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Exhibit A-Sales Order

Sales Order

Paladin Data Systems Corporation
19362 Powder Hill Place NE
Poulsbo, WA 98370-8720
Tel: 360-779-2400 1-800-532-8448
Fax: 360-779-2600

Date: October 10, 2014
Order: 1604
Ordered by: Jon Byrd
Required Date: November 10, 2014

To: City of Maricopa
    39700 W. Civic Center Plaza
    Maricopa, AZ 85138

Telephone: 520-568-9098
Fax:
Contact Person: Robert Mathias, C.B.O. Manager
Email: Robert.Mathias@maricopa-az.gov

Purpose of this - Sales Order:

City of Maricopa, AZ, is purchasing a subscription for SMARTGov® Software as a Service (SaaS) which comprises the following core modules: permitting, planning, code enforcement, inspections, licensing, recurring inspections, cashiering, public portal, and GIS mapping. This includes the modification of the following five system reports/output documents to client's specifications: permit, receipt, certificate of occupancy, inspection results, and inspection hardcard.

In addition, this purchase includes SMARTConnectors, professional services for data migration, configuration, training, and travel expenses as identified below. This SaaS Subscription includes five free "occasional named users" which individually average less than 30% usage during an 8 hour day.

This purchase includes Third Party Software called ePlan Soft (ePC), document review software, integrated into SMARTGov.

The scope of work for this integration will take place in three phases:
- Phase one: SMARTGov and ePC will be made available in a sandbox environment for the City of Maricopa, AZ to try out both systems and become familiar with them.
- Phase two: The SMARTGov delivery team will start building connectors, configuration, applicable data migration, and integration between SMARTGov and ePC. The City of Maricopa, AZ will assist by performing data validation, as well as giving feedback and suggestions for the final integration between SMARTGov and ePC.
- Phase three: Go-Live (start date) will be targeted for early 2015 including onsite training and go-live support for the integrated, final solution.

Within two (2) weeks of Sales Order Effective Date and for a period of sixty (60) days, Paladin Data Systems Corporation will provide a sandbox to City of Maricopa to access SMARTGov.

Within sixty (60) days of Sales Order Effective Date, Paladin Data Systems Corporation will schedule an implementation kick-off date and the start date will be approximately twenty (20) weeks after the kick-off meeting.

Start date: TBD   **SaaS Subscription Term:** The first term will run from start date thru June 30, 2015 ("Initial Term").
"Renewal Term": 12 months starting July 1, 2015 each year

Sales tax not included. If tax exempt, please provide a copy of tax exempt certificate.

Qty	Unit of Issue	Description	Unit Cost	Extended Price
Fees for SMARTGov SaaS Subscription				
<u>10</u>	Users[1]	SMARTGov® SaaS with public portal (12 months)	$1462.50	$14,625
<u>6</u>	Users	ePlan Review (12 months)	$835	$5,010
<u>3</u>	Connectors	SMARTConnector SaaS Transaction (12 months)	$350	$1,050
			12 month promotional discount	[$15,675]
		Subtotal for SMARTGov SaaS Subscription fees for Initial Term		**$5,010**
Fees for SMARTConnectors-(Optional Additional Services)				
1	Layer	GIS Additional Layers Connector Connection to additional GIS web services	$3,500	$3,500
1	Site	Parcel Connector Create procedure to import parcel data from master parcel source	$3,500	$3,500
1	Site	Financial Connector Create procedure to export financial transaction data into one delimited text file	$1,000	Free
1	Site	Merchant Services Connector Create integration from SMARTGov public portal to merchant services vendor's payment gateway	$3,500	$3,500
		Subtotal for SMARTConnectors		**$10,500**
Fees for Professional Services and Expenses (Optional Additional Services)				
80	Per Hour	Data Migration[2] of Munis data (estimate only)	$160	$12,800
40	Per Hour	Report Configuration[2]	$160	$6,400
40	Per Hour	Fee Configuration[2]	$160	$6,400
60	Per Hour	General Configuration[2] Assist with basic configuration of permit types, fees, and inspections	$160	$9,600
80	Per Hour	Training[2] Webinar style training or on site	$200	$16,000
1	Fixed Fee	ePlan Soft Setup, configuration, training	$3,700	$3,700
2	Week	Travel expenses[3] (estimate)	$2,500	$5,000
		Subtotal for Professional Services and expenses		**$59,900**
		Total without sales tax		**$75,410**
		SMARTGov SaaS Subscription first Renewal Term (12 months)		$20,685
		SMARTGov SaaS Subscription second Renewal Term (12 months) and beyond (or the then current fees)		$20,685

[1]<u>15</u> User Subscriptions will be set up in the system and will be subject to monitoring and amendment of the number of User Subscriptions and fees under Section 5.1(a) of the Master Saas and Professional Services Agreement.
[2]Estimate only. While We make this estimate in good faith, We will not exceed without written confirmation from You and will notify You as soon as We know that the required work will exceed the original estimate.
[3]Travel expenses:
    Airfare will be billed according to actual rates; however, We will purchase coach class tickets.
    Lodging will be billed according to the actual rates; however, We agree to book government rate lodging if available.
    Car rental will be billed according to actual rates; however, We agree to rent economy car if available.
    Meals and incidental expenses will be billed according to per diem rates as contained in the published GSA per diem rates.

Schedule of Payments	
50% of SMARTGov® total, which is comprised of 50% annual SaaS Subscription fees-$2,505 and 50% of the fees for SMARTGov Connectors-$5,250. Invoiced upon contract signing.	$7,755
50% of SMARTGov® total, which is comprised of 50% annual SaaS Subscription fees-$2,505 and 50% of the fees for SMARTGov Connectors-$5,250. Invoiced at start date.	$7,755
Statement Regarding Proration of Initial Term SaaS Subscription Fees: Since the Initial Term for City of Maricopa, AZ, is less than 12 months, the SMARTGov SaaS Subscription fees for the Initial Term ($5,010) will be prorated ($417.50 per month) and only the months from the start date until June 30, 2015 will be charged. The second 50% invoiced at start date will be adjusted appropriately.	
Professional Services and travel expenses to be invoiced monthly as they occur ($59,900)	Monthly
SMARTGov® SaaS first Renewal Term will begin July 1, 2015 and the total SaaS Subscription due before proration (see below):	$20,685
Statement Regarding Proration of Promotional Discount for first Renewal Term: Since the Initial Term is not a full 12 months and the promotional discount is for 12 months, the promotional discount will be prorated ($1306.25 per month) and will extend into the first Renewal Term. The number of months remaining in the discount period will be deducted from the first Renewal Term fees.	
100% of SMARTGov® SaaS for second Renewal Term (and successive Renewal Terms) total due July 1st each year	$20,685 (or the then current fees).

This Paladin Data Systems Corporation Sales Order ("**Sales Order**") is entered into by City of Maricopa, AZ ("**You or Your**") and Paladin Data Systems Corporation ("**We, Us or Our**" and, together with You, the "**Parties**" and each a "**Party**") as of the Sales Order Effective Date. By signing this Sales Order, You agree to the terms and conditions contained in this Sales Order and the Master Saas and Professional Services Agreement, which is incorporated herein by this reference. This Sales Order is effective as of the last date set forth below (the "**Sales Order Effective Date**").

Agreement Date: _____

(Paladin DataSystems Corporation)

By: _____

Name/Title: Robert Johnston, COP

ATTEST:

_____

Name: Michelle Dvorak

Corporate Secretary

APPROVED:

_____

District Attorney

MARICOPA

By: _____

Christian Price, Mayor

ATTEST

_____

Vanessa Bueras, City Clerk

APPROVED:

_____

Denis Fitzgibbons, City Attorney

THIS MASTER SOFTWARE AS A SERVICE (SaaS) SUBSCRIPTION AND PROFESSIONAL SERVICES AGREEMENT ("AGREEMENT"), EXHIBIT A (Sales Order), EXHIBIT B (Request for Proposals), EXHIBIT C (Response to Request for Proposals), WHICH ARE INCORPORATED INTO THIS AGREEMENT, AND EXHIBIT D (SmartGov Technical Information), GOVERNS YOUR ACQUISITION AND USE OF OUR SaaS SUBSCRIPTION AND PROFESSIONAL SERVICES. BY EXECUTING A SALES ORDER THAT REFERENCES THIS AGREEMENT, YOU AGREE TO THE TERMS OF THIS AGREEMENT. IF YOU ARE ENTERING INTO THIS AGREEMENT ON BEHALF OF A COMPANY OR OTHER LEGAL ENTITY, YOU REPRESENT THAT YOU HAVE THE AUTHORITY TO BIND SUCH ENTITY AND ITS AFFILIATES TO THESE TERMS AND CONDITIONS, IN WHICH CASE THE TERMS "YOU" OR "YOUR" WILL REFER TO SUCH ENTITY AND ITS AFFILIATES. IF YOU DO NOT HAVE SUCH AUTHORITY, OR IF YOU DO NOT AGREE WITH THESE TERMS AND CONDITIONS, YOU MUST NOT ACCEPT THIS AGREEMENT AND MAY NOT USE THE SaaS SUBSCRIPTION OR THE PROFESSIONAL SERVICES.

You may not access the SaaS Subscription if You are Our direct competitor, except with Our prior written consent. In addition, You may not access the SaaS Subscription for purposes of monitoring availability, performance or functionality, or for any other benchmarking or competitive purposes.

This Agreement was last updated on August 28, 2013. It is effective between You and Us as of the date of Your acceptance of this Agreement and the Sales Order (**"Effective Date"**).

1. **DEFINITIONS** IN addition to the terms defined elsewhere in this Agreement, the following terms have the following meanings:

1.1.   "**Affiliate**" means any entity which directly or indirectly controls, is controlled by, or is under common control with the subject entity. "Control," for purposes of this definition, means direct or indirect ownership or control of more than 50% of the voting interests of the subject entity.

1.2.   "**Malicious Code**" means viruses, worms, time bombs, Trojan horses and other harmful or malicious code, files, scripts, agents or programs.

1.3.   "**Non-SMARTGov Applications**" means online applications and offline software products that are provided by entities or individuals other than Us and are clearly identified as such, and that interoperate with the SaaS Subscription.

1.4.   "**Party or Parties**" means either We, Us, or Our, as well as You or Your individually or collectively.

1.5.   "**Professional Services**" means the labor or time and materials work that You or Your Affiliates purchase under a Sales Order.

1.6.   "**SaaS Subscription**" means the software as a service ("**SaaS**") products ordered by You on a Sales Order and made available by Us online via the customer login link and/or other web pages designated by Us, including associated offline components, as described in the User Guide. SaaS Subscription excludes Non-SMARTGov Applications.

1.7.   "**Sales Order**" means the documents for placing orders, including addenda thereto, that are entered into between You and Us or any of Our Affiliates from time to time, including addenda and supplements. By entering into a Sales Order, an Affiliate agrees to be bound by the terms of this Agreement as if it were an original party. Sales Orders will be deemed incorporated herein by reference.

1.8.   "**Third Party**" means any entity or individual other than We, Us, or Our, as well as You or Your.

1.9.   "**User Guide**" means the online user guide for the SaaS Subscription, accessible via login, as updated from time to time.

1.10.   "**Users**" means individuals who are authorized by You to use the SaaS Subscription, for whom subscriptions have been ordered, and who have been supplied user identifications and passwords by You (or by Us at Your request). Users may include, but are not limited to Your employees, consultants, contractors and agents, and any Third Party with which You transact business.

1.11.   "**We," "Us" or "Our**" means Paladin Data Systems Corporation described in Section 14.1 (Contracting Seller, Notices, Governing Law and Jurisdiction).

1.12.   "**You" or "Your**" means the company or other legal entity for which you are accepting this Agreement and Affiliates of that company or entity.

1.13.   "**Your Data**" means all electronic data or information owned by Your company or other legal entity and submitted by You to the SaaS Subscription.

