STE 1775	ATLANTA

Contractors	Primary	Business	Name	Phone	Address	City
	<input checked="" type="radio"/>	NEW ATLANTIC BUILDERS	WILLIAM TOWERS	(904) 374-2839	5875 Mining Terrace s	JACKSONVILLE
	<input type="radio"/>	HUNTER ELECTRIC COMP	ROBERT D HUNTER	(904) 268-4203	11624 DAVIS CREEK RD	JACKSONVILLE
	<input type="radio"/>	DEL-AIR HEATING A/C &	ROBERT G DELL RUSSO	(407) 333-2665	PO BOX 520522	LONGWOOD
	<input type="radio"/>	HOFFMANN PLUMBING II,	CHRISTOPHER HOFFMANN	(904) 282-9433	3918 EQUESTRIAN CT	MIDDLEBURG
	<input type="radio"/>	LWC CONTRACTING INC	Jeffrey Baker	(352) 333-6387	426 NW 19 AVE	Gainesville

Return | Application | Print Permit | Print CC | Print CO | Print Temp CO | Print Temp CC | Print Comments



Building Permit

CONTRACTORS AND OWNERS INSPECTION LINE (352) 334-5050

Application Date: 02/28/2017

Date Issued: 03/17/2017

Permit No: **BP-17-01002**

Parcel No: 06009040101

Job Address: 08241 NW 54TH ST

Permit Type: New Residential Dwelling

Description of work: New Single Family Dwelling Lot 101 - 1974 heated sq ft 2565 total sq ft

Construction Type: V-B Any material permitted by Code

Contractor: NEW ATLANTIC BUILDERS INC

Occupancy Type: Residential R-3

Owner: REO FUNDING SOLUTIONS V LLC

Job Cost/Valuation: 225796

Permit Fee: \$2,159.87

Square Feet: 2565

Code Edition in Effect: Florida Building Code 6th Edition

Approved plans **MUST** be retained on the job and this card **KEPT POSTED** until final inspections have been approved. All structures require a Final Inspection. Buildings may not be occupied until approved by the Building Official.

This permit expires and becomes null and void if work is not started within six (6) months. An inspection must be scheduled and passed every six (6) months to keep this permit active.

NOTICE: In addition to the requirements of this permit, there may be additional restrictions applicable to this property that may be found in the public records of this county, and there may be additional permits required from other governmental entities such as water management districts, state agencies, or federal agencies.

WARNING TO OWNER: YOUR FAILURE TO RECORD A NOTICE OF COMMENCEMENT MAY RESULT IN YOUR PAYING TWICE FOR IMPROVEMENTS TO YOUR PROPERTY. IF YOU INTEND TO OBTAIN FINANCING CONSULT WITH YOUR LENDER OR AN ATTORNEY BEFORE RECORDING YOUR NOTICE OF COMMENCEMENT.

Building Official or Designee

Date

INSPECTION	INSPECTOR	DATE
Foundation/Footer #1	Hoefert, Rod	03/23/2017
Slab #1	Hoefert, Rod	03/23/2017
Electrical Groundwork #1	Hoefert, Rod	03/23/2017
Plumbing Rough In #1	Hoefert, Rod	03/21/2017
Exterior Wall Sheathing #1	Schultz, Rick	04/10/2017
House Wrap #1	Hoefert, Rod	05/01/2017
P & B Strapping #1	Schultz, Rick	04/10/2017
Mechanical Duct Rough #1	Hoefert, Rod	05/01/2017
Electrical Concealment #1	Hoefert, Rod	05/01/2017
Plumbing Top Out #1	Hoefert, Rod	05/01/2017
Interior Wall Framing #1	Hoefert, Rod	05/01/2017
Insulation #1	Hoefert, Rod	05/03/2017
Electrical Preliminary #1	Tschirhart, Bud	07/13/2017
Electrical Final #1	Tschirhart, Bud	07/27/2017
Gas Final #1	Tschirhart, Bud	07/27/2017
Mechanical Final #1	Tschirhart, Bud	07/27/2017
Plumbing Final #1	Tschirhart, Bud	07/27/2017
Building Final Inspection #1	Tschirhart, Bud	07/27/2017
Landscape Final #1	Luhrman, Earline	07/20/2017
Roof Final #1	Hoefert, Rod	05/01/2017
Window/door Attachments #1	Hoefert, Rod	05/01/2017
Driveway Apron #1	Gawley, Richard	06/27/2017
Driveway Final #1	Gawley, Richard	07/19/2017
Sidewalk Inspection #1	Gawley, Richard	06/27/2017
Roof Sheathing #2	Hoefert, Rod	04/12/2017
Roof Dry In #1	Hoefert, Rod	04/20/2017
Roof Flashing #1	Hoefert, Rod	04/20/2017
Plumbing Sewer #2	Harris, Randy	06/15/2017
Energy Compliance #1	Tschirhart, Bud	07/27/2017

REQUIRED INSPECTIONS (To schedule the inspection call 352-334-5050 between 7:00am and 4:00pm on the workday prior to the proposed date of the inspection)

Permit No: BP-17-01002
 Address: 08241 NW 54TH ST
 Permit Type: New Residential Dwelling





Building Inspection Department
 Application for Building Permit
 306 NE 6th Avenue "Thomas Center B"
 PO Box 490 Station 9
 Gainesville, Florida 32602
 Phone/Inspections: 352-334-5050 Fax: 352-334-2207

Permit No: BP-17-01002	Date: 02/28/2017
Property Address: 08241 NW 54TH ST	
Parcel No: 06009040101	
Description of Work: New Single Family Dwelling Lot 101 - 1974 heated sq ft 2565 total sq ft	Permit Type: New Residential Dwelling
Property Zoning:	Job Cost/Valuation: 225796
Property Owner: REO FUNDING SOLUTIONS V LLC 3424 PEACHTREE RD NE STE 1775 ATLANTA, GA 30326	Contractor: WILLIAM TOWERS NEW ATLANTIC BUILDERS INC 5875 Mining Terrace Suite 206 JACKSONVILLE, FL 32210 (904) 374-2839
Occupancy Type: Residential R-3	Square Footage: 2565
Historic District:	Construction Type: V-B Any material permitted by Code
Flood Zone:	
Special Notes and Comments: Warning to Owner: Your failure to record a notice of commencement may result in your paying twice for improvements to your property. A notice of commencement must be recorded and posted on the job site before the first inspection. If you intend to obtain financing, consult with your lender or an attorney before recording your notice of commencement.	

