



e-PlanSoft™
Ultimate Online Plan Review



**RFP #14DSD041614 - ELECTRONIC PERMITTING AND
PLAN REVIEW SYSTEM**

The City of Maricopa, AZ

June 30, 2014

Paladin Proposal Contact:

Jon Byrd, Business Development Executive; 360-394-5993

jbyrd@paladindata.com

19362 Powder Hill Place NE, Poulso, WA 98370

Original

1 Offer Sheet



39700 W. Civic Center Plaza
Maricopa, AZ 85138
Ph: 520.568.9098
Ex: 520.568.9120
www.maricopa-az.gov

REQUEST FOR PROPOSALS Electronic
Permitting and Plan Review System RFP:
14DSD041614

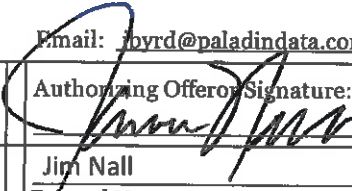
INTRODUCTION

The City of Maricopa will accept competitive sealed proposals for an Electronic Permitting and Plan Review System at the address or physical location until the date and time detailed below. Proposals shall be delivered to the location listed below and shall be in the actual possession of the City on or prior to the exact date and time indicated below. Late proposals will not be considered. Proposals shall be submitted in a sealed package with "RFP -14DSD041614 Electronic Permitting and Plan Review" and the Offeror's name and address clearly indicated on the front of the package. All proposals shall be completed in ink or typewritten. Offerors are strongly encouraged to carefully read the entire Request for Proposal.

Pre-submittal Meeting:	None.
Proposal Due Date:	June 18, 2014
Proposal Time:	2:00:00 PM Arizona time
Number of Qualifications:	1 unbound original and 5 bound copies (please label original)
Contact:	Pattie LaCombe, Purchasing Manager
E-Mail:	patricia.lacombe@maricopa-az.gov
Mailing Address:	39700 W. Civic Center Plaza, Maricopa, Arizona 85138
Location:	39700 W. Civic Center Plaza, Maricopa, Arizona 85138

OFFER

To the City of Maricopa: The undersigned on behalf of the entity, firm, company, partnership, or other legal entity listed below offers on its behalf to the City a proposal that contains all terms, conditions, specifications and amendments in the Notice of Request for Proposal issued by the City. Any exception to the terms contained in the Notice of Request for Proposal must be specifically indicated in writing and are subject to the approval of the City prior to acceptance. The signature below certifies your understanding and compliance with the Terms and Conditions contained in the Request for Proposal package issued by the City.

OFFEROR CONTACT INFORMATION	
For clarification of this offer contact:	
Name: <u>Jon Byrd</u>	Email: <u>jbyrd@paladindata.com</u>
Federal Employer Identification Number: <u>91-1670217</u>	Authorizing Offeror Signature: 
Paladin Data Systems Company Name	Jim Nall Printed Name
19362 Powder Hill Place NE Address	CEO Title
Poulsbo, WA 98370 City State Zip Code	Telephone: <u>360-394-5993</u> Fax: <u>360-779-2400</u>



2 Letter of Transmittal

June 30, 2014

Electronic Permitting and Plan Review System
City of Brooklyn Park
Attn: Patricia LaCombe
39700 W. Civic Center Plaza
Maricopa, AZ 85138

Re: Request for Proposal (RFP) for an Electronic Permitting and Plan Review System
Submission Due Date: June 30, 2014; 2pm

Dear Ms. LaCombe and the RFP Committee:

Paladin Data Systems Corporation (Paladin) is pleased to respond to your RFP. Based upon a thorough review of the RFP, Paladin is confident in its understanding of the proposal and objectives and is able to meet the stated requirements for your new system. Paladin's offer is valid for a period of 120 days from the date of proposal opening.

Jim Nall is the person who is authorized to sign binding documents and make representations on behalf of Paladin. Paladin Corporate information is as follows:

Offeror: Paladin Data Systems Corporation
19362 Powder Hill Place NE
Poulsbo, WA 98370
(360) 779-2400 p/ (360) 779-2600 f
www.paladindata.com

Cage Code: 05TU4
DUNS #: 884744871
TIN #: 91-1670217

Thank you for your consideration. We look forward to hearing from you.

Sincerely,



Jim Nall
President and CEO

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19 Pre-submittal Meeting - Not Applicable

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4 Executive Summary

Paladin has reviewed the Maricopa Electronic Permitting and Plan Review System RFP. After this review, Paladin is confident that our SMARTGov system can meet or exceed the majority of the requirements set forth in the Scope of Services section (pages 15-20) of the RFP. The one notable exception to the requirements is Electronic plan review / markup noted in Section 1 item G. At this time, SMARTGov does not have this capability. The SMARTGov product team has had this capability on their 2014 Roadmap and have been reviewing requirements and technologies available that could be added to SMARTGov to provide our clients with this new functionality. After this review, we have decided to integrate with e-PlanSoft's™ e-PlanCheck® Electronic Plan Review software application. The SMARTGov product team has been working with e-PlanSoft to identify the appropriate interfaces and integration points that will give our customers a seamless, robust, manageable interface between the two systems. The SMARTGov product team expects to have this integration completed 4th quarter 2014. Paladin has engaged e-PlanSoft with a partner agreement and has acquired the rights to provide its customers with e-PlanCheck.

Paladin will act as the prime contractor and offer's a phased approach to the implementation of SMARTGov and e-PlanCheck at the City of Maricopa. The proposed phases are described below and will result in a fully integrated Electronic Permitting and Plan Review System as described in the RFP.

Phase 1 – Implement SMARTGov's Amazon Cloud based Permitting, Code Enforcement, Licensing and Inspection Modules

During this initial phase, Paladin will work with the City of Maricopa to implement the SMARTGov Permitting, Code Enforcement, Licensing, Inspection, Public Portal, Inspection Assistant (mobile) modules. Major milestones and deliverables are:

- Data migration from Munis.
- Data migration validation by City of Maricopa.
- Interfaces defined/configured/developed/implemented for Financial system, GIS system, Merchant Services.
- SMARTGov system configuration to specific City of Maricopa requirements. (i.e. Permit types, Code Enforcement Types, License Types, Inspection Types, Submittal requirements, Workflows, Fees etc.).
- Develop and/or configure reports, form letters, and output documents.
- Provide administrator and end user training for all SMARTGov functions and modules.

At the completion of this phase the City of Maricopa will have a fully configured SMARTGov system suitable for performing all their Permitting, Code Enforcement, Licensing, Inspection, Public Portal tasks. As well as trained end-users.

Phase 2 – Deploy e-PlanSoft's e-PlanCheck module to the SMARTGov environment in the Amazon Cloud.

During this phase, Paladin will deploy e-PlanSoft's e-PlanCheck system to the SMARTGov environment in the Amazon Cloud and provide access to the software for the City of Maricopa plan reviewers. Some SMARTGov permitting data and submittal documents will be populated for use in the following interface analysis. Paladin will then conduct a detailed analysis that will identify the necessary and appropriate integration points. Paladin will work with the City of Maricopa plan reviewers to incorporate their suggestions and recommendations into the final integration. Once a final integration requirements

are defined the SMARTGov product team will develop, test and deploy the integration. Major milestones and deliverables are:

- e-PlanCheck system deployed to the SMARTGov environment in the Amazon Cloud
- City of Maricopa plan reviewers provided introduction to e-PlanCheck.
- Integration points between SMARTGov and e-PlanCheck defined by Paladin and City plan reviewers.
- Interfaces defined/configured/developed/implemented for seamless interaction between SMARTGov and e-PlanCheck.
- City of Maricopa integration acceptance.
- SMARTGov and e-PlanCheck Integration documentation.
- Provide administrator and end user training for all functions and modules.

At the completion of this phase the City of Maricopa will have a fully configured SMARTGov system integrated with e-PlanCheck suitable for performing all their electronic plan review tasks. As well as trained end-users.

In recognition of the City of Maricopa's contribution to this effort, Paladin will perform this phase at no cost to the City of Maricopa.

Phase 3 – Define, develop and review the integration of SMARTGov, e-PlanCheck® and the SMARTGov Public Portal

During this Phase, Paladin will conduct a complete end to end review of the SMARTGov permit application and document submittal process. Paladin will ensure that the end users of the system have what they need to apply for a permit, submit required documentation and pay fees for the initial submission. Paladin will also review the Portal to SMARTGov workflows, the SMARTGov to e-PlanCheck workflows, the applicant notification workflows, and the resubmittal workflows to ensure an accurate and seamless experience for all participants. Paladin will work with the City of Maricopa to identify any discrepancies and the SMARTGov product team will develop/test/deploy corrective actions as necessary. Major milestones and deliverables are:

- Functional Gap Analysis
- Process Documentation
- Identified Functional Gaps corrected with updated Public Portal
- Provide administrator and end user training

At the completion of this phase the City of Maricopa will have a fully configured SMARTGov system integrated with e-PlanCheck and the SMARTGov Public Portal suitable for performing all their permit submittal tasks. As well as trained end-users.

In recognition of the City of Maricopa's contribution to this effort, Paladin will perform this phase at no cost to the City of Maricopa.

5 Firm Overview and Management Overview

Name of Company	Paladin Data Systems Corporation
Software Brand Name	SMARTGov
Name of Preparer	Jon Byrd
Name of Primary Contact for Follow-Up Questions	Jon Byrd
Contact Phone Number	360-394-5993
E-mail Address	jbyrd@paladindata.com

Paladin Data Systems Corporation (Paladin) believes the key ingredients for helping our customers achieve their goals and objectives are *innovation, integrity and results*. Paladin is a nationally recognized products and services company and has had the honor of serving our customers



for more than 19 years. Paladin recruits and retains top talent in the industry and promotes a team environment focused on delivering results. Our customer focus, best practices, quality products, proven track record of success and an experienced team of over 45 professionals give Paladin the confidence to successfully deliver your project requirement using the SMARTGov® product suite.

5.1 Government & Public Agency Market Commitment

Paladin Data Systems Corporation is an award-winning organization with a portfolio of cloud-based products and services. Paladin was founded in 1994 in Poulsbo, Washington and has grown to have business activities in all 50 states and 6 U.S. territories. Paladin has transitioned from developing and delivering software for commercial businesses and governmental organizations, to leveraging 19 years of intellectual property for developing our own suite of cloud based solutions.

Paladin has a proven history of providing first-rate solutions to local, state, and federal agencies, Fortune 500 companies, and small to mid-sized corporations. Over its history, Paladin has experience with the design and development of major applications using a variety of operating system environments. Paladin provides management consulting services, entire development project teams and/or individual specialists. The reputation for integrity and ethics coupled with highly skilled professionals has contributed to Paladin being named one of the fastest growing private companies in the USA by INC Magazine and one of the best companies to work for. Most recently, Paladin was recognized as one of the Top 5 Department of Defense (DOD) Program Award recipients by the National Defense Industrial Association (NDIA).

5.2 People

Jim Nall, President and Chief Executive Officer

Jim Nall has been the President and CEO of Paladin since co-founding the company in 1994. Jim is a consistent proponent of local activism within Washington State and spearheaded the development of Paladin's EKO-System (Environmental Knowledge Organizer) product, which was designed specifically for the Natural Resource industry to manage conservation projects. Prior to Paladin, Jim worked in the US Navy fleet ballistic missile (FBM) program with Lockheed Martin for 15 years where he served as Project Leader and Senior Systems Architect on three mission critical projects at the



Strategic Weapons Facility - Pacific. Jim has served the Puget Sound Naval Bases Association as former President and board member at large.

Bob Johnston, Vice President

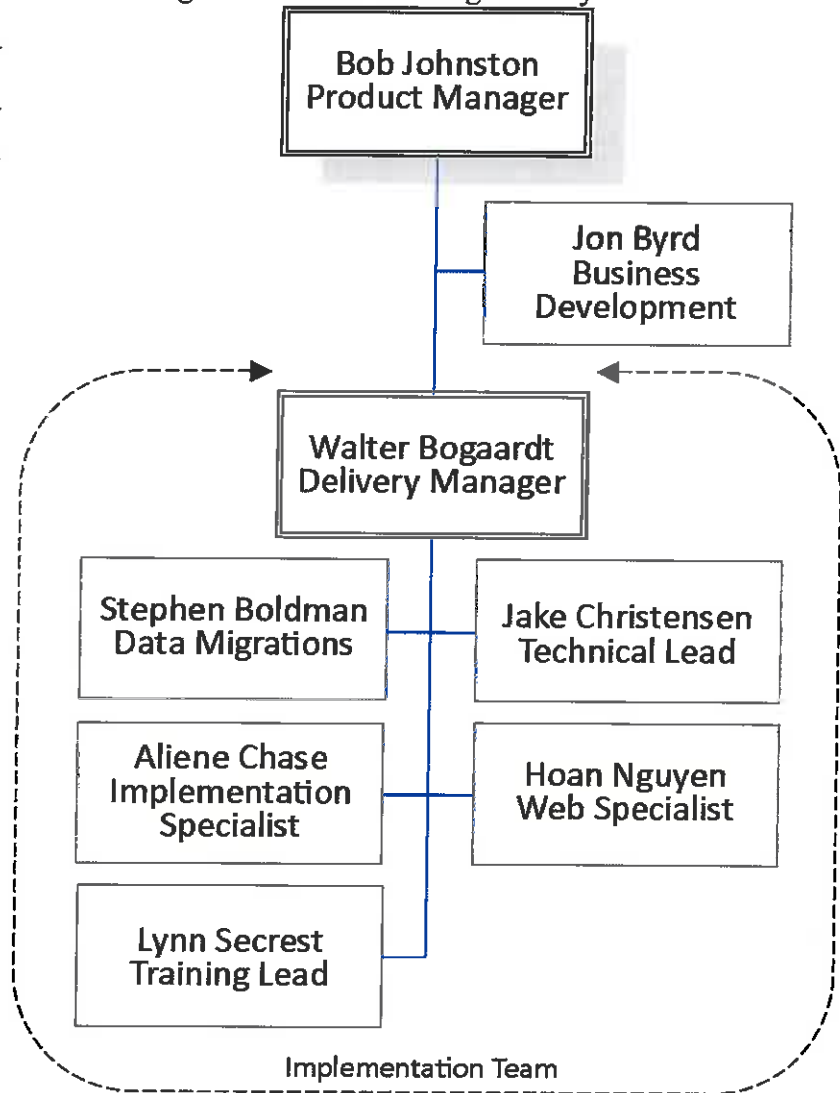
Bob Johnston provides the vision and operational oversight for Paladin's off-the-shelf product lines including EKO-System, Panoramic, SMARTGov and the SMARTGov family of products. Bob is a highly skilled business executive, information systems analyst and database application developer with over 30 years of experience. He understands the unique needs of our state, local and federal government clients from both a technology and business perspective. Prior to co-founding Paladin, Bob worked at Lockheed Martin and Oracle.