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2. SaaS SUBSCRIPTION AND PROFESSIONAL SERVICES

2.1.   **Provision of SaaS Subscription.** We will make the SaaS Subscription available to You pursuant to this Agreement and the relevant Sales Order during a subscription term. You agree that Your purchases are not contingent on the delivery of any future functionality or features, and not dependent on any oral or written public comments made by Us regarding future functionality or features.

2.2.   **User Subscriptions.** Unless otherwise specified in the Sales Order, (i) SaaS Subscription are purchased as User subscriptions and may be accessed by no more than the specified number of Users, (ii) additional User subscriptions may be added during the subscription term at the same pricing as the pre-existing subscriptions, prorated for the remainder of the subscription term in effect at the time the additional User subscriptions are added, and (iii) the added User subscriptions will terminate on the same date as the pre-existing subscriptions. User subscriptions are for designated Users only and cannot be shared or used by more than one User but may be reassigned to new Users replacing former Users who no longer require ongoing use of the SaaS Subscription.

2.3.   **Provision of Professional Services.** We will provide to You the Professional Services specified on the Sales Order. The Professional Services are cost estimates based on time and materials work for Your budgeting and Our resource scheduling purposes. If the estimate is exceeded, We will continue to provide the Professional Services on a time and materials basis if a statement of work or purchase order for continuation of the Professional Services is signed by the Parties.

3. USE OF THE SaaS SUBSCRIPTION

3.1.   **Our Responsibilities.** We will: (i) provide Our basic support for the SaaS Subscription to You at no additional charge (ii) use commercially reasonable efforts to make the SaaS Subscription available and (iii) We will provide You access to Your Data via a database extract process that enables You to execute and download a current copy of Your Data on demand.

3.2.   **Your Responsibilities.** You will (i) be responsible for Users' compliance with this Agreement, (ii) be responsible for the accuracy, quality and legality of Your Data and the means by which You acquired Your Data, (iii) use commercially reasonable efforts to prevent unauthorized access to or use of the SaaS Subscription, and notify Us promptly of any such unauthorized access or use, and (iv) use the SaaS Subscription only in accordance with the User Guide and applicable laws and government regulations, (v) validate for correctness all output and reports and (vi) have sole responsibility for downloading and storing back-up files, (vii) You will NOT (a) make the SaaS Subscription available to anyone other than Users, (b) sell, resell, rent or lease the SaaS Subscription to any Third Party, (c) use the SaaS Subscription to store or transmit infringing, libelous, or otherwise unlawful or tortious material, or to store or transmit material in violation of Third Party privacy rights, (d) use the SaaS Subscription to store or transmit Malicious Code, (e) interfere with or disrupt the integrity or performance of the SaaS Subscription or Third Party data contained therein, or (f) attempt to gain unauthorized access to the SaaS Subscription or their related systems or networks.

4. NON-SMARTGov PROVIDERS

4.1.   **Acquisition of SMARTGov Products.** We or a Third Party may from time to time make available to You, Third Party products or services, including but not limited to Non-SMARTGov Applications and implementation, customization and other consulting services. Any acquisition by You of Non-SMARTGov products or services, and any exchange of data between You and any Non-SMARTGov provider, is solely between You and the applicable Non-SMARTGov provider. We do not warrant or support Non-SMARTGov products or services, except as specified in a Sales Order. Subject to Section 4.3 (Integration with Non-SMARTGov Applications), purchase of Non-SMARTGov products is not required to use the SaaS Subscription except for a supported computing device, operating system, web browser and Internet connection.

4.2.   **Non-SMARTGov Applications and Your Data.** If You install or enable Non-SMARTGov Applications for use with SaaS Subscription, You acknowledge that We may allow providers of those Non-SMARTGov Applications to access Your Data as required for the interoperation of such Non-SMARTGov Applications with the SaaS Subscription. We will not be responsible for any disclosure, modification or deletion of Your Data resulting from any such access by Non-SMARTGov Application providers. The SaaS Subscription will allow You to restrict such access by restricting Users from installing or enabling such Non-SMARTGov Applications for use with the SaaS Subscription.

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4.3.   **Integration with Non-SMARTGov Applications.** The SaaS Subscription may contain features designed to operate with Non-SMARTGov Applications. To use such features, You may be required to obtain access to such Non-SMARTGov Applications from their providers. If the provider of any Non-SMARTGov Application ceases to make the Non-SMARTGov Application available for operation with the corresponding SaaS Subscription features on reasonable terms, We may cease providing such SaaS Subscription features without entitling You to any refund, credit, or other compensation.

5. FEES AND PAYMENT

5.1.   **Fees.** You will pay all fees specified in all Sales Orders. Except as otherwise specified herein or in a Sales Order, (i) fees are based on SaaS Subscription and/or Professional Services purchased and not actual usage, (ii) payment obligations are non-cancelable and fees paid are non-refundable, and (iii) the number of User subscriptions purchased cannot be decreased during the subscription term stated on the Sales Order. User subscription fees are based on annual periods that begin on the subscription start date and each annual anniversary; therefore, fees for User subscriptions added in the middle of an annual period will be charged a prorated amount for the remaining subscription term.

(a) If We determine, based on electronic monitoring of Your User subscriptions, the actual number of User subscriptions exceeds the number licensed on a Sales Order, We reserve the right to amend the Sales Order for successive Renewal Terms to increase the number of User subscriptions and the fees.

(b) Professional Service fees do not include travel, lodging or other expenses incurred by Us unless specified on the Sales Order. You will reimburse Us for all travel, lodging, communications, incidentals and other out-of-pocket expenses as they relate to the services rendered by Us to You.

5.2.   **Invoicing and Payment.** We will invoice You in advance for SaaS Subscription in accordance with the relevant Sales Order. We will invoice You monthly for Professional Services in accordance with the relevant Sales Order. Unless otherwise stated in the Sales Order, invoiced charges are due net 30 days from the invoice date.

5.3.   **Overdue Payments.** If any payments are not received by the due date, then at Our discretion, (a) such overdue payments may accrue late interest at the rate of 1.5% of the outstanding balance per month, or the maximum rate permitted by law, whichever is lower, from the date such payment was due until the date paid, and/or (b) We may condition future subscription renewals and Sales Orders on payment terms shorter than those specified in Section 5.2 (Invoicing and Payment).

5.4.   **Suspension of SaaS Subscription or Professional Services.** If any amount owing by You under any agreement is 30 days' overdue, We may, without limiting Our other rights and remedies, accelerate Your unpaid fee obligations so that all such obligations become immediately due and payable, and suspend Our SaaS Subscription or Professional Services to You until such amounts are paid in full.

5.5.   **Payment Disputes.** We will not exercise Our rights under Section 5.3 (Overdue Payments) or 5.4 (Suspension of SaaS Subscription or Professional Services) if You are disputing the applicable charges reasonably and in good faith and are cooperating diligently to resolve the dispute.

5.6.   **Taxes.** Unless otherwise stated, Our fees do not include any taxes, levies, duties or similar governmental assessments of any nature, including but not limited to value-added, sales, use or withholding taxes, assessable by any local, state, provincial, federal or foreign jurisdiction (collectively, "**Taxes**"). You are responsible for paying all Taxes associated with Your purchases hereunder. If We have the legal obligation to pay or collect Taxes for which You are responsible, the appropriate amount will be invoiced to and paid by You, unless You provide Us with a valid tax exemption certificate authorized by the appropriate taxing authority. For clarity, We are solely responsible for taxes assessable based on Our income, property and employees.

6. PROPRIETARY RIGHTS

6.1.   **Reservation of Rights in SaaS Subscription.** Subject to the limited rights expressly granted hereunder, We reserve all rights, title and interest in and to the SaaS Subscription, including all related intellectual property and trademark rights. No rights are granted to You other than as expressly set forth herein.

6.2.   **Restrictions.** You will not (i) permit any Third Party to access the SaaS Subscription except as permitted herein or in a Sales Order, (ii) create derivate works based on the SaaS Subscription, (iii) copy, frame or mirror any part or content of the SaaS Subscription, other than copying or framing on Your own intranets or otherwise for Your own internal business purposes, (iv) reverse engineer, decompile or

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otherwise attempt to derive source code, or (v) access the SaaS Subscription in order to (a) build a competitive product or service, or (b) copy any features, functions or graphics of the SaaS Subscription.

6.3.   **Ownership.** We retain sole and exclusive ownership of, and all right, title and interest in and to the SaaS Subscription, the documentation User Guide, any modifications and all suggestions, ideas, improvements, feedback, evaluation materials, presentations, designs, technology, inventions, know-how, works of authorship, software, specifications, and other materials, information and any other intellectual property made, developed, conceived or reduced to practice by Us (whether alone, or jointly with You) in the performance of this Agreement.

6.4.   **Your Applications and Code.** If You, a Third Party acting on Your behalf, or a User creates applications or program code using the SaaS Subscription, You authorize Us to host, copy, transmit, display and adapt such applications and program code, solely as necessary for Us to provide the SaaS Subscription in accordance with this Agreement. Subject to the above, We acquire no right, title or interest from You or Your licensors under this Agreement in or to such applications or program code, including any intellectual property rights therein.

6.5.   **Your Data.** Subject to the limited rights granted by You hereunder, We acquire no right, title or interest from You or Your licensors under this Agreement in or to Your Data, including any intellectual property rights therein. You grant to Us a non-exclusive license to use Your Data for the purposes of performing Our obligations under this Agreement.

6.6.   **Our Protection of Your Data.** We receive no ownership rights in Your Data. We will (a) maintain commercially reasonable industry standard administrative, physical, and technical safeguards for protection of the security, confidentiality and integrity of Your Data, and (b) notify You within forty-eight (48) hours regarding any known security breach. We will not (a) modify Your Data, (b) disclose Your Data except as compelled by law in accordance with Section 7.3 (Compelled Disclosure) or as expressly permitted in writing by You, or (c) access Your Data except to provide the SaaS Subscription or Professional Services and prevent or address service or technical problems, or except at Your request in connection with customer support matters.

6.7.   **Report Writer Software**. You acknowledge the SaaS Subscription Service utilizes ad hoc report writer software (**"Ad Hoc"**) under a license granted to Us by a Third Party, which licenses Us the right to sublicense the use of the Ad Hoc as part of the Service to You. Such sublicense is nonexclusive and solely for Your internal use and You may not further resell, re-license, or grant any other rights to use such sublicense to any Third Party. You further acknowledge the Ad Hoc licensing Third Party retains all right, title, and interest to the Ad Hoc and all documentation related to the Ad Hoc. All confidential or proprietary information of Ad Hoc licensing Third Party is Confidential Information under the terms of this Agreement.

6.8.   **Electronic Plan Review Software.** You acknowledge the SaaS Subscription Service utilizes electronic plan review solution software (**"Electronic Plan Review"**) under a license granted to Us by a Third Party, which licenses Us the right to sublicense the use of the Electronic Plan Review as part of the Service to You. Such sublicense is nonexclusive and solely for Your internal use and You may not further resell, re-license, or grant any other rights to use such sublicense to any Third Party. You further acknowledge the Electronic Plan Review licensing Third Party retains all right, title, and interest to the Electronic Plan Review and all documentation related to the Electronic Plan Review. All confidential or proprietary information of the Electronic Plan Review licensing Third Party is Confidential Information under the terms of this Agreement.

7. CONFIDENTIALITY

7.1.   **Definition of Confidential Information.** "Confidential Information" means all confidential information disclosed by a Party ("**Disclosing Party**") to the other Party ("**Receiving Party**"), whether orally or in writing, that is designated as confidential or that reasonably should be understood to be confidential given the nature of the information and the circumstances of disclosure. Your Confidential Information will include, but not be limited to Your Data; Our Confidential Information will include, but not be limited to the SaaS Subscription; and Confidential Information of each Party will include the terms and conditions of this Agreement and all Sales Orders, as well as business and marketing plans, technology and technical information, product plans and designs, and business processes disclosed by such Party. However, Confidential Information will not include any information that (i) is or becomes generally known to the public without breach of any obligation owed to the Disclosing Party, (ii) was known to the Receiving Party prior to its disclosure by the Disclosing Party without breach of any obligation owed to the Disclosing Party, (iii)

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is received from a Third Party without breach of any obligation owed to the Disclosing Party, or (iv) was independently developed by the Receiving Party.