 Print Name of Applicant

 Signature of the applicant

FEES

Valuation-Cost Per Square Ft	\$1,618.75
Plan Review Building	\$323.75
Fire Assessment Fee	\$154.46
Fire Assessment Fee - Adjustment	\$90.09
State Surcharge 2010	\$62.91
PAGE 56 OF 86	Total: \$2,249.96

Permit Processing and Tracking

Permit Setup Calculations Printing & Checkout Tracking

4923 NW 43 ST
OFFICE COMPLEX
Occupancy: Business

Permit Name: NEW OFFICE
Permit Number: 2002699
Valuation: \$ 55000

Permit Name: NEW OFFICE License Holder: ROBINSON, THOMAS

Agent Responsible For Permit Fees
Owner Contractor Other
THOMAS ROBINSON

Applicant: ROBINSHORE INC

Report Code: New Offices, banks, and p Census Units: 0

Substructure(Suite): Add Edit

Description of work
NEW OFFICE BUILDING

Permit Notes/Subcontractors
NEED NOC

Save & Exit Quit (No Save) ?



City of Gainesville - Building Inspection Department

P.O. Box 490 Station 9

Gainesville, FL 32602

Phone: 352.334.5050 Fax: 352.334.2207

NEW OFFICE APPLICATION

Applicant: **ROBINSHORE INC**

Permit: **2002699**

Applied: **02/12/2002**

Code: **324**

Valuation: \$ **55,000**

Property: **4923 NW 43 ST**

Total Fees: \$ **0.00**

Paid: \$ **2,210.40**

Address: **GAINESVILLE, FL 32602**

Structure

Occupancy & Construction Type

OFFICE COMPLEX

Business - Office (V-UNP)

Square Footage

Zoning

SetBacks

Utilities

Heated: 1,000	Property: OF Fire: Flood: Special: School:	Front 0.00	Rear 0.00	Water: CITY	Sewer: CITY
Unheated: 0		Left 0.00	Right 0.00	Electric:	Gas: GRU
Total: 1,000				Legal	

Parcel # (Primary)

Primary Structure

Height:

Stories:

Sprinklers

Units **0**

Occ Load

Fire Alarm

Owner

Contractor

MILLHOPPER OFFICE PARK TRUST
5800 NW 38 AVE SU 101
GAINESVILLE, FL 32606
Phone:

ROBINSHORE INC.
5800 NW 39 AVE SUITE 101
GAINESVILLE FL 32606
Phone: (352)-37.1-19 EXT. 92

Description of Work

License Holder

NEW OFFICE BUILDING

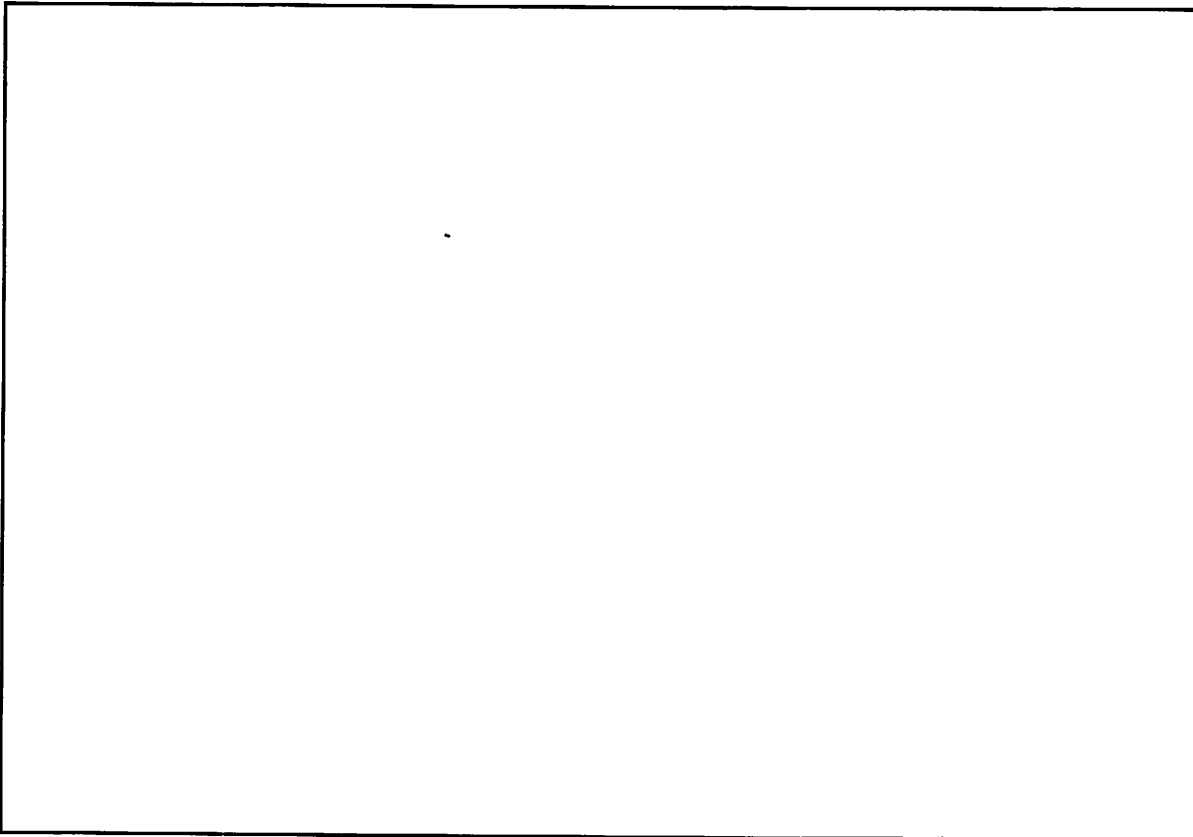
ROBINSON, THOMAS A.
CBC029122 Expires: 08/31/04
5800 NW 39 AVE SUITE 101
GAINESVILLE, FL 32606
Phone: (352)371.1992

Contractor or Agent

Date

Building Official or Designee

Date

City of Gainesville - Building Inspection Department*P.O. Box 490 Station 9**Gainesville, FL 32602**Phone: 352.334.5050 Fax: 352.334.2207***INVOICE: Permit # 2002699 NEW OFFICE****Construction Address: 4923 NW 43 ST GAINESVILLE, FL 32602****ROBINSHORE INC.**Permit Notes/Subcontractors**Invoice Date: 02/12/2002****Attn: THOMAS ROBINSON****NEED NOC****5800 NW 39 AVE SUITE 101****GAINESVILLE, FL 32606****Payment History**

Check	28776	02/12/2002	\$2,210.40
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Amount Paid: \$2,210.40**Balance Due: \$-2,210.40****(Please Submit Payment Based on This Invoice)**



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

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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 Owned

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.