Gary Anderson, Chief Financial Officer

Gary Anderson joined Paladin in 2008 as a seasoned financial executive. Gary has served senior management, boards of directors, high wealth individuals and small businesses for nearly four decades. Gary is a Certified Public Accountant with experience in real estate development, timber management, and non-profit foundations, as well as with accounting firms and the banking industry.

The most important aspects of a successful organization are the people, methods, tools and processes they follow. We staff our projects with specialists who have proven their expertise through numerous successful implementations of our product suite. Behind our implementation team is a larger team of more than 60 full-time professionals who can be called on for support. The entire team is dedicated to our client's success.

Paladin utilizes a team approach for implementation projects. The key staff positions are shown in the following organization chart followed by details for each individual's skills and experience.



5.3 Products

Paladin is a diversified software company offering a variety of products and services.

 SMARTGov™ <small>Powered by Paladin</small>	 PANORAMIC™ <small>Powered by Paladin</small>	 ASM™ <small>Powered by Paladin</small>	 CloudStream™ <small>Powered by Paladin</small>
Land Management	Portfolio Management	Skills Management	Cloud Ready Services
Local Government	GIS Mapping	Workforce Planning	Cloud Consulting
Paperless solution	Transparency	Personnel Readiness	Azure, Amazon, IBM
Web-Based	Analytics	Enterprise Wide	Product Development
GIS Mapping	Collaboration	Government/Industry	Product Support
Online Public Access	Habitat Work Schedule	Certification Tracking	Best Practices
Multi-Jurisdictional	National Fish and Wildlife	Management Dashboards	Configurable Products
Permit/Inspect/License	56 States and Territories	100,000 Web Based Users	Web-Based Access

Paladin leveraged industry leading technology toolsets and its skills/experience to create a robust, scalable and configurable community development and land use application.

The SMARTGov application’s foundation provides an extendible and configurable platform to support new or changing business processes. The ability to have the system respond immediately to changing business needs, such as new permit types, new or changing business rules and new or changing fees, is the greatest benefit and cost savings to your jurisdiction. We believe it is conservative to say that our customers are experiencing a 25 to 35 percent reduction in overall processing time. The SMARTGov product suite is scalable to accommodate growth and future departmental changes and improve overall communication between departments and citizens.

Company Information		
1	Name of vendor	Paladin Data Systems Corporation
2	Name, title, address, and telephone number of individuals with authority to contractually bind the proposer	Jim Nall, President and CEO Robert Johnston, Executive Vice President 19362 Powder Hill Place NE, Poulsbo, WA 98370 Phone: 360.779.2400
3	Designated contact person	Jon Byrd, Sr. Sales executive 19362 Powder Hill Place NE, Poulsbo, WA 98370 Phone: 360.779.2400 Fax: 360.779.2600 jbyrd@paladindata.com
4	Year that vendor started in business	2000
5	Vendor company’s headquarters	Poulsbo, Washington

Company Information

6	Vendor's sales in the previous years:	2014 - \$8,500,000 (estimated) 2013 - \$6,500,000 2012 - \$8,900,000 2011 - \$9,000,000 2010 - \$12,000,000
7	Total employees does the vendor have in each of the following categories:	Sales/Marketing - 4 Management/Administration - 5 Help Desk Staff - 3 Development Staff - 34 Implementation Staff - 5
8	Organization of company	Paladin is <u>not</u> a parent or subsidiary in a group of companies. Paladin is privately held
9	Has the company had a workforce reduction during the	Paladin had a workforce reduction in 2010 for our DoD business line. There was zero impact
10	What is the percentage of annual revenues reinvested into research & development?	20%
11	How many fully operational installations has the vendor completed?	Local Government – 54 County Government – 16 Total –70
12	What is the hourly rate for implementation assistance beyond which is included in the	\$160.00 per hour

6 Proposed Application Software and Computing Environment

Paladin’s responses in the table below include the minimum requirements for the computer hardware environments in which SMARTGov will run including the support operating systems and databases; identification of the communication protocols and networking requirements for implementation and operation of SMARTGov; and identification of the tools and methodology used by Paladin in designing, developing, maintaining and enhancing the application system.

System Information (Hardware, Operating System and Development)		
1	What server platform(s) does the vendor proposed application software currently support?	SMARTGov is a web application that runs on Microsoft IIS7 or later, with .NET 4.0 and higher.
2	What operating system does the vendor proposed application software currently support? Also, any workstation hardware requirements.	SMARTGov supports running web application on Microsoft Server 2008 or Microsoft Server 2012. There are no special workstation hardware requirements. SMARTGov is a web based application which can be run from a workstation that supports a modern web browser using HTTPS. Recommended browsers are Microsoft IE 10 or later, Google Chrome and Firefox 12 or higher.
3	What database environments does the vendor proposed application software currently support?	SMARTGov runs on SQL Server 2008r2 with planned support for later versions of SQL Server 2012.
4	Is the vendor committed to supporting the above operating system, database & hardware platforms for the foreseeable future?	SMARTGov supports running on the above software and operating system configurations. SMARTGov is constantly evolving and will continue to support the latest versions of Microsoft’s operating system, IIS server, .NET release and SQL Server offerings.
5	Is the proposed application developed with a widely accepted development environment such as Microsoft .Net? Please list all development languages utilized; including any proprietary toolsets.	SMARTGov utilizes .NET version 4.5, C#, AJAX, JSON and JavaScript. Leveraging standard frameworks such as Microsoft MVC4, Log4net and Hibernate.

**System Information
(Hardware, Operating System and Development)**

6	Does the system architecture support a multi-tier deployment?	SMARTGov was developed and designed for a multi-tier environment to ensure segmentation of data and application for security and performance optimization.
7	Does the application support native browser based deployment for workstations? Which web servers and browsers are supported and version? (IIS, IE, Firefox etc.)	SMARTGov is a web application which can be run from a workstation web browser supporting HTTPS. Recommended browsers include IE 10 or later, Google Chrome and Firefox 12 or higher.
8	Does the vendor provide a Hosted or Software As A Service Solution (SAAS)?	Most of SMARTGov's clients are utilizing our SaaS solution in the AMAZON cloud. SMARTGov does have an on premise installation option for clients that have limited connectivity and can support their own enterprise level deployment.
9	Does the system support deployment using remote access tools. Are there any issues related to this type of utilization?	SMARTGov is deployed to a Microsoft operating system which supports Remote Desktop Connectivity. VPN through firewall is needed for on premise deployments.
10	Does the system support the use of a Storage Area Network (SAN)?	SMARTGov can store documents attached to cases in the application to a SAN storage as an option, rather than the database.
11	Can the system be operated under a VMware environment?	SMARTGov can be deployed into a virtualized environment that supports Microsoft Server 2008 or higher operating systems.
12	Does your system support Intranet/Wan Deployments?	Yes, SMARTGov is a web based application that has been deployed in an Intranet/WAN based environment.
13	Does your system support wireless technology and devices? If so please explain.	SMARTGov is hosted in the public cloud and can be accessed through wireless devices having a standard web browser.
14	Does your product require the use of any outside third party applications? If so please explain.	SMARTGov does make use of ArcGIS servers for its map service and Exago Enterprise eWeb reports for adhoc report generation.

**System Information
(Hardware, Operating System and Development)**

15	Does your product require a client install on each workstation? Also does the application require any proprietary plug ins e.g. Java?	No. SMARTGov does not use any plugins only a modern browser able to support JavaScript 1.8 and higher.
16	Does your product meet PCI Compliance version 2 or higher? If not please explain.	Yes. Paladin's development strategy is to develop connectors to PCI-Compliant payment gateways/providers. These PCI-Compliant providers have the infrastructure in place and experience in handling emerging security issues & concerns 24x7. The SMARTGov public portal can be configured to interact with various payment gateways to accept credit card transactions.

7 Database Software

SMARTGov is built on an MS SQL database.

8 Third-Party Products/Optional Software

This proposal includes the functionality of ePlanSoft integrated into SMARTGov. A single contract will govern this relationship with Paladin acting as the Prime bidder and ePlanSoft as a sub. ePlanSoft is the electronic document markup functionality and electronic plan review.

9 System Security

There is a set of basic security groups already setup in the SMARTGov application. These groups are setup based on common access to functions for a role in the jurisdiction. More than one security group can be assigned to the user to limit or grant them access to a function to a module, or an area in a module. A user will have the greatest permission allowed by combining all groups assigned. For instance, a user has cashier, Permit Tech, and Permit Admin security groups.

You can modify the security group by click on the group to get to the details. The security model is built around the ability to create, update delete, and read ability that you want the user to have.

Function	Desc	Type	None	Read	Update	Create	Delete	Full
Admin.Department	Department	Model	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Admin.LOV.AdhocReport	Admin.LOV.AdhocReport	Model	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Admin.LOV.CustomReport	Custom Report	Model	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Admin.LOV.FeeCode	Fee Code	Model	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Admin.LOV.ReportCustomText	Report Custom Text	Model	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Admin.LOV.ReportGroup	Reporting Groups	Model	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Admin.LOV.ReportHeaderFooterValues	Report Headers and Footers	Model	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Admin.LOV.UserDepartment	User Department	Model	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Admin.LOV.UserToDo	Admin.LOV.UserToDo	Model	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Admin.LOV.WorkflowStep	Workflow Step	Model	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Admin.User	Application User	Model	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Licensing.License	License	Model	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Licensing.LicenseType	Case Type Status	Model	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Licensing.LOV	Licensing LOV	Area	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Selecting Users from the Department/User Setup choice of the Administration Main Menu item displays the Users List. This list shows the users that have been set up in SMARTGov. Users are the staff that login and have access to their department and functional areas. This is also where administrators can enable users accounts and security permissions.

The administrator can create new users from this page by clicking on the create button above the list. They can also click on the user to go to the user detail view.

Creating User

When creating a new user, the screen will prompt for login name, first name, Last name. The Display Name will default to the login filled name, but this can be changed at any time.

The main tab for the user allows you to change the user's name and display name. You will not be able to change their login name, as this is created when the new user is created. You will be able to set the

user to active status from the main tab, and inactivate their account. This prevents the user from being able to log in.

The two scenarios to an account being locked is via the "lock" link at the bottom of the User's Main tab or the user attempted to log in too many times with the wrong password. The locking of the account prevents any access to the user from logging on until an administrator unlocks the account. If an account is locked the locked link becomes "unlock". You can click the "unlock" link to allow them to log back into the SMARTGov system.

Reset Password link at the bottom of the main tab screen, allows you to reset the user's password to be the login name. This in cases the user forgets their password and needs it to be reset. The first time the user logs into the SMARTGov system after a new account is created or a password reset. The login name is the same as the password, and they will be prompted to change their password.

10 Response to General Requirements

10.1 Quality, clarity and responsiveness

We have made a concerted effort to be clear yet brief in our written responses contained in this proposal to sufficiently answer all requirements.

10.2 Cost and quality of software / implementation services

We have made a concerted effort to extend competitive pricing based upon all requirements. Although the total pricing exceeds \$50,000 the phases of implementation also imply phases of payment due. In other words, not all of the total cost will be billed in the first year.

10.3 Functional/Technical requirements

The functional/technical requirements are below...

10.3.1 Scope of Services

RFP Page #	Requirement	Response (Y=Yes; N=No; F=Future)	Comments
15-16	A. Ability to accept, review, issue, and inspect a variety of permits, documents, and applications, including but not limited to: <ul style="list-style-type: none"> • Building • Land use • Engineering • Business license • Fire • Public works • Special events 	Y	SMARTGov is designed to process permits in all areas according to this requirement.
16	With support for information collection for the full, end-to-end range of the permit life cycle, including: <ul style="list-style-type: none"> • Pre-application processes and conferences • Code interpretations • Design review • Peer review • Exemption and exception requests • Fee payment • Permit application • Screening for completeness 	Y	SMARTGov supports all of these requirements.

RFP Page #	Requirement	Response (Y=Yes; N=No; F=Future)	Comments
16	<ul style="list-style-type: none"> • Document acceptance • Routing, review and re-submittal • Public notice • Public comment • Appeal of decisions • Conditions of approval (and inheritance) • “Time in possession” tracking • Covenant and document recording • Permit issuance • Permit inspection • Inspection monitoring • Special Inspection programs • Bonds and insurance • Post-issuance submittals (revisions, shop drawings) • Permit relationship management • Certificate of Occupancy • On-going performance monitoring • Permit close out • Handling of any exceptions to start-to-finish process flows (such as cancellation and expiration); 	Y	SMARTGov supports all of these requirements.

RFP Page #	Requirement	Response (Y=Yes; N=No; F=Future)	Comments
16-17	<p>B. Ability to manage end-to-end code enforcement processes, including:</p> <ul style="list-style-type: none"> • Complaint lodging • Case assignment • Investigation inspections • Issuance of citations and other enforcement documents • Director's Review • Appeals • Variances • Hearing Examiner processes • Referral for legal action • Case resolution • Exception process 	Y	SMARTGov supports all of these requirements.
17	<p>C. Support a variety of periodic and ongoing inspection programs, this may include:</p> <ul style="list-style-type: none"> • Object registration • Site and object attributes • Licensing • Operator certification • Periodic recurring billing • Inspection scheduling • Inspection performance (by both City and non-City staff) • Inspection auditing (for non-City inspections) • Renewal and closure processes 	Y	SMARTGov supports all of these requirements.

RFP Page #	Requirement	Response (Y=Yes; N=No; F=Future)	Comments
17	<p>D. Support for employee resource management, including:</p> <ul style="list-style-type: none"> • Tracking employee labor effort • Employee assignment and utilization • Management reporting and performance to goals • Full support for industry-standard reporting • Querying tools • Robust ad hoc reporting tools 	Y	SMARTGov supports all of these requirements.
17	<p>E. Support for auditable financial tracking, including:</p> <ul style="list-style-type: none"> • Handling all Department cash transactions • Escrow account management • Billing process management tools • Complete records for tracing and reconciliation tasks 	Y	SMARTGov supports all of these requirements within the context or permit fees, code enforcement fees, planning fees, etc... However SMARTGov is not a utility billing system.
17	<p>F. Ability to manage a variety of licensing programs (for both individuals and objects or installations,) including:</p> <ul style="list-style-type: none"> • Testing and test management • Requirements management/satisfaction • License issuance and renewal and close out 	Y	SMARTGov supports all of these requirements.