7.2.   **Protection of Confidential Information.** The Receiving Party (i) will use the same degree of care that it uses to protect the confidentiality of its own confidential information of like kind (but in no event less than reasonable care) (ii) will not use any Confidential Information of the Disclosing Party for any purpose outside the scope of this Agreement, and (iii) except as otherwise authorized by the Disclosing Party in writing, will limit access to Confidential Information of the Disclosing Party to its Affiliates' employees, contractors and agents who need such access for purposes consistent with this Agreement. Neither party will disclose the terms of this Agreement or any Sales Order to any Third Party other than its Affiliates and their legal counsel and accountants without the other Party's prior written consent.

7.3.   **Compelled Disclosure.** If the Receiving Party is required to disclose any Confidential Information of the other by law, regulation or governmental authority, the Receiving Party will provide reasonable notice to Disclosing Party of such required disclosure and reasonably cooperate with the Disclosing Party in preventing or limiting such disclosure, or obtaining an appropriate protective order or other remedy. If a protective order or other remedy is not obtained, then the Receiving Party may disclose such Confidential Information as necessary for compliance with the applicable law, regulation or governmental authority. Notwithstanding such disclosure, such information will remain Confidential Information and subject to the requirements of this Section.

8. WARRANTIES AND DISCLAIMERS FOR SaaS SUBSCRIPTION AND PROFESSIONAL SERVICES

8.1.   **Our Warranties for SaaS Subscription.** We warrant that (i) We have the legal power to enter into this Agreement, (ii) the SaaS Subscription will perform materially in accordance with the User Guide, (iii) subject to Section 4.3 (Integration with Non-SMARTGov Applications), the functionality of the SaaS Subscription will not be materially decreased during a subscription term, and (iv) We will not transmit Malicious Code to You, provided it is not a breach of this subpart (iv) if You or a User uploads a file containing Malicious Code into the SaaS Subscription and later downloads that file containing Malicious Code. For any breach of a warranty above, Your exclusive remedy will be as provided in Section 13.4 (Termination for Cause) and Section 13.6 (Refund or Payment upon Termination) below.

8.2.   **Our Warranties for Professional Services.** We warrant the Professional Services will be performed consistent with generally accepted industry standards.

8.3.   **Disclaimer.** EXCEPT AS EXPRESSLY PROVIDED HEREIN, NEITHER PARTY MAKES ANY WARRANTIES OF ANY KIND, WHETHER EXPRESS, IMPLIED, STATUTORY OR OTHERWISE, AND EACH PARTY SPECIFICALLY DISCLAIMS ALL IMPLIED WARRANTIES, INCLUDING ANY WARRANTIES OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE, TO THE MAXIMUM EXTENT PERMITTED BY APPLICABLE LAW.

9. LIMITATION ON WARRANTIES FOR PROFESSIONAL SERVICES

YOU MUST REPORT ANY DEFICIENCIES IN THE PROFESSIONAL SERVICES TO US IN WRITING WITHIN THIRTY (30) DAYS OF COMPLETION OF THE PROFESSIONAL SERVICES IN ORDER TO RECEIVE WARRANTY REMEDIES. THE WARRANTY HEREIN IS EXCLUSIVE AND IN LIEU OF ALL OTHER WARRANTIES, WHETHER EXPRESS OR IMPLIED, INCLUDING THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE.

10. EXCLUSIVE REMEDY FOR PROFESSIONAL SERVICES

For any breach of the above warranty, Your exclusive remedy, and Our entire liability, will be the re-performance of the Professional Services. If We are unable to re-perform the Professional Services as warranted, You will be entitled to recover the fees paid to Us for the deficient services. IN NO EVENT WILL WE BE LIABLE FOR ANY CONSEQUENTIAL OR INCIDENTAL DAMAGES ARISING FROM ANY PROFESSIONAL SERVICES PROVIDED HEREUNDER, INCLUDING BUT NOT LIMITED TO CLAIMS FOR LOST PROFITS OR OTHER ECONOMIC DAMAGES.

11. LIMITATION OF LIABILITY

11.1.   **Limitation of Liability.** NEITHER PARTY'S LIABILITY WITH RESPECT TO ANY SINGLE INCIDENT ARISING OUT OF OR RELATED TO THIS AGREEMENT (WHETHER IN CONTRACT OR

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TORT OR UNDER ANY OTHER THEORY OF LIABILITY) WILL EXCEED THE AMOUNT PAID BY YOU IN THE 12 MONTHS PRECEDING THE INCIDENT, PROVIDED THAT IN NO EVENT WILL EITHER PARTY'S AGGREGATE LIABILITY ARISING OUT OF OR RELATED TO THIS AGREEMENT (WHETHER IN CONTRACT OR TORT OR UNDER ANY OTHER THEORY OF LIABILITY) EXCEED THE TOTAL AMOUNT PAID BY YOU. THE FOREGOING WILL NOT LIMIT YOUR PAYMENT OBLIGATIONS UNDER SECTION 5 (FEES AND PAYMENT FOR SaaS SUBSCRIPTION).

11.2.   **Exclusion of Consequential and Related Damages.** IN NO EVENT WILL EITHER PARTY HAVE ANY LIABILITY TO THE OTHER PARTY FOR ANY LOST PROFITS OR REVENUES OR FOR ANY INDIRECT, SPECIAL, INCIDENTAL, CONSEQUENTIAL, COVER OR PUNITIVE DAMAGES HOWEVER CAUSED, WHETHER IN CONTRACT, TORT OR UNDER ANY OTHER THEORY OF LIABILITY, AND WHETHER OR NOT THE PARTY HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES. THE FOREGOING DISCLAIMER WILL NOT APPLY TO THE EXTENT PROHIBITED BY APPLICABLE LAW.

12. TERM AND TERMINATION FOR PROFESSIONAL SERVICES

Professional Services will commence on the date specified on the Sales Order. Either Party may terminate Professional Services any time by providing the other Party with at least 14 days written notice. Any Professional Services outstanding at the time of termination will continue to be covered by this Agreement as if it had not been terminated.

13. TERM AND TERMINATION FOR SaaS SUBSCRIPTION

13.1.   **Term of Agreement.** This Agreement commences on the date You accept it and continues until all User subscriptions have expired or been terminated.

13.2.   **Term of Purchased User Subscriptions.** User subscriptions purchased by You commence on the start date specified in the applicable Sales Order and continue for the subscription term specified. Except as otherwise specified in the applicable Sales Order, all User subscriptions will automatically renew for additional periods equal to the expiring one year subscription term, unless either Party gives the other notice of non-renewal at least 30 days before the end of the relevant subscription term. The pricing during any such renewal term will be the same as the prior term unless We have given You written notice of a pricing increase at least 180 days before the end of such prior term, in which case the pricing increase will be effective upon renewal and thereafter.

13.3.   **Stop in SaaS Subscription.** Upon 180 days' prior written notice, We may terminate provision of the SaaS Subscription as a hosted offering. We will export and return Your Data to You via digital media at Our expense. We will refund You any prepaid fees covering the remainder of the term of all subscriptions after the effective date of stop in SaaS Subscription.

13.4.   **Termination for Cause.** A Party may terminate this Agreement for cause: (i) upon 30 days written notice to the other Party of a material breach if such breach remains uncured at the expiration of such period, or (ii) if the other Party becomes the subject of a petition in bankruptcy or any other proceeding relating to insolvency, receivership, liquidation or assignment for the benefit of creditors. In addition, We may terminate this Agreement if You fail to make any payment due hereunder within 30 days after receiving written notice from Us that such payment is delinquent.

13.5.   **Effect of Termination.** Upon termination for any reason, (a) all licenses granted will automatically and immediately terminate, and We may immediately disable and discontinue Your access to and use of the SaaS Subscription without further notice to You, (b) You will promptly return to Us all Documentation and all information and materials that You have acquired pertaining to the SaaS Subscription and any other Confidential Information of Ours and (c) within 30 days of the effective date of such termination, We will export all Your Data then-stored in the Service and ship the information to You in a digital format.

13.6.   **Refund or Payment upon Termination.** Upon any termination by You for cause, We will refund You any prepaid fees covering the remainder of the term of all subscriptions after the effective date of termination. Upon any termination by Us for cause, You will pay any unpaid fees covering the remainder of the term of all Sales Orders after the effective date of termination. In no event will any termination relieve You of the obligation to pay any fees payable to Us for the period prior to the effective date of termination.

13.7.   **Return of Your Data.** Within 30 days after the effective date of termination of SaaS Subscription and upon request by You, We will make available to You for download a file of Your Data. After such 30-day period, We will have no obligation to maintain or provide any of Your Data and will thereafter, unless

legally prohibited, delete all of Your Data in Our systems or otherwise in Our possession or under Our control.

13.8. **Surviving Provisions.** Section 5 (Fees and Payment), 6 (Proprietary Rights), 7 (Confidentiality), 8.3 (Disclaimer), 11 (Limitation of Liability), 13.6 (Refund or Payment upon Termination), 13.7 (Return of Your Data), 14 (Contracting Seller, Notices, Governing Law and Jurisdiction) and 15 (General Provisions) will survive any termination or expiration of this Agreement.

14. CONTRACTINGSELLER, NOTICES, GOVERNING LAW AND JURISDICTION

14.1. **Seller:** Paladin Data Systems Corporation, a Washington corporation.

14.2. **Address notices to:** 19362 Powder Hill Pl. NW, Poulsbo, WA 98370, Attn: Contracts

14.3. **Governing law:** Arizona and controlling United States federal law

14.4. **Exclusive court jurisdiction:** Pinal County, Arizona

14.5. **Manner of Giving Notice.** Except as otherwise specified in this Agreement, all notices, permissions and approvals will be in writing and will be deemed to have been given upon: (i) personal delivery, (ii) the second business day after mailing, (iii) the second business day after sending by confirmed facsimile, or (iv) the first business day after sending by email (provided email will not be sufficient for notices of termination or an indemnifiable claim). All notices to You will be addressed to: City of Maricopa, Attention: City Manager, PO Box 610, Maricopa, AZ 85139..

14.6. **Agreement to Governing Law and Jurisdiction.** Each Party agrees to the applicable governing law above without regard to choice or conflicts of law rules, and to the exclusive jurisdiction of the applicable courts above.

14.7. **Waiver of Jury Trial.** Each Party hereby waives any right to jury trial in connection with any action or litigation in any way arising out of or related to this Agreement.

15. GENERAL PROVISIONS

15.1. **Amendment; No Waiver.** Except as otherwise expressly provided herein, this Agreement may not be amended or modified and the observance of any provision of this Agreement may not be waived except with the written consent of the Parties. No failure by either Party to enforce any rights hereunder will constitute a waiver of such right then or in the future or any other right or remedy hereunder. To the extent the terms and conditions of any Exhibit, attachment, purchase order, invoice, proposal or response to request for proposal, conflict with or are inconsistent with this Agreement, the terms and conditions of this Agreement will control and no such conflicting terms will be deemed as a waiver or amendment of this Agreement.

15.2. **Anti-Corruption.** You have not received or been offered any illegal or improper bribe, kickback, payment, gift, or thing of value from any of Our employees or agents in connection with this Agreement. Reasonable gifts and entertainment provided in the ordinary course of business do not violate the above restriction. If You learn of any violation of the above restriction, You will use reasonable efforts to promptly notify Us.