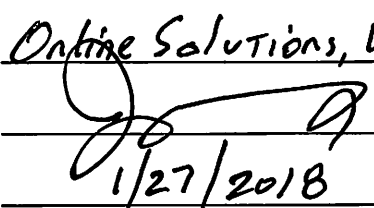
16. Question: What is the total number of permits that the City of Gainesville wants to be migrated and incorporated in its future solution?

Answer: Approximately 248,000

ACKNOWLEDGMENT: Each Proposer shall acknowledge receipt of this Addendum No. 4 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. 4 and the Proposal submitted is in accordance with information, instructions, and stipulations set forth herein.

PROPOSER: Online Solutions, LLC (DBA Citizenserve)
BY: 
DATE: 1/27/2018

CITY OF _____ FINANCIAL SERVICES
GAINESVILLE PROCEDURES MANUAL

41-424 Prohibition of lobbying in procurement matters

Except as expressly set forth in Resolution 060732, Section 10, during the black out period as defined herein no person may lobby, on behalf of a competing party in a particular procurement process, City Officials or employees except the purchasing division, the purchasing designated staff contact. Violation of this provision shall result in disqualification of the party on whose behalf the lobbying occurred.

Black out period means the period between the issue date which allows for immediate submittals to the City of Gainesville Purchasing Department for an invitation for bid or the request for proposal, or qualifications, or information, or the invitation to negotiate, as applicable, and the time the City Officials and Employee awards the contract.

Lobbying means when any natural person for compensation, seeks to influence the governmental decision making, to encourage the passage, defeat, or modification of any proposal, recommendation or decision by City Officials and Employees, except as authorized by procurement documents.

Attachment A
BUSINESS REFERENCES

BIDDER: _____

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): _____ Project Amount \$ _____