RFP Page #	Requirement	Response (Y=Yes; N=No; F=Future)	Comments
17	<p>G. Additional requirements to include but not limited to:</p> <ul style="list-style-type: none"> • User-friendly, web-based design that can track user activity and accept electronic signatures • Systems for internal and external users to create accounts with multiple security levels and possess the ability to notify users via email of changes or the status of permits • Capacity to handle copies, prints, photos, and plans, as well as process fees on-line • Capability to track internal and external process changes and user actions • Ability to implement custom workflows by permit type/group and to generate appropriate reports • Ability to host a multi-tenant client structure on a single database; and support appropriate associated/peripheral technology, including mobile technology/applications 	Y	SMARTGov supports all of these requirements.

RFP Page #	Requirement	Response (Y=Yes; N=No; F=Future)	Comments
18	<p>With our current system, we have suffered from an inability to create true integrations, with traceable relationships and maintainable interfaces. Our replacement will have excellent integration software using industry-standard approaches (such as web services and published APIs). Areas where we plan to integrate include:</p> <ul style="list-style-type: none"> • Electronic plan submittal • Electronic plan review/markup • GIS application and geo-spatial data • Public-facing services offered on the internet (such as online permit application and issuance, fee payment, inspection requests, notification subscription features, and customer-created personal portals) • Support for internal mobile applications (for field personnel) • Support for external mobile applications (for customers using mobile devices) 	Y	SMARTGov supports all of these requirements. Mobile support is limited to handheld digital tablets, pads, laptops, and Toughbook devices.

RFP Page #	Requirement	Response (Y=Yes; N=No; F=Future)	Comments
18	<p>Additional Requirements:</p> <ul style="list-style-type: none"> • Personalized dashboard view of current work assignments and due dates • for staff to estimate work effort per project, and supervisors to make assignments, set completion targets, and monitor review progress • Quality and design features that utilize software industry standards and non-proprietary languages, allow code re-use, and enable lower maintenance costs • Monitoring/alert tools to support efficient plan movement and routing • Inspection support tools to view daily assignments (list or map), balance workloads, link to related relevant documents, and enter inspection results in the field • Tool to merge duplicate Contact records while maintaining data integrity of associated permit and other records 	Y	SMARTGov supports all of these requirements except "tool to merge duplicate Contact records."

10.3.2 Expanded Capabilities Needed Include (II.)

RFP Page #	Requirement	Response (Y=Yes; N=No; F=Future)	Comments
18	<ul style="list-style-type: none"> • Robust tools for building, address, and property information management. Our practice to date has been to capture and manage information related to permit or case actions, but generally not beyond. With our new system, we plan to expand to have a City-wide focus, with information tracking and management for addresses, development site parcels, and building inventory records on a City-wide basis • Calendaring system for workgroups to manage their internal schedules • In-person interactions with the public • Tool to manage inter-Departmental application prerequisites, set specific requirements per project, and track progress toward completion 	Y, F	<p>SMARTGov supports most of these requirements.</p> <p>However SMARTGov does not currently offer Calendaring but has plans to add this in the future.</p>

RFP Page #	Requirement	Response (Y=Yes; N=No; F=Future)	Comments
18	<ul style="list-style-type: none"> • Tool to maintain records of early contacts with applicants, including notes about conferences and coaching sessions, logging of questions asked and answers received, and tracking for exception/exception processes that are resolved prior to formal permit application • Electronic interactions with the public • Manage a Knowledge Base for internal query to support public questions regarding the Land Use and Building codes (submitted electronically). Responses can be template-based, from the Knowledge Base • Accept new applications and electronic plans and documents for review, and manage subsequent routing, review, mark up, and approvals • Maintain public notice processes and “publish” public notice for Land Use permits on the web • Provide automated correction letter capability from multiple personnel 	Y, F	<p>SMARTGov supports most of these requirements.</p> <p>However SMARTGov does not automatically track all email communications nor offer a fully accessible Knowledge Base. However these items are in our road map for future development.</p>

10.3.3 Adjunct Functionality (III.)

RFP Page #	Requirement	Response (Y=Yes; N=No; F=Future)	Comments
19	<ul style="list-style-type: none"> • System to manage issuance, renewal, and expiration of trade licenses (including license testing functions) • System to track registration, inspection and billing of installations with required regular periodic inspections (such as annual inspection of elevator) by City and non- City inspectors • Has a workflow engine where jurisdiction can configure their own business processes; supports basic workflow features including sequential and parallel steps, recognition of events to trigger further actions, and branching/decision logic based on the data involved and on the user performing the action • Provides industry standard Application Programming Interfaces (API), adapter development kits, or similar enterprise application integration (EAI) tools to facilitate transmission and exchanges • Ability to call and use results from external services or APIs as part of workflow in the permitting system 	Y	SMARTGov supports all of these requirements.

RFP Page #	Requirement	Response (Y=Yes; N=No; F=Future)	Comments
19	<ul style="list-style-type: none"> • Public-facing web interfaces must support at least these major web browsers: Google Chrome (latest), Mozilla Firefox (latest), and Microsoft Internet Explorer (8+) • Public-facing interfaces must comply with the City’s Privacy Policy – no personally identifiable information should be collected unless volunteered by the user in an email or survey response. Only standard traffic-tracking data such as IP Address and browser/device information will be collected • If any installations or configurations are required on staff desktop or tablet computers to support this software, such installation or configuration must be compatible with management through Microsoft Configuration Manager 2007+, which is the standard for personal computer management • Ability to add additional document reviews and approvals (job applications, special events) 	Y	SMARTGov supports all of these requirements.

10.3.4 Provides Functionality and Interfaces for the Public to Accomplish the following operations (IV.)

RFP Page #	Requirement	Response (Y=Yes; N=No; F=Future)	Comments
19	<ul style="list-style-type: none"> • View all details and current status of any permit or complaint when searching by project number or address • Ability to create an online account and track current status and activity of all their permits and applications in one place • Start a new project online • Submit their full permit application and all related documents online • Be notified of completion of review and corrections requirements • Submit electronic corrections and revision requests • Pay permit and license fees online with a credit card and/or an advance deposit account • Schedule inspections online • Ability to process multiple record types and track process steps, fees, reviews, inspections, and specialized data for each • Ability to provide a public-facing portal for applicant/public to view permit information and status, initiate actions, and make submittals online 	Y	<p>SMARTGov supports most of these requirements.</p> <p>We are in process of adding licensing fees via the portal</p>

10.3.5 Migration from Present System (V.)

RFP Page #	Requirement	Response (Y=Yes; N=No; F=Future)	Comments
19-20	The system must be able to utilize accumulated data from the systems currently in place. The migration path from the existing systems must include any necessary modifications to currently existing systems which are not being supplanted by the new system as well as any necessary data conversion and importation from current systems to provide historical views for the last four to five years.	Y (TBD)	Data migration is typically a very important aspect of customer adoption. We are happy to scope the cost of this service by reviewing a full backup copy of your legacy data. Upon this formal scoping we will be able quote firm pricing. Until this scoping is done data migration will show on our pricing as "TBD."

10.3.6 Documentation (VI.)

RFP Page #	Requirement	Response (Y=Yes; N=No; F=Future)	Comments
20	Specific elements of documentation which must be available with the system include operations and technical manuals (both on-line and hard copy), data element dictionary and context-sensitive on-line help text with customizable help screens.	Y	SMARTGov supports all of these requirements.

10.3.7 Ongoing Training and Support (VII.)

RFP Page #	Requirement	Response (Y=Yes; N=No; F=Future)	Comments
20	<p>The vendor will be responsible for providing ongoing user and technical support for a period of three or more years in a variety of areas including, but not necessarily limited to, training users on the initial implementation, installing and configuring product updates as they become available, assistance in building and maintaining the structure of codes, fees, and permit types, and in helping to design a documented paper workflow system which best complements the electronic workflow processes made possible by the new system. Any upgrades or enhancements must include user training.</p> <ol style="list-style-type: none"> 1. On-going technical training shall be included for IT personnel during implementation of the original system and any subsequent upgrades or enhancements. 	Y, TBD	<p>Formal training is part of the pricing to deploy this solution. Additional training can be achieved via available tutorial videos, help documentation, or at our training rate of \$200/hour. We are happy to negotiate pre-purchased training packages at the time of contract negotiations. The attached pricing only includes training necessary for initial deployment.</p>

10.4 Installation, Implementation, and Training Plan

Paladin has reviewed the Maricopa Electronic Permitting and Plan Review System RFP. After this review, Paladin is confident that our SMARTGov system can meet or exceed the majority of the requirements set forth in the Scope of Services section (pages 15-20) of the RFP. The one notable exception to the requirements is Electronic plan review / markup noted in Section 1 item G. At this time, SMARTGov does not have this capability. The SMARTGov product team has had this capability on their 2014 Roadmap and have been reviewing requirements and technologies available that could be added to SMARTGov to provide our clients with this new functionality. After this review, we have decided to integrate with e-PlanSoft's™ e-PlanCheck® Electronic Plan Review software application. The SMARTGov product team has been working with e-PlanSoft to identify the appropriate interfaces and integration points that will give our customers a seamless, robust, manageable interface between the two systems. The SMARTGov product team expects to have this integration completed 4th quarter 2014. Paladin has engaged e-PlanSoft with a partner agreement and has acquired the rights to provide its customers with e-PlanCheck.

Paladin would act as the prime contractor and offer's a phased approach to the implementation of SMARTGov and e-PlanCheck at the City of Maricopa. The proposed phases are described below and will result in a fully integrated Electronic Permitting and Plan Review System as described in the RFP.

Phase 1 – Implement SMARTGov's Amazon Cloud based Permitting, Code Enforcement, Licensing and Inspection Modules

During this initial phase, Paladin will work with the City of Maricopa to implement the SMARTGov Permitting, Code Enforcement, Licensing, Inspection, Public Portal, Inspection Assistant (mobile) modules. Major milestones and deliverables are:

- Data migration from Munis.
- Data migration validation by City of Maricopa.
- Interfaces defined/configured/developed/implemented for Financial system, GIS system, Merchant Services.
- SMARTGov system configuration to specific City of Maricopa requirements. (i.e. Permit types, Code Enforcement Types, License Types, Inspection Types, Submittal requirements, Workflows, Fees etc.).
- Develop and/or configure reports, form letters, and output documents.
- Provide administrator and end user training for all SMARTGov functions and modules.

At the completion of this phase the City of Maricopa will have a fully configured SMARTGov system suitable for performing all their Permitting, Code Enforcement, Licensing, Inspection, Public Portal tasks. As well as trained end-users.

Phase 2 – Deploy e-PlanSoft's e-PlanCheck module to the SMARTGov environment in the Amazon Cloud.

During this phase, Paladin will deploy e-PlanSoft's e-PlanCheck system to the SMARTGov environment in the Amazon Cloud and provide access to the software for the City of Maricopa plan reviewers. Some SMARTGov permitting data and submittal documents will be populated for use in the following interface analysis. Paladin will then conduct a detailed analysis that will identify the necessary and appropriate integration points. Paladin will work with the City of Maricopa plan reviewers to incorporate their suggestions and recommendations into the final integration. Once a final integration requirements are defined the SMARTGov product team will develop, test and deploy the integration. Major milestones and deliverables are:

- e-PlanCheck system deployed to the SMARTGov environment in the Amazon Cloud
- City of Maricopa plan reviewers provided introduction to e-PlanCheck.
- Integration points between SMARTGov and e-PlanCheck defined by Paladin and City plan reviewers.
- Interfaces defined/configured/developed/implemented for seamless interaction between SMARTGov and e-PlanCheck.
- City of Maricopa integration acceptance.
- SMARTGov and e-PlanCheck Integration documentation.
- Provide administrator and end user training for all functions and modules.

At the completion of this phase the City of Maricopa will have a fully configured SMARTGov system integrated with e-PlanCheck suitable for performing all their electronic plan review tasks. As well as trained end-users.

In recognition of the City of Maricopa's contribution to this effort, Paladin will perform this phase at no cost to the City of Maricopa.

Phase 3 – Define, develop and review the integration of SMARTGov, e-PlanCheck® and the SMARTGov Public Portal

During this Phase, Paladin will conduct a complete end to end review of the SMARTGov permit application and document submittal process. Paladin will ensure that the end users of the system have what they need to apply for a permit, submit required documentation and pay fees for the initial submission. Paladin will also review the Portal to SMARTGov workflows, the SMARTGov to e-PlanCheck workflows, the applicant notification workflows, and the resubmittal workflows to ensure an accurate and seamless experience for all participants. Paladin will work with the City of Maricopa to identify any discrepancies and the SMARTGov product team will develop/test/deploy corrective actions as necessary. Major milestones and deliverables are:

- Functional Gap Analysis
- Process Documentation
- Identified Functional Gaps corrected with updated Public Portal
- Provide administrator and end user training

At the completion of this phase the City of Maricopa will have a fully configured SMARTGov system integrated with e-PlanCheck and the SMARTGov Public Portal suitable for performing all their permit submittal tasks. As well as trained end-users.

In recognition of the City of Maricopa's contribution to this effort, Paladin will perform this phase at no cost to the City of Maricopa.

10.4.1 Milestones within Phase 1

Most implementation services are included in the cost of system implementation. See pricing section for information relating to the cost for Data Migration/Conversion and Configuration Development.

Paladin follows a proven approach to scheduling and delivering the elements of system implementation. By using a data and process gathering approach that makes it easy for jurisdiction staff to define their unique system configuration requirements, the implementation project benefits from having a direct link to the functional requirements of the actual users. This cooperative process, coupled with Paladin's technical expertise in system deployment, provides you with a dependable and stable system, which will carry them well into the future by accommodating easy adaptation of the product to new business practices as they arise.