15.3. **Assignment; Binding Effect.** This Agreement may not be transferred or assigned by either Party without the express written consent of the other, which will not be unreasonably withheld or delayed, except that either Party may, without the consent of the other Party, assign this Agreement in its entirety to a parent, subsidiary or affiliate of such Party or an acquirer of more than 50% of the assigning Party's outstanding voting capital stock or to a purchaser of all or substantially all of the assigning Party's assets. Notwithstanding the foregoing or any other provision of this Agreement, You may not assign, sublicense, delegate or transfer this Agreement or any of its rights or obligations under this Agreement to any competitor of Ours. Any purported transfer or assignment in contravention of this Section will be null and void. This Agreement will inure to the benefit of and be binding upon the Parties and their respective successors and permitted assigns.

15.4. **Basis of Bargain.** The Parties acknowledge that they have entered into this Agreement in reliance upon the disclaimers of warranties and limitations of liability and damages as set forth in this Agreement, and that such provisions form an essential basis of the bargain between the Parties and do not cause this Agreement, or the remedies available hereunder, to fail of its or their essential purpose.

15.5. **Counterparts.** This Agreement may be executed in any number of English language counterparts or duplicate originals, and each such counterpart or duplicate original will constitute an original instrument, but all such separate counterparts or duplicate originals will constitute one and the same instrument.

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15.6.   **Entire Agreement.** This Agreement, including the Exhibits attached, constitutes the entire Agreement of the Parties concerning its subject matter and supersedes any and all prior or contemporaneous, written or oral negotiations, correspondence, understandings and agreements between the Parties respecting the subject matter of this Agreement.

15.7.   **Export Compliance.** The SaaS Subscription, other technology We make available, and derivatives thereof may be subject to export laws and regulations of the United States and other jurisdictions. Each Party represents that it is not named on any U.S. government denied-party list. You will not permit Users to access or use SaaS Subscription in a U.S.-embargoed country or in violation of any U.S. export law or regulation.

15.8.   **Force Majeure.** Except with respect to payment obligations, neither Party will be liable for any failure of performance or equipment due to causes beyond such Party's reasonable control, including but not limited to: acts of God, fire, flood or other catastrophes; any law, order, regulation, direction, action, or request of any governmental entity or agency, or any civil or military authority; national emergencies, insurrections, riots, wars; unavailability of rights-of-way or materials; or strikes, lock-outs, work stoppages, or other labor difficulties.

15.9.   **Headings and Interpretation.** Headings and captions are for convenience only and are not to be used in the interpretation of this Agreement. The words "include," "includes," and "including" when used in this Agreement will be treated in each case as followed by the words "without limitation."

15.10.   **Relationship of the Parties.** The parties are independent contractors. This Agreement does not create a partnership, franchise, joint venture, agency, fiduciary or employment relationship between the parties.

15.11.   **Severability.** If any provision of this Agreement is held by a court of competent jurisdiction to be contrary to law, the provision will be modified by the court and interpreted so as best to accomplish the objectives of the original provision to the fullest extent permitted by law, and the remaining provisions of this Agreement will remain in effect.

15.12.   **Insurance and Risk of Loss.** You bear all responsibility for damages to Your equipment and facilities.

The RFP is incorporated into the Agreement and is attached separately.

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The response to RFP is incorporated into the Agreement and is attached separately

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Exhibit D- SMARTGov Technical Information

SMARTGov is a cloud scalable web application deployed in the Amazon Web Services (AWS) Cloud. The core technology is built to use Microsoft Server 2012, Microsoft's 2012 SQL Server database, and IIS v7 running .NET 4.0 or higher.
http://media.amazonwebservices.com/pdf/AWS_Security_Whitepaper.pdf

AWS Built in Security Features

Not only are your applications and data protected by highly secure facilities and infrastructure, but they're also protected by extensive network and security monitoring systems. These systems provide basic but important security measures such as distributed denial of service (DDoS) protection and password brute-force detection on AWS Accounts. Additional security measures include:

- Secure access – Customer access points, also called API endpoints, allow secure HTTP access (HTTPS) so that you can establish secure communication sessions with your AWS services using SSL.
- Built-in firewalls – You can control how accessible your instances are by configuring built-in firewall rules – from totally public to completely private, or somewhere in between. And when your instances reside within a Virtual Private Cloud (VPC) subnet, you can control egress as well as ingress.
- Unique users – The AWS Identity and Access Management (IAM) tool allows you to control the level of access your own users have to your AWS infrastructure services. With AWS IAM, each user can have unique security credentials, eliminating the need for shared passwords or keys and allowing the security best practices of role separation and least privilege.
- Multi-factor authentication (MFA) – AWS provides built-in support for multi-factor authentication (MFA) for use with AWS Accounts as well as individual IAM user accounts.
- Private Subnets – The AWS Virtual Private Cloud (VPC) service allows you to add another layer of network security to your instances by creating private subnets and even adding an IPsec VPN tunnel between your home network and your AWS VPC.
- Encrypted data storage – Customers can have the data and objects they store in Amazon S3, Glacier, Redshift, and Oracle RDS encrypted automatically using Advanced Encryption Standard (AES) 256, a secure symmetric-key encryption standard using 256-bit encryption keys.
- Dedicated connection option – The AWS Direct Connect service allows you to establish a dedicated network connection from your premise to AWS. Using industry standard 802.1q VLANs, this dedicated connection can be partitioned into multiple logical connections to enable you to access both public and private IP environments within your AWS cloud.
- Security logs – AWS CloudTrail provides logs of all user activity within your AWS account. You can see what actions were performed on each of your AWS resources and by whom.
- Isolated GovCloud – For customers who require additional measures in order to comply with US ITAR regulations, AWS provides an entirely separate region called AWS GovCloud (US) that provides an environment where customers can run ITAR-compliant applications, and provides special endpoints that utilize only FIPS 140-2 encryption.
- CloudHSM – For customers who must use Hardware Security Module (HSM) appliances for cryptographic key storage, AWS CloudHSM provides a highly secure and convenient way to store and manage keys.
- Trusted Advisor – Provided automatically when you sign up for premium support, the Trusted Advisor service is a convenient way for you to see where you could use a little more security. It monitors AWS resources and alerts you to security configuration gaps such as overly permissive access to certain EC2 instance ports and S3 storage buckets, minimal use of role segregation using IAM, and weak password policies.

Because the AWS cloud infrastructure provides so many built-in security features, you can simply focus on the security of your guest OS and applications. AWS security engineers and solution architects have developed whitepapers and operational checklists to help you select the best options for your needs and recommend security best practices, such as storing secret keys and passwords in a secure manner and

rotating or changing them frequently.

Specific SMARTGov additions
The Paladin Data cloud environment we provided to our cloud based customers covers additional instances for "testing/training" to be used by the client. This instance is a weekly snapshot of the client's production data to allow them to test configuration changes, and train new staff.

Additionally Paladin Data has active monitoring of availability, firewalls, ssl certificates, triplicated nightly data backup, for our cloud based customers. We also recommend, besides nightly backups of the databases, transactional backup during the day to allow recovery in cases of failure.

SMARTGov Data Storage, File Storage and System Backup Technical Information
SMARTGov leverages Cloud based storage solutions to provide the best of scalability, redundancy, and availability. The data in the SMARTGov application uses a number of storage solutions to provide this level of reliability to our clients. There are two main components of storing data in the SMARTGov application, which are data storage and file storage.

The data storage is in SQL Server running on an Amazon EC2 Elastic Block Storage (EBS) volumes. This provides longer term storage, and allows the database to be backed up nightly to two separate EBS Volumes in two different datacenter regions. SMARTGov stores database backups and transaction backups on two EBS Volumes. SMARTGov has automated processes so that maintenance backups occur nightly for the database. In addition, transaction backups supplement the nightly backups at 30 minute intervals during the day. This provides transactional data recovery in a catastrophic event happening throughout the day to be no more than 30 minutes of lost data. A third level of data backup also occurs on a weekly basis where data is archived locally at Paladin's secured data location.

Amazon Elastic Block Store (EBS) Volumes provide durable block-level storage for use with Amazon EC2 instances (virtual machines). Amazon EBS volumes are off-instance, network-attached storage that persists independently from the running life of a single Amazon EC2 instance. After an EBS volume has been attached to the SQL server instance it is the same as a physical hard disk drive.
File storage is using Amazon S3 or simple storage. File storage is used in SMARTGov when files, images, and documents are attached to a note within the application. This is considered none transactional data and often consists of large file sizes. Amazon S3 is a highly scalable, durable and available distributed object store designed for mission-critical and primary data storage with an easy to use web service interface. In traditional on-premise applications, this type of data would ordinarily be maintained on SAN or NAS. However, a cloud-based mechanism such as Amazon S3 is far more agile, flexible, and geo-redundant. Amazon S3 provides a simple web services interface that can be used to store and retrieve any amount of data, at any time, from within Amazon EC2 or from anywhere on the web. SMARTGov can write, read, and delete objects containing from 1 byte to 5 terabytes of data each, and the number of objects stored in an Amazon S3 bucket is unlimited. Amazon S3 is also highly scalable, allowing concurrent read or write access to Amazon S3 data by many separate clients or application threads.

In addition to the above datacenter backup and redundancy of client's data, clients at any time can obtain the latest copy of their data through the SMARTGov application's administration console. This is done by running the Database extract job. The job is an ad hoc job and can be run multiple times a day. This will provide them a link of the raw SQL Server data and files.

Other risk factors include requiring security patches require a maintenance downtime so that IT can update systems appropriately. Through the ever evolving landscape of security holes and cyber-attacks it is important that best practices of securing customer data is followed. Take for instance, the recent release of information about the "Heartbleed" bug which left a vulnerability in the SSL cryptographic library. This was resolved in the SMARTGov cloud within a day of it being made known to the public.