Project Client Name: _____

Project Location: _____

City, State Zip: _____

Client Contact Name: _____

Phone Number: _____ Fax Number: _____

Email Address (if available): _____

#2 Project dates (i.e. 6/2009 to 9/2009): _____ Project Amount \$ _____

Project Client Name: _____

Project Location: _____

City, State Zip: _____

Client Contact Name: _____

Phone Number: _____ Fax Number: _____

Email Address (if available): _____

#3 Project dates (i.e. 6/2009 to 9/2009): _____ Project Amount \$ _____

Project Client Name: _____

Project Location: _____

City, State Zip: _____

Client Contact Name: _____

Phone Number: _____ Fax Number: _____

Email Address (if available): _____

#4 Project dates (i.e. 6/2009 to 9/2009): _____ Project Amount \$ _____

Project Client Name: _____

Project Location: _____

City, State Zip: _____

Client Contact Name: _____

Phone Number: _____ Fax Number: _____

Email Address (if available): _____

#5 Project dates (i.e. 6/2009 to 9/2009): _____ Project Amount \$ _____

Project Client Name: _____

Project Location: _____

City, State Zip: _____

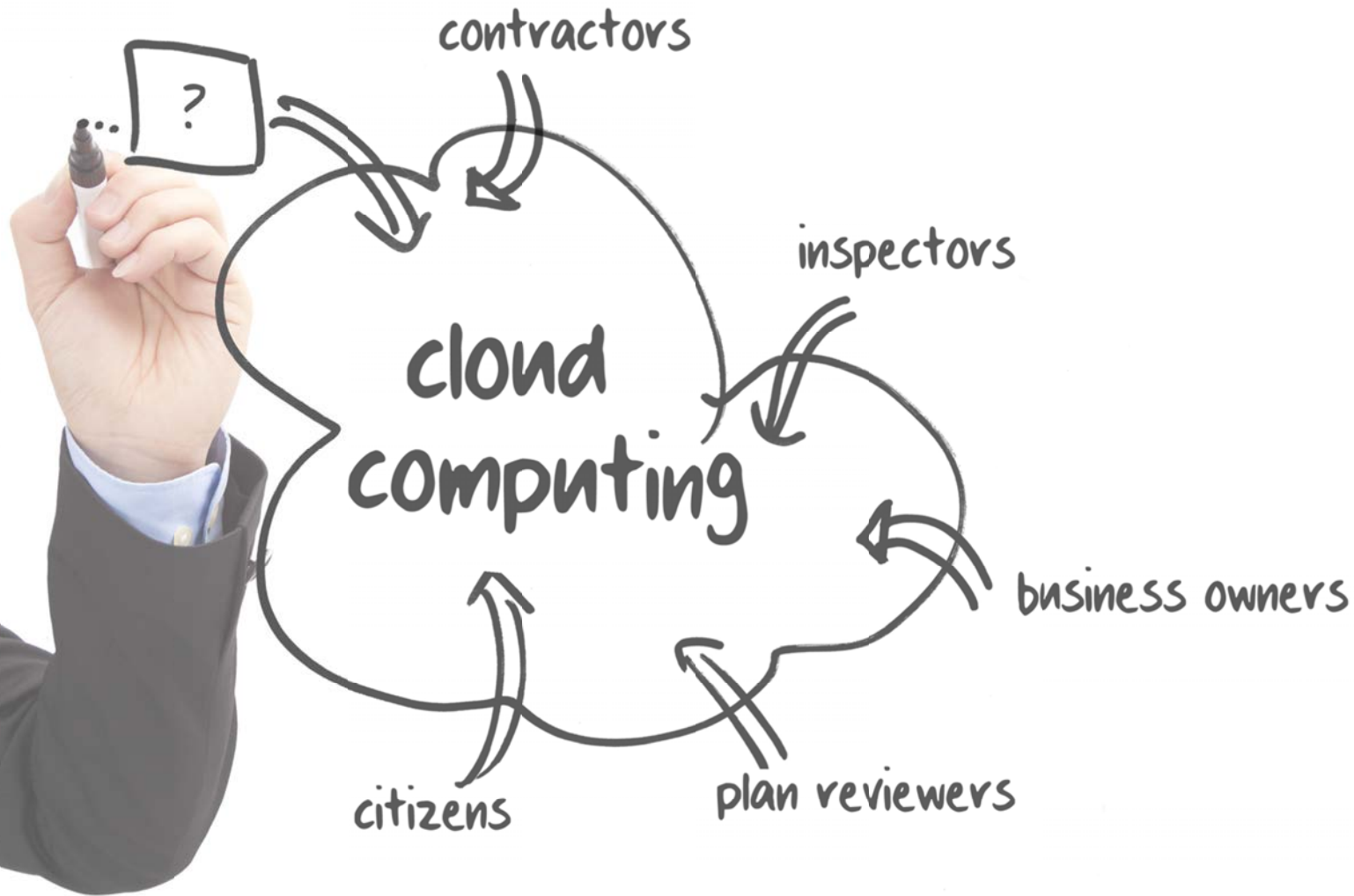
Client Contact Name: _____

Phone Number: _____ Fax Number: _____

Email Address (if available): _____

OTHER INFORMATION

Citizenserve Brochure



Join the cloud computing revolution.



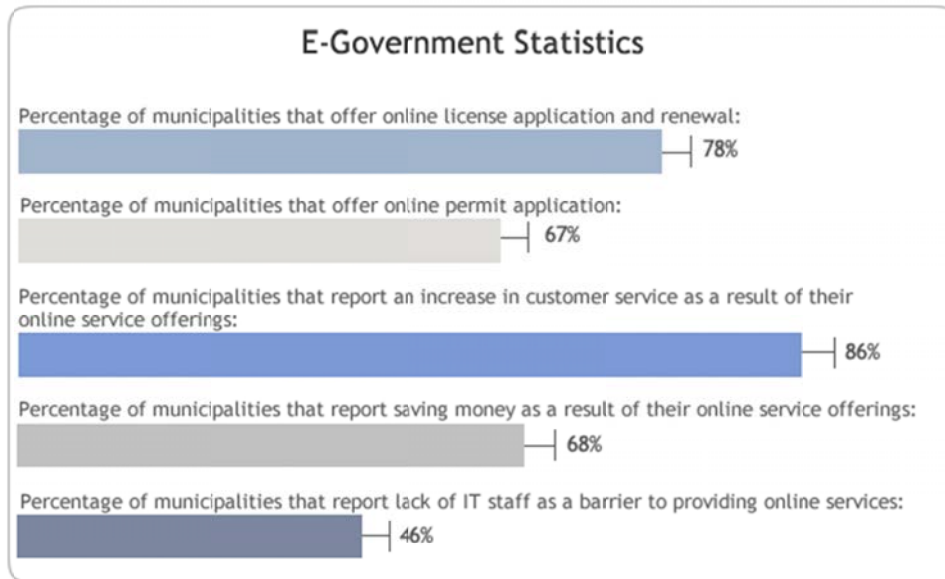
Cloud Computing

With citizenserve® cloud computing you have access to fast, secure, leading edge technologies at a low cost. The citizenserve cloud was initially launched in 2002, and currently has processed over a billion transactions.

As citizens' expectations for online services continue to grow, state and local agencies are pressured to provide online services without a significant increase to their budget or IT staff.

With the citizenserve cloud, get your constituents' online services up and running quickly while providing an easy-to-use solution for your staff.

Over the last 13 years the citizenserve cloud has had no data loss, no security breaches, and has maintained 99.9% system uptime.



Source: Norris, D., & Reddick, C. (2011). *The Electronic Government Survey*. Washington, DC: International City/County Management Association.

easy to learn & use

fully mobile.

features

mapping

online portal

flexible reporting

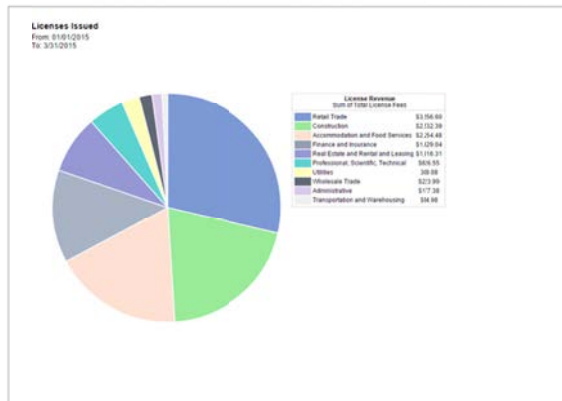
easily configurable



General Features

Citizenserve offers robust solutions filled with rich features in a user-friendly interface. All of our components, features, and services are included with every user subscription with no hidden fees. Through our Concierge Program you'll have all the help you need configuring, implementing, and using citizenserve.

Give your citizens, contractors, and business owners access to your services 24-7 through the citizenserve device and browser independent online portal.



A fully mobile solution provides your inspectors with the ability to access all system features and functions from the field using a tablet or laptop.