A standardized methodology is followed when deploying SMARTGov local government solutions. Project management functions will continue throughout the span of the implementation project and include the following tasks:

- A kick-off meeting for the Paladin and jurisdiction project teams and key stakeholders to discuss roles and responsibilities and determine project task assignments.
- A needs analysis phase, preferably on-site, to determine in detail the configuration requirements for your jurisdiction. A Project Scope and Timeline Plan will be produced following this session and delivered to jurisdiction staff.
- Weekly project team meetings via conference call to track project progress against the plan and identify impediments that need to be addressed.
- Weekly status reports, with project component delivery as required, will be delivered from Paladin to the jurisdiction project team.

Milestone 1: System Installation

Paladin's off-the-shelf system provides you with all necessary software and configuration needed to deploy the SMARTGov solutions. You are responsible for providing the hardware necessary to host SMARTGov. The Paladin technical team will, if necessary, help jurisdiction IT staff configure the hardware and then install necessary software components remotely.

Specific tasks for this phase are performed by Paladin and jurisdiction staff and include:

- Hardware identification (Paladin) and setup (jurisdiction)
- Establishment of remote connection to hardware to facilitate software installation and configuration (jurisdiction)
- Installation of SMARTGov and SMARTGov Panoramic applications and auxiliary modules (Paladin)
- Installation of basic templates and seed data (Paladin)

Milestone 2: System Configuration

Once the basic SMARTGov system is available on-site, a representative of the Paladin Implementation team will come to your jurisdiction to work with your staff and scope the needs and of the project. Paladin and jurisdiction staff will prepare for the configuration of the new system by gathering all necessary documentation about jurisdiction business processes. Following this on-site visit, jurisdiction staff will be able to easily define and document dynamic data values such as permit and planning record types, code enforcement violation, inspections, approvals, fees and submittal document dependencies that will need to be created in the new system prior to deployment by utilizing an automated electronic data-gathering tool provided to them.

As this data is turned over to the product implementation staff, Paladin is able to configure the SMARTGov systems to meet the business process requirements unique to you. By assisting in identifying and establishing these values, Paladin demonstrates the manner in which users will maintain them through the graphical user interface once the system is implemented.

All system configuration work will then be performed by Paladin staff in our offices in Poulsbo, Washington. The selected SMARTGov modules are then deployed to you fully configured with your unique data and ready to use.

Specific tasks for this phase include:

- Jurisdiction staff will identify system users and their planned roles according to in accordance with Paladin's recommendations
- Jurisdiction staff will deliver specific data and information as required by the Paladin project team (items requested typically include jurisdiction logo for report headings, street listings, zoning codes, occupation types, among others)
- Paladin will deliver the electronic data gathering tool to your project team for template configuration
- Jurisdiction staff will generate template baseline data
- Paladin will finalize the configuration of jurisdiction data

Interface Development

Paladin's development personnel are skilled in the implementation of all supported interfacing technologies and have successfully customized integration scripts with various external applications



such as GIS, ESRI and document imaging solutions. Paladin relies on a number of technologies in developing interfaces to external applications and data stores in a heterogeneous environment. The selection of any one particular technology is dependent more on performance and operating environment considerations than developer preferences.

Interfaces developed will be either direct links to external relational database tables or extraction, transformation and load processes against staged flat files. Processing against direct RDBMS links is effected utilizing configurable stored procedures or web services and the appropriate connection technology.

Data Migration/Conversion of Legacy Data –Included Access Data

Paladin will begin the data migration process early in the project by performing an analysis of your existing data in both the source system and interfacing systems. Candidate data for the target system is moved to the production environment and the business rules associated with the conversion are defined through a detailed data mapping effort. The data migration scripts are written and can be run in a modular fashion, allowing Paladin to perform the data migration as many times as necessary to validate that the incoming data is accurate and correct. This enables jurisdiction staff multiple opportunities to review and assess the state of the converted data.

Paladin recognizes that some of the data for the new system will need to be supplied by jurisdiction and will not necessarily be migrated from existing data stores. Paladin's implementation team will assist you in defining validation type codes, user accounts, security rules and other configurable system data. While assisting in identifying and establishing these values, Paladin will demonstrate how jurisdiction staff will maintain them through the graphical user interface once the system is implemented. This process, along with a complete, yet not final, data migration is performed in preparation for jurisdiction staff testing.

Once the latest data conversion is validated by jurisdiction staff, the process is performed a final time prior to going live, providing the final layer of verification and accuracy.

Customized Reports

Paladin offers a selection of standard reports, as well as custom developed reports to meet your reporting needs. Extensive features are built into the SMARTGov systems to provide a wide variety of available reports.

Included with your SMARTGov deployment is our efficient report configuration package. This package enables you to select 5 reports/output documents which the SMARTGov delivery team will modify or create from scratch. You will deliver your requirements to the SMARTGov team for a two-pass acceptance process. The SMARTGov team will deliver each report/output document for your first review and response. You will then make final requests which we will deliver for the completed reports.

Should custom report development be desired, such reports are designed, modified and implemented by meeting with jurisdiction staff, defining data and layout, and testing the completed reports with "real life" data. Such reports are available for purchase at our then current hourly rate.

For internal report development the integrated Ad Hoc query tool, empowers jurisdiction staff with additional analytical tools and report writing capabilities.

Milestone 3: Testing, Acceptance & Validation

In preparation for system testing and data validation, Paladin recommends that participating jurisdiction staff follow a comprehensive test plan that includes sample data specific to their test case scenarios. Paladin also advises that a full set of migrated data be moved to the test database during this phase (if

available). The test database will then be made available to jurisdiction testers for a period of time prior to moving it into full production. During a portion of this time, Paladin staff will be onsite to provide assistance on functionality of the system, and train jurisdiction staff members that will be involved in validation testing. This helps to make sure the new system will produce accurate results in a live environment.

Milestone 4: Training

Paladin believes that the level of training delivered throughout this process is a key step in creating knowledgeable support staff and user community capable of adequately operating and administering the SMARTGov systems.

The SMARTGov system training will be performed for the following City groups:

- IT Staff
- System administrators
- Power users
- Reviewers
- Inspectors
- Inspection Assistant users
- Public Portal administrators

Paladin also provides training for the integrated ad-hoc reporting tool. Jurisdiction users will spend time developing specific reporting solutions to their business problems.

Milestone 5: Final Implementation & Go-Live

Once jurisdiction testers and Paladin implementation teams have validated the accuracy of the configuration, application updates, data migration and interfaces, the system is ready to be moved to a production environment. Paladin will be onsite for this process, assisting jurisdiction IT staff and system users leading to successful go-live transition where jurisdiction staff assumes the roles as “primary” and “system support” users for the new system.

Milestone 6: Post-Implementation Support

Post-implementation and continuing support is an important component of a strong and lasting relationship with jurisdiction staff. Paladin understands that problems and issues can arise when a new system is implemented and Paladin commits to providing the support, resources and knowledge to assist jurisdiction staff before, during and after the system is in production.

10.4.2 Training

The objective of Paladin’s training program is to help people use the system with satisfaction and success. Paladin trains all licensed users, including identified jurisdiction super-users, on all aspects of the system, as well as IT support personnel. These super-users then will be utilized to assist Paladin’s training staff, as well as to provide ongoing day-to-day support to other system users. This helps to provide qualified in-house training resources with specialized knowledge of jurisdiction procedures to be available during the software acclimatization period, as well as in the future to train new users long after the project implementation contract ends.

1.a.1. Goals

- Improvement in user awareness and ability to use the system
- Sufficient technical knowledge transfer for successful systems support
- Ease of training program maintenance after end of project contract

The objective of Paladin's training program is to make sure people who use the system, or support the users, are able to do so with satisfaction and success. The instructor-led courses take student trainers and super-users through the complete operations of the various functional areas of the system, highlighting how operations and activities in a specific area affect others within the overall business context. At the end of this training cycle, the students will understand how to perform specific operations and how the system works overall. Students will also receive special tips on how to effectively coach and train others to use the application successfully.

Paladin takes into account diversity in preferred learning styles and accommodates multi-modal learning preferences in the development of training materials and classroom techniques. Use of a combination of handouts, overhead interactive demonstrations, discussions, and lab exercises has proven to be a successful approach. Knowledge and skills are more quickly introduced by the trainer. Retention, resulting capability, and satisfaction are higher for the student.

1.a.2. SMARTGov IT Staff Training

IT Staff training will cover the SMARTGov infrastructure to ensure that jurisdiction IT staff is ready to support the SMARTGov system through the implementation phase and after go-live.

Training Objectives

Upon training completion, students will understand the SMARTGov system database and application infrastructure and will be able to:

- Have a broad understanding of the SMARTGov system and all IT requirements for system maintenance and operation
- Plan and execute scheduled system updates and hot-fix releases
- Develop a system maintenance plan to work in conjunction with the Paladin Delivery Team to ensure smooth implementation and release deployments
- Handle database backups and maintenance
- Bring up new users and equipment for system access
- Set up Inspection Assistant on jurisdiction provided field units
- Maintain the Inspection Assistant data sync process

1.a.3. SMARTGov System Administrator Training

System Administrator training will cover all aspects of maintaining the SMARTGov system at the jurisdiction level. System administrators will learn how to create project templates, template values, map out the approval process, create a conditions library, and other tasks to help users manage projects in an efficient and consistent manner. The training will also outline how to add new users and assign appropriate roles and security levels.

Training Objectives



Upon training completion, students will understand the SMARTGov system and will be able to:

- Create lookup lists
- Create and maintain templates
- Create workflow processes
- Set up and update fees and fee schedules
- Maintain active users and user roles
- Assign inspections to inspectors
- Manage reports and reporting groups
- Set up print configurations
- Manage project approval process
- Manage parcel information
- Manage complaint information

1.a.4. SMARTGov User Training

User Training will educate system users how to use the land use and development process within SMARTGov. Training will cover functions related to permits, planning actions, inspection and code enforcement activities, from application intake and receipt through inspections and occupancy. Users will learn how to create applications, manage the approval process, assign conditions, collect fees, Jurisdiction certificates of occupancy and handle the project from submittal to final status.

Training Objectives

Upon training completion, students will understand the SMARTGov system and will be able to:

- Create and process applications
- Manage workflow processes
- Manage the permit and plan review life cycle
- Look up, search and query projects
- Create invoices and collect fees
- Create system reports
- Manage contact information
- Manage contractor information
- Manage code enforcement information
- Manage inspector and inspection information
- Manage parcel information

1.a.5. Inspector Training

Inspector training is specifically tailored for site inspectors and focuses on the system functionality they will use in their day-to-day activities and the inspection module. Students will learn how to enter and search for permits, document inspection results, schedule inspections, note issues and irregularities, and generate reports.

Inspection Assistant field application functionality will also be reviewed, educating students on how to input data while working in the field. Students will also learn how to download permits into Inspection Assistant and then upload the data into the main application after performing the inspection.

Training Objectives

Upon training completion, students will understand the inspection module and Inspection Assistant field modules and will be able to:

- Manage inspections
- Create a new inspection
- Change assigned inspector
- Print reports and inspection schedules
- Create and run form letters for notification and information requests
- Download inspection data to field Inspection Assistant
- Update inspection tasks and results in field Inspection Assistant
- Upload field data from the field Inspection Assistant

“The ability to almost immediately have the system respond to changing business needs, such as new permit types, new or changing business rules, and new or changing fees, has been the greatest benefit. We believe it is conservative to say that we are experiencing a 25 to 35 percent reduction in overall time from permit application to final date.”

*Larry Dannenfeldt
IT Director, Coconino County*

1.a.6. Code Enforcement Training

Training is specifically tailored for code enforcement officers or users who track citizen requests and code violations. This class focuses on the system functionality they will use in their day-to-day activities and the code enforcement module. Students will learn how to enter and search for cases, note issues and violations, and generate reports.

Field Inspection Assistant functionality will also be reviewed, educating students on how to input data while working in the field. Students will also learn how to download permits into Inspection Assistant and then upload the data into the main application after performing the inspection.

Training Objectives

Upon training completion, students will understand the code enforcement and Inspection Assistant modules and will be able to:

- Create new cases
- Create new case actions
- Manage case and action assignments
- Create and manage a code violation library
- Create and run reports
- Create and run form letters for notification and information requests
- Download case and violation data from Inspection Assistant
- Upload field data from the Inspection Assistant

1.a.7. Ad Hoc Reporting Training

The ad hoc report training class covers all aspects of internal custom report development utilizing the query tool. Users will learn how to view data stored in the system and develop reports based upon that

data. Users will also learn how to create and modify ad hoc queries, implement simple and advanced calculations, and present and format query results.

Training Objectives

Upon training completion, students will understand the ad hoc report query tool and will be able to:

- Create reports
- Assign conditions and parameters
- Apply subtotals and grand totals
- Use simple and complex calculations to manipulate data
- Alter the layout and appearance of a report
- Format and edit data within the report
- Share reports with other users
- Save reports as user favorites

1.a.8. Continuing Education

In addition to the initial training classes provided during the implementation process, Paladin also provides a selection of ongoing educational opportunities available to all users. This includes onsite training where Paladin professionals conduct training sessions at jurisdiction facilities, webinar training where refresher courses are offered online, and Paladin based training where a group of jurisdiction staff can come to Paladin for focused training sessions.

1.a.9. Onsite Training

If additional training is required for extended education or additional users above and beyond the named user license, Paladin will be happy to conduct such training at then current rates.

1.a.10. Data Conversion/Migration Plan

Paladin will begin the data migration process early in the project by performing an analysis of your existing data in both the source system and SMARTGov. Candidate data for the target system is moved to the production environment and the business rules associated with the conversion are defined through a detailed data mapping effort. The data migration scripts are written and can be run in a modular fashion, allowing Paladin to perform the data migration as many times as necessary to ensure the data coming across is accurate and correct. This enables jurisdiction users multiple opportunities to review and assess the state of the converted data.

Paladin's implementation team will assist jurisdiction staff in defining validation type codes, user accounts, security rules and other configurable system data. While assisting in identifying and establishing these values, Paladin will demonstrate how to maintain them through the graphical user interface once the system is implemented. This process, along with a complete, yet not final, data migration is performed in preparation for user testing/validation.

Once jurisdiction staff validates the latest data conversion, the process is performed a final time prior to going live, providing the final layer of verification and accuracy.

1.a.11. Integration Plan/Connectors

Paladin’s development personnel are skilled in the implementation of all supported interfacing technologies and have successfully customized integration scripts with various external applications such as GIS, ESRI and document imaging solutions. Paladin relies on a number of technologies in developing interfaces to external applications and data stores in a heterogeneous environment. The selection of any one particular technology is dependent more on performance and operating environment considerations than developer preferences.