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SMARTGov Deployment Options

Responsibilities and Considerations	Cloud Deployment Provided by Paladin	On Premises Deployment Provided by Jurisdiction
DATA ASSURANCE		
Redundancy & Failover	Multiple Application Servers with load balancing Active Failover Database	
Back-ups	Automatically created weekly	Responsibility of Jurisdiction
Disaster Recovery	Comprehensive Disaster Recovery Plan tested and verified	
APPLICATION MANAGEMENT		
Hot Fixes	Automatically applied as needed	
Version Updates	Automatically applied upon release	Responsibility of Jurisdiction
Database Administration	Actively Managed	
Application Instances Provided	3 instances are automatically deployed including Production, Training, & Support	Discretion and Responsibility of Jurisdiction
SECURITY		
System Firewall	Automatically provided	
VPNs	Not needed	Responsibility of Jurisdiction
Encryption	Standard SSL	
CAPITAL INVESTMENT		
System Hardware	Automatically provided and managed	At minimum (no redundancy) Application Server Database Server Portal Server ArcGIS Server
3rd Party Software	All required software and licenses are included	Annual maintenance contracts Microsoft Window Server OS Microsoft SQL Server Back-up utility, Other
Full Time Engineer (FTE)	Provided with cloud services	Responsibility of Jurisdiction
Commitment	Very flexible	Less flexible, Long term
PERFORMANCE		
Scalability & Storage	On Demand Scaling 25GB Storage at no additional cost	Manual & limited
Availability	99% uptime Service Level Agreement (SLA)	No SLA
External Access	24/7 access to product and support	
Portability of Data	Easy to share with public, 3rd party applications, and remote devices	Limited by VPN availability
RESPONSE TIME		
Deployment	No infrastructure to implement Faster iterations of data migration Real-time troubleshooting	Implementation required Remote connectivity required Delayed troubleshooting
Support	Instant, real-time access	Delayed access
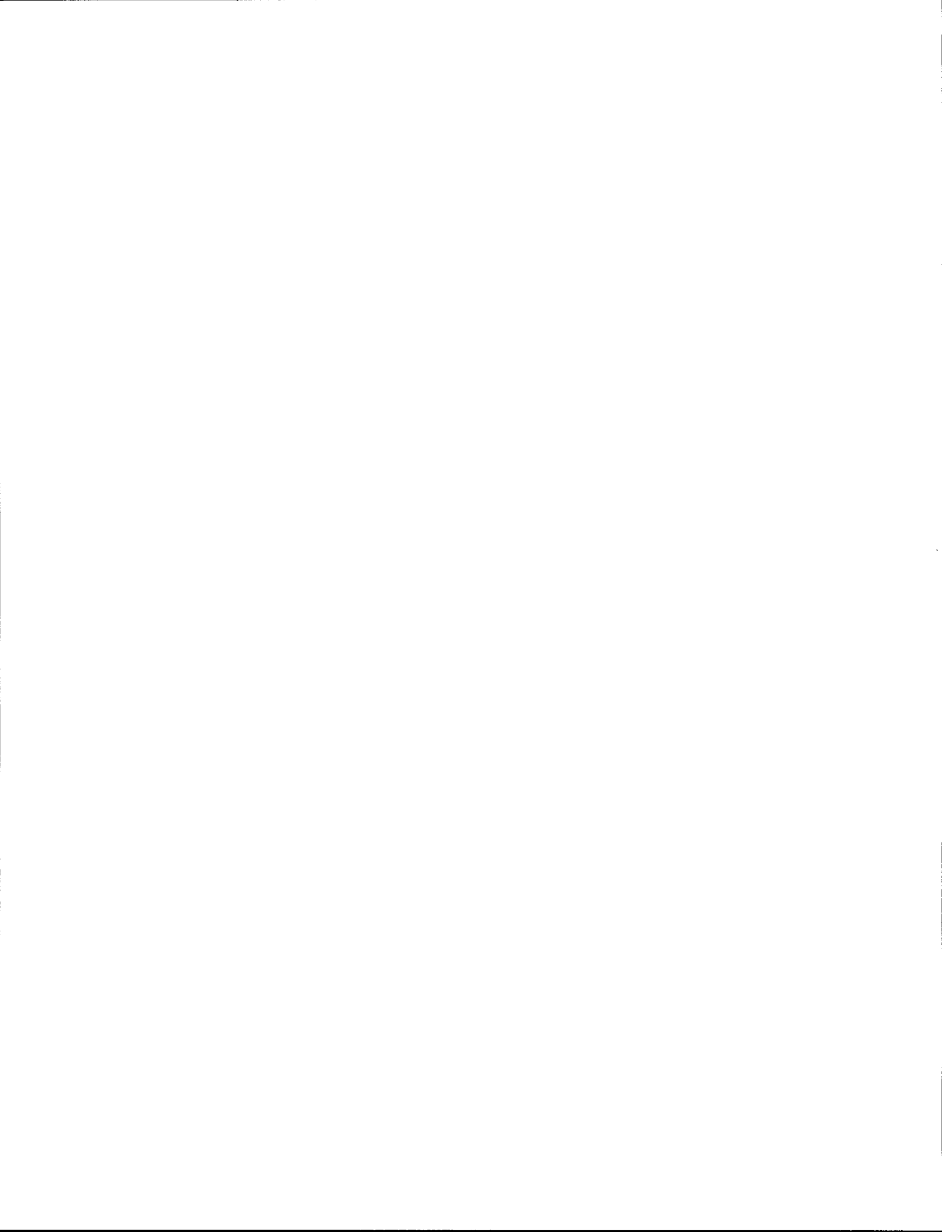
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Fx: 520.568.9120
www.maricopa-az.gov

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

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

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: _____	Email: _____
Federal Employer Identification Number: _____	Authorizing Offeror Signature: _____
_____ Company Name	_____ Printed Name
_____ Address	_____ Title
_____ City State Zip Code	Telephone: _____ Fax: _____

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8. TAXES: The City of Maricopa is exempt from Federal Excise Tax, including the Federal Transportation Tax. Sales tax, if any, shall be indicated as a separate item.

9. AWARD OF CONTRACT: Notwithstanding any other provision of this _Request for Proposal_, The City expressly reserves the right to:

6 Waive any immaterial defect or informality: or
7 Reject any or all proposals, or portions thereof, or
8 Reissue a Request For Proposal
9 Award based on Best Value
10 Unless the Offeror states otherwise, the City reserves the right to award by individual line item, by group of line items, or as a total, whichever is deemed most advantageous to the City. If the Offeror's offer is an "all or nothing" offer, it must be so indicated on the offer sheet.

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language between the City and the Contractor, the provisions and requirements of the resultant contract shall govern. In event of a conflict in language between the RFP and the Contract, the provisions and requirements of the Contract shall govern. However, the City reserves the right to clarify in writing, any contractual terms with the concurrence of the Offeror, and such a written contract shall govern in case of conflict with the applicable requirements stated in the Contract or the Offeror's offer. The RFP shall govern in all other matters not affected by the written contract.

f. **Contract Applicability**: The Offeror shall substantially conform to the terms, conditions, specifications, and other requirements found within the text of this specific RFP. All previous agreements, contracts, or other documents, which have been executed between the Offeror and the City, are not applicable to this RFP or any resultant contract.

g. **Relationship to Parties**: It is clearly understood that each party will act in its individual capacity and not as an agent, employee, partner, joint venturer, or associate of the other. An employee or agent of one party shall not be deemed or construed to be the employee or agent of the other for any purpose whatsoever. The Offeror is advised that taxes or Social Security payments will not be withheld from any City payments issued hereunder and that the Offeror should make arrangements to directly pay such expenses, if any.

h. **Subcontracts**: the Contractor shall enter into no subcontract with any other party to furnish any of the material, service, or construction specified herein without the advance written approval of the City. The Contractor is responsible for contract performance whether or not Subcontractors are used.

i. **Indemnification**: Consultant shall defend, indemnify, and hold City, its officers and employees harmless from any and all loss, damage, claim for damage, liability, expense, or cost, including reasonable attorneys' fees, which arise out of, or is in any way connected with the performance of work under this Agreement by Consultant, or any of Consultant's employees, agents or subconsultants, and from all claims by Consultant's employees, subconsultants and agents for compensation for services rendered to Consultant in the performance of this Agreement, notwithstanding that City may have benefited from their services. This indemnification provision shall only apply to any and all negligent acts or omissions, willful misconduct or negligent conduct, whether active or passive, on the part of Consultant or Consultant's employees, subconsultants or agents.

j. **Overcharges by Antitrust Violations**: The City maintains that, in practice, overcharges resulting from antitrust violations are borne by the purchaser. Therefore, to the extent permitted by law, the Contractor hereby assigns to the City any and all claims for such overcharges as to the goods and services used to fulfill the Contract.

k. **Force Majeure**: Except for payment for sums due, neither party shall be liable to the other not deemed in default under the resultant contract if and to the extent that such party's performance of the contract is prevented by reason of force majeure. The term "Force Majeure" means an occurrence that is beyond the control of the party affected and occurs without its fault or negligence. Without limiting the foregoing, force majeure includes acts of God: acts of the public enemy; war; riots; strikes; mobilization; labor disputes; civil disorders; fire; floods; lockouts; injunctions-intervention-acts, or failures

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This shall be accomplished by a written determination for the City.

p. **Liens**: All materials, service or construction shall be free of all liens, and if the City requests, a formal release of all liens shall be delivered to the City.

q. **Licenses**: Contractor shall maintain in current status all Federal, State, and Local licenses and permits required for the operation of the business conducted by the Contractor as applicable to the contract.

r. **Patents and Copyrights**: All services, information, computer program elements, reports and other deliverables, which may be patented or copyrighted and created under this RFP are the property of the City and shall not be used or released by the Contractor or any other person except with the prior written permission of the City.

s. **Cost of Bid/Proposal**: The City shall not reimburse the cost of developing or providing any response to this RFP. Offers submitted for consideration should be prepared simply and economically, providing adequate information in a straightforward and concise manner.

t. **Public Record**: All offers submitted in response to this RFP shall become a matter of public record available for review, subsequent to the award notification, in accordance with the City's Procurement Code.

u. **Termination for Non-Appropriation:** Any contract entered into by the City shall terminate at the end of the then current fiscal period for non-appropriation of funds if the City's governing body fails to appropriate funds to pay for the payments contemplated by the contract. The City's fiscal period ends June 30th of each year.

v. **Warranties:** Vendor warrants that all goods delivered under this contract will conform to the requirements of this contract (including all applicable descriptions, specifications, drawings and samples), and will be free from defects in material and workmanship and will be free from defects in design and fit for the intended purpose. Any inspection or acceptance of the goods by Buyer shall not alter or affect the obligation of vendor or the right of Buyer under the foregoing warranties.

w. **Cooperative Use of Contract:** In addition to the City of Maricopa and with the approval of the contracted vendor, this contract may be extended for use by other municipalities, school districts and government agencies of the State. Any such usage by other entities must be in accordance with the ordinance, charter and/or procurement rules and regulations of the respective political entity.

24. Per A.R.S. § 35-392, the City is prohibited from purchasing for a company that is in violation of the Export Administration Act.

25. **Federal Immigration and Nationality Act (FINA):** By entering into the Contract, the CONTRACTOR warrants compliance with the Federal Immigration and Nationality Act (FINA) and all other Federal immigration laws and regulations related to the immigration status of its employees. The Contractor shall obtain statements from its subcontractors certifying compliance and shall furnish the statements to the Purchasing Manager upon request. These warranties shall remain in effect through the term of the Contract. The

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PURPOSE:

The City of Maricopa intends to establish a contract for the purchase of and implementation of an Electronic Permitting and Plan Review System. The products and services required are detailed in this RFP.

Based on an evaluation of the Proposals and qualifications of the firms responding to this solicitation, the City desires to retain a qualified firm until project is completed.

1. **Authority:** This Solicitation as well as any resultant contract is issued under the authority of the City. No alteration of any resultant contract may be made without the express written approval of the City in the form of an official contract amendment. Any attempt to alter any contract without such approval is a violation of the contract. Any such action is subject to the legal and contractual remedies available to the City inclusive of, but not limited to, contract cancellation, suspension and/or debarment of the contractor.

2. **Offer Acceptance Period:** In order to allow for an adequate evaluation, the City requires an offer in response to this Solicitation to be valid and irrevocable for ninety (90) days after the opening time and date.

3. **Term of Contract:** The term of any resultant contract shall commence upon the issuance of a Contract awarded by the City of Maricopa City Council and shall continue until the project is completed, unless terminated, cancelled, or extended as otherwise provided herein. At the discretion of the City of Maricopa, there may be an option for renewal. Renewals shall be accomplished through the issuance of subsequent purchase order and signed contract renewal.

4. **Proposal Format:** *A total of one (1) unbound original document (label original) and five (5) bound copies of the proposal shall be submitted in the format indicated in the Proposal Format and Requirement section of the RFP. Failure to comply with the format or to submit incomplete information will be grounds for disqualification and will be strictly enforced.*

5. **Key Personnel:** It is essential that the Contractor provide adequate experienced personnel, capable of and devoted to the successful accomplishment of the work to be performed under any resultant contract. The Contractor must agree to assign specific individuals to the key positions.

   a. The Contractor agrees that, once assigned to work under any resultant contract, key personnel shall not be removed or replaced without written notice to the City.

   b. If key personnel are not available for work under any resultant contract for a continuous period exceeding 30 calendar days, or are expected to devote substantially less effort to the work than initially anticipated, the Contractor shall immediately notify the City, and shall, subject to the concurrence of the City, replace such personnel with personnel of substantially equal ability and qualifications.

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10. **Confidentiality of Records**: The contractor shall establish and maintain procedures and controls that are acceptable to the City for the purpose of assuring that information contained in its records or obtained from the City remains confidential pursuant to applicable requirements.

11. **Resultant Contract:** A contract shall be issued between the City and the successful Offeror following award.

12. **Compensation:** Compensation for services shall be based upon fees negotiated, including all approved costs and expenses incurred.