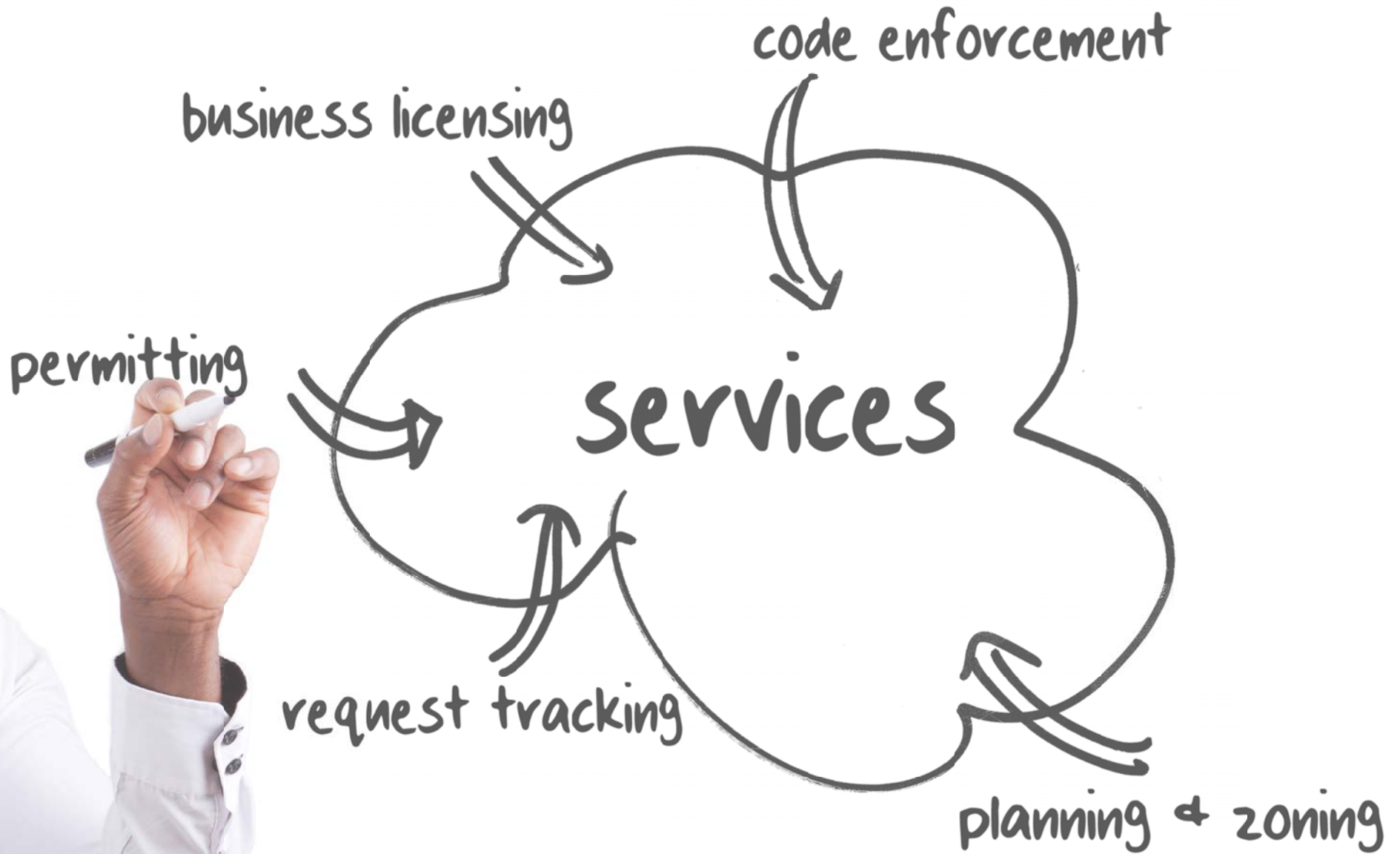
Load your GIS layers such as zoning districts and parcel lines. View or look up your files or inspections due on a map.

Create your own custom reports with the report writer or let our support engineers create reports for you at no additional costs. You can easily add pie-charts, bar-charts, and line graphs to your reports.



“ We began using citizenserve in 2010, the internet based feature and customization were the initial selling points for our town; however, the service response and continuing improvements to the software has been the real key to the software. ”

-Town of Duck



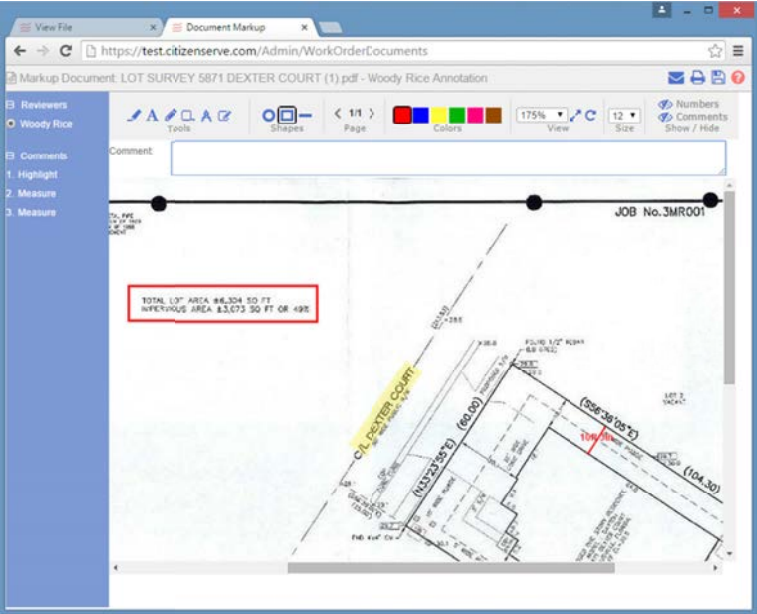
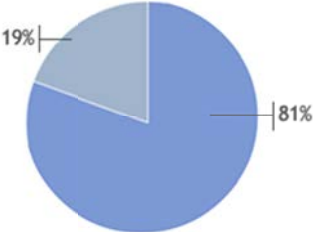
Permitting

With citizenserve permitting software your contractors, architects, engineers, and property owners can apply for a permit, upload digital plans, and pay application fees online. Municipalities have reported online applications through the citizenserve portal making up more than 80% of total permit applications.

Create customized workflow routes that mimic your plan review process and digitally track plan review status and comments. With the document markup tool measure distances, add comments, shapes and highlights to plans and documents.

Move to the citizenserve cloud

Municipalities have reported online applications through the citizenserve portal making up more than 80% of total permit applications.