Interfaces developed by Paladin staff will be either direct links to external relational database tables or extraction, transformation and load processes against staged flat files. Processing against direct RDBMS links is effected utilizing configurable stored procedures or web services and the appropriate connection technology.

10.5 Anticipated Proposed Time Line

Week (Starting Aug 4 th – Ending Nov 14 th)	01	02	03	04	05	06	07	08	09	10	11	12	13	14	15
Project Scoping and Business Practice Review															
Project Kickoff Meeting															
Scoping and Business Practice Review Sessions															
Configuration															
Data Migration															
System Configuration (Permit Types Inspection Types, Workflow Steps and Actions, Fees, Reports, etc.)															
Connectors Creation (GIS, Parcel Updates, Financial System, On-line Payments, Document Management System)															
Public Portal Configuration															
Validation															
Train Users for Validation Testing															
Users Validate Configuration															
Go Live															
Train Users															
Onsite Go Live Support															

10.6 Demonstrated Performance

We are happy to demonstrate this solution at the appropriate time.



11 Implementation Support and Training

11.1 Project Management Approach

Most implementation services are included in the cost of system implementation. See the pricing section for information relating to the cost for Data Migration/Conversion and Configuration Development.

Paladin follows a proven approach to scheduling and delivering the elements of system implementation. By using a data and process gathering approach that makes it easy for jurisdiction staff to define their unique system configuration requirements, the implementation project benefits from having a direct link to the functional requirements of the actual users. This cooperative process, coupled with Paladin's technical expertise in system deployment, provides you with a dependable and stable system, which will carry them well into the future by accommodating easy adaptation of the product to new business practices as they arise.

A standardized methodology is followed when deploying SMARTGov local government solutions. Project management functions will continue throughout the span of the implementation project and include the following tasks:

- A kick-off meeting for the Paladin and jurisdiction project teams and key stakeholders to discuss roles and responsibilities and determine project task assignments.
- A needs analysis phase, preferably on-site, to determine in detail the configuration requirements for your jurisdiction. A Project Scope and Timeline Plan will be produced following this session and delivered to jurisdiction staff.
- Weekly project team meetings via conference call to track project progress against the plan and identify impediments that need to be addressed.
- Weekly status reports, with project component delivery as required, will be delivered from Paladin to the jurisdiction project team.

11.1.1 Phase 1: System Installation

Paladin's off-the-shelf system provides you with all necessary software and configuration needed to deploy the SMARTGov solutions. You are responsible for providing the hardware necessary to host SMARTGov. The Paladin technical team will, if necessary, help Jurisdiction IT staff configure the hardware and then install necessary software components remotely.

Specific tasks for this phase are performed by Paladin and jurisdiction staff and include:

- Hardware identification (Paladin) and setup (Jurisdiction)
- Establishment of remote connection to hardware to facilitate software installation and configuration (Jurisdiction)
- Installation of SMARTGov and SMARTGov Panoramic applications and auxiliary modules (Paladin)
- Installation of basic templates and seed data (Paladin)

11.1.2 Phase 2: System Configuration

Once the basic SMARTGov system is available on-site, a representative of the Paladin Implementation team will come to your Jurisdiction to work with your staff and scope the needs and of the project. Paladin and Jurisdiction staff will prepare for the configuration of the new system by gathering all necessary documentation about jurisdiction business processes. Following this on-site visit, Jurisdiction staff will be able to easily define and document dynamic data values such as permit and planning record types, code enforcement violation, inspections, approvals, fees and submittal document dependencies that will need to be created in the new system prior to deployment by utilizing an automated electronic data-gathering tool provided to them.

As this data is turned over to the product implementation staff, Paladin is able to configure the SMARTGov systems to meet the business process requirements unique to you. By assisting in identifying and establishing these values, Paladin demonstrates the manner in which users will maintain them through the graphical user interface once the system is implemented.

All system configuration work will then be performed by Paladin staff in our offices in Poulsbo, Washington. The selected SMARTGov modules are then deployed to you fully configured with your unique data and ready to use.

Specific tasks for this phase include:

- Jurisdiction staff will identify system users and their planned roles according to in accordance with Paladin's recommendations
- Jurisdiction staff will deliver specific data and information as required by the Paladin project team (items requested typically include jurisdiction logo for report headings, street listings, zoning codes, occupation types, among others)
- Paladin will deliver the electronic data gathering tool to your project team for template configuration
- Jurisdiction staff will generate template baseline data
- Paladin will finalize the configuration of Jurisdiction data

Interface Development

Paladin's development personnel are skilled in the implementation of all supported interfacing technologies and have successfully customized integration scripts with various external applications such as GIS, ESRI and document imaging solutions. Paladin relies on a number of technologies in developing interfaces to external applications and data stores in a heterogeneous environment. The selection of any one particular technology is dependent more on performance and operating environment considerations than developer preferences.

Interfaces developed will be either direct links to external relational database tables or extraction, transformation and load processes against staged flat files. Processing against direct RDBMS links is effected utilizing configurable stored procedures or web services and the appropriate connection technology.

Data Migration/Conversion of Legacy Data –Included Access Data

Paladin will begin the data migration process early in the project by performing an analysis of your existing data in both the source system and interfacing systems. Candidate data for the target system is moved to the production environment and the business rules associated with the conversion are defined through a detailed data mapping effort. The data migration scripts are written and can be run in a modular fashion, allowing Paladin to perform the data migration as many times as necessary to validate that the incoming data is accurate and correct. This enables Jurisdiction staff multiple opportunities to review and assess the state of the converted data.

Paladin recognizes that some of the data for the new system will need to be supplied by the Jurisdiction and will not necessarily be migrated from existing data stores. Paladin's implementation team will assist you in defining validation type codes, user accounts, security rules and other configurable system data. While assisting in identifying and establishing these values, Paladin will demonstrate how Jurisdiction staff will maintain them through the graphical user interface once the system is implemented. This process, along with a complete, yet not final, data migration is performed in preparation for jurisdiction staff testing.

Once the latest data conversion is validated by Jurisdiction staff, the process is performed a final time prior to going live, providing the final layer of verification and accuracy.

Customized Reports

Paladin currently offers over 70 standard reports. Additionally, 5 custom reports are included in our standard pricing. Extensive features are built into the SMARTGov systems to enable you to create and deploy an unlimited number of reports/output documents.

Included with your SMARTGov deployment is our efficient report configuration package. This package enables you to select 5 reports/output documents which the SMARTGov delivery team will modify or create from scratch. You will deliver your requirements to the SMARTGov team for a two-pass acceptance process. The SMARTGov team will deliver each report/output document for your first review and response. You will then make final requests which we will deliver for the completed reports.

Should additional custom report development be desired from Paladin developers, such reports are available for purchase at our current hourly rate. The average creation time for a report is three hours. The current hourly rate is \$160.

For end user report development the integrated Ad Hoc query tool, empowers jurisdiction staff with additional analytical tools and report writing capabilities.

11.1.3 Phase 3: Testing, Acceptance & Validation

In preparation for system testing and data validation, Paladin recommends that participating Jurisdiction staff follow a comprehensive test plan that includes sample data specific to their test case scenarios. Paladin also advises that a full set of migrated data be moved to the test database during this phase (if available). The test database will then be made available to jurisdiction testers for a period of time prior to moving it into full production. During a portion of this time, Paladin staff will be onsite to provide assistance on functionality of the system and train jurisdiction staff members that will be involved in validation testing. This helps to make sure the new system will produce accurate results in a live environment.

11.1.4 Phase 4: Training

Paladin believes that the level of training delivered throughout this process is a key step in creating knowledgeable support staff and user community capable of adequately operating and administering the SMARTGov systems.

The SMARTGov system training can be performed for the following City groups:

- IT Staff
- System administrators
- Power users
- Reviewers
- Inspectors
- Inspection Assistant users
- Public Portal administrators

Paladin also provides training for the integrated ad-hoc reporting tool. Jurisdiction users will spend time developing specific reporting solutions to their business problems.

11.1.5 Phase 5: Final Implementation & Go-Live

Once Jurisdiction testers and Paladin implementation teams have validated the accuracy of the configuration, application updates, data migration and interfaces, the system is ready to be moved to a production environment. Paladin will be onsite for this process, assisting jurisdiction IT staff and system users leading to successful go-live transition where jurisdiction staff assumes the roles as “primary” and “system support” users for the new system.

11.1.6 Phase 6: Post-Implementation Support

Post-implementation and continuing support is an important component of a strong and lasting relationship with jurisdiction staff. Paladin understands that problems and issues can arise when a new system is implemented and Paladin commits to providing the support, resources and knowledge to assist jurisdiction staff before, during and after the system is in production.

11.2 Deliverables and Roles

Title	Role	Responsibilities	Deliverable/Milestone
Product Manager	Senior Project Oversight	<ul style="list-style-type: none"> Establish relationships with customer's senior management to understand project goals and provide the support required for project success Provide senior level project oversight 	<ul style="list-style-type: none"> Escalation process
Chief Architect	Senior Technical Lead	<ul style="list-style-type: none"> Responsible for the technical aspects of the products related to this procurement 	<ul style="list-style-type: none"> Product cohesion on customer site
Business Development Executive	Sales	<ul style="list-style-type: none"> Provides continuity from sales to service delivery 	<ul style="list-style-type: none"> Agreements on feature inclusions and capabilities Contract development Delivery turn-over
Delivery Manager	Project Management	<ul style="list-style-type: none"> Performance of the work related to this procurement and for communications with customer representatives 	<ul style="list-style-type: none"> Project plan Status reporting Risk plan Issue tracking Roles & responsibilities Staffing plan Communications plan
Implementation Specialist	Requirements Management / Product Specialist	<ul style="list-style-type: none"> Responsible for understanding customer requirements, configuring product suite to meet those requirements and make sure all other work performed meets customer requirements 	<ul style="list-style-type: none"> Configuration tables Application configuration Report modifications and updates Data conversion IT staff training Portal configuration Portal installation
Training Specialist	Training Coordinator	<ul style="list-style-type: none"> Responsible for the user training services related to this procurement. 	<ul style="list-style-type: none"> Training plan Training execution Administrator training User training Validation training
Interface Specialist	Interface Development	<ul style="list-style-type: none"> Provide interface connectors to all external data 	<ul style="list-style-type: none"> Interface development, testing and delivery

Title	Role	Responsibilities	Deliverable/Milestone
Panoramic Specialist	Requirements Management/ Product Specialist	<ul style="list-style-type: none"> Responsible for understanding customer requirements, configuring product suite to meet those requirements and make sure all other work performed meets customer requirements 	<ul style="list-style-type: none"> Project needs analysis System configuration User training

11.3 Milestones of Project & Estimated Project Timeline

Week (Starting Aug 4 th – Ending Nov 14 th)	01	02	03	04	05	06	07	08	09	10	11	12	13	14	15
Project Scoping and Business Practice Review															
Project Kickoff Meeting	Paladin/Jurisdiction Cooperative Tasks														
Scoping and Business Practice Review Sessions	Paladin/Jurisdiction Cooperative Tasks	Paladin/Jurisdiction Cooperative Tasks	Paladin/Jurisdiction Cooperative Tasks												
Configuration															
Data Migration															
System Configuration (Permit Types Inspection Types, Workflow Steps and Actions, Fees, Reports, etc.)			Paladin Tasks	Paladin Tasks	Paladin Tasks	Paladin Tasks	Paladin Tasks	Paladin Tasks	Paladin Tasks	Paladin Tasks	Paladin Tasks	Paladin Tasks	Paladin Tasks		
Connectors Creation (GIS, Parcel Updates, Financial System, On-line Payments, Document Management System)			Paladin Tasks	Paladin Tasks	Paladin Tasks	Paladin Tasks	Paladin Tasks	Paladin Tasks	Paladin Tasks	Paladin Tasks	Paladin Tasks	Paladin Tasks	Paladin Tasks		
Public Portal Configuration												Paladin Tasks			Paladin/Jurisdiction Cooperative Tasks
Validation															
Train Users for Validation Testing											Paladin/Jurisdiction Cooperative Tasks				
Users Validate Configuration											Jurisdiction Tasks	Jurisdiction Tasks	Jurisdiction Tasks		
Go-Live															
Train Users														Paladin/Jurisdiction Cooperative Tasks	Paladin/Jurisdiction Cooperative Tasks
Onsite Go Live Support														Paladin/Jurisdiction Cooperative Tasks	Paladin/Jurisdiction Cooperative Tasks

Legend:

- Paladin Onsite
- Jurisdiction Tasks
- Paladin Tasks
- Paladin/Jurisdiction Cooperative Tasks

11.4 Proposed Staffing Plan (Measured in FTE)

The following table shows an estimate of the amount of time that will be needed to support the project by Jurisdiction staff. (One FTE = 40 hours)

WEEK	0 1	0 2	0 3	0 4	0 5	0 6	0 7	0 8	0 9	1 0	11	12	13	14	1 5
Configuration															
Permit and Planning Specialists	1.0	1.0	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3					
Code Enforcement Specialist	0.7	0.5	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3					
IT Specialists	1.0	1.0	0.2	0.2	0.3	0.2	0.2	0.2	0.2	0.2					
Validation and Review															
Permit and Planning Specialists						0.7	0.6	0.6	0.3	0.3	1.0	1.0	1.0		
Code Enforcement Specialist						0.7	0.6	0.6	0.3	0.3	0.5	0.5	0.5		
IT Specialists						0.4	0.2	0.2	0.2	0.2	0.3	0.3	0.3		
Training and Go Live															
Permit and Planning Specialists														4.0	4.0
Code Enforcement Specialist														1.0	1.0
IT Specialists														0.5	0.5
Systems Specialist														0.7	0.7
Follow Up															
Systems Specialist															0.5
Total FTE															
JURISDICTION STAFF – TOTAL FTE	2.7	2.5	0.8	0.8	0.9	2.6	2.2	2.2	2.2	2.2	1.8	1.8	1.8	6.2	6.7

11.5 Maintenance Program

Maintenance and Support

How regular support is provided

Users can access the Service Desk by phone from 8am- 5pm (PST) Monday through Friday, or 24/7 using email and in the near future via the web. (866) 367-4572

How after hours support is provided

SMARTGov support staff is available 24/7 365 for down production systems. For on premise deployments, the rate for after-hours support is \$225/hour.