13. **Liquidated Damages:** Liquidated damages shall be in the amount of $50.00 for each calendar day of delay.

   a. If the contract is not terminated, the contractor shall continue performance and be liable to the City for the liquidated damages until the products are delivered or services performed.

   b. In the event that the City exercises its right of termination, the contractor shall be liable to the City for any excess costs, and in addition, for liquidated damages until such time the City may reasonably obtain delivery or performance of similar supplies or services.

   c. The City will issue written notice to Company for acting or failing to act as in any of the following:

      i. The Company fails to adequately perform the services set forth herein;
      ii. The Company fails to complete the work required within the time required;
      iii. The Company fails to make progress in the performance of this Agreement and/or gives the City reason to believe that the Company will not or cannot perform the requirements herein. Upon receipt of the written notice of concern, the Company shall have ten (10) days to provide a satisfactory response to the City. Failure on the part of the Company to adequately address all issues of concern may result in the City restoring to any single or combination of the following remedies:
      a. Cancellation of this Agreement
      b. Collection of liquidated damages at the rate of $50.00 per day which shall be collected by reducing the monthly compensation due to the Company;
      c. Reserve all rights or claims to damage for breach of any covenants of this Agreement;
      d. In case of default, the City reserves the right to complete the required work. The City may recover any actual excess costs from the Company by deduction from an unpaid balance or any other remedies as provided by law.

   d. The City's right of termination for cause as set forth herein shall be in addition to, and not a limitation of any and all other remedies available to City at law, equity, or under the terms and provisions of this Agreement. In the event of termination for cause, City shall not be liable to Company for any amount and Company shall be liable to City for any and all damages sustained by reason of the default which gave rise to the termination.

14. **Insurance:**

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General Liability Insurance: All liability insurance shall cover comprehensive general and automobile liability for both bodily injury, including death, and property damage, including but not limited to aggregate products, aggregate operations, aggregate protective and aggregate contractual with the following minimum limits:

A combined single-limit policy with aggregate limits in the amount of $5,000,000 and an underinsured/uninsured policy with aggregate limits in the amount of $300,000.

Policies or certificates and completed forms of City's Additional Insured Endorsement (or a substantially equivalent insurance company form acceptable to the City Attorney) evidencing the coverage required by this section shall be filed with City and shall include City as an additional insured. The policy or policies shall be in the usual form of public liability insurance, but shall also include the following provision:

> "Solely as respects work done by or on behalf of the named insured for the City of Maricopa, Arizona, it is agreed that the City of Maricopa, Arizona, and their respective officers, employees, and contractors are added as additional insured under this policy."

15. **Licenses:** Contractor shall maintain in current status all Federal, State, and Local Licenses and permits required for the operation of the business conducted by the contractor.

16. **Bonds:** Not Applicable.

17. **Cancellation:** The City reserves the right to cancel the whole or any part of any resultant contract due to failure by the contractor to carry out any obligation, term or condition of any resultant contract. The City will issue written notice to the contractor for acting or failing to act as in any of the following:

    1. The contractor provides material that does not meet the specifications of the contract;
    2. The contractor fails to adequately perform the services set forth in the specifications of the contract;
    3. The contractor fails to complete the work required or to furnish the materials required within the time stipulated in the contract;
    4. The contractor fails to make progress in the performance of the contract and/or gives the City reason to believe that the contractor will not or cannot perform to the requirements of the contract.

    Upon receipt of the written notice of concern, the contractor shall have ten (10) days to provide a satisfactory response to the City. Failure on the part of the contractor to adequately address all issues of concern may result in the City resorting to any single or combination of the following remedies:

    - o Cancel any contract;
    - o Reserve all rights or claims to damage for breach of any covenants of the contract;
    - o Perform any test or analysis on materials for compliance with the specifications of the contract. If the results of any test or analysis find a material non-

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SCOPE OF SERVICES

PURPOSE:

The City of Maricopa is seeking a "Software as a Service (SaaS)" cloud based solution to facilitate Electronic Permitting and Plan Review for its Development Services department. The system shall serve as either a replacement for, or work in conjunction with the City's current MUNIS permitting module as provided by Tyler Technologies. Due to limited budget constraints, this project needs to be completed at a cost Not to Exceed (NTE) $50,000. This estimate reflects the initial startup costs including but not limited to project management, systems design, systems configuration, data conversion and migration, data extraction (to the MUNIS ERP), systems testing, user documentation development and training - as well as the first year subscription or maintenance fee.

Based on an evaluation of the Proposals and qualifications of the firms responding to this solicitation, the City desires to retain a qualified firm until project is completed.

A. BACKGROUND

City of Maricopa is located in Pinal County, 20 miles south of Phoenix. The City operates under the Council/Manager form of government. Management of the City is responsible for establishing and maintaining an internal control structure which is designed to ensure that adequate tracking of permitting and plan review records. As a recipient of federal, state and county financial assistance, the City also is responsible for ensuring that an adequate internal control system is in place to assure compliance with applicable laws and regulations related to these programs.

The vendor must establish and implement a training program to teach the skills and knowledge necessary to effectively use the technology being proposed. The vendor will also be required to provide ongoing technical support and documentation to implement system updates as they become available, and to assist in the process of technological migration and organizational changes involved in moving to a distributed computing environment in which end users will have direct access to and control of those portions of the System necessary for the performance of their jobs.

DATA IMPORT/EXPORT FACILITY: The system must permit the import and export of information to and from other systems, e.g., the City's currently implemented financial, permitting, and plan review systems, and must integrate with other desktop and server applications such as Microsoft Access, Microsoft Excel, query and reporting tools, and electronic mail. In addition, tools must be available which provide decision support capabilities such as the ability to select a subset and/or summary database from the production database.

I. SCOPE OF SERVICES

A. Ability to accept, review, issue, and inspect a variety of permits, documents, and applications, including but not limited to:
- Building
- Land use
- Engineering

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- Exception process

C. Support a variety of periodic and ongoing inspection programs, this may include:
    - 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

D. Support for employee resource management, including:
    - 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

E. Support for auditable financial tracking, including:
    - Handling all Department cash transactions
    - Escrow account management
    - Billing process management tools
    - Complete records for tracing and reconciliation tasks

F. Ability to manage a variety of licensing programs (for both individuals and objects or installations,) including:
    - Testing and test management
    - Requirements management/satisfaction
    - License issuance and renewal and close out

G. Additional requirements to include but not limited to:
    - 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

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III.   Adjunct Functionality

- 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
- 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)

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

- 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 tack 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

V.   Migration from Present System

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

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PROPOSAL FORMAT AND EQUIPMENT RESPONSES

A total of one (1) unbound original document (label original) and five (5) bound copies of the proposal shall be submitted in the format indicated in the Proposal Format and Requirement section of the RFP.

In order for the City to conduct a uniform review process, all proposals must be submitted in the format set forth below. The information set forth in paragraphs below must be included with all proposals. *Failure to provide any of the information requested by these paragraphs is grounds for the City to reject a proposal.*

Proposals should be prepared as simply as possible and provide a straightforward, concise description of the vendor's capabilities to satisfy the requirements of the RFP. The requirements response section of the proposal shall be submitted in hard-copy as part of the submitted document. Expensive bindings, color displays, promotional material, etc., are neither necessary nor desired. Emphasis should be concentrated on accuracy, completeness, and clarity of content. All parts, pages, figures and tables should be numbered and clearly labeled.

1. **Offer Sheet:** The attached Introduction/Offer Sheet (Page 1 of RFP) must be completed and returned with the Offeror's proposal. Failure to return the Offer Sheet and to sign it is grounds for the City to reject a proposal.

2. **Letter of Transmittal (Limit to one page):** A letter of transmittal must be submitted with an Offeror's proposal. The letter must include:
   a. A statement of the Offeror's understanding of the products and services required by the Request for Proposal listed in the scope of work.
   b. The names of the persons who are authorized to make representations on behalf of the Offeror (include their titles, addresses, fax number, e-mail addresses and telephone numbers).
   c. A statement that the individual who signs the transmittal letter is authorized to bind the Offeror to contract with the City.

3. **Table of Contents:** The Table of Contents must indicate the material included in the proposal by section and page number. A proposal's table of contents should mirror this section of the City's Request for Proposal and must include all the items set forth in this section of the Request for Proposal.

4. **Executive Summary:** This part of the response to the RFP should be limited to a brief narrative (maximum 2 pages) highlighting the vendor's proposal. The summary should contain as little technical jargon as possible and should be oriented toward non-technical personnel. The Executive Summary should not include cost quotations.

5. **Firm Overview and Management Overview (Excluding attachments, limit to four pages):** Vendors must provide the following information about their company so that the City can evaluate the vendor's stability and ability to support the commitments set forth in response to the RFP. City, at its option, may require a vendor to provide additional support and / or clarify requested information.

   a. The vendor should outline the company's background, including:
      i. How long the company has been in business
      ii. A brief description of the company size and organization

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the proposed Permitting and Plan Review system that have not been specifically requested in this RFP. Consideration of these products, features, or other value added components will be given where these may be of value to the City.

9. System Security:

The vendor should include a detailed description of the proposed system's security features.

10. Response to General Requirements:

The vendor must provide narrative responses to each of the evaluation criteria in the Special Terms and Conditions, page 10, Item #7.

11. Implementation Support and Training:

The vendor must provide a detailed plan for implementing the proposed system and for providing training and ongoing support. This information must include but is not limited to:

1.1 Project organization chart
1.2 Detailed implementation methodology
1.3 Conversion support
1.4 Overview of proposed training, including options for on-site or training center services, end users and data processing personnel
1.5 Implementation and training plan, including estimated time-frame and deliverables for each stage of the project
1.6 Expected number of City FTE hours required at different stages/modules of the implementation process and for ongoing support
1.7 Level of expertise required of City staff for conversion and implementation, report writer, database and other system component maintenance, and for implementation and maintenance of any relevant hardware and software
1.8 Resumes and detailed related trainer expense requirements

12. Maintenance Program:

Specify the nature of any post-implementation support provided by the vendor including:

1.1 Telephone support to include toll-free support hotline; hours of operation; availability of a 24 x 7 hotline etc.
1.2 Special plans defining "levels" of customer support (e.g., gold, silver, etc.)
1.3 Delivery method of future upgrades and product enhancements including historical frequency of upgrades by module
1.4 Availability of user groups
1.5 Problem reporting and resolution procedures
1.6 Other support (e.g., on-site, remote dial-in, Website access to patches, fixes and knowledge base

13. Vendor Questionnaire

Please complete the attached Vendor Questionnaire (Attachment B) and return it with your submittal.

14. Client References:

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VENDORS SUBMITTAL CHECK-OFF FORM

The information set forth below must be included with all proposals. *Failure to provide any of the information requested by these paragraphs is grounds for the City to reject a proposal.*

_____ Offer Sheet **Signed**

_____ 1 Unbound Original and 5 bound copies

_____ Letter of Transmittal

_____ Table of Contents

_____ Firm Overview and Management Overview

_____ Database Software addressed

_____ Third-party Products/Optional Software addressed

_____ System Security addressed

_____ Evaluation Criteria addressed

_____ Functional/Technical Requirements addressed

_____ Implementation Support and Training detailed

_____ On-going Training and Support detailed

_____ Migration to Present System detailed

_____ Maintenance Program detailed

_____ Experience of Implementation Staff and On-going Support

_____ Qualifications, Experience and Competence of entire team

_____ References provided

_____ Disclosures of Conflict of Interest

_____ Substitute W -9 Form, completed and **signed**

_____ Proposed Fees/Compensation

_____ Organization Chart

_____ Amendment included and **signed**

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SOLICITATION AMENDMENT No.1:
<u>RFP 14DSD041614</u>
<u>Electronic Permitting and Plan Review System</u>

An **<u>original</u>** signed copy of this amendment shall be received by the City of Maricopa Purchasing Office with your offer or prior to the Solicitation due date and time. This Solicitation is amended as follows:

1. **Offer Sheet (page 1 of solicitation)**

   Proposal due date has been extended to June 30, 2014.