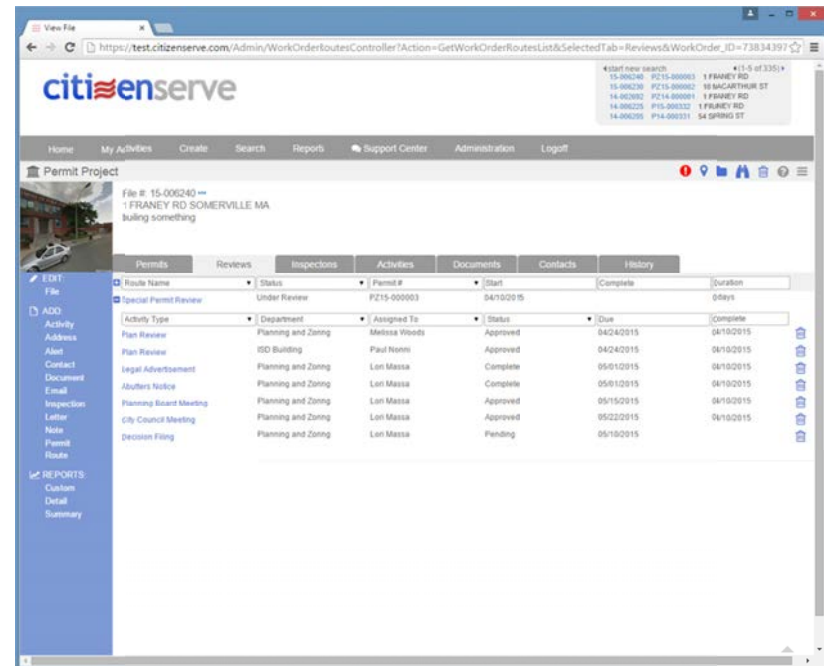


Custom rules will ensure permits are not issued without the required approvals. After construction begins inspections can be requested through the online portal, inspectors can enter inspection results directly from the field using a tablet or laptop. After the final inspection has been completed easily generate a certificate of occupancy that can be printed, emailed or downloaded by the applicant, contractor or property owner.

Planning and Zoning

Citizenserve planning and zoning software completely automates the process of application, review, routing, resubmittals, and public notification.

Applicants can submit applications, attach plan documents, and pay application fees through the online portal. Applications are automatically routed to the appropriate reviewers based on your workflow routes. Track due dates for public notice and legal advertisements based on the hearing dates you select. Build your plan review report by selecting comments from a custom library of review comments. Electronically comment on plans with the document markup tool by adding notes, highlights, and other annotations. Through a flexible and user-friendly interface, citizenserve helps keep your projects organized and on schedule.



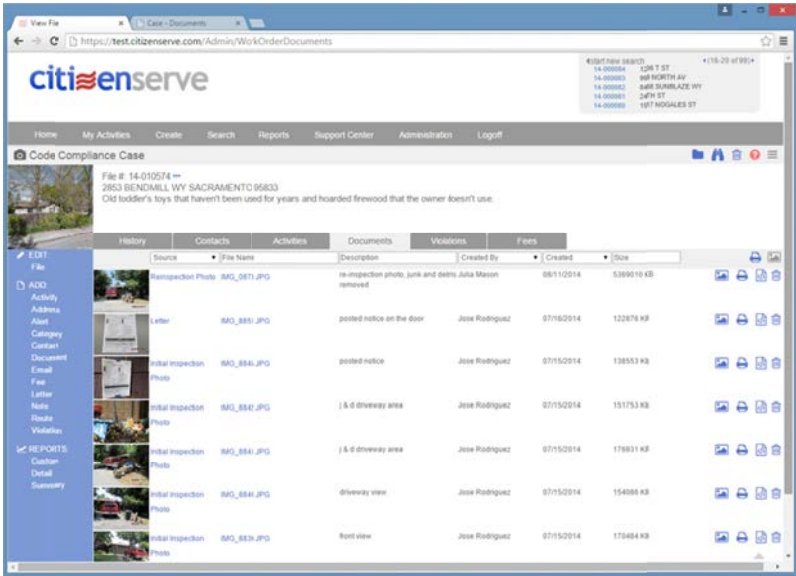
“ The online portal has really helped cut down on the daily phone calls asking for a status on projects, with the reporting functions we can accurately track our review timelines. ”

-City of Lewiston

Code Enforcement

Citizenserve code enforcement software completely automates the process of opening cases, scheduling inspections, recording violations, and coordinating resolutions. Property ownership, inspection results, photos, notices, violations, and notes become an electronic record of each case.

As a fully mobile solution, inspectors are notified of inspections due, can lookup property ownership information, add violations, take and attach photos, generate tickets or notices of violation, and schedule re-inspections all in the field from a tablet or laptop.



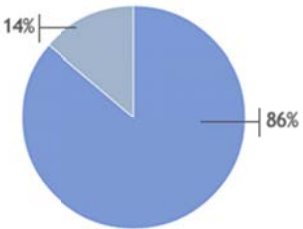
“Citizenserve has made it possible for our officers to have access to records and the ability to enter case data in the field. This allows the officer to be accurate to the minute with code enforcement, keeping the officer in the field and not at a desk.”

-City of Boulder

Business Licensing

Citizenserve business licensing software automates the application, payment, review, and renewal of business licenses.

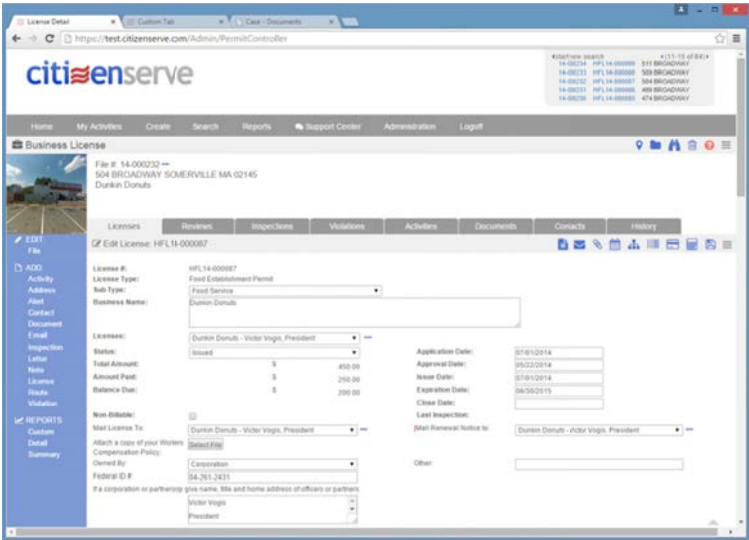
Move to the citizenserve cloud



Municipalities have reported online applications through the citizenserve portal make up more than 85% total business license applications.