How software defects are handled

Technical Assistance Requests (TARs) are defined as individual problems referred by customers to Paladin. Paladin support center analysts categorize TARs identified by customers as follows:

Maintenance and Support

Severity 1

The problem causes complete loss of service. Work cannot reasonably continue, the operation is mission-critical to the business and the situation is an emergency. A Severity 1 problem has one or more of the following characteristics:

- Data corrupted
- A critical function is not available
- System hangs indefinitely, causing unacceptable or indefinite delays for resources or response.
- System crashes and crashes repeatedly after restart attempts

Severity 1: Paladin 24-Hour Commitment

Paladin will work 24/7 until the issue is resolved or as long as useful progress can be made. Customer must provide Paladin with a contact during this 24/7 period, either on site or by pager, to assist with data gathering, testing and applying fixes.

For Severity level 2, 3, 4 our Service Desk follows a simple workflow process that delivers fast and efficient incident resolution, keeping all users at maximum productivity. Most questions are addressed instantly, or are escalated for further action and resolved accordingly. All calls to Paladin are logged and response time tracked. Each call is prioritized based on are resolved based on priority, severity, type of problem reported and the impact to the operation. The objective is to respond to a service call within one hour, within normal operating hours, to further diagnose, clarify or resolve the issue.

Severity 2

The problem causes a severe loss of service. No acceptable workaround is available; however, operation can continue in a restricted fashion.

Maintenance and Support

	<p>Severity 3</p> <p>The problem causes minor loss of service. The impact is an inconvenience, which may require a workaround to restore functionality.</p> <p>Severity 4</p> <p>The problem causes no loss of service. The result is a minor error, incorrect behavior, or a documentation error that does not impede the operation of a system.</p>
<p>How and when software upgrades, minor and major are provided and timing to complete them</p>	<p>A significant benefit of using subscription-based SMARTGov is that new features developed become available to all customers. These features are grouped into product releases which are preceded by product announcements and followed up with updated documentation and training opportunities.</p>
<p>Modifications required as a result of state/federal requirements</p>	<p>New state and federal requirements can be handled with our SMARTGov configuration capabilities.</p>
<p>Custom modifications desired</p>	<p>Customers use the SMARTGov configuration tools to customize application to their needs</p>

12 Vendor Questionnaire (Attachment B)

1.a.12. Which other systems, if any, does your product integrate with and which products do you prefer to work with and why?

SMARTGov can be integrated with many merchant shopping cart services, GIS mapping, and general ledger systems. We do not have preferences for which 3rd party vendors you wish to connect with.

1.a.13. Does your system track permit and plan check workflows?

SMARTGov together with EPC offer advanced workflow options. The proposed solution provides an API method that allows the integrated Permit application to *create* plan check assignments for departments and/or assigned reviewers on demand.

The plan check workflow can be also *monitored* via API calls. Detailed information can be returned from the proposed solution to the Permit application and/or customer portal that includes the current plan check status by project or for every department/assigned reviewer.

When all assigned departments complete their plan reviews for a permit/submittal package, the proposed solution raises an internal event that notifies the integrated Permit application that the plan check is complete. This solution can also email specific users who may wish to receive these alerts.

1.a.14. Does your system have the ability to easily import, view, and edit submittal packages that may include various information, plan sheets and technical reports?

The proposed solution provides the ability to view and edit submittal packages for all plans and technical reports. Importing documents can be performed manually or via the API.

Submittals

Submittal	Required	Received	Accepted	
Application	Yes			
Business License 	Yes	6/24/2014	n/a	
Contractors License	Yes			
Building Plans - 3 Copies 	Yes	6/2/2014	n/a	
Site Plan - 4 copies 	Yes	6/12/2014	n/a	
Residential Energy Calcs	Yes			
Structural Calcs 	Yes	6/17/2014	n/a	
Geotech Report (if in Critical Area)	Yes			
Landscape Plan (if proposed modification to CA)	Yes			
Wetland/Stream/Habitat Mitigation Plan	Yes			
Street Cleaning Agreement	Yes			
Plan Review Waiver	Yes			
Vicinity Map	Yes			
Utility Availability letters (unless plattd after 1996)	Yes			
Building Height Worksheet	Yes			
Owner acting as General Contractor form	Yes			

1.a.15. Does your system have workflow capabilities for various submittal types?

The proposed solution provides a workflow manager allows agencies to create distribution models for asynchronous reviews by various departments based on the project type and the discipline set of the plans. Workflows can be created in a matter of minutes and require no coding or IT support.

The Permit application can also use the API to create workflow distributions on demand, thus eliminating the need to maintain workflows in two separate programs.

1.a.16. Does your system allow for applicants to submit applications, documents, and plans electronically? If so what is the method of submittal?

The proposed solution accepts Plans and supporting documents saved in PDF format. Integration to the Permit/Enterprise app is available via API calls.

1.a.17. Will applicants have real time access to permit status (beyond applied, in review, issued)?

The proposed solution can provide information to the Portal or Permit application which breaks down the current plan check status by department for each project.

1.a.18. Does your system recognize/utilize digital stamps and signatures (e.g. architects and engineers)?

Any stamps or signatures added by the originating architects/engineers to their submitted plans will be recognized by the proposed solution.

1.a.19. What instructions do we give to the public for submitting digital applications, documents, and plans?

See the Electronic Submittal Recommendations.pdf attached.

1.a.20. Do you have a web interface that allows customer to fill out application and insert specific information that will automatically calculate submittal fees and allow for payment?

Yes, the proposed solution offers this capability.

1.a.21. Does your system have the ability to automatically notify an applicant that all approvals have been secured and permit is ready for issuance?

Yes, the proposed solution offers updated statuses via the public portal. The applicant can easily check and monitor permit status on demand.



[Home](#) | [Jon Byrd](#) ▾

SFR-2014-015 Single Family Residence - New

[Contact](#)

Address: 120 124TH ST SW UNIT 10A EVERETT, WA 98204-5796 Parcel #: 00685500101000	Status: Application is under initial review	Submitted: 5/16/2014 Approved: Issued: Closed: Expires: 11/12/2014	Inspections Required: 16 Requested: 0 Respect: 0 Complete: 0	Total Due: \$5,188⁶⁰ Pay
---	---	--	--	--



Contacts

OWNER: **RAMCHANDANI ARUN W**
12118 5TH PL W
EVERETT, WA 98204-5646

APPLICANT: **Byrd, Jon**
236 Serenade Way

1.a.22. Does your system allow the applicant to pay balance owed at website and print out permits and plans?

Yes, the proposed solution offers this feature.

1.a.23. Does your system have the ability to add deferred permit application materials, or to notate permit applications with dates that are due at a different time than the original starting permit request?

The proposed solution can accept deferred submittals at any time. New documents coming into a project are designated as a 1st Submittal.

1.a.24. Does your system allow others to access and view digital documents?

The proposed solution enable any City user of the system to access and view digital documents.

Permit Detail										
Main Details Parcels Structures Contacts Contractors Valuations Fines Fees Submittals Workflow Conditions Inspections										
Permit #: SFR-2014-015 Alerts Status: PENDING Contact: Byrd, Jon Address: 120 124TH ST SW UNIT 104										
Type: SFR-NEW Project: Contractor: AMARO, JOEY G JR EVERETT, WA 98204-5756										
Order	Submittal	Defar	Web Upload	Received	Received On	Rec'd Req.	Accepted	Accepted On	Acc'd Req.	
1	APPLICATION	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	
2	BUSINESS LICENSE	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	06/24/2014	<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	
3	CONTRACTOR LICENSE	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	
4	BLD PLAN-3	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	06/02/2014	<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	
5	SITE PLAN-4	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	06/12/2014	<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	
6	SFR ENERGY CALC	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	
7	STRUCTURAL CALCS	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	06/17/2014	<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	
8	GEO TECH RPT CRITICAL	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	
9	LANDSCAP PLAN/MOD CA	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	
10	WET/STREAM/HAB MIGR	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	
11	STREET CLEAN AGREEMT	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	

1.a.25. Does your system have the capability for plan reviewers and applicants to concurrently review drawings for coordinated conversations and information sharing?

The proposed solution provides truly concurrent reviews. Plan checkers in any department can work on the same plans at the same time and see the markups and comments placed by other users in real time. Reviewers can work on multiple projects at a time and open as many plans as desired.

From the Markup Review page, comments attached to the plan by any user are viewable by any other user.

From the Comment Log page, users can perform keywords searches or apply custom filters for all comments in the project.

Via the API, this data can also be passed to the Permit Application and displayed in whatever manner is desired.

The screenshot shows a search panel for the Comment Log. It includes several dropdown menus for filtering: Department (All), Discipline (All), Submittal (All), Disposition (All), Project (All), Record Number (to), Reviewer Firm (All), Sheet Number, Comment, Sub-Category (All), Reviewer ID (All), Category (All), Entry Date (to), Comment Date (to), and Comment Type (All Comments). A search button with a magnifying glass icon and a clear button are located at the bottom right of the panel.

Comment Log - Search Panel

Sheet No	Comment No	Reviewer Comment	App/Case Responder	Disp	Department	Discipline	Imp
A-2	0023	The permit application must be signed by the property owner or licensed contractor or authorized agent at the time the permit is to be issued.		Closed	null	null	minor
A-2	0024	Doors between garage and dwelling unit shall be self-closing and self-latching, solid wood or solid or honeycomb core steel not less than 1-3/8" thick, or have a minimum fire protection rating of 20 minutes. (406.1.4)		Open	null	null	minor
A-1	0025	Provide 1-hr fire-resistance rating for exterior walls for R-3 and/or U occupancy less than 5' from property line or assumed property line. 2-hr fire-resistance rating exterior required for building 0' from property line or assumed property line. (Table 602, 705.1.1 & Table 705.4)		Open	null	null	minor
A-2	0026	Rooms containing bathtubs, shower, spas, and similar bathing fixtures, shall be mechanically ventilated. Separate mechanical permit may be required. (1203.4.2.1)		Open	null	null	minor
A-1	0027	provide ultra flushwater closets for all new construction. Existing shower head and water closets must be adapted for low water consumption.		Closed	null	null	minor
A-2	0023	The permit application must be signed by the property owner or licensed contractor or authorized agent at the time the permit is to be issued. For the owner-builder permits: Owner's signature can be verified with additional documentation required for properties owned by partnership, joint venture, corporation, LLC, etc. For contractor-builder permits: Prior to the issuance of		Open	null	null	major

41 Records

Batch Upload Attachment Report Add Standard Add Comment

Corrections Report Export Excel Export RTF ICC eCodes

Comment Log - Search Results

1.a.26. What is the ability to easily navigate through plan sets on a large screen that may contain 30 to 40 pages of technical drawings?

Because the proposed solution runs in a web-browser, users can open plans in individual 'windows' for review.

Available in 4th quarter 2014, EPC will introduce a Page preview tool that will allow users to flip through multi-page PDF documents, access document bookmarks, etc.

1.a.27. Is your system capable of electronically stamping submittals and/or approvals?

The proposed solution provides the ability for Reviewers to apply their digital stamps and signatures to their reviewed plans and maintain an audit log for every stamp/signature added to (or removed from) the plans.

The proposed solution also provides a stamp management tool that allows administrators the ability to upload and assign stamps to the reviewers.

Support for digital certificates and batch stamping of the plans is coming in 4th quarter 2014.

1.a.28. Does your system allow applicants and/or reviewers to overlay resubmittals on screen?

Yes, using the custom built Markup Review Tool, reviewers can enable an overlay or side by side comparison view to the plans. Since the proposed solution is not a tool for the general public, an applicant would not be a user of the system.

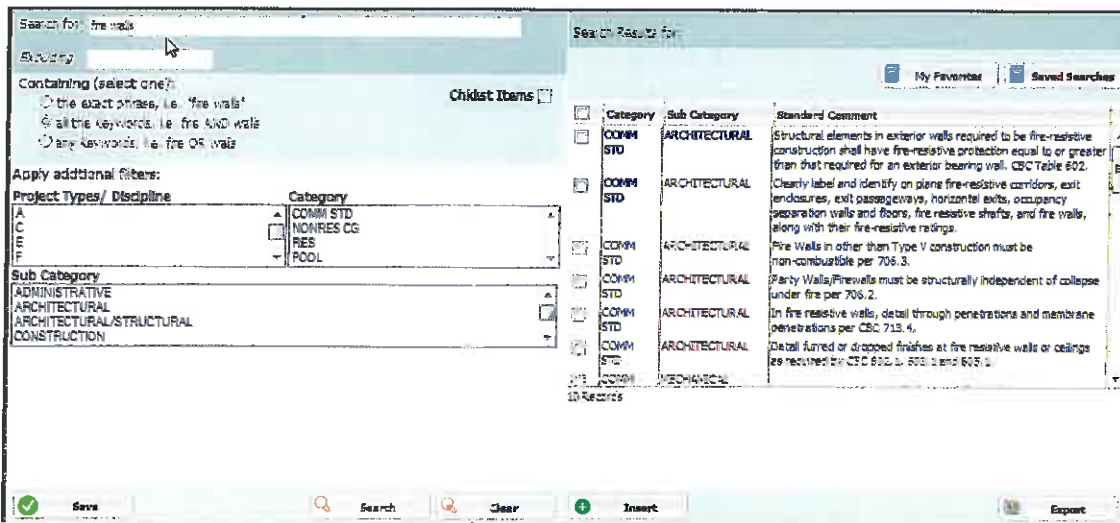
1.a.29. Does your system have an electronic freehand sketching tool?

Yes. The Markup Review Tool does include a free hand sketch tool.

1.a.30. Does your system allow for the development and management of standard comments that can be dropped into a document or project?

Yes. The proposed solution comes with a Standard Comment and Checklist Library module that allows agencies to batch upload and manage their standard comments and checklists. This Library allows reviewers the ability to insert one or many comments into their project – or an entire checklist into their project.

Because The proposed solution is built on a SQL database, it allows users to perform powerful keyword searches, filter the comments by project type, checklists and to save searches as ‘My Favorites’,



1.a.31. Does your system allow comments to be created without linking them to a plan review or Document? (Simple permit, gas, electrical, etc.)

Yes. The proposed solution allows comments to be created for a project without plan review.

1.a.32. Does your system allow individual comments to be viewable by other staff members, but not editable?

Yes. The proposed solution manages the security for each comment so that reviewers can view, copy and paste another reviewer’s comment, but not edit or delete it. A department manager has rights to delete a comment associated to his department, but not edit it.