2. **Instructions to Offeror**
   a. **Item # 4 Due Date and Time**: should read as follows:

   "Offerors must submit proposal to the City's Purchasing Manager or designee by 2:00:00 pm on June 30, 2014, at the address or physical location listed on the Introduction/Offer Sheet (Page 1 of RFP). Late proposals will not be accepted.

ALL OTHER PROVISIONS OF THE SOLICITATION SHALL REMAIN IN THEIR ENTIRETY.

Offeror hereby acknowledges receipt and understanding of the above amendment.	
_____ Signature Date	The above referenced Solicitation Amendment is hereby executed this eleventh day of June, 2014, at Maricopa, Arizona.
_____ Typed Name and Title	
_____ Company Name	
_____ Address	
_____ City State Zip	_____ Patricia A. LaCombe, CPPB Purchasing Manager City of Maricopa, AZ

Exhibit C- Response to RFP

e-PlanSoft™
Ultimate Online Plan Review

PALADIN Data

SMARTGov™
Powered by Paladin

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

19362 Powder Hill Place NE, Poulsbo, WA 98370

1 Offer Sheet

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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: Jon Byrd	Email: jbyrd@paladindata.com
Federal Employer Identification Number: 91-1670217	Authorizing Offeror Signature:
Paladin Data Systems	Jim Nall
Company Name	Printed Name
19362 Powder Hill Place NE	CEO
Address	Title
Poulsbo, WA 98370	Telephone: 360-394-5993
City State Zip Code	Fax: 360-779-2400

PALADIN Data

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 size 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

PALADIN Data

3   Table of Contents

19   Pre-submittal Meeting - Not Applicable   74

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.

Bob Johnston
Product Manager

Jon Byrd
Business
Development

Walter Bogaardt
Delivery Manager

Stephen Boldman
Data Migrations

Jake Christensen
Technical Lead

Aliene Chase
Implementation
Specialist

Hoan Nguyen
Web Specialist

Lynn Secrest
Training Lead

Implementation Team
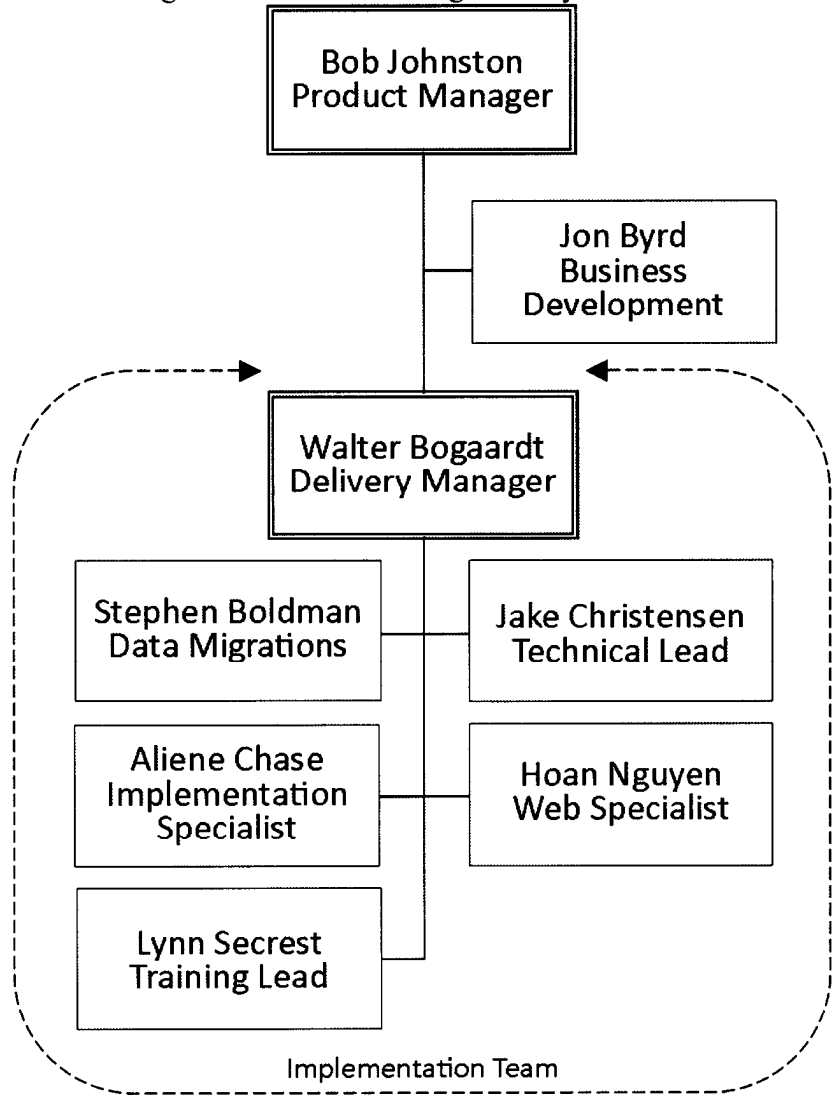
5.3 Products

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

SMARTGov™	PANORAMIC™	ASM™	CloudStream™
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 _not_ 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.

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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.

Name: * [LICENSE ADMIN] x

Description: * Licensing Administrator

Functions

Function	Desc	Type	None	Read	Update	Create	Delete	Full	
Admin.Department	Department	Model	☐	☑	☑	☐	☐	☐	
Admin.LOV.AdhocReport	Admin.LOV.AdhocReport	Model	☐	☑	☑	☐	☐	☐	
Admin.LOV.CustomReport	Custom Report	Model	☐	☑	☑	☐	☐	☐	
Admin.LOV.FeeCode	Fee Code	Model	☐	☑	☐	☐	☐	☐	
Admin LOV ReportCustomText	Report Custom Text	Model	☐	☑	☐	☐	☐	☑	
Admin LOV ReportGroup	Reporting Groups	Model	☐	☑	☑	☑	☐	☐	
Admin LOV ReportHeaderFooterValues	Report Headers and Footers	Model	☐	☑	☐	☐	☐	☑	
Admin LOV UserDepartment	User Department	Model	☐	☑	☐	☐	☐	☐	
Admin LOV UserToDo	Admin LOV UserToDo	Model	☐	☑	☐	☐	☐	☑	
Admin.LOV WorkflowStep	Workflow Step	Model	☐	☑	☑	☐	☐	☑	
Admin User	Application User	Model	☐	☑	☐	☐	☐	☐	
Licensing License	License	Model	☐	☑	☐	☐	☐	☐	
Licensing LicenseType	Case Type Status	Model	☐	☑	☐	☐	☐	☑	
Licensing LOV	Licensing LOV	Area	☐	☑	☐	☐	☐	☑	

[Add]

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

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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: • 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: • 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	• 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	B. Ability to manage end-to-end code enforcement processes, including: • 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	C. Support a variety of periodic and ongoing inspection programs, this may include: • 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	D. Support for employee resource management, including: • 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	E. Support for auditable financial tracking, including: • 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	F. Ability to manage a variety of licensing programs (for both individuals and objects or installations,) including: • 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	**G. Additional requirements to include but not limited to:** • 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	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: • 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.

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RFP Page #	Requirement	Response (Y=Yes; N=No; F=Future)	Comments
18	Additional Requirements: • 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	• 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	SMARTGov supports most of these requirements. However SMARTGov does not currently offer Calendaring but has plans to add this in the future.

RFP Page #	Requirement	Response (Y=Yes; N=No; F=Future)	Comments
18	- Tool to maintain records of early contacts with applicants, including notes abut 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	SMARTGov supports most of these requirements. 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.

10.3.3 Adjunct Functionality (III.)

RFP Page #	Requirement	Response (Y=Yes; N=No; F=Future)	Comments
19	• 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	- 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	- 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 tack 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	SMARTGov supports most of these requirements. We are in process of adding licensing fees via the portal

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	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. 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	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.

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.

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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

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.

> "The ability to almost immediately have the system responds 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*

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 4th – Ending Nov 14th)	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	▪ Establish relationships with customer's senior management to understand project goals and provide the support required for project success ▪ Provide senior level project oversight	▪ Escalation process
Chief Architect	Senior Technical Lead	▪ Responsible for the technical aspects of the products related to this procurement	▪ Product cohesion on customer site
Business Development Executive	Sales	▪ Provides continuity from sales to service delivery	▪ Agreements on feature inclusions and capabilities ▪ Contract development ▪ Delivery turn-over
Delivery Manager	Project Management	▪ Performance of the work related to this procurement and for communications with customer representatives	▪ Project plan ▪ Status reporting ▪ Risk plan ▪ Issue tracking ▪ Roles & responsibilities ▪ Staffing plan ▪ Communications plan
Implementation Specialist	Requirements Management / Product Specialist	▪ Responsible for understanding customer requirements, configuring product suite to meet those requirements and make sure all other work performed meets customer requirements	▪ Configuration tables ▪ Application configuration ▪ Report modifications and updates ▪ Data conversion ▪ IT staff training ▪ Portal configuration ▪ Portal installation
Training Specialist	Training Coordinator	▪ Responsible for the user training services related to this procurement.	▪ Training plan ▪ Training execution ▪ Administrator training ▪ User training ▪ Validation training
Interface Specialist	Interface Development	▪ Provide interface connectors to all external data	▪ Interface development, testing and delivery

Title	Role	Responsibilities	Deliverable/Milestone
Panoramic Specialist	Requirements Management/ Product Specialist	▪ Responsible for understanding customer requirements, configuring product suite to meet those requirements and make sure all other work performed meets customer requirements	▪ Project needs analysis ▪ System configuration ▪ User training

11.3 Milestones of Project & Estimated Project Timeline

Week (Starting Aug 4th – Ending Nov 14th)	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															█

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	01	02	03	04	05	06	07	08	09	10	11	12	13	14	15
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					
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		
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
Systems Specialist															0.5
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:

PALADIN Data

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

Severity 3

The problem causes minor loss of service. The impact is an inconvenience, which may require a workaround to restore functionality.

Severity 4

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.

How and when software upgrades, minor and major are provided and timing to complete them	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.
Modifications required as a result of state/federal requirements	New state and federal requirements can be handled with our SMARTGov configuration capabilities.
Custom modifications desired	Customers use the SMARTGov configuration tools to customize application to their needs

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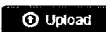
The plan check workflow can be also *monitored* via API calls. Detailed information can be returned from the proposed solution to the Permit application and/or customer portal that includes the current plan check status by project or for every department/assigned reviewer.

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			⊕ Upload
Business License 🚩	Yes	6/24/2014	n/a	⊕ Upload
Contractors License	Yes			⊕ Upload
Building Plans - 3 Copies 🚩	Yes	6/2/2014	n/a	⊕ Upload
Site Plan - 4 copies 🚩	Yes	6/12/2014	n/a	⊕ Upload
Residential Energy Calcs	Yes			⊕ Upload
Structural Calcs 🚩	Yes	6/17/2014	n/a	⊕ Upload
Geotech Report (if in Critical Area)	Yes			⊕ Upload
Landscape Plan (if proposed modification to CA)	Yes			⊕ Upload
Wetland/Stream/Habitiat Mitigation Plan	Yes			⊕ Upload
Street Cleaning Agreement	Yes			⊕ Upload
Plan Review Waiver	Yes			⊕ Upload
Vicinity Map	Yes			⊕ Upload
Utility Availability letters (unless platted after 1995)	Yes			⊕ Upload
Building Height Worksheet	Yes			⊕ Upload
Owner acting as General Contractor form	Yes			⊕ Upload

◁PALADIN Data

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 ▾

SMARTGov™
Powered by Paladin

SFR-2014-015 Single Family Residence - New   ✉ Contact

Address:	Status:	Submitted: 5/16/2014	Inspections:	Total Due:
120 124TH ST SW	Application	Approved:	Required: 16	**$5,188**⁵⁰
UNIT 10A	is under	Issued:	Requested: 0	
EVERETT, WA	initial			Pay »
98204-5796	review	Closed:	Reinspect: 0	
Parcel		Expires: 11/12/2014	Complete: 0	
#: 00685500101000				

👤 🔧 📍 🖥 📋 🏷 ☑ 🏳

👤 **Contacts**

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

APPLICANT: **Byrd, Jon**
235 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.