Businesses can submit applications, upload copies of required documents and pay application fees through the citizenserve online portal. Create customizable deficiency checklists based on application types and quickly generate and email of Deficiency Notices. If an inspection is required before issuance, citizenserve can automatically notify your inspectors of pending applications and required inspections. Upon final approval, generate License Certificates and ID cards that can be mailed, emailed or downloaded from the online portal.

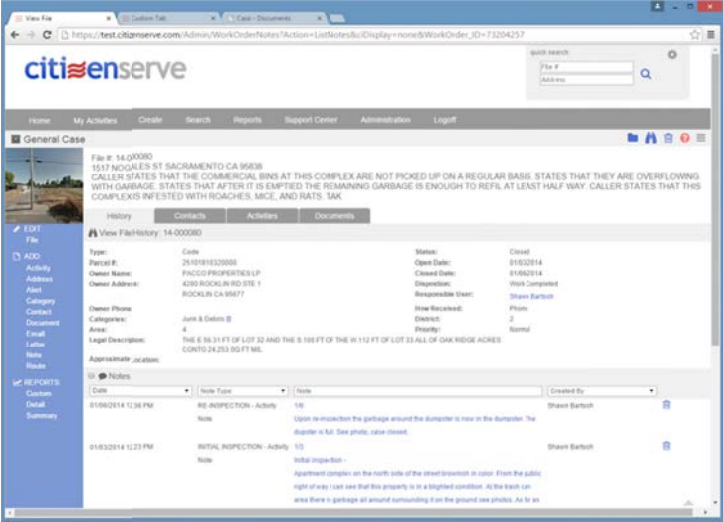
When it comes time for renewal, create batch email or mail renewal notices quickly. Citizenserve can be configured to automatically calculate penalties and interest for late renewals. License holders can submit required documentation such as proof of identity and insurance verification through the online portal as part of their license renewal.



Request Tracking

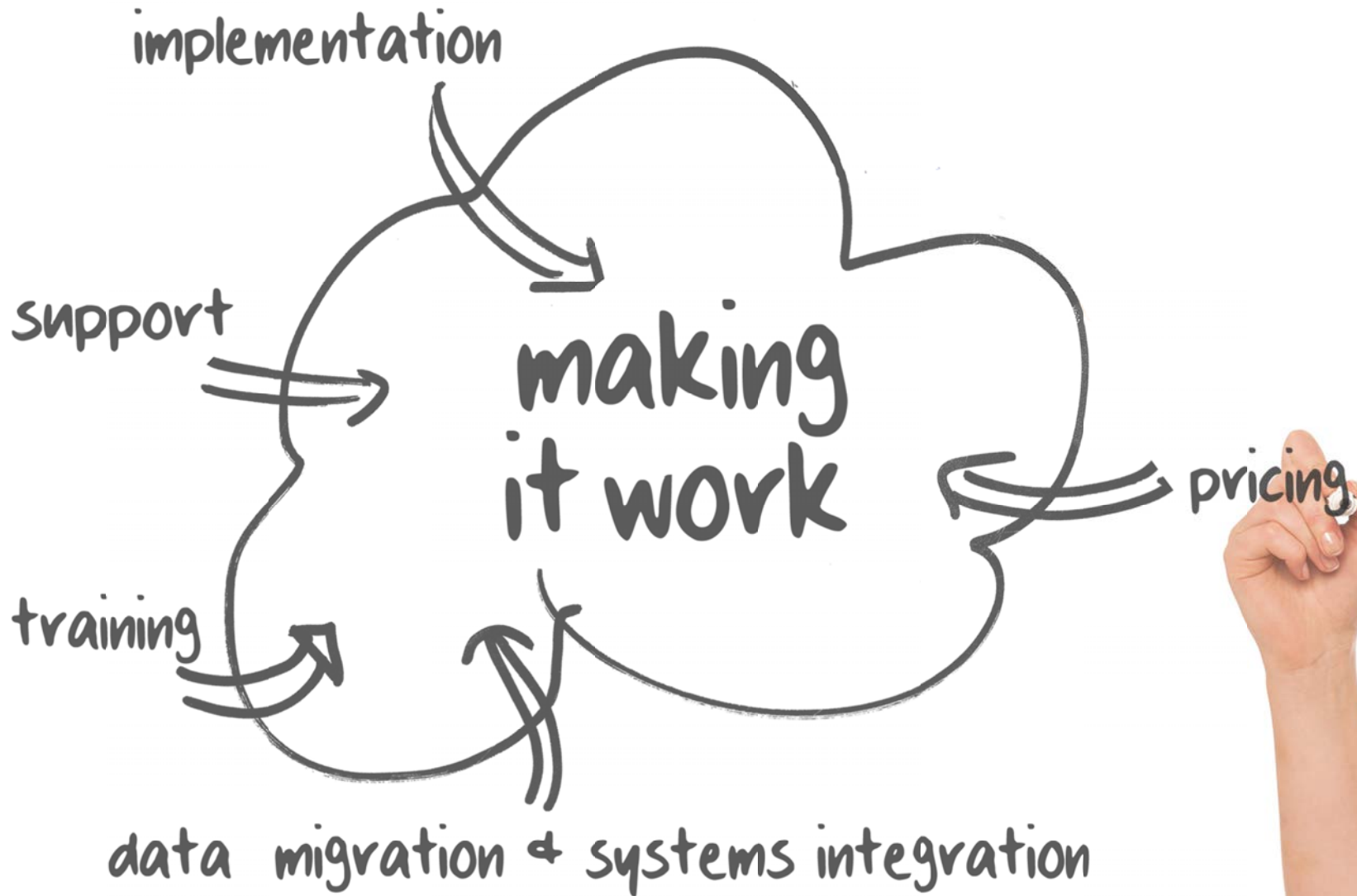
Citizenserve request tracking software automates the assignment, routing, and fulfillment of your citizens' requests.

Your citizens can submit requests on your municipal website through the citizenserve online portal. With configurable automatic routing based on request type, appropriate staff will be notified and can respond to your citizens' requests immediately. Communicate with your citizens effectively and efficiently by using citizenserve's automatic notifications, automated letters, and email templates.