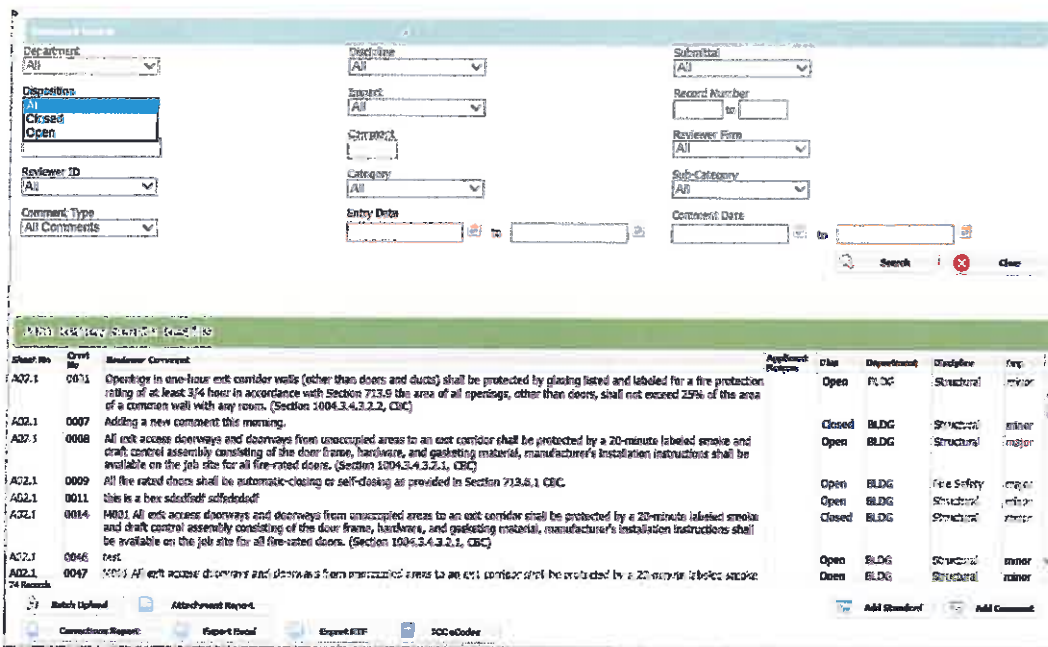
The proposed solution tracks these database events in the audit log, so system Administrators can view the history of all comments added and deleted for each project.

1.a.33. How is the correction list/letter created in your system?

In The proposed solution the 'Corrections List' report can be generated from the Project Comment log page. Simply filter the comments to retrieve the comments that should appear on the report, then click the 'Corrections Report' button. This powerful tool allows users to create custom searches of all the comments within a project and filter the data by department, disposition, discipline, reviewer, date range, etc.

The proposed solution will ask whether the Corrections Report should be saved as a deliverable to be returned with the plans and other supporting documents to the Applicant. Below is a screen shot of the comment log page which is used to filter and generate the report.

Users of the proposed solution can run the Corrections Report at any time. The data can also be exported to RTF or XLS format if desired.



This sample of a Correction report generated by the proposed solution shows how the sheet # and database assigned comment number are displayed on each line item. Each comment can be created with a link to the Correction Report heading and sub-heading labels. The proposed solution uses this information to place each comment under the proper section of the report.

BUILDING

APPLICATION

1. The permit application must be signed by the property owner or licensed contractor or authorized agent at the time the permit is to be issued. [#E100] [0001]
2. Doors between garage and dwelling unit shall be self-closing and self-latching, solid wood or solid or honeycomb core steel *not less than* 1-3/8" inched thick, or have a minimum fire protection rating of 20 minutes. (406.1.4) [#E100] [0003]

ADMINISTRATION

1. Clarify the scope of work, new, modified and existing on the plans (93.027). [#E100] [0002]
2. Provide Single Line Diagram (93.0207(n),215.5) [#E100] [0004]
3. Unless permitted otherwise, the highest operable part of all controls, dispensers, receptacles shall be placed within *not less than* 15 inches above floor *and no more than* 48 inches above floor. [#E100] [0005]
4. Provide calculation for the combustion of air. (95.701.1.1) [#E100] [0006]

Page 1 of 3

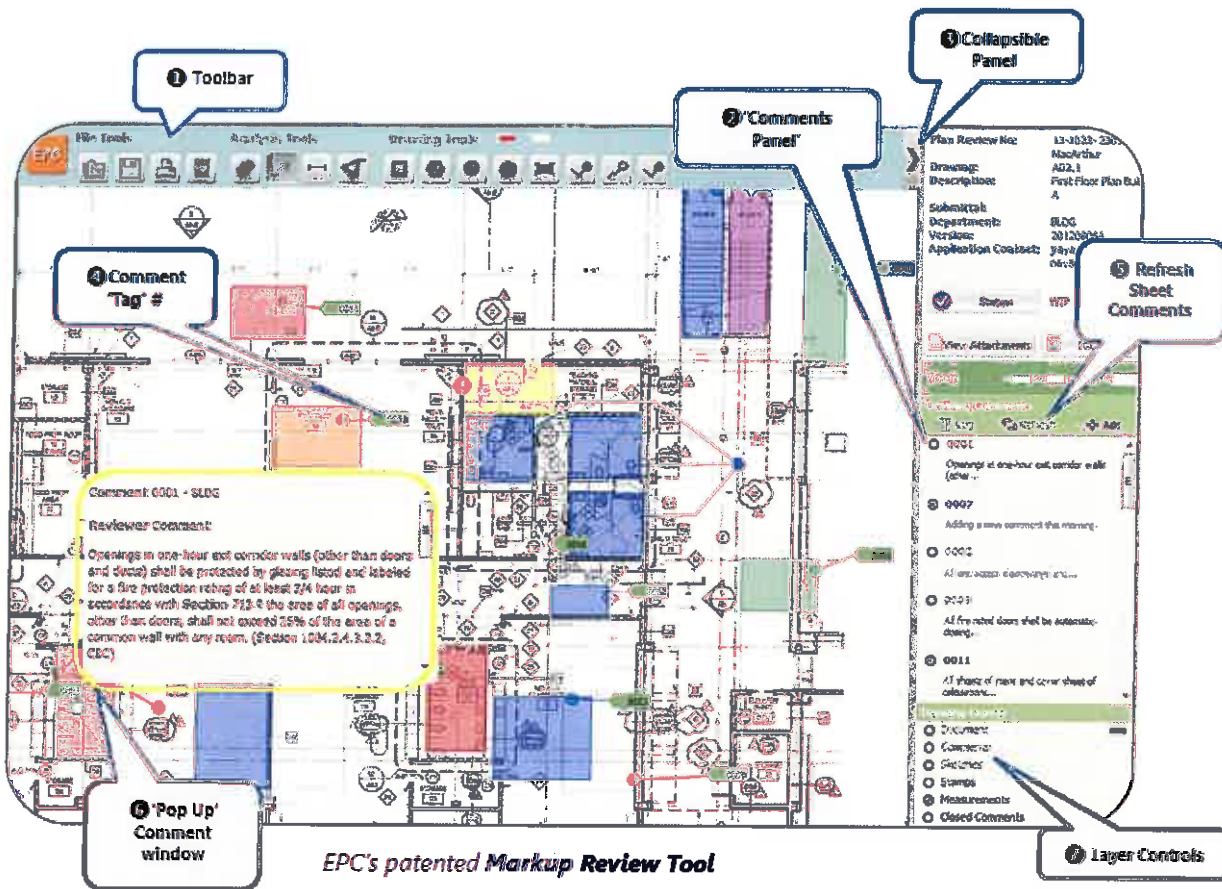
A complete plan check will be performed when the listed items are addressed.

Plan Check By: [Name] Direct: [Name] FAX: [Number]

1.a.34. What make your software unique and different?

Unlike other plan review tools, E-PLANSOFT products are wholly owned, patented, custom built applications designed by industry professionals. Because we own our products, we encourage input from our clients as we work together to develop product enhancements and features.

- Because the proposed solution is web-based, multiple plan checkers can conduct their reviews on the same plans concurrently and see the sketches, measurements and comments made by other staff on screen *in real time*.
- There is **no software to install** on the client computers.
- The proposed solution can be integrated to most permitting applications and their customer portals – eliminating the need for duplicate data entry.
- Because the proposed solution runs in a web-browser, each plan opens in its own window, so having multiple sheets open at once is easy. Reviews can open plans from several projects at once, if necessary.
- There is no *need to upload and download plans* and supporting documents from FTP sites and the proposed solution fully manages resubmittals to ensure that the most recent versions are being used for reviews.
- Because the proposed solution is built on a *SQL database*, all previously drawn markups, measurements and open comments are automatically carried forward from the earlier submittals to the most current plan – and visible to all assigned departments.
- In the proposed solution, staff can create workflow rules in as little as two minutes that route incoming plans to specified departments and/or specific plan reviewers based on the project type. There is no programming required.
- Our custom-built markup tool provides rectangles, polygons, circles, clouds, line tools, freehand sketches, color selectors, opacity settings, panning, zooming, line and area measurements, stamps and auto-numbered comment tags. Overlay and side-by-side comparisons tools are also provided.
- Like other plan review tools, comments can be placed at an x/y coordinate chosen by the user. However, in the proposed solution adding comments is taken it to a whole other level because all data is stored not in a text box, but in a **searchable database**.
- All reviewer comments can be filtered by department, discipline, reviewer, disposition (open or closed) – and many other options.
- The proposed solution provides a sophisticated Standard Comments Library where entire checklists can be added to a project - and pushed to multiple sheets at the click of a button.
- This Standard Comment library becomes a powerful search tool for the plan checkers and can be easily managed by an administrator.
- In the proposed solution, comments can be formatted with bolding, italics, bulleted and numbered lists and hyperlinks to provide a professional narrative style Correction Report.
- The proposed solution delivers the reviewed plans as PDF documents with pop-up comments, sketches, attachments and the Correction Report in PDF, RTF or XLS format.



13 Client References (Attachment D)

13.1 Camden County, GA

Camden County, GA ~ Land Management System	
Address	107 N. Gross Road, STE 3 Kingsland, GA 31548
Contact Person	John Peterson
Contact Title	Community Development Director
Contact Phone	(912) 729-5603
Contact Email	jpeterson@co.camden.ga.us
Timeframe	Start – February 2012; Go Live – July 2012
Population	50,513
Version	SMARTGov Hosted in the Amazon Cloud
Data Conversion	Over 10 years of data is scheduled to be converted from Black Bear PTWin32
Project Overview	Camden County purchased SMARTGov to replace their unsupported Black Bear PTWIN32 system.
Project Cost	
Lessons Learned	

13.2 Santa Cruz, County, AZ

Santa Cruz County, AZ ~ Land Management System	
Address	2150 North Congress Drive, Suite 117 Nogales, AZ 85621
Contact Person	Mary Dahl
Contact Title	Director Department of Community Development
Contact Phone	(520) 375-7930
Contact Email	mdahl@co.santa-cruz.az.us
Timeframe	Start – August 2011; Go Live – September 2011 to Present
Population	47,420
Version	SMARTGov Hosted in the Amazon Cloud
Data Conversion	Over 10 years of data was converted
Project Overview	Santa Cruz County was using an unsupported permit tracking system from Black Bear Systems called PTWin which needed to be replaced. They selected SMARTGov Community for the comprehensive functionality as well as the affordable costs.
Project Cost	

Santa Cruz County, AZ ~ Land Management System

Lessons Learned This deployment enabled our team to refine our migration process for PTWin data. We have since improved our data migration from all databases.

13.3 City of Harrisonville, MO

City of Harrisonville, MO ~ Land Management System

Address	300 E. Pearl Street, P.O. Box 367 Harrisonville, Missouri 64701
Contact Person	April Clark
Contact Title	Permit Technician
Contact Phone	(816) 380-8958
Contact Email	aclark@ci.harrisonville.mo.us
Timeframe	Start – July 2011; Go Live – August 2011 to Present
Population	10,010
Version	SMARTGov Hosted in the Amazon Cloud
Data Conversion	Over 8 years of data was converted
Project Overview	The City of Harrisonville, MO was using an older system that was no longer being supported called PTWin from Black Bear Systems. They needed to find the right solution that could contain their legacy data and provide improvements over their previous permit processing methods. They selected SMARTGov for the configurability along with the embedded GIS browser to leverage mapping along with permits and code enforcement actions. Additionally, Harrisonville implemented SMARTGov’s administrative abilities to standardize all permits by type and required submittal. No all permits are processed in a predictable way allowing for predictable processing times.
Project Cost	\$60,000
Lessons Learned	Harrisonville is a very extensive user of code enforcement. Our delivery team was able to build out an extended library of code enforcement letters as a result of this deployment.

13.4 Skamania County, WA

Skamania County, WA ~ Land Management System

Address	240 NW Vancouver Street Stevenson, WA 98648-0790
Contact Person	Karen Witherspoon
Contact Title	Community Development Director
Contact Phone	(509) 427-3900
Contact Email	witherspoon@co.skamania.wa.us
Timeframe	Start – August 2011; Go Live – September 2011 to Present

Skamania County, WA ~ Land Management System

Population	11,066
Version	SMARTGov Hosted in the Amazon Cloud
Data Conversion	Over 10 years of data was converted from Black Bear PTWin32
Project Overview	Skamania County purchased SMARTGov to replace their unsupported Black Bear PTWIN32 system. Additionally SMARTGov is intended to improve communication between departments and collaboration with the public thru better reporting, reduced processing time, and improved plan review routing.
Project Cost	\$32,000
Lessons Learned	Skamania was a good exercise in cross-departmental collaboration. We gained greatly in our understanding of workflow in the plan review process.

13.5 Town of Florence, AZ

Town of Florence, AZ ~ Land Management System

Address	775 North Main Street P.O Box 2670 Florence, AZ 85232
Contact Person	Tracy Ramirez
Contact Title	Permit Specialist
Contact Phone	(520) 868-7573
Contact Email	Tracie.Ramirez@florenceaz.gov
Timeframe	Go Live with Interlocking – December 2005; Go Live with SMARTGov February 2013
Population	17,781
Version	SMARTGov Hosted in the Amazon Cloud
Data Conversion	Previously used our Interlocking Software (precursor to SMARTGov). Migrated to SMARTGov in 2013.
Project Overview	Florence purchased our precursor product InterLocking Software to improve communication and collaboration between departments and well as to offer improved service to the public with better reporting, reduced processing time, and improved plan review routing. They migrated to our SMARTGov solution in early 2013 to update technology, provide a public portal, and better increase communication and efficiency between departments.
Project Cost	\$20,000
Lessons Learned	This deployment was important in improving our available reports within SMARTGov.