PALADINData

Permit Detail

Main   Details   Parcels   Structures   Contacts   Contractors   Valuations   Fixtures   Fees   Submittals   Workflow   Conditions   Inspections   C

Permit #: SFR-2014-015 Alerts   Status: PENDING   Contact: Byrd, Jon   Address: 120 124TH ST SW UNIT 10A
Type: SFR-NEW   Project: Contractor: AMARO, JOEY G JR   EVERETT, WA 98204-5796

	Order	Submittal	Defer	Web Upload	Received	Received On	Rec'd Req.	Accepted	Accepted On	Acc'd Req.	
	1	APPLICATION	☐	☑	☐		☑	☐		☐	
	2	BUSINESS LICENSE	☐	☑	☑	06/24/2014	☑	☐		☐	☑
	3	CONTRACTOR LICENSE	☐	☑	☐		☑	☐		☐	
	4	BLD PLAN-3	☐	☑	☑	06/02/2014	☑	☐		☐	☑
	5	SITE PLAN-4	☐	☑	☑	06/12/2014	☑	☐		☐	☑
	6	SFR ENERGY CALC	☐	☑	☐		☑	☐		☐	
	7	STRUCTURAL CALCS	☐	☑	☑	06/17/2014	☑	☐		☐	☑
	8	GEOTECH RPT CRITICAL	☐	☑	☐		☑	☐		☐	
	9	LANDSCP PLAN/MOD CA	☐	☑	☐		☑	☐		☐	
	10	WET/STREAM/HAB MIGR	☐	☑	☐		☑	☐		☐	
	11	STREET CLEAN AGREEMT	☐	☑	☐		☑	☐		☐	

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.

Search Plan Reviews

Simple   Advanced   Hide Search

Department	Discipline	Submittal
All	All	All
Disposition	Impact	Record Number
All	All	to
Sheet Number	Comment	Reviewer Firm
		All
Reviewer ID	Category	Sub-Category
All	All	All
Comment Type	Entry Date	Comment Date
All Comments	to	to

Search   Clear

Comment Log - Search Panel

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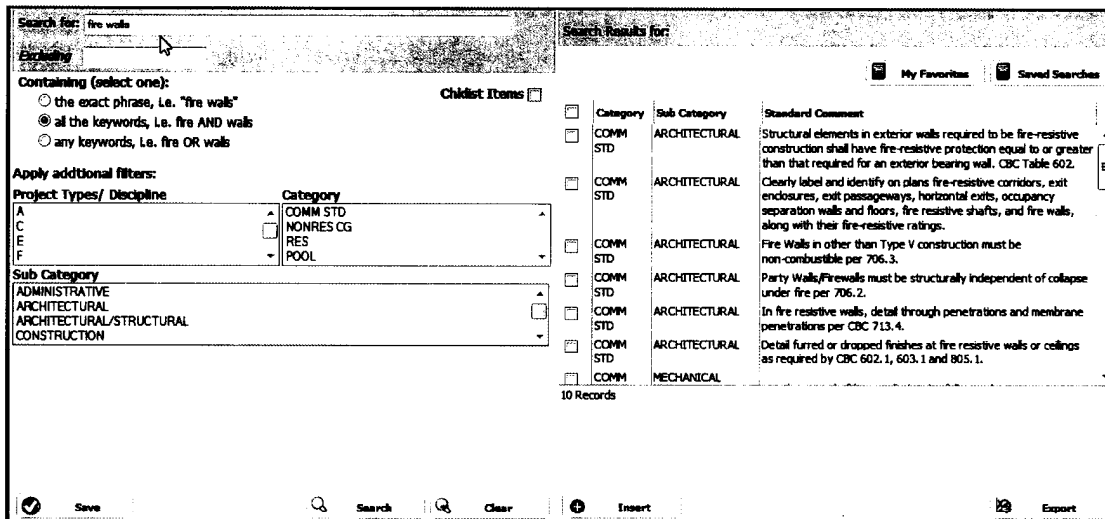
1.a.31. Does your system allow comments to be created without linking them to a plan review or Document? (Simple permit, gas, electrical, etc.)

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 moore 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 ⋯⋯⋯⋯⋯ Direct: FAX:

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.
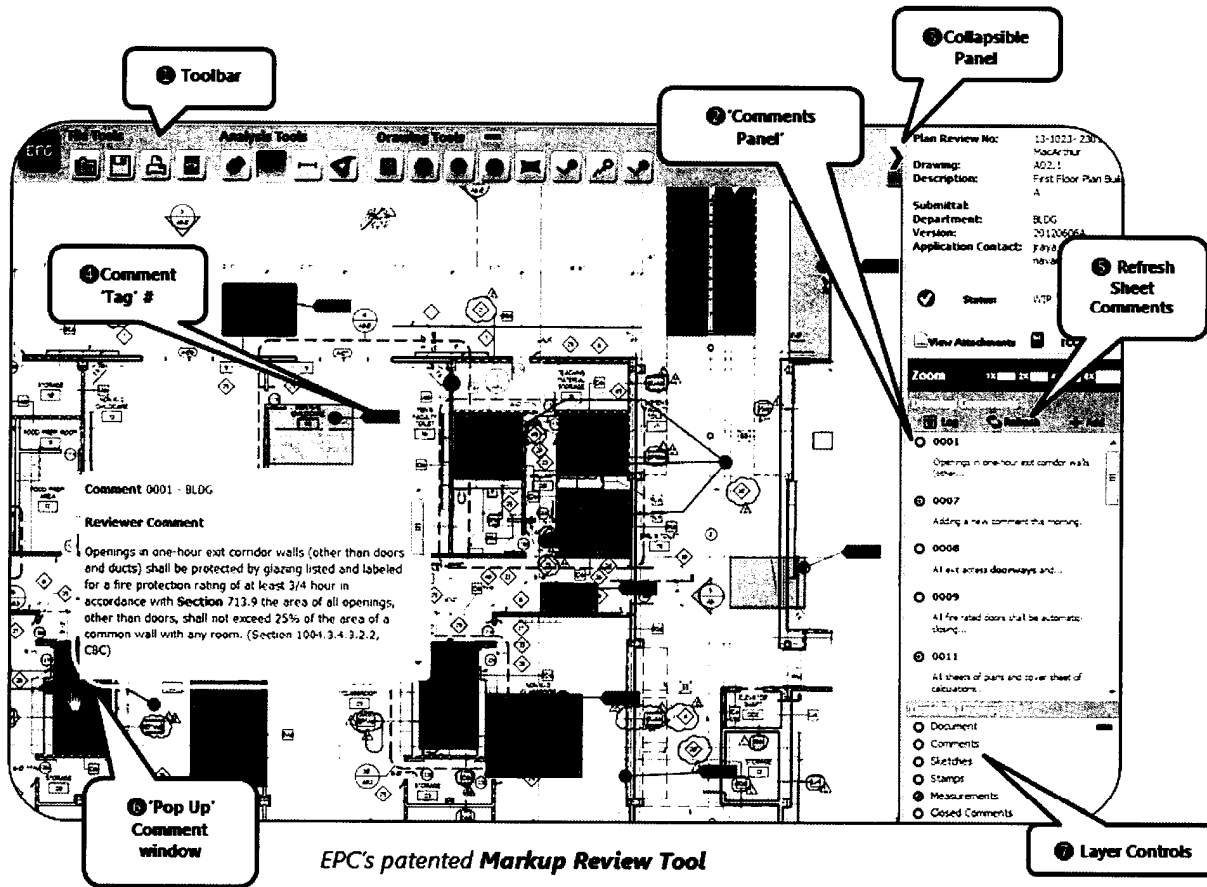
*EPC's patented **Markup Review Tool***

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	

PALADIN Data

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

PALADINData

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	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. 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. The system replaced the Access database system previously used to process over 300 permits issued and 200 plan reviews conducted each year.
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)*:

   ☐ Individual/Sole Proprietor   ☐ Limited Liability Company*

   ☒ Corporation   ***Choose the tax classification**

   ☐ Partnership   ☐ Disregarded Entity

   ☐ Other: _____   ☐ Corporation

                                              ☐ Partnership

6. Order Address:

   19362 Powder Hill Place, Poulsbo, WA 98370

   (Order address)   *(City)*   *(State)*   *(Zip code)*

7. Remittance address *(if different than above)*:

   Same

   (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)*:

    ☐ Factory Representative   ☐ Jobber

    ☐ Manufacturer   ☐ Authorized distributor

    ☐ Retail dealer   ☒ Contractor

    ☐ Consultant   ☐ Other: _____

12. Indicate if the business is registered as a minority or woman-owned company.

    ☐ Minority-owned   ☐ Woman-owned   ☒ 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?

    ☐ Yes   ☒ 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 & CERTFICATION

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):

☐1   Non-Small/Non-Minority/Non-Disabled

☒2   Small Business (Per ARS §41-1001.14)

☐3   Minority Owned Business [Per 15 CFR §1400.1(a)]

☐4   Woman Owned Business

☐5   Owned By Disabled Individual (Per ARS §41-1492.5)

☐6   Small Business/Minority Owned

☐7   Small Business/Woman Owned

☐8   Small Business/Disabled Owner

☐9   Minority Woman Owned Business

☐10   Disabled-Minority Owned Business

☐11   Disabled-Woman Owned Business

☐12   Small Business/Minority-Woman Owned

☐13   Small Business/Disabled-Minority Owned

☐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

6/26/2014

Date

16 Bonds – Not Applicable

17 Amendments of Proposal

17.1 Extension

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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

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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	$ 36,908	$ 36,908	$ 36,908	$ 36,908	$ 36,908
Maintenance					
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 "occassional 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%		$ -

[1]This item is estimated.

[2]Actual costs & GSA Per Diem will be charged.

[3]Price quote is valid for 120 days.

Estimated Cost Year One			$ 67,620
Annual Recurring Yr 2			$ 36,908
Annual Recurring Yr 3			$ 36,908

	Subsc. Costs	Discounts		Tax	1-time Costs	Total Costs
year 1	$ 36,908	0%	$ (26,888)	$ -	$ 57,600	$ 67,620
year 2	$ 36,908	0%	$ -	$ -		$ 36,908
year 3	$ 36,908	0%	$ -	$ -		$ 36,908
year 4	$ 36,908	0%	$ -	$ -		$ 36,908
year 5	$ 36,908	0%	$ -	$ -		$ 36,908
					Five Year Cost Of Ownership	$ 215,250

19 Pre-submittal Meeting - Not Applicable

PALADINDATA
innovation   integrity   results

19362 Powder Hill Place NE
Poulsbo, WA 98370

www.PaladinData.com
p 360.779.2400
p 800.532.8448
f 360.779.2600

October 10, 2014

Robert E. Mathias, CBO
City of Maricopa
39700 W. Civic Center Plaza
Maricopa, AZ 85138

Dear Mr. Mathias:

Attached you'll find two signed copies of the Sales Order and Master Software as a Service Agreement, along with the attachments (Exhibit B and Exhibit C—Exhibits A and D are included, in the body and the page count of the agreement). Please sign both copies as per the procedure of the City of Maricopa and return one full copy to Paladin Data Systems Corporation, attention Jon Byrd.

Please let us know if you have any questions and we look forward to working with you. Thank you.

Sincerely,

Genevieve Olivarez-Conklin

Genevieve Olivarez-Conklin
Contracts Manager
contracts@paladindata.com

Enclosures (2)