“ After years of research and studying various case management programs, we have found citizenserve to be the most comprehensive and user friendly solution on the market. ”

-City of Sacramento



“ When it comes to customer service and tech support the staff at citizenserve is at the top of my list ranking #1. I know they have many other users but when I contact them they make me feel like I am the only user with their personal, undivided attention. ”

-Wood County

“ We have been with citizenserve for a few years now and are very impressed with the level of service we receive and the speed of response. We would highly recommend them. ”

-City of Athens

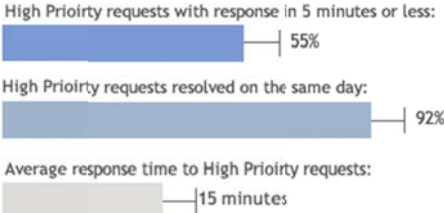
“ My staff and I couldn’t be happier. Citizenserve has been fantastic in getting us up to speed and helping us with changes to our new procedures. It’s like dealing with good friends. ”

-City of Oviedo

Concierge Program

Through our Concierge Program every user subscription comes with unlimited training and support at no additional cost. Your dedicated, certified support engineer and project manager will work with you to configure citizenserve to meet your needs. They will coordinate any other setup tasks such as data migration or system integration to ensure your success. When you need help our staff is available. Our certified support staff members are trained on all areas of citizenserve, and they will assist you with whatever you need. We guarantee response time of one hour or less on your high priority items; our average response time is fifteen minutes. For your standard requests, we will respond on the same business day, and our average response time is less than four hours.

Concierge Program Statistics



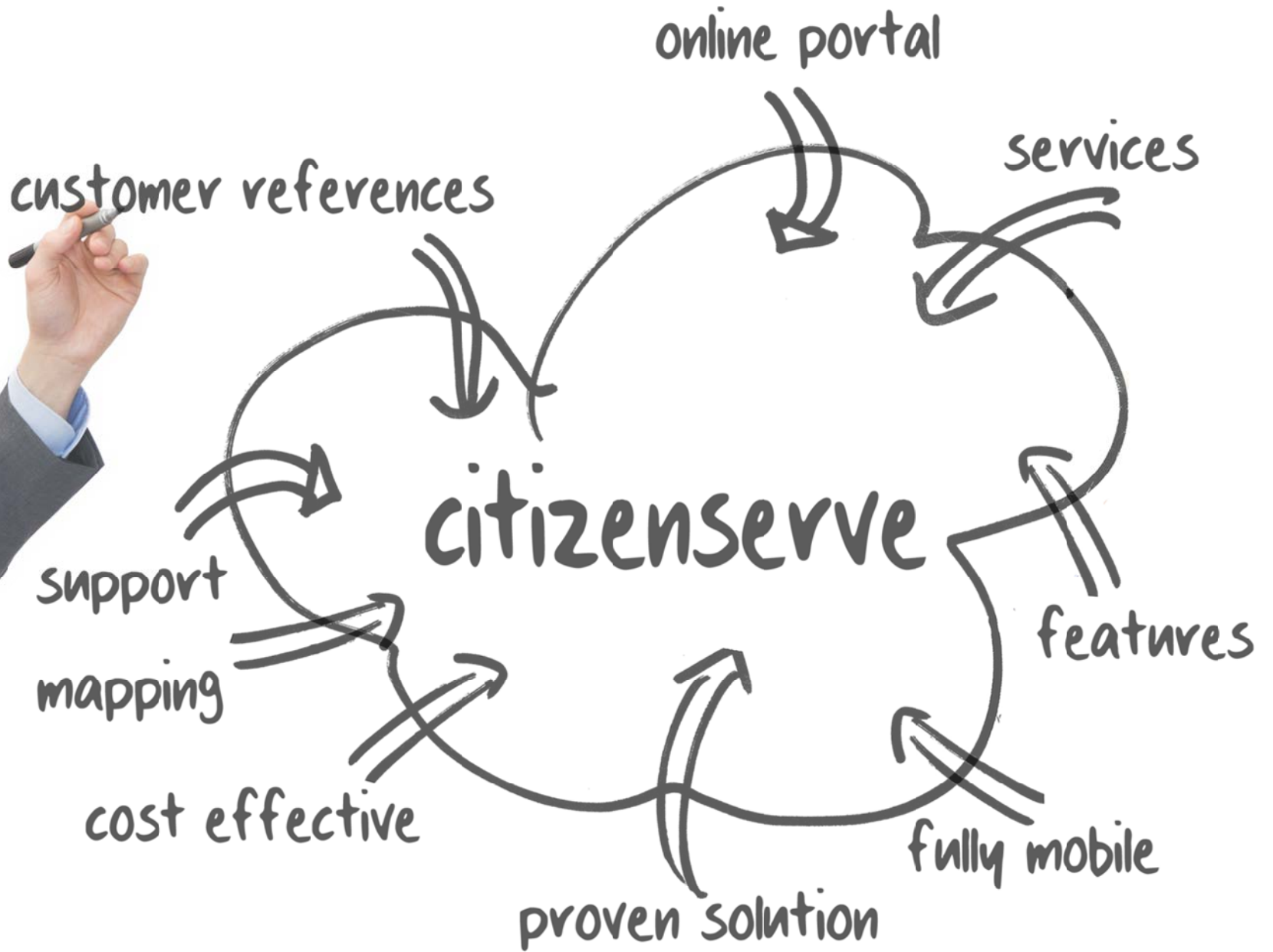
Pricing

Citizenserve pricing is based on the number of dedicated user subscriptions you need. Each of your citizenserve user subscriptions will have access all citizenserve components and features.

User Subscription Fees	
Number of Users	Annual Fee per User
1 – 10	\$1,800
11 – 25	\$1,500
26 – 50	\$1,200
50 or more	\$900

One-Time Initial Fees	
Service	Fee per User
Training	\$200
Setup and Configuration	\$300
Project Management	\$100
Data Migration*	varies
Systems Integration*	varies

**Pricing for data migration and systems integrations will vary based on your requirements; our team will work with you to determine requirements and pricing.*





Contact Us

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contactus@citizenserve.com

www.citizenserve.com

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