13.6 City of Spokane Valley, WA

City of Spokane Valley, WA ~ Land Management System

Address	11703 E. Sprague Avenue, Suite B-3 Spokane Valley, WA 99206
Contact Person	Mike Turbak
Contact Title	Senior Permit Specialist
Contact Phone	(509) 720-5317
Contact Email	MTurbak@spokanevalley.org
Timeframe	Start – August 2011; Go Live – February 2012
Population	89,755
Version	SMARTGov hosted on Amazon Cloud
Data Conversion	Over 10 years of data was converted
Project Overview	Spokane Valley was using a home grown system which Spokane County built called PLUS. The designer of this system is in process of retiring which forces both the County and the City of Spokane Valley to replace PLUS with a new system. They needed a system which can handle multijurisdictional tenancy while allowing for autonomous configuration for each jurisdiction. SMARTGov is currently in process of deployment. We are on schedule for Go-Live in early March 2012.
Project Cost	\$50,000
Lessons Learned	This deployment was initially via an on premises server managed by a local, offsite IT consultant. We learned how important it is to deploy in the cloud for jurisdictions that do not have fulltime IT staff. Spokane Valley opted to move to our cloud platform a year after deployment. They love the service they are getting in the cloud from the SMARTGov team.

13.7 City of Mukilteo, WA

City of Mukilteo, WA ~ Permit Center Software

Address	11930 Cyrus Way Mukilteo, WA 98275
Contact Person	Patricia Love
Contact Title	Director of Community Development
Contact Phone	(425) 263-8041
Contact Email	plove@ci.mukilteo.wa.us
Timeframe	Start – December 2008; Go Live – February 1, 2009 to Present
Population	20,000
Version	SMARTGov hosted in Amazon Cloud

City of Mukilteo, WA ~ Permit Center Software

Data Conversion	Over 10 years of data was converted
Network	LAN covering the entire community development department
Project Overview	<p>The City of Mukilteo was nearing a large annexation which would double the Cities land mass and significantly increase land management issues. They needed a new permit and planning system to efficiently track all aspects of land.</p> <p>Mukilteo purchased InterLocking Software solution from Paladin Data Systems and implemented it in the Spring of 2009. Mukilteo also added Paladin’s Code Enforcement module as well as the Inspection Assistant, Public Portal and Management Dashboard applications for in the city’s planning, building, engineering, and fire departments.</p> <p>The system replaced the Access database system previously used to process over 300 permits issued and 200 plan reviews conducted each year.</p>
Project Cost	\$90,000
Lessons Learned	Mukilteo was a great example of deployment in phases. We have really refined our ability to break the project into smaller steps that are easier for all parties to manage.

13.8 Kitsap County, WA

Kitsap County, WA ~ Land Management System & Assessor Treasurer System

Address	614 Division Street Port Orchard, WA 98366
Contact Person	Loren Chilson
Contact Title	Application Specialist
Contact Phone	(360) 337-5777 x 3124
Contact Email	lchilson@co.kitsap.wa.us
Timeframe	Start – October 2011; Go live – May, 2012 to present
Population	247,600
Version	SMARTGov hosted internally by County IT organization
Data Conversion	Over 20 years of data was converted
Network	LAN covering community development, assessor, & treasurer
Project Overview	Kitsap County needed to replace a 20-year-old Assessor/Treasurer system and permit tracking/land management system. They needed this new system to be

Kitsap County, WA ~ Land Management System & Assessor Treasurer System

totally integrated with the Jurisdiction's GIS, appraisal, auditor and financial systems.

Kitsap County hired Paladin Data Systems to build this new system to efficiently handle all property tax and assessor related functions, but also to fully integrate a new state-of-art web-based permit tracking system. Paladin designed a table-driven tax administration and permit tracking system. From this model, Kitsap County benefits from the real time sharing of assessor parcel data while performing permit and licensing business functions. The four largest cities in the County have subsequently implemented the system in a shared multi-jurisdictional fashion. This scenario creates a single repository for permit and land-use information throughout Kitsap County.

After using the InterLocking system for 10 full years, Kitsap County migrated over to SMARTGov, Paladin's latest version of land management software.

Project Cost \$120,000

Lessons Learned Kitsap implemented a series of lean manufacturing best practices during the deployment of SMARTGov and were instantly able to improve processing workflow by over 15%. We are convinced in the capabilities of SMARTGov as a tool of automation and we look forward to delivering the same type of efficiencies across the country.

14 Disclosures of Conflict

Paladin does have any conflicts of interest to disclose as defined by Arizona Revised Statutes, Title 38, Chapter 3, Article 8. Paladin agrees that in the event any professional or personal financial interest, does exist the nature of the relationship shall be disclosed to the City and examined by the City of the material facts of the disclosure. Furthermore, the above reference statute shall govern the actions of the city in the event a conflict exists.

15 Substitute W-9 Form (Attachment C)

ATTACHMENT C

SUBSTITUTE W-9 FORM

PART I: Company Information:

- 1. Name (as shown on Income Tax Return): Paladin Data Systems Corporation
- 2. Business Name (if different than above): same
- 3. DUNS #: 884744871
- 4. Federal employer identification number (or SSN): 91-1670217
- 5. Type of organization (check one):

<input type="checkbox"/> Individual/Sole Proprietor	<input type="checkbox"/> Limited Liability Company*
<input checked="" type="checkbox"/> Corporation	*Choose the tax classification
<input type="checkbox"/> Partnership	<input type="checkbox"/> Disregarded Entity
<input type="checkbox"/> Other: _____	<input type="checkbox"/> Corporation
	<input type="checkbox"/> Partnership
- 6. Order Address:

<u>19362 Powder Hill Place, Poulsbo, WA 98370</u>
(Order address) (City) (State) (Zip code)
- 7. Remittance address (if different than above):

<u>same</u>
(Remittance address) (City) (State) (Zip code)
- 8. Contact person for bid invitations: Jon Byrd
- 9. Phone Number: 360-779-2400 Fax Number: 360-779-2600
- 10. Email address of contact person: jbyrd@paladindata.com
- 11. Applicant is a (check one):

<input type="checkbox"/> Factory Representative	<input type="checkbox"/> Jobber
<input type="checkbox"/> Manufacturer	<input type="checkbox"/> Authorized distributor
<input type="checkbox"/> Retail dealer	<input checked="" type="checkbox"/> Contractor
<input type="checkbox"/> Consultant	<input type="checkbox"/> Other: _____
- 12. Indicate if the business is registered as a minority or woman-owned company.

<input type="checkbox"/> Minority-owned	<input type="checkbox"/> Woman-owned	<input checked="" type="checkbox"/> Not Applicable
---	--------------------------------------	--
- 13. How long has the company been in business? 19 years
- 14. Does applicant currently hold a valid business license issued by the City of Maricopa?

<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No would acquire as needed.
------------------------------	---

PART II: COMMODITY OR SERVICE DESCRIPTION

- a. Commodity/Service description (this section must be completed):
Paladin's SMARTGov is a flexible cloud based solution to streamline permitting, plan review, code enforcement, inspections and licensing.

PART III: APPLICANT TERMS & CERTIFICATION

Terms:

The City of Maricopa may take up to 30 calendar days after the receipt of vendor's invoice to render payment unless other arrangements are made through a written contract. Applicant's signature below signifies acceptance of those terms.

Under Penalties of perjury, I certify that:

1. The number shown on this form is my correct federal employer identification number.
2. I am not subject to backup withholding because of failure to report interest and dividend income.
3. I am a U.S. person (including a U.S. resident alien).

(NOTE: You must cross out item 2. Above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return).

4. The following business ownership classifications are applicable:

Disadvantaged Business Enterprise Ownership Classification (Select One Only):

- | | |
|--|--|
| <input type="checkbox"/> 1 Non-Small/Non-Minority/Non-Disabled | <input type="checkbox"/> 8 Small Business/Disabled Owner |
| <input checked="" type="checkbox"/> 2 Small Business (Per ARS §41-1001.14) | <input type="checkbox"/> 9 Minority Woman Owned Business |
| <input type="checkbox"/> 3 Minority Owned Business [Per 15 CFR §1400.1(a)] | <input type="checkbox"/> 10 Disabled-Minority Owned Business |
| <input type="checkbox"/> 4 Woman Owned Business | <input type="checkbox"/> 11 Disabled-Woman Owned Business |
| <input type="checkbox"/> 5 Owned By Disabled Individual (Per ARS §41-1492.5) | <input type="checkbox"/> 12 Small Business/Minority-Woman Owned |
| <input type="checkbox"/> 6 Small Business/Minority Owned | <input type="checkbox"/> 13 Small Business/Disabled-Minority Owned |
| <input type="checkbox"/> 7 Small Business/Woman Owned | <input type="checkbox"/> 14 Small Business/Disabled-Minority-Woman Owned |

"The Internal Revenue Service does not require your consent to any provision of this document other than the certifications required to avoid backup withholding."

Robert Johnston

Name (Please print)

Executive Vice President

Title (Please print)

[Signature]

Signature

6/26/2014

Date

16 Bonds – Not Applicable

17 Amendments of Proposal

17.1 Extension



Wed 6/11/2014 5:49 PM

Pattie LaCombe <patricia.lacombe@maricopa-az.gov>

RFP 14DSD041614 [Electronic Permitting and Plan Review System]

To Jonathan Byrd

This complimentary message is being sent to opt-in subscribers that might be interested in its content. If you do not wish to continue receiving these messages, please accept our apologies, and unsubscribe by following the instructions at the bottom of this message.

The City has posted Amendment No. 1 which extends the deadline for submittals to Monday, June 30, 2014, 2:00 pm. If you have any questions, please contact me.

Pattie LaCombe, Purchasing Manager

City of Maricopa

City of Maricopa sent this e-mail to you because your Notification Preferences indicate that you want to receive information from us. We will not request personal data (password, credit card/bank numbers) in an e-mail. You are subscribed as joyrd@paladindata.com, registered on City of Maricopa (<http://www.egovlink.com/maricopa>).

Click Here to Unsubscribe From this List(s): You will be removed from the following lists: 911 - MISC.
http://www.egovlink.com/maricopa/subscriptions/subscribe_remove.asp?i=1122012&d=1675

Manage Subscriptions: If you do not wish to receive further communications, or you wish to view and/or modify which lists you are subscribed to, simply click the link below.
http://www.egovlink.com/maricopa/manage_mail_lists.asp

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18 Proposed Fees/Compensation (Attachment A)

18.1 Required Pricing Form

PRICE and COST SCHEDULE

The vendor's cost quotations must be presented in the following form (Costs are based upon 25 named users of SMARTGov and 12 users of ePlanSoft):

Major Cost Descriptions	Year One	Year Two	Year Three	Year Four	Year Five
1. Software Product	\$ -				
License Fees	\$ -				
a. List any all relevant license fees	\$ -				
	\$ -				
2. Data Migration	TBD				
3. Interfaces	\$ 10,500				
4. Implementations Services	\$ 22,400				
5. Project Management Costs	\$ -				
6. Training	\$ 16,000				
7. Subscription/Support and Maintenance	\$ 36,908	\$ 36,908	\$ 36,908	\$ 36,908	\$ 36,908
8. Travel	\$ 5,000				
9. Other, Please itemize:					
Discount	\$ (26,888)				
ePC Setup/config/Training	\$ 3,700				
Total By Year	\$ 67,620	\$ 36,908	\$ 36,908	\$ 36,908	\$ 36,908
Total Five-Year Cost				\$ 215,252	

18.2 Vendor Pricing Sheet

Notes: **Software as a Service - Subscription** - SMARTGov® Community System - Permit, Planning, Code Enforcement, Licenses, Cashiering, Public Portal, ePlansoft, Integrated GIS w/satellite imagery and road map base layers. **This subscription includes 5 free "occasional users"** which individually average <30% usage during an 8 hour day.

Quantity	Unit of Issue	Description	Unit Cost (US Dollars)	Extended Price (US Dollars)
ANNUAL SUBSCRIPTION COSTS:				
25	Named Users	SMARTGov	\$ 1,034	\$ 25,838
12	Named Users	ePlan Review	\$ 835	\$ 10,020
0	Named Users	SMARTInspection Assistant	\$ 600	\$ -
		SMARTConnector SaaS Transaction	10%	\$ 1,050
		Subtotal for Annual Subscription		\$ 36,908
OPTIONAL ONE TIME COSTS:				
SMARTConnectors				
1	Site	Additional GIS Overlays	\$ 3,500	\$ 3,500
1	Site	Parcel	\$ 3,500	\$ 3,500
1	Site	Financial	\$ 1,000	FREE
1	Site	Merchant Services	\$ 3,500	\$ 3,500
0	Site	Elec Doc Manag Sys	\$ 3,500	\$ -
0	Site	IVR	\$ 7,000	\$ -
Professional Services				
0	Hours	Data Migration Estimate ¹	\$ 160	TBD
40	Hours	Report Configuration	\$ 160	\$ 6,400
40	Hours	Fee Configuration	\$ 160	\$ 6,400
60	Hours	General Configuration	\$ 160	\$ 9,600
80	Hours	Training ¹	\$ 200	\$ 16,000
		ePC Setup/config/training		\$ 3,700
2	Week(s)	Travel ²	\$ 2,500	\$ 5,000
		Subtotal for One Time Costs		\$ 57,600
		Subtotal		\$ 94,508
		1st Year Promotional Discount		\$ (26,888)
		Adjusted Subtotal ³		\$ 67,620
		Tax Rate: 0.00%		\$ -
		Estimated Cost Year One		\$ 67,620
		Annual Recurring Yr 2		\$ 36,908
		Annual Recurring Yr 3		\$ 36,908
		Subsc. Costs		\$ 36,908
		Discounts		\$ (26,888)
		Tax		\$ -
		1-time Costs		\$ 57,600
		Total Costs		\$ 67,620
year 1				\$ 36,908
year 2				\$ 36,908
year 3				\$ 36,908
year 4				\$ 36,908
year 5				\$ 36,908
		Five Year Cost Of Ownership		\$ 215,250

¹This item is estimated.

²Actual costs & GSA Per Diem will be charged.

³Price quote is valid for 120 days.

19 Pre-submittal Meeting - Not Applicable